CIRCOM+UVIGO
CHAIR

TRENDS IN INNOVATION AND ADAPTATION TO DIGITAL TRANSFORMATION IN REGIONAL PUBLIC EUROPEAN BROADCASTERS RESEARCH

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1. INTRODUCTION

1.1. REGIONAL AND LOCAL TELEVISION IN THE EUROPEAN MEDIA CONTEXT

1.1.1. The local and regional television market in Europe

The regional and local television sector makes a significant contribution to the broader European audiovisual market. By the end of 2023, the European audiovisual media services market comprised a total of 12,703 services. According to data from the European Audiovisual Observatory, approximately three-quarters of these were linear services, while the rest 3,269 services were video-on-demand (VOD) platforms.

A total of 42% of the 9,434 television channels in Europe were local and regional broadcasters. These channels operate across all European countries, with the majority focusing on generalist programming: around nine out of ten local and regional TV channels offer generalist content. Thematic programming is not a primary focus, as their aim is to reach the broadest possible audience rather than catering to niche markets.

Table 1. *Type of programming on local and regional television in Europe (2023)*

Thematic programming	Generalist programming
13%	87%

Source: MAVISE

The local and regional television market in Europe is highly concentrated. The six countries with the highest number of local and regional TV channels in Europe (Italy, Spain, Hungary, Ukraine, the Netherlands and Germany) account for 53% of the total. Italy alone accounts for 18% of all local and regional channels in Europe.

Table 2. *Largest local and regional television markets in Europe (2023)*

Country	Number of channels	Share, as % of total local and regional TV market
Italy	716	18%
Spain	311	8%
Hungary	307	8%
Ukraine	300	7%
Netherlands	228	6%
Germany	222	6%

Source: MAVISE

There is no clear pattern of market development distinguishing different regions of Europe in terms of the size of their local and regional TV markets. The distribution is relatively balanced. Among the 13 European countries with at least 100 local and regional television channels, two are in Southern Europe (Italy and Spain), four in Western and

Northern Europe (the Netherlands, Germany, Austria and France), three in Central Europe (Czech Republic, Hungary and Slovakia) and three in Eastern Europe (Ukraine, Serbia and Romania).

Table 3. *Size of local and regional television markets in Europe (2023)*

Size (by number of providers)	Country
Over 600	Italy
Over 300	Spain, Hungary, Ukraine
Over 200	Netherlands, Germany
Over 100	Austria, Czechia, France, Romania, Serbia, Slovakia, Turkey
Between 30 and 100	Albania, Bosnia & Herzegovina, Bulgaria, Switzerland, Denmark, Georgia, Greece, Slovenia, Sweden, UK
Between 10 and 30	Armenia, Belgium, Croatia, Latvia, Lithuania, Luxembourg, Moldova, North Macedonia, Norway, Poland
Under 10	Finland, Ireland, Liechtenstein, Montenegro, Portugal
None	Cyprus, Estonia, Iceland, Malta

Source: European Audiovisual Observatory.

In terms of ownership, most generalist TV services are publicly owned, while thematic channels distributed via cable, IPTV, and satellite are mostly privately owned. Indeed, 97% of VOD service providers are privately owned. In recent years. However, in recent years, public service media have started to launch their own VOD platforms, mainly offering drama, cultural and educational content.

Nearly half of all public TV channels in Europe operate at the local and regional level, with the Netherlands and Spain being the most prominent. Together, the Netherlands and Spain account for roughly two-thirds of all public service local and regional channels on the continent. All CIRCOM members fall into this category.

Table 4. *Overview of public local and regional television channels in Europe (2023)*

Country	Number of channels	Share (%) of total number in Europe
Netherlands	203	49%
Spain	73	18%
Ukraine	27	6%
France	22	5%
Poland	16	4%
Bosnia & Herzegovina	15	4%
Germany	11	3%
Other	47	11%

Source: MAVISE

1.1.2. Audience insights

Currently, there is no publicly available data regarding the audiences of local and regional television in Europe. This is not necessarily a transparency issue, but rather a consequence of the organisational structure of these broadcasters. In many countries, regional television stations that are members of CIRCOM operate within larger public service media groups in their countries. As such, their audiences are measured as part of these broader entities.

The popularity of public service broadcasters across Europe varies widely, with significant discrepancies between countries. Data from the European Audiovisual Observatory on the daily market share of public service television provides a valuable indicator for this analysis. For instance, public service broadcasting in Denmark, including the regional TV2 (a CIRCOM member), has a robust market share of over 81%. In contrast, public service broadcasters in countries such as Romania and North Macedonia struggle with audience shares below 5%.

Data from public media show a gradual increase in audiences since the onset of the COVID-19 pandemic. Compared to private media, public broadcasters experienced a decline in audience share from the late 1990s to 2013, followed by a period of stagnation averaging 26.5%. However, by 2022 this figure had risen to 27.5%, signalling a positive trend. However, this remains well below the average audience share of 35% recorded in the early 2000s.

Table 5. *Audience of public service television in Europe (daily audience market share, on average, in %), 2018-2022*

Country	2018	2019	2020	2021	2022
Austria	31.9	30.5	31.8	34.2	34.6
Bosnia & Herzegovina	21.1	15.4	13.6	n/a	n/a
Belgium (RTBF)	24.8	24.7	26.6	23.3	26.4
Belgium (VRT)	38.7	38.0	37.5	27.5	28.8
Bulgaria	6.7	5.8	5.5	7.6	11.0
Croatia	28.1	27.1	27.1	31.0	n/a
Cyprus	13.3	12.9	12.0	n/a	n/a
Czechia	30.2	30.1	30.1	n/a	31.5
Denmark*	76.0	76.4	79.9	81.0	81.0
Estonia	19.2	20.4	23.1	n/a	n/a
Finland	43.7	43.5	43.1	43.0	44.4
France	31.3	29.2	28.9	28.9	28.7
Germany	47.8	47.3	48.4	49.9	50.2
Great Britain	46.3	45.1	46.3	47.5	48.9
Greece	9.1	8.7	8.9	n/a	n/a

Hungary	12.7	10.8	9.8	n/a	n/a
Iceland	60.2	59.7	67.0	n/a	n/a
Ireland	27.4	27.2	27.0	n/a	n/a
Italy	36.2	35.8	35.5	36.0	39.2
Lithuania	12.6	14.9	15.0	15.4	14.7
Latvia	12.4	12.5	13.1	16.8	16.1
North Macedonia	3.4	n/a	n/a	n/a	n/a
Malta	n/a	n/a	35.6	n/a	n/a
Netherlands	32.0	34.5	35.5	36.2	38.0
Norway	38.1	39.6	44.8	43.0	42.0
Poland	28.3	28.6	28.4	27.9	26.3
Portugal	14.6	14.8	14.0	13.2	12.2
Romania	4.1	3.5	3.6	3.4	4.3
Serbia	n/a	20.7	19.4	n.a.	18.5
Slovakia	14.0	13.9	13.1	11.2	n/a
Slovenia	21.9	20.2	20.8	n/a	n/a
Spain	23.7	23.1	23.4	22.7	23.1
Sweden	34.9	35.7	34.7	35.0	34.0
Switzerland (German speaking)	32.9	31.7	30.8	32.7	33.5
Switzerland (Italian speaking)	29.1	27.1	29.7	29.5	32.3
Switzerland (French speaking)	29.1	27.2	28.0	33.6	29.6

*it includes TV2; **it includes BBC, UKTV and Channel 4

Source: European Audiovisual Observatory.

n/a: not available

Note: the countries marked in grey have broadcasters that are members of CIRCOM.

1.1.3. Financial health

Currently, no publicly available financial data exists on the expenditure of regional television operators across Europe. However, since these operators are part of public broadcasting groups, data on the revenues of the public audiovisual sector in Europe serve as a relevant indicator of the financial health of these organisations.

Overall, both total revenues and the share of public funding in the sector have shown growth over the last five years. In the European Union, total sector revenue increased by approximately 8% between 2017 and 2022, reaching over €28.14 billion. Public funding, however, has seen more modest growth over the same period: of around 7%, reaching €22.51 billion. Despite a slight decline, public funding remains the primary source of income in the sector, accounting for around 80% of total income within the EU-27.

Considering the larger European market, as defined by the European Audiovisual Observatory (see Funding of the public audiovisual sector in Europe below), total sector revenue increased by nearly 10% between 2017 and 2022. Public funding also forms part of the revenue, though growth here was less pronounced, at around 5% in the region over the period. As a result, the share of public funding in the total revenue of the public audiovisual sector in Europe decreased, from approximately 78% in 2017 to 76% in 2022.

Table 6. *Funding of the public audiovisual sector in Europe, figures expressed in €m, 2017-2022*

Country	Indicator	2017	2018	2019	2020	2021	2022
Europe (EU27)	Total revenue	25,981.4	26,447.5	26,609.6	26,393.9	27,895.8	28,143.3
	Of which public funding	21,040.3	21,164.5	21,421.6	21,572.1	22,212.2	22,518.5
Larger Europe*	Total revenue	35,918.3	35,980.3	36,237.4	35,996.3	38,536.4	39,345.5
	Of which public funding	28,353.4	28,170.9	28,236.5	28,579.9	29,581.2	29,929.1

Source: European Audiovisual Observatory.

*including the 41 countries covered by the European Audiovisual Observatory

The individual financial performance of regional public service media across Europe (CIRCOM members only) varies significantly. At the top end, five broadcasters generate annual revenues exceeding €1 billion (BBC, France Télévisions, Rai in Italy, SRG-SSR in Switzerland and ORF in Austria). Another six broadcasters operate with budgets between €500 million and €1 billion, and 17 have annual revenues between €100 million and €500 million. The remainder (12 broadcasters) have an annual budget of less than €100 million.

In general, between 2017 and 2022, the overall trend for public service media budgets across Europe was growth, though there are a few exceptions, namely in Croatia, Finland and Norway. However, growth rates varied considerably across the continent, with some growing much faster than others. The highest revenue growth over the period were recorded by TVP in Poland, with over 84% growth, Radio Televisión Canaria with almost 75%, RTCG in Montenegro, with 56%, Danish TV2 with 38%, and RTS in Serbia, with 36%. Note only CIRCOM members were included in this analysis.

Table 7. *Overview of revenues of public service media (CIRCOM members*), 2017-2022*

Country	Company	Total Revenues					
		2017	2018	2019	2020	2021	2022
Albania	Radio Televizioni Shqiptar (RTSH)	19.6	18.6	18.1	16.8	17.2	n/a
Austria	Österreichischer Rundfunk (ORF)	1,002.1	1,012.5	1,019.1	990.5	1,014.9	1,031.1
Belgium	Radio-télévision belge de la Communauté française (RTBF)	357.4	369.5	384.3	383.2	410.7	442.7
Bosnia & Herzegovina	Radiotelevizija Bosne i Hercegovine (BHRT)	19.4	24.6	22.2	21.1	21.1	n/a
Bulgaria	Bulgarian National Television (BNT)	49.6	40.2	39.4	40.4	60.4	49.8
Croatia	Hrvatska Radiotelevizija (HRT)	181.4	183.9	181.9	171.3	170.4	176.6
Czechia	Česká Televize (CT)	240.8	258.7	255.9	239.3	260.6	268.5
Denmark	TV2/Danmark	375.0	384.5	402.1	433.2	482.5	518.0
Finland	Yleisradio (YLE)	475.0	474.4	480.6	490.3	502.6	514.1
France	France Télévisions	3,196.9	3,193.7	3,166.9	3,047.5	3,110.1	3,088.1
Germany	Hessischer Rundfunk (HR)	482.2	493.7	484.6	498.4	522.9	532.1
Germany	Rundfunk Berlin-Brandenburg (RBB)	464.5	458.3	457.6	483.8	472.9	n/a
Greece	Hellenic Broadcasting Corporation (ERT)	190.8	194.6	203.4	198.1	203	209.1
Hungary	Médiaszolgáltatás-támogató és Vagyonkezelő Alap (MTVA)	307.6	310.4	290.3	305.3	332.4	328.9
Ireland	Raidió Teilifís Éireann (RTE)	337.6	339.1	342.1	331.1	344.5	347.7
Ireland	TG4	36.9	38.9	38.8	40.5	42.1	46.2
Italy	Radiotelevisione Italiana (RAI)	2,624.0	2,578.0	2,655.5	2,508.7	2,687.7	2,737.6
Montenegro	Radio Televizija Crne Gore (RTCG)	12.9	13.7	15.3	15	17.9	20.2
Netherlands	Nederlandse Publieke Omroep (NPO)	863.5	895.7	864.0	946.5	941.5	967.5

Country	Company	Total Revenues					
		2017	2018	2019	2020	2021	2022
North Macedonia	Makedonska Radio Televizija (MKRTV)	16.6	15.5	15.0	16.4	15.8	17.9
Norway	Norsk Rikskringkasting (NRK)	632.2	621.7	608.1	548.1	591.0	614.7
Poland	Telewizja Polska (TVP)	423.6	526.1	639.6	699.6	737.2	780.0
Portugal	Rádio e Televisão de Portugal (RTP)	216.0	240.2	219.9	219.9	223.2	230.6
Romania	Televiziunea Română (TVR)	90.4	95.1	81.3	79.2	84.7	101.9
Serbia	Radio-televizija Srbije (RTS)	87.8	94.2	114.5	113.3	113.3	119.7
Slovakia	Rozhlas a televízia Slovenska (STVR)	117.1	119.7	130	125.3	137.2	141.6
Slovenia	Radiotelevizija Slovenija (RTVSLO)	119.6	120.2	122	121.6	128.4	131.2
Spain	Radio y Televisión de Andalucía (RTVA)	161.3	155.6	160.7	168.3	160.8	n/a
Spain	Corporació Catalana de Mitjans Audiovisuals (3Cat)	302.6	298.3	297.5	289.9	309	323.1
Spain	Radio Televisión Madrid (RTVM)	76.0	80.5	83.1	81.0	80.9	77.4
Spain	Corporación Radio e Televisión de Galicia (CRTVG)	104.6	106.9	108	106.2	109.7	110.7
Spain	Euskal Telebista Televisión Vasca (ETB)	136.7	137	144.4	149.1	156.4	165.0
Spain	Corporación Aragonesa de Radio y Televisión (CARTV)	47.1	46.1	50.7	53.1	52.2	52.1
Spain	Castilla La Mancha Media (CMM)	42.0	43.9	42.6	49.1	45.7	n/a
Spain	Radio Televisión Canaria (RTVC)	40.3	45.3	54.6	56.5	61	70.5
Spain	Ens Públic de Radiotelevisió de les Illes Balears (IB3)	31.9	30.6	31.2	31.2	33.1	34.7
Spain	Radio Televisión del Principado de Asturias (RTPA)	19.3	22.2	21.3	20.6	22.7	22.9

Country	Company	Total Revenues					
		2017	2018	2019	2020	2021	2022
Spain	Radiotelevisión de la Región de Murcia (TRM)	4.3	3.8	5.0	5.3	5.1	n/a
Sweden	Sveriges Television (SVT)	498.3	471.9	481.6	455.8	522.6	499.1
Switzerland	Schweizerische Radio- und Fernsehgesellschaft (SRG SSR)	1,436.5	1,359.0	1,355.9	1,358.8	1,412.4	1,537.9
United Kingdom	British Broadcasting Corporation (BBC)	5,740.3	5,544.3	5,576.3	5,674.4	6,266.6	6,623.2

*for which data are available
n/a: not available

Source: European Audiovisual Observatory.

As previously discussed, most of public service media in Europe depend on public funding, either through government budget allocations or taxpayers' contributions such as taxes, levies or licence fees. The only exception among the broadcasters in this study is TV2, in Denmark, which operates without any public funding despite its public service status. All the other channels analysed in this study receive more than 50% of their budget from public funding sources. The channels with the lowest dependence on public funding (based on CIRCOM members surveyed) include RTÉ in Ireland (56.3%), ORF in Austria (64.2%), TVP in Poland (65.2%) and RAI in Italy (68.1%).

Table 8. *Overview of public funding of public service media (CIRCOM members*), 2017-2022*

Country	Company	Public funding (expressed in % of total revenue)					
		2017	2018	2019	2020	2021	2022
Albania	RTSH	77.3	81.1	86.4	90.1	87.2	n/a
Austria	ORF	62.4	62.9	63.1	65.0	63.6	64.2
Belgium	RTBF	72.9	73.2	74.1	76.8	75.2	75.7
Bosnia & Herzegovina	BHRT	61.8	76.8	79.1	71.6	76.6	n/a
Bulgaria	BNT	93.0	85.9	89.7	90.0	87.9	86.1
Croatia	HRT	91.6	91.5	91.9	92.4	90.6	91.9
Czechia	ČT	90.0	89.5	89.4	90.6	88.0	85.5
Denmark	TV2/Danmark	0	0	0	0	0	0
Finland	YLE	97.2	97.4	98.2	98.8	98.3	98.5
France	France Télévisions	79.7	78.8	78.7	79.8	79.9	77.1
Greece	ERT	95.1	93.3	93.2	94.4	92.8	91.2

Country	Company	Public funding (expressed in % of total revenue)					
		2017	2018	2019	2020	2021	2022
Hungary	MTVA	79.3	75.7	81.6	82.5	84.9	87.9
Ireland	RTE	55.1	55.7	57.4	59.4	56.9	56.3
Ireland	TG4	88.9	89.5	88.8	89.4	87.6	88.3
Italy	RAI	67.7	68.2	69.2	70.3	67.7	68.1
Montenegro	RTCG	89.6	91.6	90.5	90.7	77.4	78.7
Netherlands	NPO	67.5	71.1	69.0	72.6	74.1	n/a
North Macedonia	MKRTV	96.1	94.0	96.7	97.1	84.7	92.7
Norway	NRK	94.8	95.7	97.2	98.1	98.1	97.9
Poland	TVP	35.8	45.8	53.2	62.3	62.7	65.2
Portugal	RTP	81.7	74.6	81.5	82.1	81.3	80.3
Romania	TVR	90.4	85.7	85.8	87.7	88.4	85.4
Serbia	RTS	76.5	73.7	78.5	77.8	77.2	73.6
Slovakia	STVR	93.4	93.3	92.4	93.8	90.1	89.3
Slovenia	RTVSLO	80.8	80.7	80.7	82.1	79.6	79.3
Spain	RTVA	86.5	90.5	87.8	88.3	92.5	n/a
Spain	3Cat	78.5	78.0	80.5	84.2	83.4	83.5
Spain	RTVM	89.5	90.1	90.4	92.8	92.5	87.0
Spain	CRTVG	92.1	92.1	89.8	94.1	93.7	93.2
Spain	EITB	90.0	90.7	91.9	92.6	92.1	91.9
Spain	CARTV	93.4	92.8	91.9	94.2	94.2	94.1
Spain	CMM	95.5	95.9	95.5	95.3	95.8	n/a
Spain	RTVC	100.0	100.0	99.1	100.0	100.0	100.0
Spain	IB3	98.1	96.7	98.1	98.1	98.5	96.0
Spain	RTPA	94.3	95.1	94.8	95.2	95.2	93.9
Spain	TRM	95.4	94.7	96.0	94.3	96.1	n/a
Sweden	SVT	93.9	93.6	92.9	94.8	94.8	94.8
Switzerland	SRG-SSR	77.9	78.4	79.8	82.9	81.6	81.1
United Kingdom	BBC	81.9	82.1	77.3	79.3	77.1	71.2

*for which data are available

n/a: not available

Source: Calculations made by Media and Journalism Research Centre based on data from the European Audiovisual Observatory

1.1.4. Challenges for public service television. Innovation as a response to the demands of new audiences in the digital era

Public service media, and public television in particular, are undergoing a significant process of profound and crucial transformation in response to changes brought about by the digital era. This adaptation process, driven by profound social shifts, that interact with technological advances, digitalisation and new forms of content production and consumption, places public broadcasters in an unprecedented scenario. They now compete with new global players without the limitations that have often constrained public service broadcasters.

In this context, public broadcasters face the following key challenges as part of their quest to remain relevant and fulfil their public mission:

1. Necessary adaptation to technological changes and digitisation

One of the most significant challenges facing all media, regardless of format, is how to navigate the rapid and constant technological evolution, alongside a digitalization process that is continuously evolving, transforming, and reinventing itself in increasingly short cycles.

There has been a notable shift in audience consumption patterns, with traditional linear television being replaced by video-on-demand platforms such as Netflix, Amazon Prime, and YouTube. This has resulted in a fragmentation of the traditional viewership of public broadcasters.

To address this fragmentation, broadcasters must transition from a linear broadcasting model to a multidimensional one, with a presence across multiple platforms and social networks. It is also essential to guarantee that content is easily accessible on mobile devices and other channels that represent a significant proportion of audiovisual consumption, particularly among younger viewers.

To navigate these changes, public broadcasters must rethink their strategies and operational models, emphasizing the creation of high-quality, original content that is grounded in reality and resonates with the needs and values of their local audiences.

It is therefore crucial for public broadcasters to differentiate themselves from global competitors in terms of their target audience, content, and distribution across different platforms.

Furthermore, it is crucial to foster engagement and interaction with the audience. It is crucial for public broadcasters to engage audiences not only as consumers of content, but also as contributors to its creation and dissemination.

This evolution occurs within the context of an internet-driven economy, where data management and exploitation are fundamental business processes. New digital operators have been acutely aware of this reality from the outset, positioning the monetization of user data as a pivotal aspect of their business models.

2. Redefining strategic identity in the digital age

Another key challenge for public broadcasters is the redefinition of their strategic identity. In a scenario where they coexist with traditional media and video-on-demand platforms and digital channels, public service media must reaffirm their purpose.

Without abandoning their founding principles—to inform, educate and entertain—broadcasters must adapt these goals to the digital era by producing content that reflects the cultural and social diversity of their audiences and fosters democratic and civic development.

In this process, alliances and partnerships are essential. Public broadcasters can benefit enormously from co-productions and collaborative agreements, both among themselves and with other actors and platforms. These partnerships can ultimately increase content quality and variety, maximising resources at a time when financial constraints are commonplace.

3. Fighting misinformation: the role of broadcasters as social information infrastructures

In an era marked by the proliferation of fake news and disinformation, public media play a key role as guarantors of truthful and reliable information. They also serve as key promoters of the culture of truthfulness, actively contributing to countering disinformation. Thus, their editorial independence and responsibility to deliver impartial and well-documented news make public broadcasters pivotal actors in the fight against disinformation.

To strengthen this role, broadcasters must harness digital technology to engage new audiences and create spaces for fact-checking and information verification. This will contribute to a more informed and critically engaged public sphere.

4. The impact of artificial intelligence (AI) on the media sector

The introduction of artificial intelligence (AI) in the media sector raises questions both about the professional future of media employment and the quality of information. While AI can offer solutions to automate processes, such as content personalisation or comment moderation, it also raises significant ethical concerns. The replacement of human decision-making in certain processes could lead to the dehumanisation of journalism and the reduction of diverse perspectives in news production. Public broadcasters must find a balance between adopting new technologies and preserving journalistic ethics and the plurality of voices.

In terms of employment, AI may displace certain roles, but it also has the potential to generate new opportunities, particularly in fields such as data analysis and automated content production. Public broadcasters must invest in training their workforces for this transition, ensuring their teams are equipped to adapt to these emerging technologies.

5. Financing and sustainability in a globalised market

Public broadcasters are facing financial challenges in a market dominated by large global platforms that control both advertising revenues and content distribution. Securing public funding in times of austerity and political change requires a clear demonstration of the social value they provide beyond mere entertainment. To justify their relevance, public broadcasters must deliver distinctive content that promotes social inclusion, education and local culture, in line with their public service mission.

6. Governance: ensuring objectivity and neutrality

One of the biggest challenges for public broadcasters is to safeguard governance frameworks that uphold objectivity and neutrality. Since these institutions depend on public funds, they may be subject to political and other external pressures. To guarantee their independence, transparent governance structures must be established that ensure impartiality in decision-making, both within internal management and in the content and information they distribute.

These governmental structures should incorporate robust oversight mechanisms that prevent the instrumentalization of public media, thereby strengthening their public service mission.

Additionally, public broadcasters must adopt management models that help to build public confidence, enabling citizens to perceive them as guarantors of impartial, quality information. This is vital not only to maintain their credibility, but also to secure future public funding.

7. Adapting to a new consumer demanding new products and content

The profile of the content consumers has shifted dramatically in recent years. Audiences not only consume a greater amount of content, but they now have access to a much wider range of formats and platforms. The challenge for public broadcasters is to understand and adapt to these evolving consumption habits. Today's viewers demand the freedom to choose what to watch, when to watch and on which device. Despite this, no VOD platform has yet matched the ability of major live events to attract large, simultaneous audiences. In addition, new audiences demand personalised content, often in short-form and available via mobile platforms.

While maintaining their essence, public broadcasters must adapt their content and formats to remain relevant to this audience, which is still young today. This implies not only investing in new forms of distribution and technological platforms, but also the creation of innovative content that resonates with young and diverse audiences. In addition, public broadcasters must explore the use of data and AI to offer personalised experiences that compete with global services.

In this increasingly complex and ever-changing environment, innovation becomes an essential lever to address the challenges faced by public broadcasters in the digital age.

As rapid technological advancements shape consumer habits and global platforms increase competition, the ability to innovate across formats, distribution channels, operational and governance models, and business models is crucial to ensure the relevance and sustainability of public broadcasters.

Taking risks—by experimenting with new, more personalised content and narratives that connect with young audiences, and integrating emerging technologies to optimise production and distribution—is no longer optional, but essential for public broadcasters seeking to meet the demands of the new media environment.

In this context, innovation is not only a means to remain competitive—so that viewers continue to choose to engage with public broadcasters and citizens keep supporting their funding—, but is also a transformative process that enhances their public service mission and reinforces their credibility.

Any study of 'innovation', whether focused on an organisation, region, etc., must consider the polysemic nature of this term. Innovation has acquired various meanings over time, all focused on the ability of organisations and individuals to effectively adapt to changes and generate value for their consumers.

Innovation is not simply about generating ideas or developing cutting-edge concepts—it is about implementing these ideas and creating tangible value for customers and users. At its core, innovation regulates our ability to adapt to changing circumstances, not just to survive but to thrive, providing solutions that respond to real needs. Innovation is challenging, requiring discipline, effort and persistence. However, as Professor Xavier Marcet observes, rejecting innovation is foolish, especially in a world where change is the only constant.

One of the keys to effective innovation is that it is neither an isolated nor a merely technical process. In today's context, concepts such as **open and collaborative innovation** have become increasingly relevant.

Innovation rarely occurs in a vacuum, nor does it depend exclusively on an organisation's internal talent. It is essential to draw from external talent, leverage from other sectors, and to reinterpret of the same challenges from different perspectives.

Innovation therefore means exploring new paths in a results-oriented manner. While it requires creativity, it also demands effort, consistency, risk-taking, discipline, and persistence. Without this continuous balance between inspiration and execution, the risk of failing to implement innovation increases exponentially.

The growing interest in innovation is linked to its significant impact it has on the bottom line of both public and private organisations. Literature reviews on the subject1 show that the ability to innovate drives key improvements in areas such as productivity, operational efficiency and market competitiveness. From a business perspective, innovation not only leads to the creation of new products and services, but also redefines internal processes, generating sustainable competitive advantages. Since Schumpeter's proposal in 1934, innovation has been recognised as an essential factor in economic and business development. Companies that consistently invest in innovation tend to obtain higher returns on investment (ROI) in the long term, especially in highly competitive sectors.

This relationship between innovation and performance is particularly significant in companies that have adopted open and collaborative innovation strategies, which leverage both internal and external talent to remain competitive and generate differentiated value for their customers. Studies on innovation and performance show that innovation can enhance competitiveness and contributes to economic growth by introducing new technologies and management practices.

Innovation serves as a key driver for adaptation to change, value creation in a competitive environment and growth.

However, as experts note, the results of innovation are not always uniform. Its success largely depends on external and internal factors, including the organisational context, execution capacity, internal talent, leadership and the regulatory environment, among other things.

The factors affecting any company's ability to innovate and the success of its innovation strategies, include both internal and external elements. While findings may differ and must be tailored to specific sectors, certain factors that impact innovation outcomes include:

1. Leadership and management style: The way a company is led has a significant impact on its ability to foster innovation. What is needed is leadership that promotes creativity, takes risks and encourages internal and external collaboration.

2. Resources: Access to financial, technological and human resources is crucial to the success of innovation strategies. Companies with access to adequate funding, and highly skilled talent can more effectively apply these resources to innovation processes, gaining a competitive advantage in terms of innovative capacity that translates into desirable results.

3. Organisational structure: Flexible and decentralised organisational structures enable greater agility in innovations. Such structuring facilitates rapid decision-making and allows for more effective adaptation to changes. More rigid hierarchical structures often inhibit innovation.

4. Corporate culture: The culture of the organisation has a direct impact on its capacity to innovate. Companies that promote a culture of experimentation, where mistakes are seen as learning opportunities, tend to be more successful in their innovation efforts.

5. Knowledge management: The ability to manage and leverage knowledge, both internal and external, is essential for innovation. This includes the integration of insights from various sources, such as customers, suppliers, competitors, the academy and research centres, often through mechanisms that promote and implement open innovation strategies.

6. Public policy and regulatory environment: The regulatory environment can either stimulate or hinder innovation. Supportive policies, such as tax incentives and funding programmes, can stimulate innovation, while restrictive regulations may act as barriers.

7. External collaboration and social networks: Companies that are active in collaborative networks with other businesses, universities or research centres, are more likely to innovate. Open innovation, which allows leveraging external ideas and resources, is key.

8. Market demand: Competitive pressure and market demand determine decisions related to innovation. Customers' interest in new or improved products are often major drivers of innovation.

The type of innovation implemented by companies also has an impact on their ability to translate their effects into results.

Traditionally, innovation has been categorised according to its impact and focus. Some of the most common types include

product innovation, which involves the creation or improvement of goods and services; **process innovation**, which refers to the optimisation of the methods and systems that companies use to produce their goods or services; **business model innovation**, which redefines the way an organisation creates, delivers and captures value; and **organisational innovation**, which involves changes to the company's structure, culture or management.

A systematic approach to understanding types of innovation was developed by Larry Keeley (2013) and his team at the Doblin consulting firm. They identified **ten types of innovation** that allow organisations to approach change from multiple angles.

1. **Profit Model Innovation.** This refers to the way a company generates revenue. Examples of this are subscription models, pay-per-use or freemium strategies.

2. **Network Innovation.** This form of innovation involves creating value through partnerships with other organisations or by integrating into collaborative ecosystems. Open innovation, for example, is based on this type of approach.

3. **Structure Innovation.** This entails efficiently reorganising the company's internal assets, competencies and resources to create value. This may include optimising teams, talent management or ownership structure.

4. **Process Innovation.** This refers to improving internal methods and processes to increase efficiency and effectiveness. Common examples include the adoption of agile methodologies or the use of AI for task automation.

5. **Product Performance Innovation**. Here the focus is on improving the features and capabilities of existing products and services. It is the most visible type of innovation to consumers and may involve substantial improvements or disruptive transformations.

6. **Product System Innovation:** This type of innovation occurs when a company creates a coherent and connected ecosystem of products and services that complement each other.

7. **Service innovation.** This relates to improving customer service or creating complementary services that add value to the core product.

8. **Channel Innovation.** Here the focus is on how products and services are delivered to customers. It can include the creation of new distribution channels, such as e-commerce or digital platforms.

9. **Brand Innovation.** This focuses on how a company positions itself and communicates its value proposition to the market, which involves creating strong emotional connections with customers.

10. **Customer Engagement Innovation**. This type of innovation relates to how the organisation interacts with its customers to generate a continuous value experience. Loyalty programmes, personalised experiences or social interaction platforms are examples of customer engagement innovation.

Through their analysis, Keeley's team concluded that the innovations with the greatest impact on value generation were those linked to new business models and networks' creation, even though these are less common. In addition, the results show that 2% of the innovation projects generate over 90% of the value.

In terms of size, while numerous studies indicate a positive correlation between larger sized organisations and innovative activity, the existing literature is inconclusive. Rather, the literature overall suggests that the size of the organisation has little to do with the implementation of innovative measures.

Indeed, small firms enjoy behavioural advantages, while large firms benefit from greater resources, which enable more resource-intensive innovations. Several studies suggest that the relationship between firm size and innovation intensity follows a U-shape curve.

Lastly, it should be noted that some studies prove that the innovative contributions of small firms vary significantly depending on the sector.

2. METHODOLOGY

2. METHODOLOGY

The study, conducted in 2024, employed both quantitative and qualitative research methods. A survey was distributed to CIRCOM members via an online platform. Some members completed the survey in person during the 40th Annual Conference, held on May 23 and 24 in Poznań, Poland.

The quantitative research involved a survey consisting of 39 questions, divided into two sections aligned with the objectives outlined in the proposal presented to the CIRCOM Executive Committee for approval during the 2023 Annual Conference in San Sebastián, Spain. The survey was structured as follows: the first section contained specific questions about Innovation and Management (questions 1 to 27), and the second section focused on Audience and Social Networks (questions 28 to 39). The survey included both closed and open-ended questions, some of which used a Likert scale ranging from 0 to 10.

The survey sent to members can be accessed via the following link: https://forms.gle/pJ26rzG6LR2TirjTA (see annexes).

As part of the analysis, categorisation was done by regions. This was considered the best option due to the wide diversity of countries and channels that are members of the CIRCOM Regional network: North, South, East, and West. While it is true that some academic literature (e.g., https://statemediamonitor.com/) divides Europe into three regions: North-West, South, and East our research highlights the differences among the Northern, Western, Southern and Eastern channels. This led us to opt for a four-zone model.

Other models were also considered. One such example is the Hallin and Mancini (2004) model of comparative media systems, which highlights that media structures are influenced by political systems. However, their framework extends beyond Europe and as such is beyond the focus of our report. Another approach might classify broadcasters by governance structures, innovation culture, or size-based factors of each broadcaster, such as funding, audience, and area of influence. Such a framework is similar to the classification used by CIRCOM, which integrates several of the aforementioned models.

The survey responses show a fair geographical distribution, with 10 countries from Eastern Europe and 8 from Western and Northern Europe. While there are only responses from 3 Southern European countries (Spain, Portugal and Italy), the participation of 8 regional broadcasters from Spain brings more balance.

Despite some research limitations, such as the absence of major broadcasters like the BBC, the sample of countries and organisations remains balanced and robust, covering more than two-thirds of the total number of CIRCOM members and the countries they represent.

The table below shows the 21 countries and 28 regional European organisations that responded to the survey, classified by geographical zones following the Reuters Digital Report´s rating (Newman et al., 2024).

Table 9. *Countries and broadcasters that responded to the survey, classified following the Reuters model.*

Northern Europe	Southern Europe	Eastern Europe	Western Europe
Sweden (SVT)	Italy (RAI)	Hungary (MTVA)	Germany (Hessischer Rundfunk)
Finland (Yle)	Spain (CRTVG, EITB, CEXMA, CyLTV, RTPA, CMM, IB3, 3Cat)	Slovakia (STVR)	Austria (ORF)
Norway (NRK)	Portugal (RTP)	Romania (TVR)	Netherlands (RPO)
		Bulgaria (BNT)	France (France Télévisions)
		Poland (TVP)	Ireland (TG4)
		Serbia (RTS)	
		Albania (RTSH)	
		Slovenia (RTVSLO)	
		North Macedonia (MKRTV)	
		Montenegro (RTCG)	

Source: Own production.

Regarding the qualitative analysis, a total of 17 interviews with representatives of CIRCOM broadcasters were conducted online, lasting an average of 50 minutes each.

Table 10. *Countries and broadcasters that responded to the interview, classified following the Reuters model.*

Northern Europe	Southern Europe	Eastern Europe	Western Europe
Sweden (SVT)	Italy (RAI)	Slovakia (STVR)	Germany (Hessischer Rundfunk)
	Spain (CRTVG, EITB, CEXMA, RTPA, CMM, IB3)	Romania (TVR)	Austria (ORF)
		Bulgaria (BNT)	Netherlands (RPO)
		Serbia (RTS)	
		Albania (RTSH)	
		Slovenia (RTVSLO)	

Source: Own production.

Map 1. *Countries and broadcasters that responded to the survey.*

Map 2. *Countries and broadcasters that responded to the interview.*

The social network analysis was divided into several stages. In the first stage, data was extracted from the survey responses to identify the programs with the highest audience ratings across different time slots.

Regarding the section on **audience measurement on social networks and the estimation of presence, performance, reach, and engagement** of European regional public broadcasters, all the publications generated by the different profiles of each broadcaster were compiled from the programs identified as having the largest audiences. To facilitate data collection and coding, the silver-paid version of FanPageKarma scraping software was utilised. This allowed us to download the publication records from the time each profile was first registered.

This software was primarily used to analyse the profiles of the programs themselves. When a program did not have its own profile or could not be located using the software, the broadcasters' generic profiles were analysed. The sampling period was March 2024. As such, all publications made during this month were downloaded.

After gathering all the publications, the 20 publications with the most engagement were selected for further analysis. Using AI, the type of content that attracted the most audience attention, which generated more dialogue, was investigated. Furthermore, the level of participation between account managers and the social community was assessed.

The analysis covered various social platforms, including Facebook, Instagram, TikTok, X (formerly Twitter) and YouTube.

In total, publications from 308 profiles belonging to 28 broadcasters were analysed during the period from March 1, 2024, to April 1, 2024.

- Profiles analysed on Facebook: 78
- Profiles analysed on Instagram: 82
- Profiles analysed on X (formerly Twitter): 69
- Profiles analysed on TikTok: 32
- Profiles analysed on YouTube: 47

3. RESULTS

3. RESULTS

3.1. Innovation: Context and background

This section presents a review of the academic literature, background, and contemporary arguments regarding innovation. It should be noted that these previous studies informed the design of the survey questions and the interviews with broadcasters' representatives.

The first step is to define innovation. This involves understanding what innovation is and how it is perceived. There is a substantial body of literature on innovation, encompassing a range of models, typologies, methodologies, and applications. Furthermore, the relationship between innovation and the technological, regulatory, and social environments has been extensively researched, as have the social structures of companies.

These factors are closely interrelated, influencing the contingency of situations and, in particular, affecting the perception and interpretation of innovation in different countries. This diversity in perception is reflected in the composition of the Regional CIRCOM network, which includes a variety of broadcasters.

In this sense, the contingency theory emphasizes the need for organisations to adapt to environmental circumstances. It suggests that the most suitable structure is the one that best responds to the operational contingency of each corporation. As such, organisations and their structures are shaped by contexts and contingency, meaning that if the external conditions change, their configuration must adapt accordingly.

New regulations, framework mandates, and program contracts must reflect this contingency. A review of the legislative changes adopted by the European Union (EU) in audiovisual matters over recent decades shows a clear evolution in legislative priorities (Psychogiopoulou et al., 2023).

Historically, economic and cultural preferences have featured prominently in the legislation, though technological developments have increasingly taken precedence. Social and professional issues have failed to capture a significant share of the legislators' attention.

Before 1990, audiovisual legislation focused mainly on advertising, placing this issue at the core of the European Commission's agenda. However, other issues such as production and language also gained importance, signalling an emerging interest in cultural issues. Likewise, the prominence of terms such as common market, minorities and consumer in the legislation during that period, were emblematic of political and social considerations at the time.

Between 1990 and 2000, while advertising remained a key focus, legislators began to include terms such as telecommunications and accessibility within audiovisual legislation. Accessibility, in particular, became a focal point between 2002 and 2010.

The fourth period, between 2001 and 2010, was characterized by a more multifaceted approach to audiovisual policy. At this time, terms such as cultural heritage and creativity, rose to prominence. Moreover, the inclusion of the consumer within the legislative concerns was noteworthy, showing the EU's commitment to improving consumer access to audiovisual content.

In recent years, the legislative agenda has adopted a more hierarchical approach, with technological concerns now dominating the top three positions: digital content, platforms and innovation. Other concerns such as those related to the consumer, accessibility and availability also feature prominently. Cultural issues rank as third in priority, with terms like cultural heritage and creative included in the top ten. In addition, new concerns have emerged in EU regulation during this period, including sustainability and data.

In contrast, analysis of the data collected in the Council of Europe (CoE) presents some different trends and characteristics regarding the audiovisual legislative debate. The CoE has long sought to create a regulatory framework for the European audiovisual sector, particularly emphasizing the audiovisual and film industries. It distinguishes itself by introducing a regulatory framework in European audiovisual governance.

In addition, the CoE has prioritized issues such as democracy, freedom of expression, gender equality and human rights over the last two decades (Sithigh, 2015). Furthermore, the CoE has promoted links between the European audiovisual industry and issues related to democracy, freedom of expression, gender equality and human rights, which receive far greater attention within the CoE than within EU institutions.

Additionally, the high frequency of concepts such as public service broadcasting and co-production highlights that the CoE provides a complementary, and to some extent alternative, approach to audiovisual regulation issues. Their agenda is based on public and policy coordination considerations rather than economic integration concerns. In fact, the EU approach is intrinsically linked to the need to strengthen economic integration and modernise the internal market.

Although the EU scores high in all periods and institutions on terms such as market, platforms, competitiveness and innovation, the CoE does not consider these terms a top priority in its audiovisual policy agenda. The CoE differs by focusing mainly on specific issues such as accessibility (also discussed by the EU), gender equality, co-production, language, minors and minorities. In short, the CoE is less concerned with economic and technological matters, and places little emphasis on competitiveness.

Finally, the CoE advocates for cultural diversity, making it a central component of its policy mission. In fact, the Council often advocates "cultural diversity" as a key component of its core policy mission.

As Calligaro and Vlassis (2017) observe, the Council has been a key entity in advocating for artistic concerns since before 1990, when the Parliament began supporting its initiatives. Together, they ensured that cultural and artistic issues were given prominence in the EU's agenda-setting for the 2010s, thereby contributing to the diversification of the EU's approach to audiovisual governance. Furthermore, public service broadcasting is a key priority for the CoE and remains a central component of its core policy mission.

In a previous study on the analysis of the similarities and differences in how CIRCOM network broadcasters adapted to the digital environment (Rodríguez-Martelo; Rúas-Araújo & Maroto-González, 2023), we followed Hallin and

Mancini's comparative media models and systems of 2004. Both scholars argue that the media system is conditioned by the political system, distinguishing between the Liberal Model (typical of countries such as the United Kingdom and Ireland), the Northern European or Democratic Corporatist Model (Denmark, Finland, Norway, Sweden, Austria, Belgium) and the Mediterranean or Polarised Pluralist Model (countries such as France, Spain, Italy, and Portugal).

However, in this report, we opted for a classification and division based on the geographical zones of Northern, Southern, Eastern, and Western Europe. Indeed, a similar approach was used by Reuters in its reports (Newman et al., 2024). This classification is also reflected in some tables and graphs.

We also expand upon the concept of innovation from Schumpeter's original 1950 theory, towards the definition adopted by the OECD's Oslo Manual (2003). The Oslo Manual understands innovation as the conception, creation, and implementation of significant changes in organisation, products, processes, and marketing through the application of new knowledge, technologies, or research that can be developed internally, in external collaboration, through consultancy or the acquisition of new technological tools.

Therefore, innovation refers to the process of generating and applying new ideas, techniques, products, or technologies to improve and progress various areas of companies, organisations, and societies as a whole. Moreover, the ability to invoke change is considered a key factor for the long-term success of companies, organisations, and societies (García-Avilés et al., 2023).

As a starting point, it is necessary to first determine the type of organisation or corporate typology, which can be mechanistic and/or organic. This distinction is particularly relevant when analysing the structure of public television in each of the European regions of the CIRCOM network.

Mechanistic organisations are characterised by rigid, hierarchical structures, suited to stable and predictable environments, with vertical interactions, and statically defined professional and functional competencies—typical features of the broadcasting era in the 20th century.

In this type of structure, innovation typically occurs at the hierarchical and more specialised levels. In such organisations, specialisation and learning through training play key roles in driving innovation. However, fostering a culture of progress is also essential.

In contrast, organic structures are more flexible and better suited to face changing or unstable contingent conditions, such as competition from new operators, the introduction of new technologies, increasingly complex processes, the need for continuous self-learning, and organisational adaptation among the different teams. This type of structure is much more suitable for exploratory and disruptive innovation, which is essential in today's media ecosystem.

Canadian professor Henry Mintzberg identified different organisational archetypes that have been adopted by audiovisual companies and are closely linked to the requisites for innovation (Campos-Freire, 2022). There are five typologies: simple structures, mechanical bureaucracies, professional bureaucracies, departmental division, and adhocracy.

From the evolution of these basic archetypes the matrix organisation has emerged, one which integrates networks, teams, communities, and project clusters. In practice, these archetypes often combine or hybridize, a trend that is also reflected in the formal structures of the audiovisual sector.

Simple structures are highly dynamic and flexible and are typically found in entrepreneurial ventures and start-ups. They can be modified easily to address changes and innovation, though they tend to struggle with sustainability and risk assessment. Mechanical bureaucracies are rigid organizational models that ensure the stable management of routine operations. Professional bureaucracies are the systems that present the most specialised functions. Though those operating in this system are often very knowledgeable, they are also alien to the transversality of the rest of the organisation.

Divisional systems rely on departmentalization. They are efficient and function-focused, but with a tendency to become confined within the boundaries of their own competencies and specialisations, as well as in the resolution of the operational problems rather than strategic ones. Overcoming these obstacles and improving interdepartmental communication are critical challenges in traditional audiovisual organisations.

Departmentalization can bring about matrix organisations, leading to the emergence of adhocracy. Adhocracies are flexible, matrix-based structures that arise out of professional or divisional bureaucratic organisations. They are malleable and informal, suited for transversality, and designed to form and dissolve according to project needs. They are favourable to diversity and learning and conducive to innovation. However, they also require adaptability and bureaucratization avoidance.

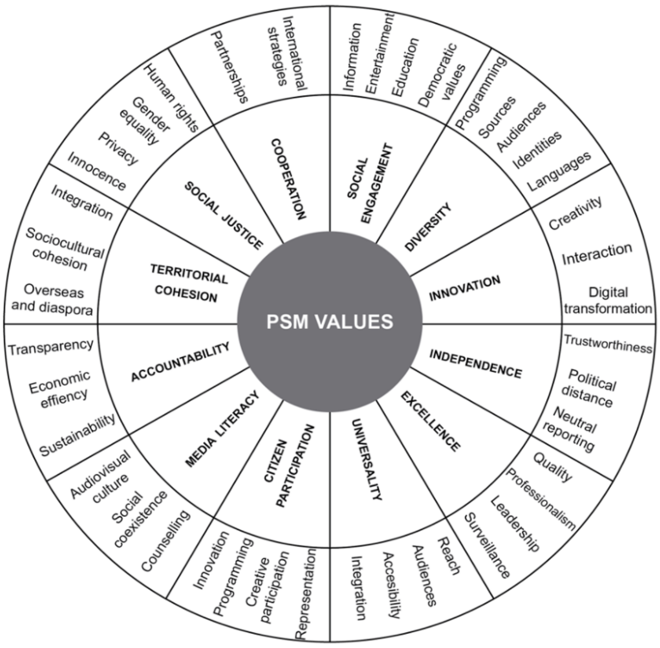
Ambidextrous organisations combine rigid and flexible structures. This concept was introduced by Robert Ducan in 1976 and later expanded upon by O'Reilly III and Michael L. Tushman (1996) of Harvard Business School, who defined ambidexterity as "the ability to simultaneously achieve both incremental and discontinuous innovation across multiple contradictory structures, processes, and cultures for the long-term survival of a company" (Campos-Freire, 2016).

This theory responds to the needs of the life cycle of companies and supports growth and innovation across three distinct areas: that of traditional business operations (television and linear radio), in which incremental innovation is favourable; that of emerging media (online supply and access), with discontinuous exploration and renewal innovation; and that of Research, Development, and Innovation (R&D&I) on what is yet to come (e.g., AI, metadata, research and incubation projects).

Based on this theory, strategists decide where and how innovation is most appropriate—internally, externally, or through a hybrid approach—taking into account the company's size and strategic approach. Innovation rooted in an open community, where greater value is given to societal contributions, helps reinforce the organisation's public value.

The following figure shows the factors that reinforce public value in European Public Service Media (PSM), considering both innovation and other critical items, as proposed by Cañedo, Rodríguez-Castro & López Cepeda (2022).

Figure 1. *Proposal of central dimensions of public value in PSM.*



Source: Cañedo, Rodríguez-Castro & López Cepeda (2022)

Japan's innovation model is based on organisations that learn collectively through training. This approach favours incremental innovation but requires permeability and motivation from the employees' internally to break away from traditional routines. This explains the low transformative capacity of the internal training provided by companies, which goes little beyond the use of tools and technologies

For the analysis of innovation within European public broadcasters, the so-called **hexagonal public innovation model (HIP)** is particularly relevant, and was used in the survey conducted with the CIRCOM network broadcasters.

This model was proposed by the Ibero-American General Secretariat (SEGIB) in a report presented at the 27th Ibero-American *Summit of Heads of State and Government in Andorra* (2021) as a framework for sustainable innovation aligned with the 2030 Agenda. It follows an open innovation model designed to accelerate systemic change within organisations, as defined by Henry Chesbrough, professor at the University of California (Campos-Freire, 2022). This model is grounded in six drivers of innovation culture:

1. OPEN. Opening organisations and establishing collaboration networks with suppliers and competitors, but also with users and audiences.

2. TRANS. Making innovation transversal, creating project teams and circles that work in a network, hybridising ideas and competencies.

3. FAST. Making organisations more flexible and agile, breaking bureaucratic inertia, removing departmental obstacles, and improving internal and external communication.

4. PROTO. Aligning visions, inspiring change, and turning prototypes into projects.

5. CO. Promoting collaboration, cooperation, co-creation, collective intelligence, and the creation of learning and innovation communities.

6. TEC. To foster digitization and personalization.

It is also worth noting that in 2008, the European Union introduced an innovation management system for small and medium-sized companies (SMEs) called IMP3rove. Developed by AT Kearney using the "House of Innovation" model, this framework divides innovation management into five major sections: strategy, organisation and culture, life cycle management, enablers, and results.

In European public audiovisual corporations, three major models of innovation coordination can be identified:

1. Large departments that develop innovation projects with their own resources.

2. Medium-sized departments that coordinate internal and external innovation by creating teams for projects commissioned by other areas of the corporation.

3. Innovation coordinators with minimal structure or budget (only staff and functional resources), who rely on ambassadors, links, or nodes within each corporation's department. These are selected in collaboration with each area's manager for each change project that is implemented. This represents the simplest and most genuine model of an innovation network or community. This network strategy applies to open and external innovation with audiovisual production companies, start-ups and entrepreneurs.

In each context, the size and structure of the corporation shape the implementation of the model. However, what is normally recommended is an innovation **model** based on the **circular economy**, treated as a strategic priority for the coming years and as a tool for social change and innovation. This of course falls in line with the 2030 Agenda of the United Nations and the European Union's Green Deal.

The term "circular model" references the quality circle management method developed by Kaoru Ishikawa, who utilised project groups as a way to attain continuous internal improvement. These circles focus on quality control throughout every part of the value chain in each process.

In this sense, the circular model is particularly suited for organisations with an eye on the future, given that public audiovisual media have a social mission and mandate. These institutions must engage with and play an active part in their own territory, language, and culture.

The relationships between public administrations, universities, the cultural sector, and businesses, are known as the quadruple helix (Leydesdorff & Ahrweiler, 2014). These networks are crucial in driving innovation, where environmental and social considerations complement economic viability.

Authors such as Zaragoza-Fuster and García-Avilés (2020) argue that part of the social function of public service media lies in their "experimentation with technologies and commitment to innovation to ensure the highest quality in their audiovisual products". This also includes promoting media and digital literacy, bringing new technologies closer to audiences and helping them navigate and engage with these tools (Pérez-Tornero *et al.*, 2021).

In conclusion, innovation is crucial for the survival and growth of media organisations amid a changing ecosystem, particularly as they adapt to a highly competitive digital environment (García-Avilés *et al.*, 2023), in areas like the following:

1. Developing sustainable monetization strategies
2. Attracting new audiences, especially younger ones
3. Fact-checking and combating disinformation
4. Exploring new trends in the production of fiction and non-fiction
5. Creating new journalistic narratives
6. Experimenting with new technologies for production and distribution
7. Automating routine tasks that do not add human value
8. Personalising content
9. Encouraging user collaboration

3.2. Survey results

3.2.1. Innovation and corporate culture

The interviewees' responses to the first question of the survey, *"How does the corporation you work for understand and define innovation?"* (Q1), show both the multifaceted nature of innovation and highlight that CIRCOM members recognise its importance. The responses also indicate that there is diversity across organisations in terms of how innovation is understood and defined, as well as on how innovation influences structural and strategic domains.

To conduct a descriptive analysis, responses were grouped into six categories, using AI tools to identify associations between answers and keywords. The categories were defined as follows:

1. **Innovation related to technological/technical development.** This category includes responses linking innovation with the incorporation and development of new technologies and techniques.

2. **Innovation associated with new formats and/or new content development.** Innovation here is associated with the creation of new program formats and/or content.

3. **Innovation as a transversal element in corporate culture that translates into new processes implementation.** This group includes responses that view innovation as an integral process within the organisation, rooted in its operational approach and embedded throughout all areas within the organisation.

4. **Innovation as a key element/lever for growth and/or adapting to market changes and new viewer demands.** This includes responses emphasising the essential role of innovation in adapting to a changing environment while delivering greater value to viewers.

5. **Innovation as a tool for achieving public service's mission, vision, and objectives.** These responses highlight the role of innovation as a tool for fulfilling public service objectives.

6. **Responses that do not fit into any of the above categories.** These responses do not fall into any of the aforementioned categories. The percentage of responses in each category is shown in Table 11.

Table 11. *Percentages of the relative frequency of innovation aspects related to public broadcasters belonging to CIRCOM Regional.*

Category	Relative frequency (%)
Innovation related to technological/technical development	39.29%
Innovation associated with new formats and/or new content development	17.86%
Innovation as a transversal element in corporate culture that translates into new processes implementation	21.43%
Innovation as a key element/lever for growth and/or adapting to market changes and new viewer demands	14.29%
Innovation as a tool for achieving public service's mission, vision, and objectives	14.29%
The answer to the question does not fall into any of the above categories	10.71%

Source: Own production.

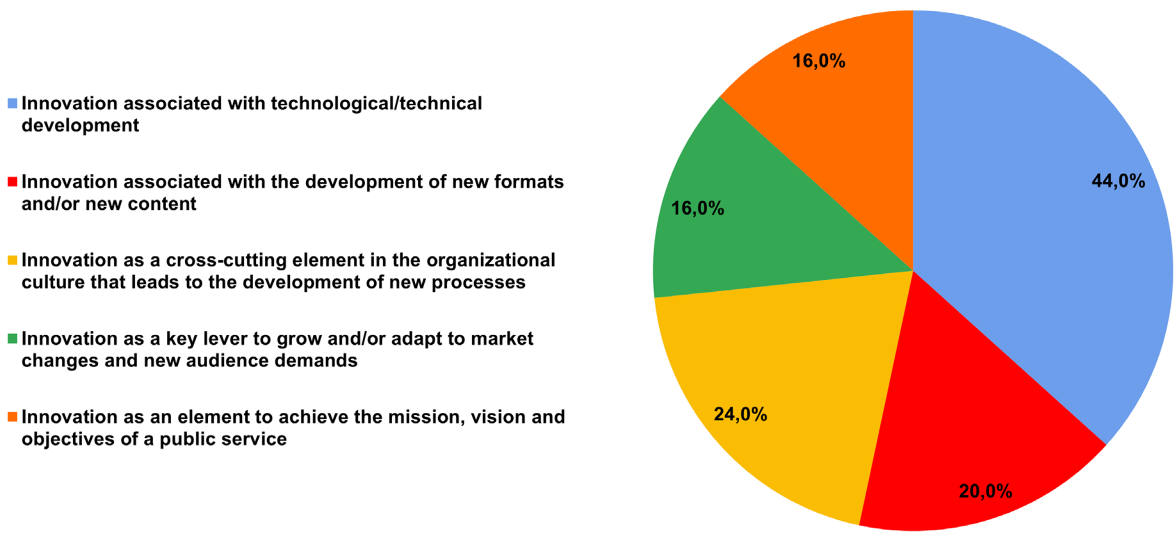
Excluding responses that do not connect innovation to any of its key features, the data reveal that innovation is predominantly understood as technological innovation within the media industry. This approach is reflected in 44% of the responses, underscoring the importance that media organisations assign to new technology development and adoption, Apparently, they consider such developments crucial to maintaining their competitiveness and relevance in the sector, while aligning themselves with their audience's preferences and expectations.

Notably, innovation is perceived as a cross-cutting element in the organisational culture in 24% of the responses. This suggests that a considerable number of the interviewed broadcasters recognise that innovation will only materialise if a firm commitment to such practises is deeply rooted in the corporate culture. In a dynamic media environment, this integration is seen as crucial for the corporation's long-term evolution and sustainability.

Additionally, 20% of the responses highlight the importance of new formats and content, while 16% mention innovation as a response to market adaptation. These figures suggest a shared understanding that creativity and flexibility are critical factors for growth and for keeping pace with the audience's changing demands.

Finally, 16% of organisations mention the use of innovation as a key tool to achieve public service objectives. This highlights the relevance of innovation not only as a mechanism to ensure competitiveness but also as a fundamental means of meeting the obligations and expectations inherent in public service (Figure 2).

Figure 2. *View of innovation among the studied corporations*

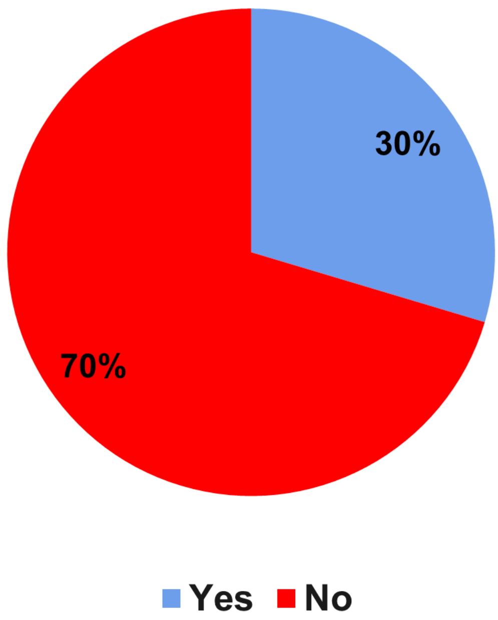


Source: Own production.

40% of the responses indicate a multidimensional approach to innovation, highlighting the shared efforts among the analysed organisations to integrate innovation across several business areas, both at the strategic and operational levels. This perspective proves that there is a holistic view of innovation, characterised by maturity and complexity, in which organisations seek to incorporate innovation into their corporate culture, diversifying and amplifying its effects across all their activities.

However, it is important to mention that 7 out of 10 organisations still lack a dedicated department or individual responsible for innovation management. This shortcoming underlines the need for a more formalised process that assumes specific responsibility for driving and managing innovative processes within these entities (Figure 3).

Figure 3. *Existence of a department with specific and transversal responsibilities regarding innovation*

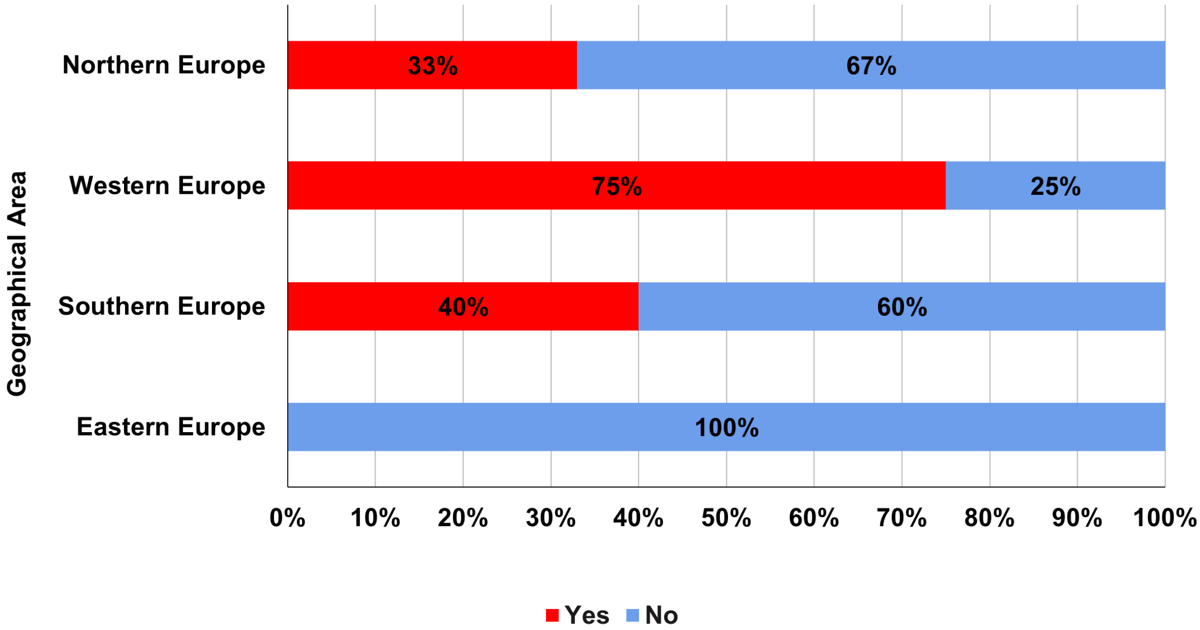


Source: Own production.

An analysis of the responses regarding the existence of innovation managers and/or departments (Q2) within the corporations reveals a clear geographical disparity across regions. While the existence of specific innovation managers is common in most broadcasters operating in Western Europe, it is almost non-existent in Eastern Europe (Figure 4). Most likely, this reflects the fact that many broadcasters in Eastern Europe are still in the early stages of their innovation journey.

The absence of a specific department or individuals responsible for innovation among the participants who report innovative practises and culture could be explained by the fact that such respondents consider innovation to be a strategic area that should be decentralised. This approach views innovation as a shared responsibility across several departments, aiming to foster a global innovation culture within the organisation as a whole. This vision seeks to

Figure 4. *Existence of departments with specific and transversal responsibilities in terms of innovation by geographical zones*



Source: Own production.

encourage each team to contribute to the innovation process from and within their respective areas.

However, the absence of a clear leader or department that holds responsibility in this area presents significant challenges in the coordination and execution of innovation initiatives. This can lead to fragmented or inconsistent efforts, and a reduction in the overall effectiveness of a centralised innovation strategy in terms of responsibilities and momentum. Establishing a dedicated department or appointing a specific innovation leader is essential to maintaining strategic focus and drive. This structure would also ensure coherent, long-term planning, enabling innovation to serve as a key lever to address challenges, allocate resources effectively and measure the impact of initiatives undertaken.

Both decentralised and centralised approaches present advantages and disadvantages, depending on the specific situation, goals and contexts of each organisation. However, for those organisations that currently lack a specific innovation department or leader, the findings of this report can perhaps serve as a point of reflection. Indeed, the creation of an innovation department could enhance the corporation's ability to adapt and thrive in a dynamic and constantly evolving environment that demands agile and precise responses.

Further academic analysis could explore the departmental structures of various broadcasters, comparing these findings with other strategic areas within organisations, such as technology or marketing. This comparison could facilitate an assessment of whether the lack of a formal accountable structure is a unique feature of innovation or whether it extends to other key areas.

In organisations where there is an innovation department, it is common for the team to be relatively small. In fact, in 2 out of 3 organisations with innovation departments, the team consists of 4 or fewer members, while only one-third have over 10 professionals in their innovation teams.

Additionally, in organisations where there is a specific innovation manager or department, it typically reports directly to the CEO or managing director. This underlines the strategic importance these organisations place on innovation.

3.2.2. Innovation strategies and approaches

Broadcasters' innovation strategies have predominantly been oriented towards achieving tangible results. Almost 3 out of 4 broadcasters surveyed (71.4%) have developed new products and formats in the last three years. An even higher percentage (82.4%) have integrated emerging or disruptive technologies in their processes during the same period, which shows a predominantly technological view of innovation among those questioned.

A closer examination of the areas in which the broadcasters have focused their innovative efforts reveals that 21.0% of the participants in the study have developed and implemented innovations in the area of corporate organisation and structure, relating to both the workplace and the company's external relations. This percentage exemplifies commitment to continuous adaptation to a changing environment through internal restructuring and the strengthening of relations with other entities.

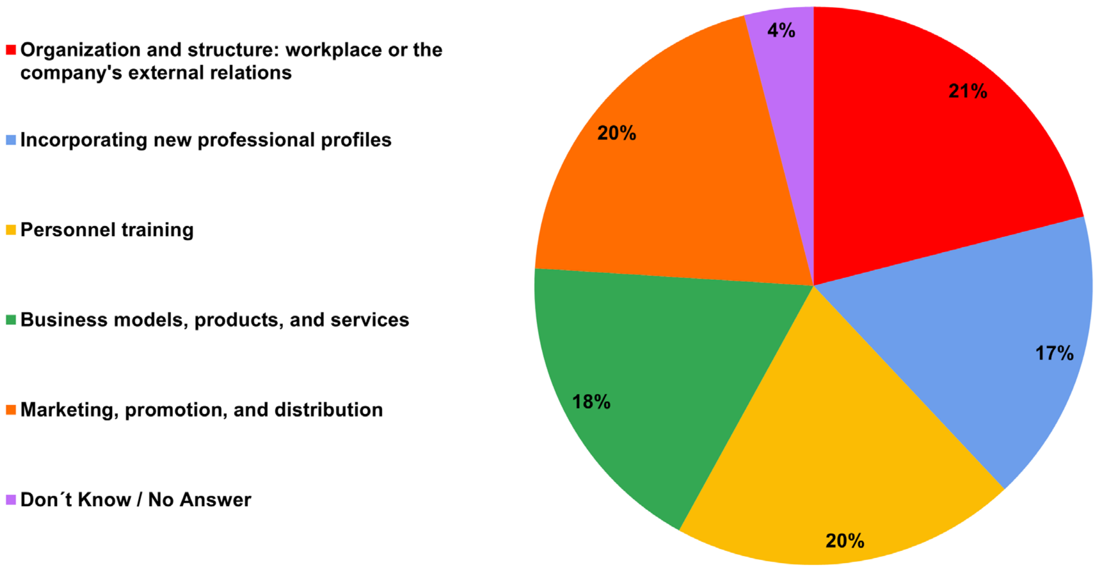
Some 20% of respondents indicated that innovation efforts were directed toward "marketing, promotion and distribution" areas, with innovations being driven by the organisations' need to address digital transformation processes, the search for new markets and the need to implement more effective strategies to reach viewers.

Approximately the same percentage (20%) focused on fostering innovation culture and/or process innovations through staff training procedures, seeking to improve the team's skills and capabilities through new forms of training or professional development. Furthermore, 17% of the companies participating in the study have incorporated new professional profiles, highlighting the importance placed on the knowledge and talent of human resources to tackle present and future challenges.

Lastly, 18% of the responses indicate that the companies have innovated in business models, products and services (Figure 5).

These global data show regional differences. While the percentage of organisational and structural innovation remains relatively consistent in the different geographical areas, Northern European broadcasters exhibit a stronger focus on business model innovations. Over the last three years, their rate has been twice as high as that of their counterparts in

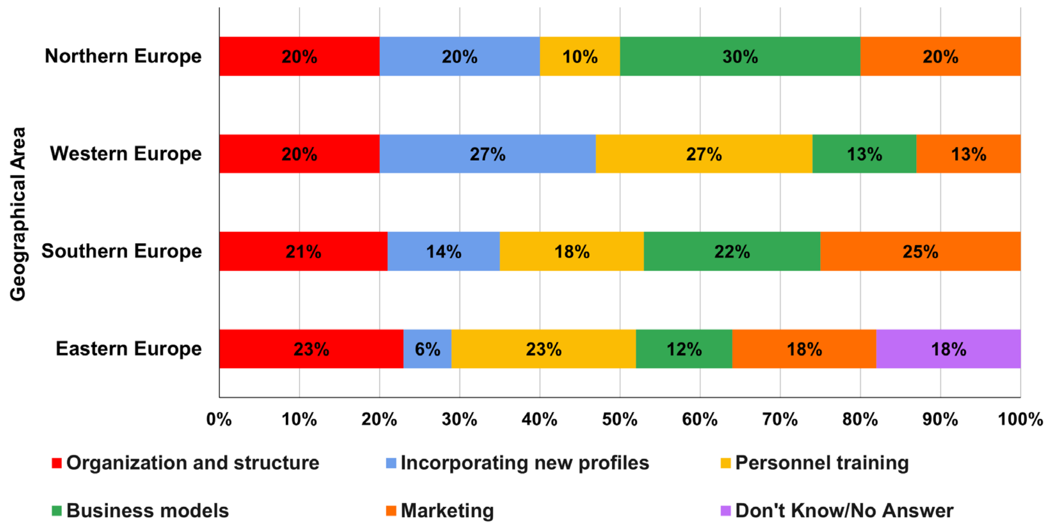
Figure 5. *Areas of innovation in which companies have innovated in the last three years*



Source: Own production.

Western and Eastern Europe. Western European broadcasters have concentrated their innovation efforts on staff training processes innovation. In Southern Europe, the most emphasis was placed on marketing and promotion innovations (Figure 6).

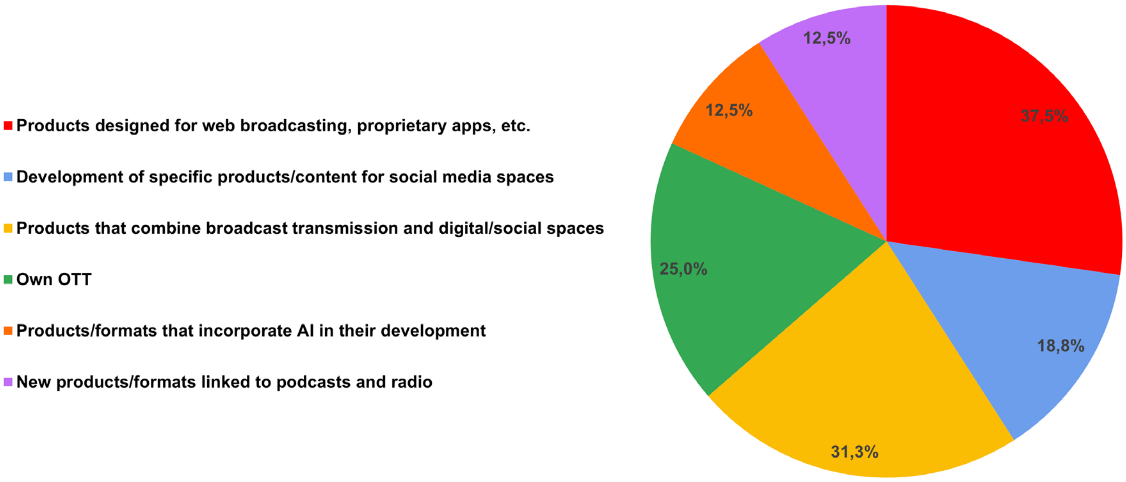
Figure 6. *Areas in which companies have innovated in the last three years. Analysis by geographical area*



Source: Own production.

Regarding the new formats developed, there is a clear trend towards the creation of specific content for both the broadcasters' own platforms and third-party online spaces. This is in response to the growing demand for digital content, allowing broadcasters to adjust their strategies to capture audiences who value the flexibility and accessibility that these channels offer (Figure 7).

Figure 7. *Areas concentrating format innovation in the last three years*



Source: Own production.

Thus, 37.5% of the broadcasters who specified the type of innovative formats launched in the last three years reported developing products specifically designed for broadcasting on their own websites and apps.

Additionally, 31.3% of broadcasters indicated that some of their new formats combine broadcasting with social media distribution. This hybrid approach seeks to take advantage of the convergence between traditional and digital media, reflecting an increasingly widespread strategy aimed at maximising the reach and relevance of content by leveraging multiple distribution channels.

Furthermore, 25.0% of organisations have developed their own OTT (Over-The-Top) platforms, signalling a shift toward independence and direct control over content distribution. OTT platforms allow broadcasters to offer on-demand services, personalise the user experience, and obtain valuable data on audience behaviour. These features not only improve monetization possibilities but also strengthen the direct relationship with the viewer.

Meanwhile, 18.8% of organisations state that they have developed specific and exclusive content for social networks, highlighting the importance of digital social platforms, which increasingly compete with TV content, as content distribution channels. This focus on digital platforms allows broadcasters to amplify their content across other networks, making them central to their audience engagement strategy, particularly for younger segments.

Survey results also show that 12.5% of the interviewed corporations are implementing AI tools for hot topics related to new products and formats development. Some broadcasters are implementing intensive advanced technologies as part of efforts to innovate content creation and personalization via AI. Although the adoption of this technology is still limited, early adopters of AI could be at the forefront of implementing solutions that optimise content production, improve user experience, and offer predictive analytics for better informed decision-making.

Finally, 12.5% of organisations mentioned innovations in podcasts and radio, underscoring that these traditional formats remain relevant. They are, however, being reformulated to adapt to new forms of consumption. Podcasts, in particular, are experiencing a revival, and their flexibility and accessibility make them a perfect complement to broadcasters' digital strategies.

The importance attributed to younger audiences is noteworthy. 62.5% of the organisations describing the new products or formats they have developed specify that they have been primarily aimed at young audiences. This shows how European public broadcasters are aware that young audiences consume media in a very different way than previous generations.

Focusing on young audiences is essential for the long-term sustainability of CIRCOM network broadcasters, as this demographic not only accounts for a significant percentage of the current audience—thanks to their high level of content consumption—but also represents future media consumers. Therefore, capturing their attention, interest, and loyalty can lay the foundation for a core future audience.

Broadcasters are also aware of the role of young people as trendsetters, and by targeting them, they are also seeking to influence a broader audience that follows these emerging trends.

Finally, by maintaining their innovation efforts towards younger demographics, these corporations are simultaneously building and reinforcing their brand identity, projecting a clear message that they are dynamic, modern, and conscious of with current trends.

The participants' responses to the question 'Has the corporation you work for implemented new technologies in the last three years? If so, please indicate which ones' (Q8) have been classified into 6 categories:

a) OTT and Content Management Platforms. The answers included in this section emphasise the development of innovations that respond either to OTT implementation, to elements for their improvement, and to solutions to efficiently manage large volumes of digital content.

b) AI and Automation. The use of AI is profoundly transforming numerous sectors, including the media industry. It facilitates the automation of complex processes and improves operational efficiency.

c) Storage and Backup Systems. Secure and efficient data storage is crucial for media operations, especially with regards to the growing amount of digital content. This category includes responses that address technologies adopted to protect and manage data.

d) Remote Production and Transmission. Technologies enabling content transmission from remote locations, especially in contexts such as remote work, are becoming increasingly relevant. This category brings together technologies that allow broadcasters to adapt to these needs.

e) Mobile Journalism and Social Media Content Production. With the increase in content consumption on mobile devices and social media, broadcasters are adopting technologies to create contents that reaches these audiences.

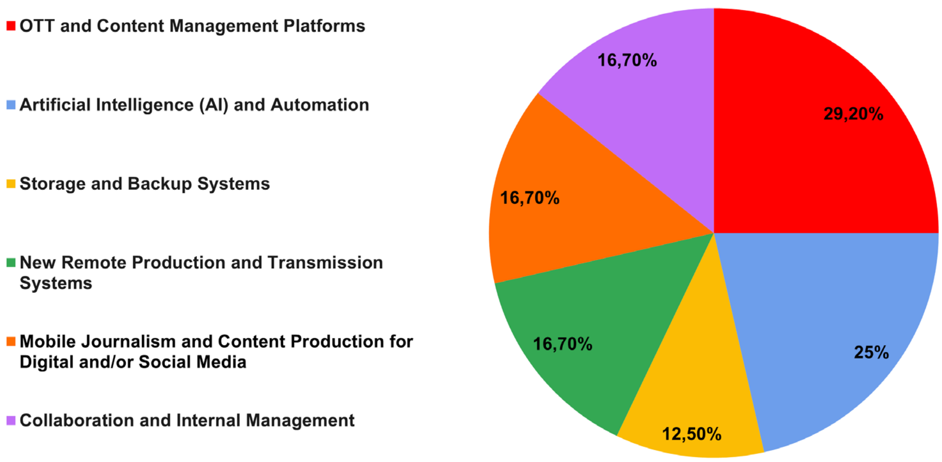
f) Collaboration and Internal Management. Operational efficiency and collaboration between organisations are key to producing quality content. This category includes technologies that enhance collaboration and internal management.

As shown in Figure 8, broadcasters are adopting a variety of new technologies to adapt to the demands of the current media environment. The most represented areas—innovation in the development of OTT platforms, the management of digital content delivery platforms, and the development of projects that incorporate AI or automation processes— indicate a strong trend towards digitization and automation in the industry. Additionally, storage solutions and improved production systems prove that broadcasters understand the need to respond to constantly evolving operational needs.

This mixed approach to the implementation of new technologies underscores the importance of continuous innovation to remain competitive in an increasingly digitised and demanding market.

Nonetheless, the results do indicate that cybersecurity has been somewhat overlooked.

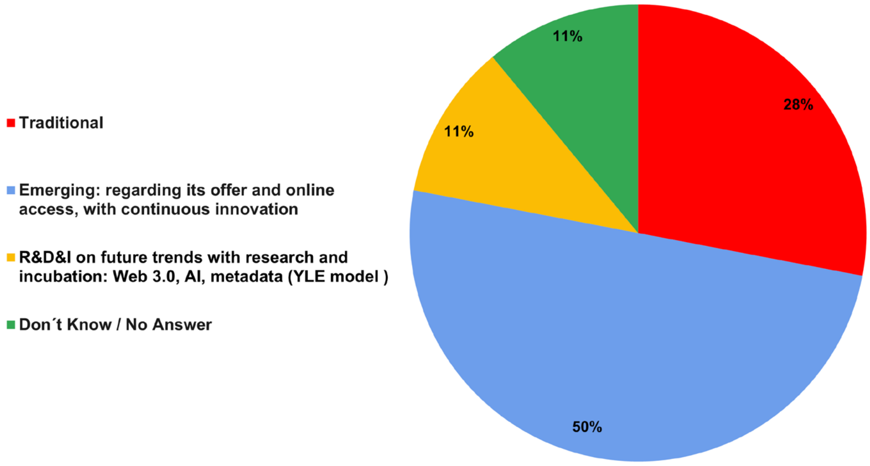
Figure 8. *Areas in which technological innovation has been implemented in the last three years*



Source: Own production.

The pace of innovation and advancement in regional broadcasting in Europe is relatively slow, as evidenced by the responses to the question in our survey '*How does the corporation consider itself in terms of innovation?' (Mehrad Baghai et al.)* (Q13). Only 11% of respondents indicated an advanced level of research, development and incubation. In particular, the cohort of Eastern European nations in the survey appears to be lagging behind in this regard. Six of the eight respondents who perceive their organisations as "traditional" in terms of innovation adoption are from Eastern Europe (Albania, Slovenia, Romania, Bulgaria and Montenegro), with the other two being Germany and Spain (Castilla y Leon).

Figure 9. *Perception of Innovation Within the Corporation*



Source: Own production.

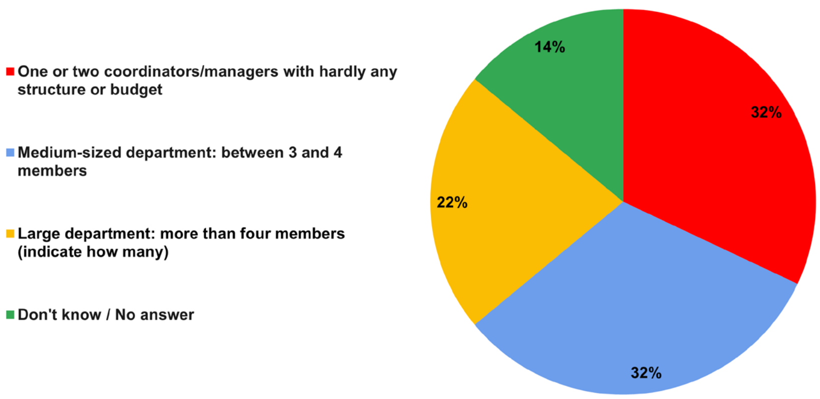
Which of the following three innovation models do you think the public corporation you work for corresponds to? (One or two coordinators/members with hardly any structure or budget/ Medium size department with 3 to 4 members/ Large department with more than 4 people (Q14 in the survey) /If you have chosen large department, indicate the number of members (Q15 in the survey)

The results suggest that innovation is not a primary focus for many organisations, as most do not dedicate significant human resources to it. Fewer than a quarter of the organisations reported having a large innovation-focused department. Additionally, there are significant discrepancies between the levels of investment in innovation across different regions of Europe.

The broadcasters from Western and Northern Europe in the survey tend to assign more than two staff members to innovation. In contrast, nine broadcasters, hailing from Eastern Europe (Slovenia, Romania, Bulgaria, North Macedonia and Montenegro) and Spain (EITB, CEXMA, Radio Televisión de Castilla y León and Castilla La Mancha Media) assign two staff members or less to innovation-related tasks.

Among the broadcasters with a significant focus on innovation, SVT of Sweden is notable. They have a dedicated team of approximately 150 professionals that drive innovation across the organisation.

Figure 10. *Correspondence of Public Corporation to Innovation Models*



Source: Own production.

3.2.3. Social innovation and cultural diversity

In terms of social innovation and cultural diversity *(Has the organisation developed any social innovation/cultural diversity-related process?* Q9 in the survey), a third of stations have yet to implement any such processes. The majority of those that provided such answers are located in Eastern Europe: for example, in Albania, Hungary, Romania, Bulgaria, Montenegro and Slovakia.

Conversely, broadcasters in Western and Northern Europe have a social innovation/cultural diversity process in place, primarily focusing on audience diversification through the inclusion of ethnic minorities.

For instance, the Finnish public broadcaster Yle runs a programme aimed at monitoring diversity across its content. In Ireland, TG4 has implemented a strategy known as GESG, which stands for Gaeilge Environmental, Social and Governance issues. "We are engaging the entire organisation in this strategy," a TG4 representative stated in the survey. The strategy is about inclusion for minority language speakers, centring on environmental objectives and social goals including diversity (such as gender, race and culture), and governance. This ensures that the broadcaster's decision-making capacity is aligned with the highest standards of governance, thus reinforcing TG4's reputation as a reliable public service media organisation.

Regional broadcasters in both Sweden and Norway have also stated that they are placing an increased emphasis on diversity in their training and recruitment programmes, ensuring that their leadership teams, language output and workforce reflect the diversity of their respective communities. This includes the presence of indigenous cultures and languages. Similarly, 3Cat, a regional broadcaster in Catalonia, Spain, has prioritised racial diversity within their newsroom, offering training courses for journalists on how to report on immigration issues and other related topics. In Galicia, the regional television station runs *DigochoEu*, a Galician-language initiative on the social media platform TikTok, aimed at promoting the local language to younger audiences.

Among the Eastern European broadcasters, RTV Slovenija has announced a series of programmes focusing on the Roma ethnic group and the members of the former Yugoslavian nations who live or have become Slovenian citizens.

In the Basque Country, Spain, the regional broadcaster, EITB stands out. Their EKIN (Action) initiative aims to promote social change through short-form audiovisual pieces across TV, web, apps and social networks. The programme initially focused on the climate emergency but has since expanded its scope to cover a range of other topics, including social, cultural and functional diversity, biodiversity, responsible consumption and cultural heritage.

Some regional broadcast media have also started prioritising health-related issues. For example, the Serbian broadcaster has made a commitment to ensuring programme accessibility for blind viewers, while CyLTV Radio Televisión de Castilla y León is using Artificial Intelligence to increase the number of hours of subtitled content, which has led to improved access for people with limited hearing capacities.

In a separate development, the regional broadcaster in Castilla-La Mancha has allocated some of its resources to addressing mental health issues. Prior to the onset of the pandemic, the broadcaster launched a podcast, which subsequently evolved into a radio programme. The programme has since become a cornerstone of the corporation, according to a broadcaster's representative. It features expert advice, special programmes and live social media feeds, all of which are designed to assist those grappling with mental health challenges. The programme's notable impact led to it being bestowed with one of the most prestigious awards of the Psychological School of Madrid.

The survey revealed that cross-cutting innovation remain underdeveloped within regional broadcasting. In response to the question *Are there any established procedures for cross-cutting innovation flows within the organisation?* (Q10 in the survey), over half of the respondents indicated that they lack internal procedures or incentives to encourage the flow of innovative practices.

Of all the broadcasters in Eastern Europe, only those in Romania and Serbia have reported having such policies in place. RTS, the public broadcaster in Serbia, has confirmed that it has various procedures in place for development projects. Romania is a notable exception, having adopted by the end of 2023 a set of procedures as part of a new organisational and operational framework. This framework was introduced by TVR, the country's public television broadcaster. The procedures target cross-cutting innovation flows in content creation, such as the introduction of new formats or guidance on team structures for content production projects.

Of the regional broadcasters in Southern Europe, only CRTVG, 3Cat and Castilla-La Mancha Media have implemented policies to promote cross-cutting innovation across the organisation. RAI, the Italian broadcaster, has also made progress in promoting cross-cutting innovation within the organisation. However, the group is still working on optimising these processes, which is challenging due to the company's size.

Broadcasters in Western Europe that participated in the survey reported the most significant advances in promoting cross-cutting innovation flows within their organisations. These include tech sprint programmes, which are rolled out twice a year across all departments by the technology department at Swedish STV, and Yle Sandbox, a concept adopted by the Finnish Yle. This consists of a system that allows all kinds of innovation to occur with minimal bureaucracy throughout the whole company. There is also an internal practice at Ireland's TG4 where any employee can pitch an idea and request feedback from their peers. Finally, Norwegian NRK has invested heavily in a series of events related to innovation.

In response to the question of what factors have driven or hindered innovation in their corporations (Q11 in the survey), the majority of survey respondents identified barriers. Only Yle, in Finland, whose representative stated that the passion of their staff is the primary driver of innovation in their organisation, mentioned positive internal factors, which is indicative of the approach taken by regional media management with regard to innovation.

Financial constraints, legal frameworks and staff reluctance to embrace change appear to be the most significant factors impeding innovation.

Regional broadcasters in countries such as Sweden, Germany, Norway and Ireland in Western Europe, the broadcasters in the regions of Extremadura, Castilla Leon, Asturias, Castilla La Mancha and Catalonia in Spain, and the Romanian and Slovak broadcasters in Eastern Europe all identified financial constraints as a significant barrier to innovation within their organisations.

In Austria, legal limitations also pose challenges for broadcasters. The country's strict legal framework has constrained the Austrian public broadcaster's ability to produce online-only and social media-only content. Similarly, in Romania, recent legal provisions have imposed significant constraints on recruitment and wages in public institutions.

It appears that the reluctance of the staff regarding change and new ideas is a significant barrier to the adoption of innovation in regional media. In Austria, for instance, trade unions refuse to embrace cross-departmental collaboration, which has resulted in instances where journalists are not permitted to edit their own footage. This task is instead reserved for technical specialists. Such situations present significant obstacles to innovation. Unions at the public broadcaster in France also wield considerable influence and can at any time oppose any major changes that the corporation wishes to implement. In Finland, it is the structural organisation of Yle, which leads to the isolation of work, that most hinders the development of innovative ideas and initiatives.

One particular factor that prevents innovation that is particularly evident in Eastern Europe is the influence of politics on broadcasters. This is exemplified by responses from Slovenia and Slovakia. For instance, between 2020 and 2023, RTV Slovenia was subjected to considerable political pressure from a right-wing government known for restricting liberal democracy. This resulted in the appointment of individuals lacking the needed competence and experience to their senior roles at RTV Slovenia. The management team is thought to have misallocated resources and failed to embrace innovation or develop new technology-driven programmes within the organisation. Following a change in government, the broadcaster is now undergoing a period of gradual restoration.

A number of respondents to the survey, representing broadcasters such as CRTVG and EiTB in Spain, or public media in Albania, Bulgaria, Hungary and North Macedonia in Eastern Europe, did not identify any factor that either spurred on or prevented innovation. This could be interpreted as a strong indication that the topic is not even addressed in their organisations.

The majority of regional broadcasters surveyed for this report have identified two key areas for innovation: the use of AI to reach younger audiences and the introduction of streaming services.

In response to the question *What aspects of innovation is the organisation currently focusing on? In your view, which ones should be expanded in the future? (trends and future)* (Q12 in the survey), a number of organisations, including RAI in Italy, EiTB, RTPA and Castilla La Mancha Media in Spain, as well as public broadcasters in Serbia, Slovakia and Bulgaria in Eastern Europe, and regional media in Sweden, Finland, the Netherlands and Ireland, stated that Artificial Intelligence would be a key area of focus for the near future.

Broadcasters such as CyLTV in Castilla y León, RTPA in Asturias and IB3 in the Balearic Islands have been allocating considerable human and financial resources to developing their own streaming service in recent years. This is a direct response to the growth of global Video-on-Demand (VoD) providers. CyLTV, for instance, is planning to launch its own streaming service, CyLTV Play, in autumn 2024. The innovative aspect of this project is the use of a new semi-automatic system for integrating multi-platform content, which significantly reduces processing costs. For IB3, the launch of a streaming service is a significant undertaking, as it will provide the broadcaster with valuable insights into their user base. Following the launch of the service, the broadcaster plans to distribute newsletters to communicate more effectively with their users, with the ultimate goal of establishing an “IB3 community”.

The majority of respondents in the survey identified a clear link between innovation-led initiatives and the need to expand audience reach, particularly among younger demographics. Respondents from Germany, France and the Netherlands emphasised that the resources allocated to innovative projects are primarily aimed at reaching a younger (or new, in the Dutch case) audience. Yle in Finland and CRTVG in Galicia (Spain) identified the user experience as the primary objective of their innovation-led initiatives. The majority of media outlets surveyed view innovation-driven initiatives as a means of enhancing the visibility of their work. By migrating their linear broadcasting content to web platforms, social media, or apps, these organisations hope to improve their visibility. In the case of 3Cat in Catalonia, however, this process is mainly designed to provide greater exposure for its entertainment products (as opposed to news and journalistic output).

The situation with regard to innovation in regional broadcasters in Eastern Europe is somewhat different. The majority of broadcasters in this part of Europe indicate that the adoption of AI and new technologies within their organisations is still in embryonic form.

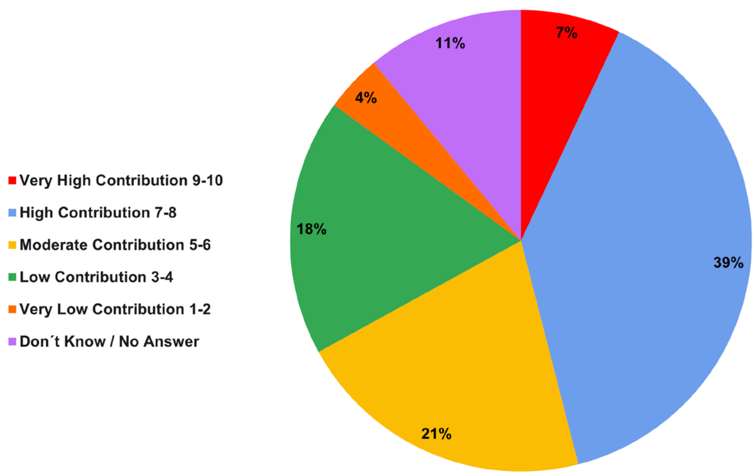
Albanian public broadcaster RTSH is an example of a media organisation that is exploring the potential of interactive shows or events where audiences can actively participate through social media polls and comments. This approach complements the growing trend towards personalisation that platformisation has brought about. In Hungary, the adoption of innovative formats and strategies is also aimed at reducing post-production time, which is expected to enhance the competitive advantage of the public broadcaster in an increasingly crowded digital market.

3.2.4. The Hexagon for Public Innovation Model (HIP)

The following are the answers given to each of the six questions related to the **Hexagon for Public Innovation Model (HIP):** 1. OPEN (openness of organisations to collaboration with other entities, users, and audiences), 2. FAST (making dynamics more flexible and agile and the ability to break bureaucratic inertia and improve internal and external communication), 4. PROTO (turning ideas and prototypes into projects), 5. CO (fostering collaboration, cooperation, and collective co-creation) and 6. TEC (to promote digitization).

Concerning OPEN Innovation, (Q16), figure 11 shows that the corporation's capacity and willingness to be open to innovation is considered high or very high in almost half (46%) of the broadcasters surveyed, compared to just over a fifth who consider it to be moderate (21%), and 22% low or very low.

Figure 11. *Rating Organisational Contribution to OPEN Innovation: Hexagon for Public Innovation Model (HIP)*

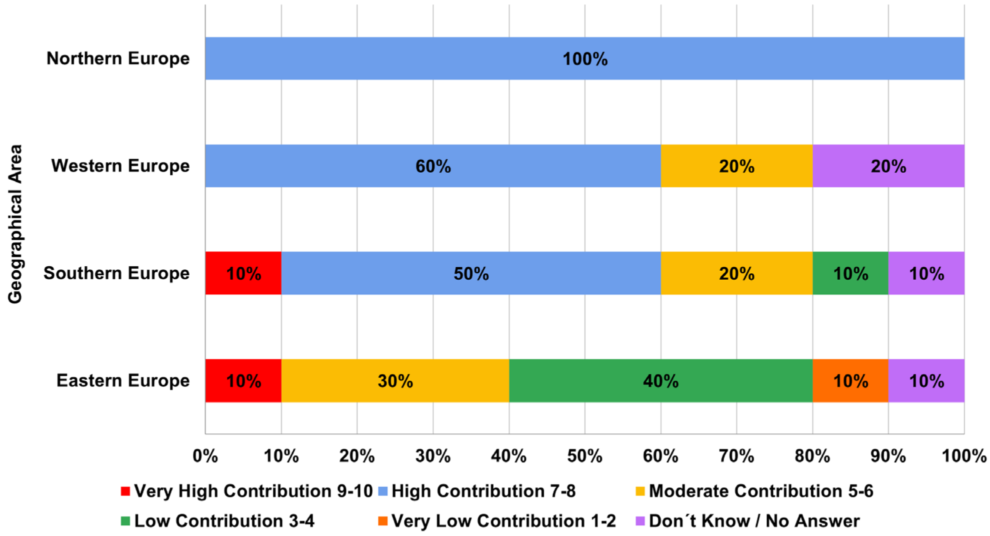


Source: Own production.

Upon examining the distributions by country, the differences are notable. 100% of Northern European broadcasters stated high openness, followed by Western organisations, where more than half of the broadcasters expressed a very high or high openness to innovation. For Southern Europe, the percentages are lower.

This situation varied within the Eastern broadcasters, where 50% expressed a low or very low willingness to innovate (see Figure 12).

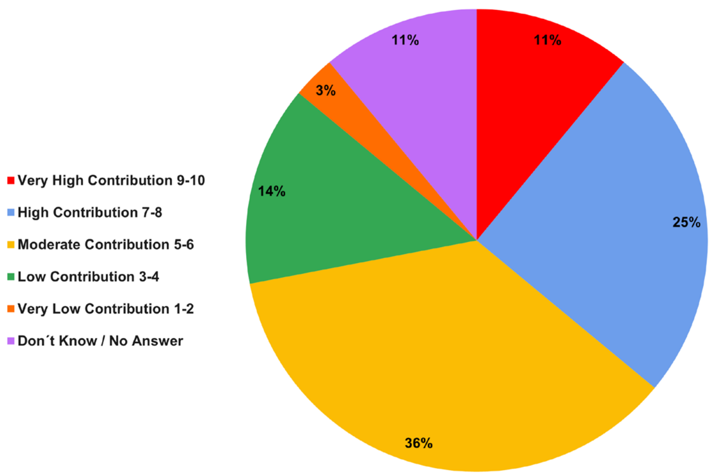
Figure 12. *Rating Organisational Contribution to OPEN Innovation: Hexagon for Public Innovation Model (HIP), Divided by Geographical Areas*



Source: Own production.

Regarding TRANS innovation and the question 'Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): TRANS: mainstreaming and creating project teams and "circles" that work as a network, combining ideas and skills' (Q17), most of the broadcasters asked (36%) said that their contribution was moderate. The percentage of those who consider it to be high or very high was basically the same.

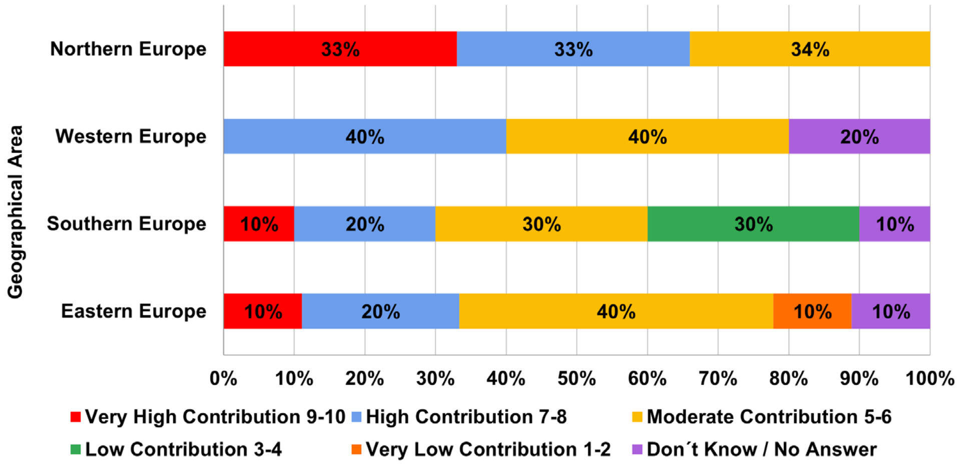
Figure 13. *Rating Organisational Contribution to TRANS Innovation: Hexagon for Public Innovation Model (HIP)*



Source: Own production.

Within this general trend towards moderation in the TRANS section, the Northern broadcasters stand out, declaring a high or very high disposition (66%). Then come Western (40%), Southern and Eastern (30%) corporations.

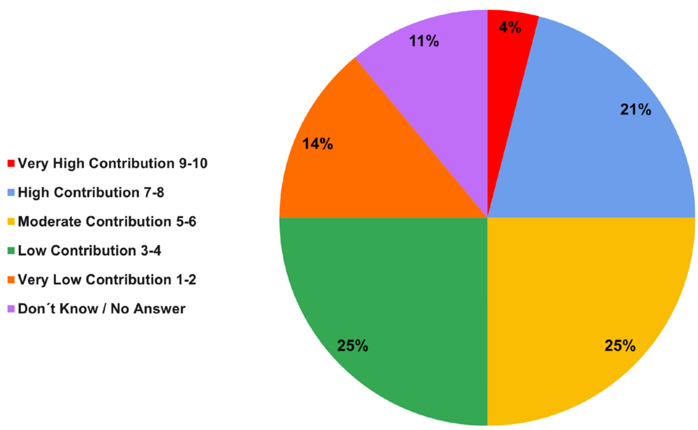
Figure 14. *Rating Organisational Contribution to TRANS Innovation: Hexagon for Public Innovation Model (HIP), Divided by Geographical Areas*



Source: Own production.

One of the aspects where the lowest figures are observed is related to the FAST issue (Q18), where the majority of broadcasters show a low or very low (39%) or moderate (25%) capacity. This last percentage is equal to those who consider it to be high or very high. This shows the **heterogeneity** and existence of certain differences in the flexibility of different broadcasters to work in teams and networks. This is probably due to their **significant internal structural differences** as well as the lack of agility and speed in the work dynamics, as well as the capacity to break away from bureaucratic inertia.

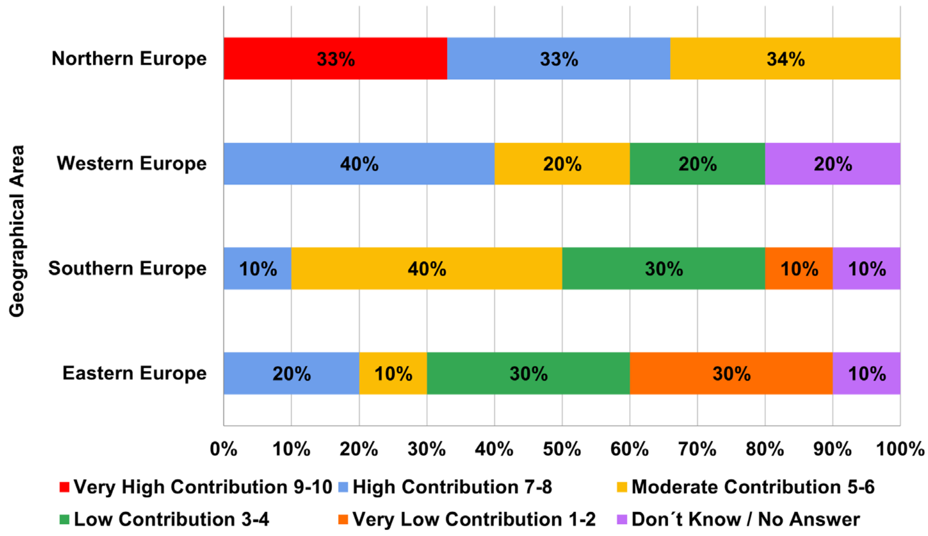
Figure 15. *Rating Organisational Contribution to FAST Innovation: Hexagon for Public Innovation Model (HIP)*



Source: Own production.

This rigidity in the structures is most pronounced in the Eastern European corporations, where 60% gave a moderate or very low response, while the Northern broadcasters show a high or very high contribution (66%).

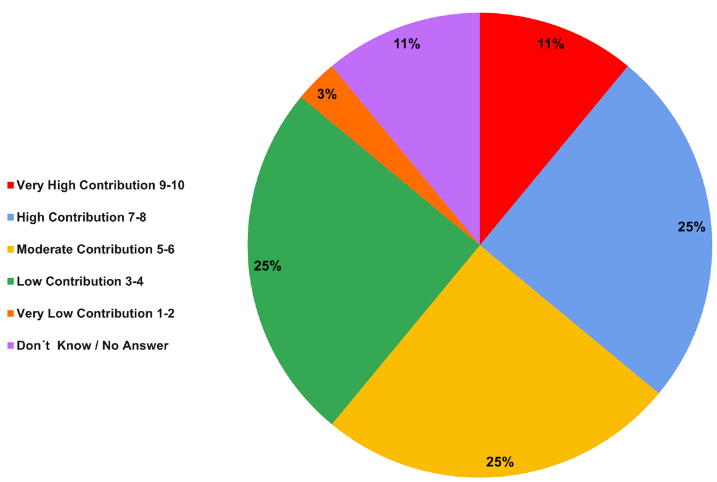
Figure 16. *Rating Organisational Contribution to FAST Innovation: Hexagon for Public Innovation Model (HIP), Divided by Geographical Areas*



Source: Own production.

Something similar occurs with the item PROTO (Q19), regarding the scarce capacity to carry out projects, where substantial differences are also observed, in the same proportion (25%), between those who consider their contribution in this regard to be high and those who describe it as moderate or low. The sum of the latter two (moderate/low) amounts to 50% of the public broadcasters.

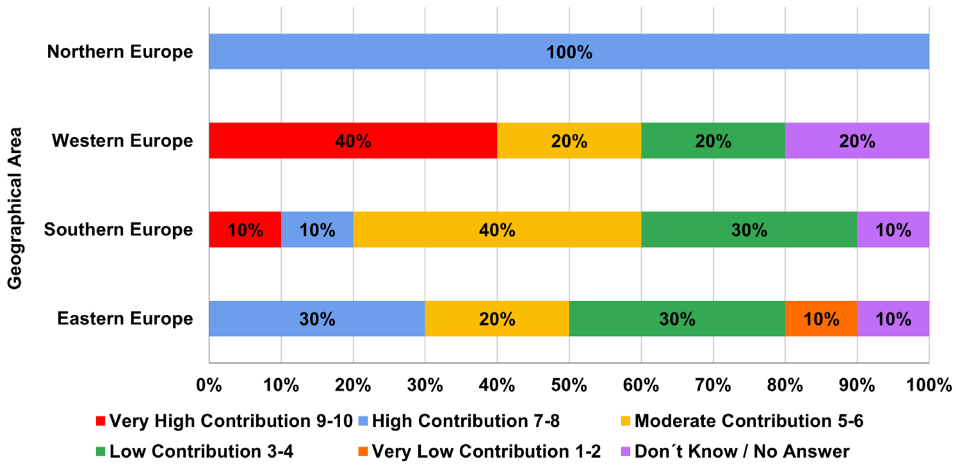
Figure 17. *Rating Organisational Contribution to PROTO Innovation: Hexagon for Public Innovation Model (HIP)*



Source: Own production.

Analysed by geographical area, there is a significant difference between the Northern broadcasters, where the willingness to participate in projects is considered very high or high in 100% of cases, compared to the Southern and Eastern countries, where, again, they express a moderate, low or very low contribution in 70% and 60% of cases, respectively.

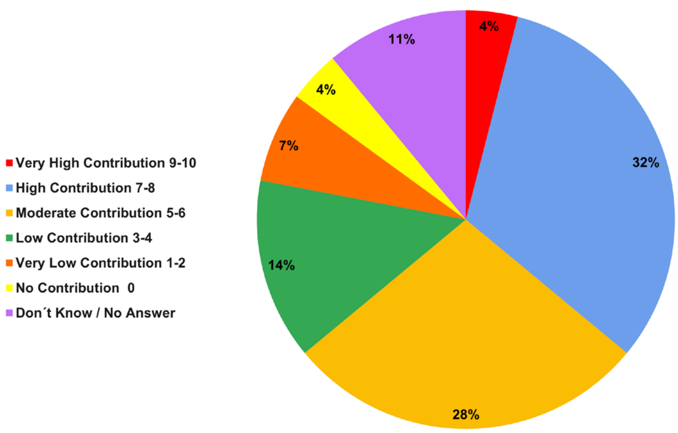
Figure 18. *Rating Organisational Contribution to PROTO Innovation: Hexagon for Public Innovation Model (HIP), Divided by Geographical Areas*



Source: Own production.

The item Co-operation/collaboration between the broadcasters (Q20) that belong to the CIRCOM network is slightly higher, with 36% of organisations seeing themselves as above average in this respect. Indeed, only 21% answered as low or very low. This shows a **tendency and positive disposition** from the partners when it comes to collaborating in promoting learning and innovation groups and communities.

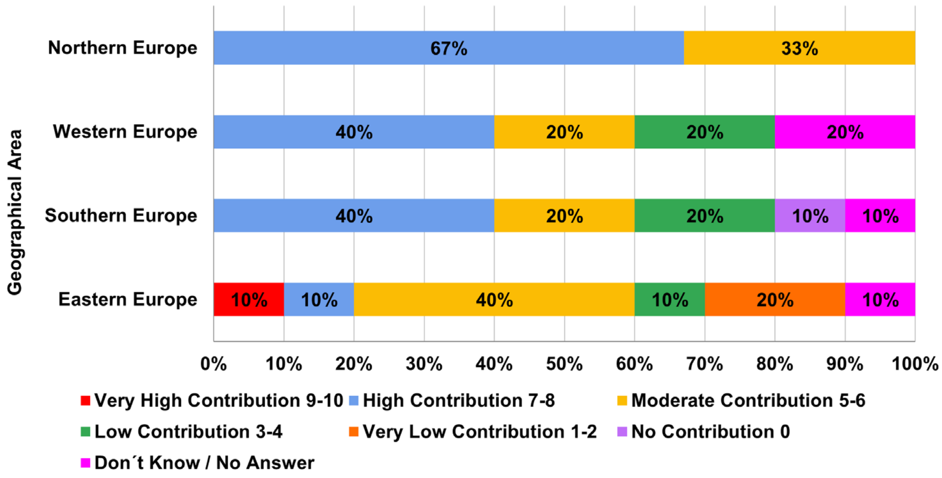
Figure 19. *Rating Organisational Contribution to CO Innovation: Hexagon for Public Innovation Model (HIP)*



Source: Own production.

Northern broadcasters report a high contribution and tendency to cooperate and collaborate (67%). The percentage is lower for Western and Southern corporations (40% for both), compared to the Eastern area, where broadcasters reporting a very high or high contribution do not exceed 20%.

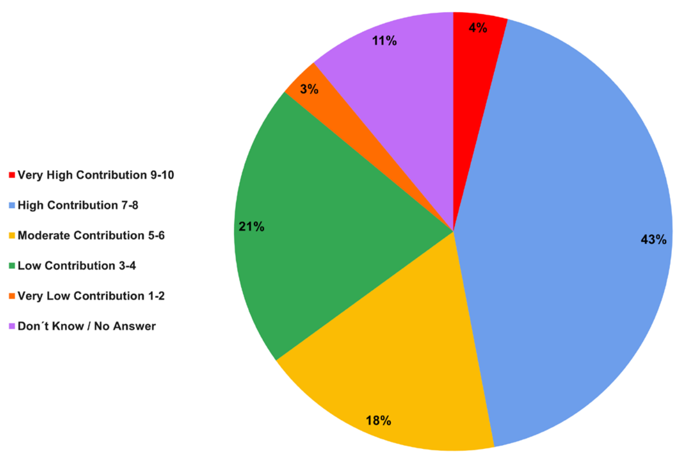
Figure 20. *Rating Organisational Contribution to CO Innovation: Hexagon for Public Innovation Model (HIP), Divided by Geographical Areas*



Source: Own production.

Finally, the sixth question of the HIP on the capacity for **technological impulse**, TEC (Q21), is the one that gives with the **highest percentage**: 47% of broadcasters answered high or very high and only a quarter of broadcasters (24%) gave as low or very low.

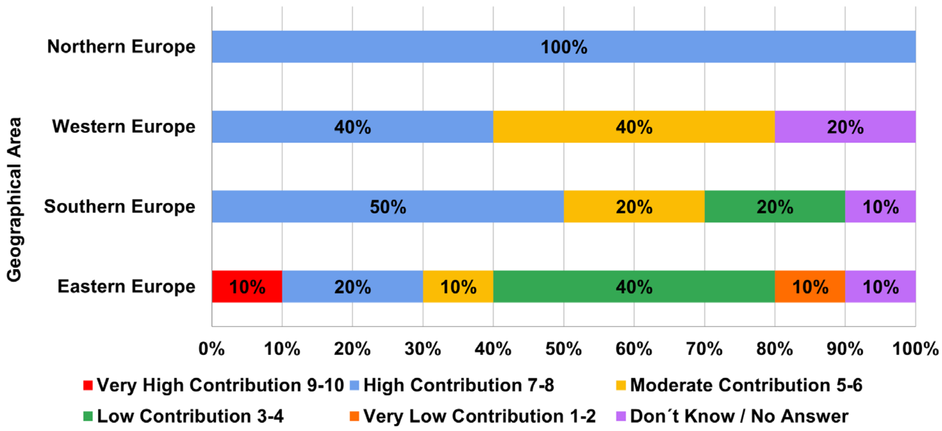
Figure 21. *Rating Organisational Contribution to TEC Innovation: Hexagon for Public Innovation Model (HIP)*



Source: Own production.

Once again, Northern broadcasters show a noteworthy contribution in their technological implementation (100%), followed by the Southern corporations, where 50% of the broadcasters indicate a high contribution. 40% of Western and 30% of Eastern organisations saw their contributions as very high or high.

Figure 22. *Rating Organisational Contribution to TEC Innovation: Hexagon for Public Innovation Model (HIP), Divided by Geographical Areas*



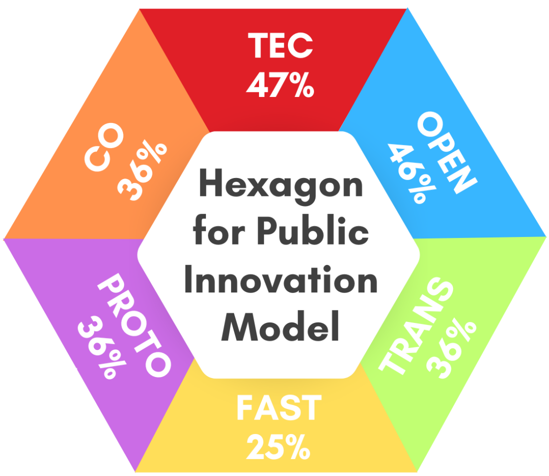
Source: Own production.

In conclusion, looking at the HIP analysis as a whole, the highest capacities recognised by the public broadcasters are those related to Technology (47%) and capacity for external openness (46%), while the lowest are also linked to Technology (24%) Openness (22%) and Transversality capacity (17%).

From the results, it is clear that there is a **significant disparity** between the highest and lowest capacities for technological innovation and openness to innovation among the **broadcasters**, which is similar to that of the capacity for agility, flexibility and dynamism (FAST), something that implies the need to overcome bureaucratic inertia.

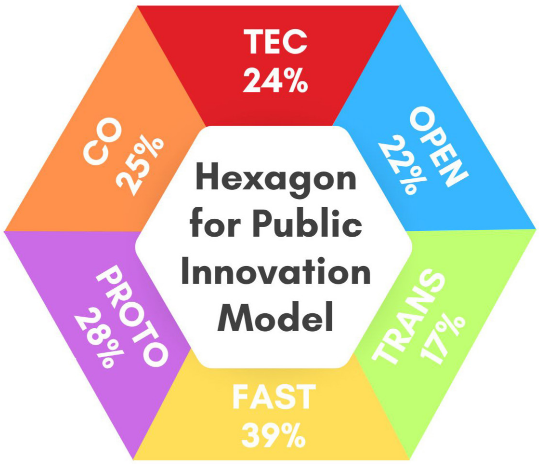
The figure below shows the highest and lowest ratios in each of the six items related to this communication model.

Figure 23. *Hexagonal Model for Public Innovation (HIP), showing the highest ratios in each of the six aspects related to this communication model*



Source: Own production.

Figure 24. *Hexagonal Model for Public Innovation (HIP), showing the lowest ratios in each of the six aspects related to this communication model*



Source: Own production.

The responses to the questions related to the HIP model show significant differences between the various items among the participants. Thus, most of the broadcasters record the highest level of recognition and capacity for TEC (technological) innovation and high levels of OPEN (openness) and CO (collaboration and cooperation), but moderate levels for TRANS and low levels for PROTO.

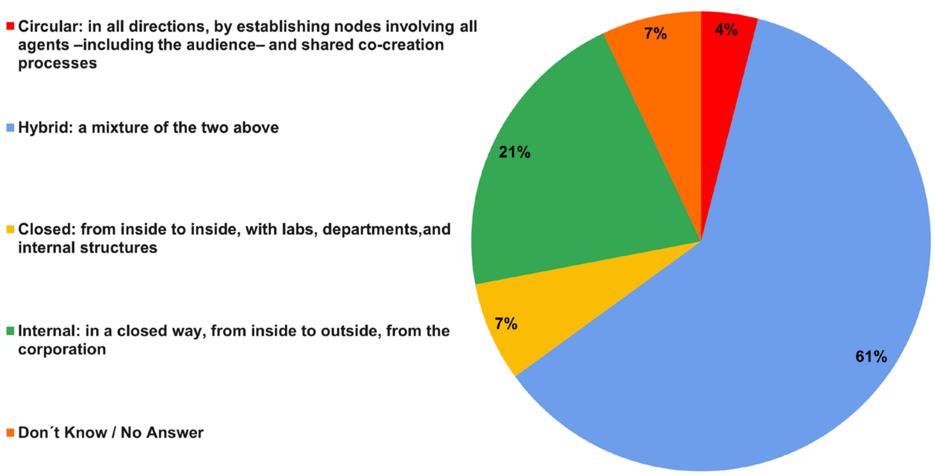
On the other hand, a comparison by geographical areas shows that Northern broadcasters are by far the ones with the highest percentage in each of the 6 items, reaching scores between 66% and 100% in all of them.

Western organisations show percentages between 40% and 60% in all items, while the Southern channels have the highest ratios in TEC (50%), OPEN (44%) and CO (40%), and the lowest percentages in TRANS (30%), PROTO (20%) and FAST, including the lowest figure for this item (10%).

Finally, Eastern broadcasters have the lowest scores in all the items of the HIP model, ranging from highs of 30% (TEC, PROTO and TRANS), 20% (CO and FAST) and 10% (OPEN).

On the other hand, when asked about how each broadcaster generates innovation, the majority (61%) acknowledged a mixed or hybrid form, followed by an internal one (21%) and a closed or circular form.

Figure 25. *How the Organisation Generates Innovation*

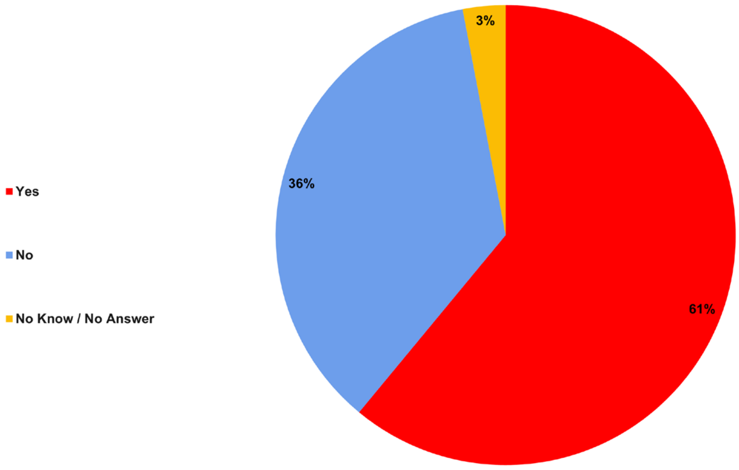


Source: Own production.

Regarding the question of whether the organisation receives any funds or subsidies (Q23), most of responses said they do not, (outside of the funds they receive from their respective countries' governments and regional parliaments, which cover almost all their budgets). However, some broadcasters say they receive innovation-related inputs. For instance, the Norwegian broadcaster collaborates on a project on investigative journalism with a university, and other corporations receive funds from collaboration with European programmes such as EU Horizon (Ireland), or are in the process of applying for grants from the MEDIA Programme of the European Union (Bulgaria) and international grants (Montenegro).

The presence of innovation in the thematic agenda of European regional public broadcasters is high (61%), as can be seen in the answers to the question *'Does the organisation have a thematic innovation agenda?'* (Q24).

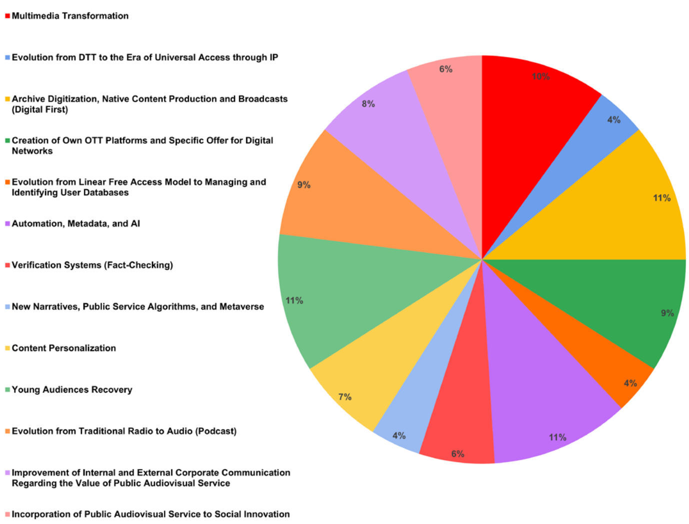
Figure 26. *Presence of a Thematic Innovation Agenda*



Source: Own production.

Concerning the topics around which public television broadcasters generate innovation, a great variety is observed, albeit in small percentages: all are between 11% and 4%, as can be seen in the answer to the question *'Top topics in the innovation agenda* (Q25)'.

Figure 27. *Topics Involved in Organizations Innovation Agendas*



Source: Own production.

Regarding the **priorities** in the innovation projects and programmes implemented by broadcasters, most of those surveyed mentioned those related to digital transformation and, specifically, to **multimedia content creation and AI tools** (Sweden, Finland, Norway, Netherlands, Bulgaria) and the creation of **multimedia platforms** and their own **OTT platforms.** This is a process that several regional broadcasters in Spain and southern European countries are currently implementing.

OTT is similar. As the tendering process is currently underway for some broadcasters, the implementation of different multimedia devices is being considered through the offer of hybrid television services. These services combine traditional television broadcasting with web content via broadband (HbbTV, Hybrid Broadcast Broadband TV), including the transition from SD to HD broadcasting, along with the implementation of new technical equipment with IP support.

Concerning AI innovation, efforts are focused on the automatic generation of subtitles for online content and news, including the development of voice-generated avatars for news presentation such as AI Nina (Netherlands). Additionally, there is a focus on creating new video formats for the production of short series and co-productions, particularly in TV drama content.

3.3. Interviews results

3.3.1. Introduction

The qualitative results presented in this section are based on 17 online video interviews, with decision-makers from various public broadcasters that are part of CIRCOM Regional. The interviews were conducted between April and May 2024 and lasted between 30 and 60 minutes.

The interview script contained a total of 18 open-ended questions that centred on the topics of innovation, production and distribution of digital content, emerging technologies, challenges and obstacles.

The order of the results follows the geographical divisions of Europe: North, East, West, and South. Table 1 shows the name of the interviewees and the post that they hold.

Table 12. *Name and professional post held by the interviewees, and geographical location of the analysed corporations*

North	• Sweden: Sveriges Television (SVT), Josefin Ziegler (Editor in Chief/News Editor/ SVT National Coordinator at CIRCOM-Regional)
East	• Slovakia: Radio and Television of Slovakia (STVR), Miroslav Debnar (Director of Regional studio Banská Bystrica/STVR National Coordinator at CIRCOM-Regional) • Romania: Romanian Television (TVR), Oana Dan (Senior Journalist) • Bulgaria: Bulgarian National Television (BNT), Alexander Kumanov (Head of the International Communications Department/BNT National Coordinator at CIRCOM-Regional) • Serbia: Radio Television of Serbia (RTS), Tatyana Ćitić (Head of the Development Department) • Albania: Radio Television Shqiptar (RTSH), Genc Caushi (International Relations Director at RTSH/RTSH National Coordinator at CIRCOM-Regional) • Slovenia: Radio Television Slovenia (RTVSLO) Zoran Medved (RTVSLO National Coordinator at CIRCOM-Regional)
West	• Germany: Hessischer Rundfunk (HR), Frank Boehm (Portfolio Manager/HR National Coordinator at CIRCOM-Regional) • Austria: Austrian Broadcasting Corporation (ORF), Werner Herics (Director at ORF Regional Studio Burgenland/ ORF National Coordinator at CIRCOM-Regional) • Netherlands: RPO, Renzo Veenstra (Editor in Chief/ Director of Journalistic Innovation Department/RPO National Coordinator at CIRCOM-Regional)

South	• Italy: Italian Radio Television (RAI), Andrea Gerli (Head of Digital)
	• Spain:
	  • Radio and Television Corporation of Galicia (CRTVG): José Pereira Fariña (Head of Innovation and Business)
	  • Radio Television of the Principality of Asturias (RTPA): Francisco González Orejas (General Director)
	  • Euskal Irrati Telebista (EITB): Lontzo Sainz (Head of Strategy and Research)
	  • Castilla-La Mancha Media (CMM): Isaías Blázquez Rosales (Digital Content Director)
	  • Extremadura Audiovisual Media Corporation (CEXMA): José Carlos Macías Moreno (Head of Projects and Citizen Participation)
	  • IB3: Marisa Candia (Director of Corporate Communications and Digital Media)

Source: Own production.

3.3.2. Artificial Intelligence in SVT: Hubs, manager, SVT GPT and council

SVT defines itself as an emerging innovator with a large department responsible for its implementation. The company works across all suggested areas of innovation, opting for a hybrid approach. Innovation is embedded in their everyday work, meaning that employees occasionally need to collaborate with new people and experiment with entirely new solutions. This helps them learn in both everyday situations and structured settings.

The company has adopted multiple new technologies with a special focus on the use of **Artificial Intelligence** in production. For example, they use AI for online news videos captioning and for facial recognition and geolocation. Other innovations include a new search function for their archive content; remote broadcasting technology for program transmissions, a verification desk within the news division and a Content Management System (CMS) for web publishing.

SVT have been working with AI for several years. They have used it for subtitling local news, as well as in journalism and program production. Roughly one year ago, the company established an **AI council** to offer strategic guidance in navigating new services and opportunities.

SVT is now taking the next step by recruiting an AI manager and initiating comprehensive training for all employees. Additionally, they are planning to establish AI hubs within the television division and exploring the possibilities of an "SVT GPT" model.

Innovation

News Editor Josefin Ziegler emphasizes that for employees to achieve the company's goals and embrace shared values and desired outcomes, teams must be structured in a way that allows them to explore optimal solutions to challenges. This underscores the importance of independence and public service media principles, extending to shared values and cooperation in fostering innovation within the organization.

SVT contends that innovation should be generated from all possible directions. The effectiveness of innovation is measured by cost savings, enhanced quality for the audience, and reduced environmental impact.

Digitalization

Since 2013, emerging technologies have been implemented to help improve efficiency, convenience, reduce costs, and deliver faster and more accurate content to the audience. Digital production and distribution have significantly affected workflows, from content creation to editing and publishing. At SVT, a**pproximately 87% of the staff are involved in the ongoing digitization process**, which began a decade ago.

The objectives focus on centralizing broadcast program distribution, improving efficiency, reducing costs, enhancing convenience, streamlining workflows for journalists and enabling faster, more accurate content delivery to the audience.

Human resources

SVT places great importance on leveraging the expertise of employees at all levels, while also drawing knowledge and inspiration from external sources, including companies, universities, and the media networks they belong to.

Looking ahead, there is a need to focus on emerging professional profiles, particularly in AI and verification. SVT requires individuals skilled in data journalism and fact-checking to support its dedicated verification desk, **SVT Verify.** Additionally, future recruitment efforts will prioritize professionals with expertise in new technologies and AI.

Challenges and obstacles

One of the primary challenges to innovation is the extended timeline required for implementation, which demands considerable patience. "However, once these challenges are addressed, the gain is often increased efficiency or quality improvement for the audience", Ziegler highlights.

The organization distinguishes itself from the competition by adhering to core public service principles. As a public service broadcaster, it is committed to producing content that is impartial, independent, and fact-based. Ensuring broad, balanced coverage that reflects diverse perspectives—both geographically and thematically—is a key priority. Furthermore, the organisation offers news services in several minority languages. In the future, they will continue to implement developments and adopt relevant technological innovations to remain competitive and deepen audience engagement.

HIGHLIGHTS

- *"There is a need to, in the future, recruit persons that know the new technology and AI".*
- *"We started an AI council, which has provided sharp and wise guidance in navigating new services and opportunities".*
- *"We are exploring the possibilities of an "SVT GPT".*

Josefin Ziegler, News Editor.

3.3.3. STVR stands for innovation through its 'Creative Centres' project

Slovakia's state broadcaster STVR affirms its commitment to innovation by experimenting with new formats, adopting alternative production processes, and using emerging technologies.

Rather than maintaining a dedicated innovation department within the corporation, multiple divisions within the organisation oversee the integration of new content and technologies. One team focuses on developing **new programs**, another on technological advancements, and a third on **new media initiatives**. While this structure constitutes a clear effort to implement innovation, it also means that innovation efforts are distributed across different departments rather than being centralized.

According to STVR's Executive Director in Banská Bystrica, Miroslav Debnar, the most effective path to innovation often originates from the ground up, empowering editors to drive change. However, he also acknowledges that in certain cases, top-down decisions are necessary to implement changes quickly.

'Creative Centres' project

STVR is currently immersed in the so-called **'Creative Centres' project**, funded by the European Regional Development Fund. The initiative aims to help form creative spaces equipped with hi-tech TV and radio systems to be used by the corporation's journalists, and by students of journalism or technical degrees. Currently, three creative centres are in the process of opening: one in Bratislava, one in Banská Bystrica, and one in Kosice, which correspond to the central and two regional operations hubs in the country.

The STVR Executive Director in Banská Bystrica admits that employees' traditional thinking and resistance to change hinder the project's implementation. Administrative problems such as paperwork and controls are also mentioned as potential obstacles.

Digitalization

STVR S began its digitization process almost 20 years ago. In the beginning, TV and radio operations were handled separately, but they have been integrated for more than a decade.

The corporation estimates that **80% of the production is now centralized**. Content is uploaded daily to a server or cloud platform. From there it is distributed. On average, one or two employees are responsible for managing uploads to the corporation's website, social networks, and other digital platforms.

Culture of innovation

Although STVR has not yet integrated artificial intelligence tools into its workflow, the topic is currently under active consideration, with plans to explore its implementation in the near future.

Engaging with students plays a key role in STVR's strategy, as it provides insight into the expectations of younger audiences regarding public information services and fosters the exchange of ideas. Incorporating new talent into the organization, however, requires collaboration with workers' representatives so as to reach appropriate agreements.

STVR's work is firmly rooted in the **values** of trust, quality of information, and the delivery of high-quality programs, irrespective of audience metrics. This commitment includes dedicated programming for minorities, children, and other specific audiences.

Challenges and obstacles

Navigating an increasingly adverse political climate, where freedom of information and expression face many threats, is the primary challenge for STVR. The government has announced plans to dissolve the public broadcaster and replace it with a new entity, one easier to control.

Among the major challenges, Executive Director Miroslav Debnár highlights the need to reinforce professionalism to guarantee the highest quality service to audiences. He also underscores the importance of producing new radio formats and high-quality TV programs that can be distributed across multiple platforms.

A persistent structural issue within the corporation is its tight budget, which constrains innovation efforts and fuels resistance to change in the workplace. Nevertheless, Debnár argues that even the most change-resistant are gradually recognizing the importance of innovation as tangible results are produced, proving that innovation is no longer an aspiration but a reality.

HIGHLIGHTS

- *STVR is actively engaged in the 'Creative Centres' project, which aims to build creative spaces equipped with hi-tech systems to be used by journalists and students.*
- *Rather than relying on a dedicated innovation department, multiple divisions are responsible for the implementation of new content and technologies.*
- *Budget constraints and resistance to change in the workplace are among the obstacles that STRV is currently facing.*

Miroslav Debnár, Director of STVR Regional studio Banská Bystrica

3.3.4. TVR aims to establish an innovation department despite budget constraints

Romanian public television TVR acknowledges that their innovative practises are currently lacking, and that they have no official strategy in regards to innovation. Ongoing budgetary limitations are the main reason for this.

Despite these issues, some progress has been made on an informal level. A new social media initiative is gaining traction, and much of the organization's efforts now centre on digital innovation. These advancements are primarily driven by individual journalists working on **small-scale projects**. Many are experimenting with new ideas or using new IA tools, while bypassing the extensive bureaucracy required for larger, officially sanctioned initiatives.

TVR senior journalist Oana Dan insists that innovation will soon be addressed formally, as the incoming innovation director—a graphic designer and videographer—plans to introduce new approaches. These include integrating **IA tools** and recruiting new talent to support the creation of new innovative roles within the organisation.

In particular, progress is already being made in areas such as marketing and promotion, with the development of new promotional channels (especially on social media), the use of AI tools and the implementation of new process automation software for promotion and commercial operations.

Digital content

Currently, only 20 out of over 2,000 employees at TVR are dedicated to producing digital content, with the social media team comprising only two people. The organization is actively seeking **new talent** among its workforce to strengthen its digital efforts.

TVR's archive was digitised in 2010, while online content production started after 2007-2008. Despite this, the budget allocated to digital content production and distribution remains negligible, according to Oana Dan, who notes that the corporation relies heavily on **in-house resources**.

At the end of 2023, TVR's Administration Council approved a new organizational chart that includes the appointment of a new Digital Direction and a Marketing Strategy Service. In addition, since the COVID-19 pandemic, TVR has adopted several procedures to support remote work.

Procedures for cross-cutting innovation flows in content creation, such as new formats and team configurations, exist and are included in the new organizational and operational rules adopted.

The corporation measures the effectiveness of these new strategies using analytics from TVR's streaming platform. Currently, there are two people in the data team.

Culture of innovation

In Dan's view, innovation at TVR should be driven from the bottom up, relying on trial and error alongside a clear strategy. Many journalists within TVR are using **ChatGPT** and other generative AI tools. Despite having new ideas, they frequently face frustration when these initiatives fail to gain traction due to limited budgets and inadequate infrastructure.

Nevertheless, to foster a culture of innovation, TVR encourages employees to propose new ideas, regardless of their scale or the potential risk of failure during experimentation.

Challenges and obstacles

Financial constraints, combined with the fact that the TVR's direction is politically appointed every 3-4 years—often leading to layoffs and the cancellation of ongoing projects—creates a challenging environment for innovation and competitiveness.

Additionally, the corporation is hampered by extensive **bureaucratic processes**. As Oana Dan highlights, every new idea must go through a formal approval process, requiring employees to complete numerous forms.

Salaries at TVR also pose a problem, since they are lower than those in commercial media, resulting in a shortage of personnel in areas such as online sales.

The broader economic situation, marked by rising inflation and certain legal provisions in recent years such as recruitment limitations in public institutions and increases in the minimum wage, has further exacerbated these challenges.

HIGHLIGHTS

- *Budgetary constraints and bureaucracy are the main obstacles to innovation.*
- *Innovation is taking place at a small, individual and unofficial scale, without a specific department or clear strategy.*
- *Only 20 employees out of over 2,000 are producing digital content, with the social media team consisting of just two people.*

Oana Dan, TVR Journalist, member of EBU's Digital Committee

3.3.5. Budget constraints and resistance to change: significant barriers to innovation at BNT

Bulgarian National Television (BNT) understands innovation as the introduction of new practices that can be directly implemented within the organisation. The absence of a specific innovation department does not mean the corporation is disengaged from innovation. The technology and content production teams are responsible for implementing new developments. However, a limited budget and employee reluctance to embrace change amount to significant barriers to innovation.

According to Alexander Kumanov, Head of the International Communications Department at BNT, innovation at BNT usually starts from the bottom up, though final support from general management is crucial for any initiative to move forward. Otherwise, it simply will not happen.

Emerging technologies

In recent years, BNT has incorporated **AI-based technologies** such as text-to-speech software that extracts content from video streams, generating images and sending posts to social networks.

The idea behind this innovation is to attract younger audiences by enhancing BNT's social media presence and, in turn, maintain their position in the market. The digital department monitors the performance of websites and products to measure the effectiveness of these innovation strategies. However, the broadcaster has not yet incorporated new professional profiles.

When it comes to AI tools, BNT has not yet implemented any. This is primarily due to employee apprehension and lack of budget. Nevertheless, BNT is in dialogue with Finland's public broadcaster to learn from their experience with AI and to exchange ideas.

Commitment to diversity

As a public broadcaster, BNT is aware of the need to reach **minorities**. This is why they keep producing content in minority languages, such as Turkish and Ukrainian. According to Kumanov, this commitment goes above and beyond that of other broadcasters.

Challenges and obstacles

BNT faces significant internal challenges, including rigid internal structures and employee reluctance to **adapt to change**.

Kumanov points out that the corporation has to overcome the fear of change by clearly explaining the need for innovation and showcasing successful examples. However, he remains unsure about how prepared the organisation is to undertake such efforts. He suggests that an internal communications team would help accommodate the transition.

Moreover, the support of the staff is essential to developing innovative technology. While BNT's management is aware that innovation is crucial for the corporation's survival, they also recognise the risks that AI poses, including those related to data control.

Finally, budget constraints prevent them from investing in innovation. The corporation has applied to get additional funding from the European Commission to help address this issue.

HIGHLIGHTS

- *BNT has implemented AI-based technologies such as text-to-speech and innovative software for social media posts.*
- *The corporation must overcome the employees' fear of change by showcasing successful examples of innovation.*

Alexander Kumanov, Head of the International Communications Department at BNT

3.3.6. RTS in Serbia bets on an Innovation Lab and focuses AI on content transcription

Serbia's public broadcaster defines internal innovation as any program or technical improvement in production, broadcasting, and audiovisual archiving workflows. This innovation extends to all areas of the corporation, including television, online platforms, OTT, and HD broadcasts.

The Development Department, led by Tatyana Ćitić, is responsible for innovation, through collaboration with the Technical Department. The team consists of fifteen people who report directly to General Management, though the exact percentage of the budget allocated to innovation is unclear.

The corporation has launched the **RTS Lab**, which brings together staff from different teams to encourage knowledge-sharing and cultivate a culture of innovation. The lab involves young journalists and also students, with a focus on new projects for younger audiences, social media management, and video content production

AI for transcription

The **transcription project** is currently a major focus for the Development Department. Notwithstanding, it the language barrier presents a challenge. As Tatyana Ćitić explains, while English has a vast database for video transcription, such resources are lacking for the Serbian language, making the process more complicated.

As part of this project, RTS is experimenting **with artificial intelligence tools**, although two major uncertainties persist: ethical concerns about using AI for journalistic work to free up journalists for more creative tasks, and budgetary requirements.

The director of the Development Department highlighted that her department lacks IT staff dedicated to AI developments, meaning that costly outsourcing becomes necessary. The corporation's leadership senses that the difficulty to attract **high-level technical managers** due to non-competitive salaries, is a common issue among public broadcasters. To address this, RTS is collaborating with universities and the academic community.

RTS has also dedicated efforts to developing a recommendation tool for **OTT** services and created avatar software for sign language services. Their goal is to reach more audiences, as accessibility is one of their obligations as a public service media outlet.

Digital content

In addition to exploring artificial intelligence through the testing of transcription software designed for visually impaired audience, the corporation has continued to evolve its digital products. Notably, they launched their own OTT platform in 2018, introduced several enhancements, launched a **subscription-based HD VOD platform**, and released the new RTS Sound mobile audio app in October 2023.

These efforts are part of RTS's goal is to reach **younger audiences**, , connect with previously unreached groups, and ultimately expand their audience base 'everywhere, every time'. During the COVID-19 pandemic, they collaborated with the Serbian Ministry of Education to test new educational content on its OTT platform. The target audience was children.

Digitalization

RTS's digitization process began in 2004. By 2014, their HD cameras were fully installed. Today, all workflows within the corporation are digital and interconnected through servers accessible to all journalists. Management describes the digitization process, which spanned over two decades, as "huge". It began in the 1960s with the **digitization of archives**, and was driven by a national strategy that gave special value to preserving local cultural content.

Currently, digital work is carried out by different departments within the corporation: Radio, OTT, television programs and news, with online editing on the web portal. Around 50 staff out of the corporation's 2,500 employees are involved in these tasks. **Social media** management, however, is not centralised in a single department.

Social media management is handled by various profiles across the organisation, with personnel from various TV programs carrying out this duty.

Challenges and obstacles

Unfortunately, the labour market is a major impediment to pursue AI. It is very is difficult to attract professionals to lead or develop such projects.

Nevertheless, the corporation is actively working to create **professional profiles** such as web administrators, digital creators, and web designers with specific technical skills in order to advance their digital transformation. Additionally, in 2022, the corporation approved a professional reclassification through collective bargaining to include **new job categories**, which will remain in place until 2026.

While management does not consider staff attitudes a significant issue, they recognize some resistance to deep innovation processes, such as the one in 2010, which they attribute to the high average age of the staff.

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HIGHLIGHTS

- *"The Innovation Lab is the best mechanism to improve the culture of innovation".*
- *"It is difficult to attract high-level technical managers due to the proposed salaries".*
- *"Digital work within the Corporation is handled by around fifty people out of the total 2,500 staff"*

Tatyana Ćitić, Director of the Development Department.

3.3.7. Digital content and new profiles, priorities for Albanian Radio Television

Innovation is key for Albania's radio and television broadcaster, RTSH, which is producing new content and has recently started working with **Artificial Intelligence tools**. However, the corporation does not have a specific innovation department.

In terms of their innovation approach, the corporation is open to both bottom-up, and top-down processes.

According to International Relations Director Gennc Caushi, the corporation's operations are anchored by three core components: the news, and the technical and programming departments. The first of the three is led by an experienced journalist, the second by an engineer, and the third a young journalist.

Digital content and new profiles

Digital content has become a priority for RTSH, with the broadcaster publishing stories on its online platforms and social media channels, including Instagram, Facebook, and TikTok. Currently, 12 employees focus on digital content and RTSH has seen a growing number of viewers, making it the leading broadcaster on Instagram in Albania.

As part of a new strategy led by the current general director, the corporation is bringing in young talent to fill **newly created profiles and departments.** Since the corporation cannot offer high salaries to recruits, they are offered incentives such as international training opportunities and exchanges, including with Turkish TV broadcasters.

Emerging technologies

In recent years, RTSH has incorporated emerging technologies that improve **data storage** and mail services, helping the broadcaster meet the demands of the evolving media landscape.

In the last few months, the corporation has begun experimenting with **AI software**, using it to create podcast covers for children's programs and to enhance promotional posters.

Caushi points out that digital production has had an effect on all departments, particularly on those directly engaged with new technologies, such as the web department.

However, the corporation is still in the process of developing effective ways to measure the impact of its innovation strategies, with assistance from different **partners and foreign donors**.

Challenges and obstacles

The main problem for the Albanian broadcaster is the lack of funding as well as high software costs. To address these issues, the broadcaster often relies on second-hand or outdated equipment provided by Swedish broadcasters. This partnership also facilitates the exchange of ideas and expertise between the broadcasters.

HIGHLIGHTS

- *The Albanian radio and television broadcaster is actively producing new content and has started implementing Artificial Intelligence tools.*
- *The corporation is recruiting young talent for new roles and departments as part of a new strategy.*
- *The lack of funding and software costs are the main obstacles to innovation faced by the corporation.*

3.3.8. RTVSLO seeks a mindset change to pave the way for innovation

The National Coordinator at RTVSLO, Zoran Medved, acknowledges that the current financial situation of the state broadcaster is complicated, which makes it difficult to plan for innovation. “It’s hard to think about innovation if you don’t know how much money you will have for it” Medved says.

However, the corporation is aware of its potential to innovate by following successful models from broadcasters in Nordic countries, the BBC, and Germany. However, there is a need for significant changes in both **workflow and mindset** among staff.

Digital content

RTVSLO initiated its digitalisation after 2010. While the process is now complete, the implementation has been slow, the overall result is of good quality, according to Medved.

The corporation has allocated approximately 60-80% of its budget to the production and distribution of **digital content**. Around 70% of employees are tasked with content production, while the remaining 25-30% work in other services.

Medved believes that although digital distribution has improved compared to traditional workflows, the corporation still operates with an analogue mindset.

New technologies

In recent years, RTVSLO has implemented digital broadcasting, improved online technologies, and developed new software. The corporation has also invested in building knowledge and is aware of the need to adapt in order to reach **younger audiences**, who no longer consume traditional media.

The main obstacle that the organization has encountered is providing education and **training** in the use of new tools.

As of now, RTVSLO has yet to adopt AI tools or create in new professional profiles.

Cultural diversity

RTVSLO is **subtitling-oriented,** offering content in original languages with subtitles rather than voiceovers. The broadcaster also provides live sign language interpretation and caters to audience with special needs, such as those who have limited hearing.

The development of minority-focused programs has been inconsistent, with more efforts directed towards content in Italian, for the Roma community, regional channels serving the country's western regions, and programs for the Hungarian minority population.

The organization works on integrating professionals from different minority groups, such as members of the Roma population, in producing content.

Obstacles and challenges

Medved identifies three main difficulties for innovation at RTVSLO. Firstly, financial limitations prevent the corporation from investing in new projects. Secondly, **knowledge gaps** at the managerial level impede the efficient organisation of workflows.

Lastly, legislative changes, particularly the recent RTV Slovenia Law accepted by the government, have resulted in a vertical separation instead of a horizontal integration. In this sense, Medved stresses that adopting a horizontal approach, coupled with a **learning-by-doing strategy,** will be crucial for overcoming these hurdles in the near future..

HIGHLIGHTS

- *RTVSLO has implemented digital broadcasting, improved online technologies, and developed new software.*
- *The corporation needs to boost a workflow and mindset change among workers.*
- *RTVSLO faces three main difficulties in developing innovative processes: financial, top management, and legislation.*

3.3.9. HR reflects on recognizing new ideas to motivate internal and external staff

The HR corporation in Germany defines innovation as the development of new formats, fresh program ideas, and technical advancements in fields such as studies, cameras, and Artificial Intelligence, or any other source of progress. Their innovative philosophy also includes **new methods for organizing work teams**, with shared responsibilities being a central component.

The HR innovation team, led by Frank Böhm, was restructured in October 2023 and consists of three people, with additional support from technical staff. These journalists follow a method that starts with two key premises: identifying the necessary programs and determining the target audience. They also tackle important questions about new formats to ultimately create fresh content. The money allocated to these processes represents less than 15% of the corporation's total budget.

Böhm advocates for innovation that originates from the staff and rises to the management level. However, he also expresses some scepticism about this approach due to the time constraints that journalists are subjected to. In this context, he sees potential in working with external companies to generate ideas, though he acknowledges that this remains a matter that is up for debate.

Recognizing good ideas

From a HR perspective, the corporation is working on understanding employee efficiency throughout their workday to optimize time management. Böhm also points out that staff are not compensated for new ideas and formats. Without receiving **additional pay or incentives**, employees have little motivation to come up with innovative concepts.

The culture of innovation needs to dismantle the fears held by many staff that modern changes could lead to job losses, changes in workflows, or irreversible errors. This is particularly challenging for external companies or freelance workers who collaborate with the corporation. Böhm believes that offering security and support to all creators, along with a system for **recognising and rewarding** new ideas, is essential.

Digitalization

Technological innovation at HR is focused on **automating processes** to save money, energy, and time for staff, with the expectation that results could potentially be better, faster, and more cost-effective.

HR's primary concern at present is the technical performance of its video-on-demand (VOD) platforms, which are seen as more critical than that of television or radio, since minor errors can lead to audience losses. In this regard, the model to follow is Netflix.

While platform accessibility remains a priority, the public's reluctance to create profiles using their email and password poses a challenge. Despite assurances that user data is protected, resistance to this requirement is still noticeable.

Artificial Intelligence

Regarding Artificial Intelligence, the corporation is proceeding "cautiously" and only uses it with audience inquiries via email and phone calls. They are aware of experimentation by ARD, with whom they collaborate, but significant results have yet to emerge.

HR has a few members that are experienced using AI. As such, they have been tasked with testing it in certain areas, though progress has been minimal. So far, AI has been used for creating **graphics and animations** dduring production and as a tool for community management.

For Böhm, HR's main challenge is to develop programs and formats that engage audiences, rather than simply satisfying the journalists' interests. He emphasizes the need for a corporate culture that encourages stepping outside the professional bubble to understand the specific needs of the public. As the German saying goes, "the worm must suit the fish, not the fisherman."

Challenges and obstacles

Relationships with social partners are not an issue for HR, partly due to salaries being above the industry average.

According to Böhm, the reason for the lack of new recruits has less to do with compensation and more with uncertainties surrounding the future of public media.

HR's main challenge is having the foresight to know exactly what the audience wants and needs, and to then, after a process of trial and error, launch innovative processes that succeed. While the corporation conducts many **audience studies**, they are not yielding the desired market success. For this reason, they call for improved research that asks the right questions.

The corporation is closely monitoring innovations across the German media landscape. In Germany, different approaches to innovation have emerged, particularly among the nine major broadcasters. Those with bigger budgets and more extensive staff resources have distinguished themselves by collaborating within a network to drive joint innovation. However, this model demands significant investment in terms of time, personnel, and financial resources.

HIGHLIGHTS

- *"The assumption that public television will never die has changed, and that discourages new profiles from considering to work with us."*
- *"There should be a recognition system to honour staff's new ideas".*
- *"50% of HR's staff is dedicated to producing and distributing digital content."*
- *"Sometimes market studies start with the wrong questions."*

Frank Böhm, HR Innovation Director.

3.3.10. Austria's state broadcaster ORF embarks on a process of digital transformation

The Austrian Broadcasting Corporation (ORF) understands innovation from two perspectives. One the one hand, there is the technological side, with **IA** being a major focus. On the other hand, ORF is rethinking how it produces content and engages **younger audiences** through digitalization and social media.

ORF's streaming platform is the result of the corporation's efforts to adapt to the digital environment, although the organisation still relies heavily on traditional media. According to Werner Herics, Director of ORF's Regional Studio Burgenland, the corporation has historically lagged behind in adopting innovation, often waiting to implement certain processes only after seeing that they have been successful elsewhere. Nonetheless, their current efforts to innovate are described as unstoppable.

Culture of innovation

While the corporation lacks a dedicated innovation department, the drive for innovation permeates all ORF departments. They are also actively seeking new **talent** and profiles.

From Herics' point of view, young professionals are key to innovation, since "they have a totally different spirit and way of understanding the digital world". He acknowledges resistance to change from more senior workers but emphasizes the need for a younger generation to be "at the centre of decision-making".

In recent years, Austria's national broadcaster has incorporated new hybrid roles combining communication and marketing, mainly focused on social media.

Digitization and work processes

Two key aspects of ORF's digitalization efforts include the launch of its **news platform** in 1995—still considered as the country's most important, according to Herics, and its focus on content production for social media. The COVID-19 pandemic also led to "unimaginable changes" at ORF, such as the production of radio programs performed remotely from home.

However, digitization has diminished radio's leading position as the fastest and most immediate medium, while workflow changes have led ORF to produce **web-first content** for the first time, whilst simultaneously providing versions of that content for TV and radio. As a result, producing "online-only" content is not yet possible.

ORF is experimenting with Artificial Intelligence (or **"intelligent assistance"**, as Herics prefer to call it, since humans have to check the whole process) in its newsroom, using AI to support tasks like news production for radio, headline generation, podcasts creation, and online texts, However, AI is not yet part of the content distribution process.

Cultural diversity, local communities

As a regional broadcasting service, ORF shows a clear commitment to the country's **ethnic minorities,** including Burgenland Croats, Slovenes, Hungarians, Czechs, Slovaks, and Roma, for whom they create daily content in their native languages.

Additionally, Austria's public broadcaster continues to serve rural communities with robust local and service journalism.

Challenges and obstacles

ORF faces several challenges regarding not only the implementation of new technologies and products, but in terms of its overall survival. Internally, Herics sees middle **management** as crucial for driving innovation, emphasizing the need to embrace new ideas and not fear mistakes in an environment where the corporation no longer holds a monopoly on information.

Market share and viewership in regional television are declining, with younger generations largely unaware of ORF, as they primarily consume online content rather than traditional television. In this sense, according to Herics, ORF's platform is key to reaching new audiences and also for the corporation to maintain the relevance they have, as well as the public funding they need to operate.

As Herics points out, the Austrian broadcaster is still navigating significant challenges in implementing change and is still within a transitional phase. For example, the **digital radio initiative has yet to begin**, with the lack of funding posing a major hurdle. In recent years, ORF has been forced to downsize, even as demand for content continues to grow. Recently, the government has launched a new financing system requiring all households pay an annual fee, replacing the previous license fee model.

On an external level, the potential rise of the far-right in Austria poses a clear threat to ORF's survival since the party has announced funding cuts and the end of the household fee model. This would mean the corporation would have to go back to relying on state budget allocations, which is of course more economically precarious.

HIGHLIGHTS

- *Innovation in ORF is understood as technology. AI is the key example, though content and audience engagement, especially through digitalisation and social media, are also noteworthy.*
- *Innovation is evident across all departments, and it is noted on their BBC-like platform.*
- *"The best way to bring innovation is with young people. They have a totally different spirit and way of understanding the digital world".*

Werner Herics, ORF Regional Studio Burgenland Director

3.3.11. NL wants to lead the use of AI in its digital-first strategy

The heart of innovation at NL is a strong will among its staff to embrace change in response to consumption trends. As radio and television audiences decline and online numbers surge, employees are motivated to drive this transformation.

The Journalistic Innovation Department, led by Reenzo Veenstra, plays a key role in supporting this shift. While innovation happens across the company, this department supports them in the process. Veenstra explains that eight years ago, NL made everything online its top priority. In fact, "online is not only their number 1, it's positions one through five. Only after that do radio and TV come into play", he stated.

In terms of Human Resources, the department is composed of **young**, **bold** professionals, who are capable of resisting pressures from people who want to put their feet on the breaks". As part of the hiring process, they looked for prospective employees with both editorial and technical expertise.

Veenstra underlined that innovation is essential for public broadcasters to survive. NL must adapt to audience needs to remain relevant. He further highlights that this culture of innovation comes from all parts of the corporation, and that new ideas are constantly encouraged.

NL considers itself very open to innovation. They also celebrate **daily successes**, even with simple gestures like sharing a cake to recognize achievements. "When people see the results of their work, it motivates them to keep pushing forward," according to Veenstra.

Artificial Intelligence

NL incorporates **Artificial Intelligence** in its daily operations. For instance, the company uses AI to subtitle all the videos to support audiences with impaired hearing. Another innovation is an AI presenter designed to appeal to younger audiences who prefer watching the news rather than reading it—NL was the first to introduce this in the Netherlands.

Furthermore, the organisation has also developed AI systems to enhance articles, suggesting improved headlines. It also gives them information about how well articles perform, both in terms of readership and appreciation. The data is displayed in a graph that helps identify areas for improvement.

Additionally, NL uses an AI tool that **scrapes news sources** and gives them 30-40 relevant articles daily. While they don't publish the AI-generated articles as such, since they may not match their desired tone, the tool helps journalists stay informed on the relevant issues.

NL has also built its own AI system, an internal version of **ChatGPT**, which acts as an archive. By feeding it all their articles, this system can then tell them what exactly happened on any given day in the past 10 years.

Veenstra believes that staying on the cutting edge of AI is essential to keeping pace with audience demands and competing with Big Tech. While they may have lost ground to platforms like Facebook and Instagram, AI presents a new playing field where NL can lead. Indeed, he believes that they can surpass **Big Tech**.

He is sure that if public broadcasters do not develop AI-driven news solutions, Big Tech will do it for them. Google, for instance, has its own news generation method that bypasses media sources.

Human resources

There are three roles within NL. First, the innovation team. Second, there are **two data specialists**, one of whom transitioned from being a journalist to becoming a data specialist. Her role is to assist journalists in improving their articles and she even authored a handbook titled The Perfect News Day. This document analyses the optimal output of 27,3 articles per day and 8 push notifications, striking a balance between too much and too little content. Lastly, the **young social team** is responsible for creating stories tailored specifically for younger audiences in their region on social media. This team makes a significant impact by producing content that differs notably from NL's website and is uniquely suited for platforms like Instagram, Facebook and TikTok.

In terms of human resources, staffing is not a major problem as all employees are under the same journalistic salary schemes. They might receive additional years of experience recognition due to their specialised training, but salary structures are consistent.

Challenges and obstacles

For NL, the main obstacles are time and money. Adapting to the fast-paced news environment is a constant struggle. The introduction of an AI presenter, for example, was a breakthrough that briefly bought them more time. Financial constraints are also a limiting factor, with a budget of just **€20 million** for all their activities, leaving limited resources for innovation.

Public broadcasting companies, in general, currently occupy a very precarious position. In Veenstra's opinion, the future looks uncertain, with many public broadcasters struggling to stay afloat. The most significant challenge isn't technology (everyone will eventually adopt these innovations because they have to) but rather the ability to survive long enough to see the integration of that technology. "Staying alive is the hardest part", Veenstra concluded.

HIGHLIGHTS

- *"We are the first broadcaster in the Netherlands to have an AI-generated news presenter".*
- *"We have our own GPT working as our own archive".*
- *"These innovations are a necessity for public broadcasters to survive".*

Renzo Veenstra, director of the Journalistic Innovation Department

3.3.12. Artificial Intelligence is RAI's Challenge for Producing News Content

RAI, Italy's public broadcaster, has embraced Artificial Intelligence as a key driver of innovation via a **mixed Lab**, consisting of both journalists and technicians, and under the supervision of the Digital Information Director, who reports directly to the General Director of the Corporation.

The Digital Information team, led by Andrea Gerli, is responsible for developing tools that address the needs of journalists. This is attained through in-house developments or **collaborations with major Big Tech** companies, such as Microsoft.

The Corporation is experimenting with using **AI for live automatic subtitling**. As a public service broadcaster, they cannot afford any errors in this area. Similarly, they have introduced AI-powered tools on their news website for automatic tag suggestions (**auto-tagging, metadata**), headline generation, and text editing. In the short term, RAI plans to pre-edit agency footage using AI, based on text analysis.

The ultimate goal is to save time and boost productivity to reach wider audiences through new digital media channels. In this way, the corporation aims to enhance its coverage, particularly through infographics and more efficient subtitling, which were previously more labour-intensive. Additionally, they are using a tool called View, based on Deeper and other models, which allow technical staff to simply correct content, rather than creating it from scratch.

Despite this transformation, the workflow for news broadcasts remains largely unchanged, aside from the ability to enrich digital coverage. According to Andrea Gerli, the most significant change has occurred in subtitling.

Social media

In terms of digital distribution, RAI has started creating new content for social media platforms like Instagram, using tools from digital groups such as **Adobe**.

However, they face challenges, particularly due to the political environment. In 2024, the Italian government excluded TikTok from its public information channels, which directly impacts RAI. Currently, only TG1 has a profile on that platform, and it has been active for only a few months.

Innovation

For RAI's Digital Information unit, innovation is about striking the right balance between collaborating with Big Tech companies and defending the corporation's content on platforms like YouTube or Meta. A top priority is ensuring that RAI's content is available on these platforms while safeguarding its rights and copyright.

RAI has expressed concerns about **social platforms** like TikTok distributing public service content without proper attribution. For this reason, Gerli emphasized the need to lead with legal innovation, alongside technical and workflow innovation within the newsroom, to better address journalists' needs.

The corporation is also working on creating a joint Editorial Directorate for all channels, with a digital innovation strategy aimed particularly at attracting younger audiences.

Gerli advocates for innovation that comes from the bottom up and outside in, emphasizing the importance of exploring new partnerships beyond just the typical players like Microsoft and Google. These companies, which have been slow to adopt Artificial Intelligence, are now acquiring small start-ups that were pioneers in the field.

This continuous push for innovation follows the process of digitizing television news, which began in 2008 with the transition from analogue to digital in news production on Channel 2 first, followed by the regional networks and other media.

RAI is particularly focused on its **historical archive**, "a treasure" that has yet to be fully utilized. Associated Press is a model example in this regard, as it goes far beyond traditional thematic categories. Their archive is based on AI, working with data, names, and even facial recognition.

Challenges and difficulties

Currently, 30% of RAI News staff are dedicated to their website. Until recently, the rest of the staff only contributed to linear broadcasts. Now, they also produce content for both **linear and digital formats**. An example of this is the Ukraine bureau, which not only covers stories for television but also creates videos, edits, and livestreams for digital platforms. However, not all staff are ready or willing to transition to digital, as many consider traditional broadcasting to be the priority.

AI and new technologies have not yet been fully introduced across the company as the main hurdle is staff training and adapting workflows. To address this, staff has access to **training courses** organized by RAI management, the workers' council, and the Association of Journalists, which requires journalists to earn training credits.

At the same time, management is keen on hiring staff with innovative profiles. With that being said, for now they are working primarily with the existing technical and journalistic staff. Meanwhile, the company's social representatives believe that adaptation to new technologies should occur under their guidance, particularly the legal transformation of job categories.

The primary challenge in RAI's innovation process is human resources training. The second biggest challenge involves navigating relationships with Big Tech and other companies to protect their own content while exploring ways to secure resources from these companies and social media platforms. In this regard, RAI continues to crack down on accounts that share its content without proper attribution, profiting from it with through millions of views.

While **human resources** poses the biggest challenge to ensuring that all professional roles are engaged in the innovation process, another significant obstacle is market pressure, as public companies are highly affected by political changes.

HIGHLIGHTS

- *"The goal is to save time and increase productivity to reach wider audiences through new digital media".*
- *"The most challenging aspect is staff training and changes in workflows".*
- *"Relationships with Big Tech are one of the Corporation's main challenges".*

Andrea Gerli, Digital Information manager RAI TG1

3.3.13. CRTVG: Strategy and impulse for digital transformation. A comprehensive vision

At the Galician Radio and Television Corporation (CRTVG), innovation is not only understood to be the adoption of new technologies such as Artificial Intelligence (AI), but also the **transversal process** that spans across all departments internally and engages stakeholders externally. José Pereira Fariña, Director of the Innovation and Business area, explains that innovation management at CRTVG follows a multidirectional and participatory approach, drawing inspiration from the collaborative economy and **open innovation**. From this perspective, all needs, whether technological or content-related, are addressed collaboratively, fostering active feedback from both employees and audiences.

A clear example of this dynamic is the implementation of OTT (Over-The-Top) platforms, a project that arose from the need to adapt to new forms of digital consumption and that has been key in the transformation strategy that CRTVG is undertaking. Pereira highlights the importance of **audience participation** through focus groups and feedback on digital channels, which has facilitated a quick response to user demands, such as an innovative voting system implemented in one of the corporation's flagship programmes, "Luar".

Digital transformation. Four phases towards the future

CRTVG's digital transformation has been a gradual but decisive process, organised in four main phases:

1. The digitalisation of production. The first step was the implementation of the AVID system, which transformed the workflows in the newsroom. This digitised system has significantly increased content production efficiency, though full implementation on the radio area is still pending.

2. Broadcasting and distribution platforms**.** CRTVG has developed three **OTT** platforms tailored to different target audiences: AGalega, AGalegAaudio and Xabarín. These platforms have been crucial in changing the content consumption experience and catering to new forms of digital access.

3. "Out of Home" consumption. As part of its future strategy, CRTVG is working on facilitating access to its content in public spaces, thus extending the scope of its media offerings and creating unique user experiences.

4. Organisational transformation. The final stage entails the digitalisation of the corporation's archive, the implementation of KPI systems and the use of big data to optimise internal processes. The corporation seeks continuous improvement to boost organisational and operational efficiency.

The current focus is on stabilising OTT platforms by nurturing its offerings with digital native content and improving the user experience.

Culture of innovation. A commitment to constant change

The development of a culture of innovation within CRTVG is one of the pillars of its corporate strategy. Pereira explains that this process is structured on three levels.

1. The clear definition of objectives. The management team is responsible for setting goals that adapt to new trends, ensuring that each project has a clear and sustainable focus.

2. Resource allocation and internal negotiation. Innovating involves reorganising resources, which often means negotiation with employees to adapt roles, functions, and shifts within the corporation. This step is key to balancing innovative objectives with workforce capabilities.

3. Training and capacity building. CRTVG implements training plans to arm its employees with the necessary technical skills to manage new technologies and workflows, ensuring an efficient transition into digital operations.

"This approach has paid off," says Pereira, to the extent that the corporation can maintain a constant innovation strategy that encompasses all phases of content production and distribution.

Challenges on the path to transformation

CRTVG's digital transformation has encountered several roadblocks. Pereira highlights institutional resistance and excessive bureaucracy as significant obstacles. He explains that "convincing the organisation of the need for radical change has been complex, as these decisions profoundly affect the future of the corporation". In addition, he points out that the interaction with external bodies, such as the Xunta de Galicia and the Agency for the Technological Modernisation of Galicia (AMTEGA), adds layers of complexity to the transformation process, at times slowing down the implementation of innovative solutions.

The significant investments required for digital transformation, together with the need to change the internal business culture, have also been a challenge for CRTVG. "Convincing staff to adopt a **digitisation-focused vision** has not been an easy task," Pereira adds. In some cases, CRTVG has pursued innovations without previous references, making the implementation of certain technological solutions more difficult.

Finally, the lack of new professional profiles has forced the corporation to outsource certain services. Currently, CRTVG is in the middle of a **negotiation process** or the modification of professional categories, a task managed by the Human Resources department.

HIGHLIGHTS

- *Innovation at CRTVG is a collaborative and open process that involves all parties, from management to workers and the audience.*
- *Despite internal and external resistance, CRTVG has made significant progress in its digital transformation, consolidating its position among regional public service media.*
- *CRTVG remains committed to innovation, constantly striving to enhance organisational and operational efficiency.*

3.3.14. Limited innovation: RTPA's challenge amid outsourcing and reduced resources

The management model of the Radio Television of the Principality of Asturias (RTPA) is heavily reliant on outsourcing, with a core workforce of less than 160 employees. This lean structure limits the corporation's capacity for innovation compared to larger regional entities, both in terms of human and material resources.

According to RTPA General Director, Francisco González Orejas, the value of innovation is intrinsically linked to organisational improvement, with technology driving most of the changes. However, without a specific department to lead innovation, the responsibility falls on the 'Systems' IT area, a unit consisting of just two telecommunications engineers. This limits its operational capacity significantly. As a result, RTPA has outsourced more complex IT tasks to external providers.

Currently, the 'Systems' area is focused on reconfiguring the corporation's website and the development of an **OTT platform**, which is due to be launched l in 2025.

Digitisation process

The digitisation process at RTPA has been relatively smooth compared to historical broadcasters such as the Galician Radio and Television Corporation (CRTVG), which started operations in 1985. Founded in 2006, RTPA entered the digital era from the outset, avoiding the conversion of large volumes of magnetic tapes to digital format. Since its inception, the Asturian broadcaster has worked with digital media, operating with a **digitised archive**.

RTPA is currently in the process of modernising its production centre in Gijon as part of the transition to high definition. This effort includes upgrading the headquarters' core infrastructure and renovating the audiovisual equipment on the sets, enhancing both the image and sound quality of its programmes. Moreover, the organisation is implementing advanced tools to optimise **images' localisation and cataloguing** with the aim of strengthening the digital archive management while improving the documentation department's tasks.

Digital content and allocated budget

RTPA's presence on digital channels or social networks is minimal. González says that the entity uses Instagram, Facebook and X to replicate pre-existing content due to the lack of resources and capacity to generate exclusive material for social media. The strategy of recycling content, rather than producing original material, underscores a limitation in the organisation's ability to generate specific content tailored to the unique dynamics and demands of each platform.

Moreover, the budget allocated to the production and distribution of digital content is limited. Technical support for the website is outsourced to a spin-off company of the University of Oviedo, while digital content updating on the website and social media is managed by an external team of five people. However, updates are not immediate. "They are only made after being approved by the editors from the traditional media of radio and television,"

As a result, the production and distribution of digital content has seen few **changes in workflows**, with much of the process remaining outsourced.

Challenges to innovation

Like other public service broadcasters, RTPA is characterised by a traditional, hierarchical structure, which makes it difficult to undertake major transformations with flexibility. In addition, its budget, something that in other contexts can act as a key tool for driving transformative actions, is very limited. This further reduces the corporation's ability to innovate in today's multiplatform media landscape.

Since the creation of the digital media department in 2009, the corporation has faced significant challenges regarding innovation, particularly due to limited staff expansion. The **lack of vacancies**, mainly restricted to replacement roles, haas hindered the dynamic renewal of its workforce. Although the current team, with an average age of 40-42, has shown to be adaptable to new technologies and digital media, the lack of expansion and updated recruitment remains a considerable obstacle to the evolution and modernisation of RTPA's digital media management

HIGHLIGHTS

- *In 2024, RTPA will execute an ambitious and complex process of comprehensive technological renovation for broadcasting improvement.*
- *Responsibility for innovation falls on the IT 'Systems' area, formed by only two engineers, limiting its operational capacity and forcing outsourcing for complex developments.*
- *RTPA's social networks are limited to replicating existing content previously produced by the organisation's traditional media.*

3.3.15. Transformation and Innovation at EITB. New digital brands for Basque society

Euskal Irrati Telebista (EITB), the Basque public broadcaster, is immersed in developing and implementing digital strategies aimed at strengthening and increasing the value of the corporation's business model. This process involves a profound cultural transformation within the organisation, focused on integrating processes that not only enhance traditional radio and television operations but also drive a robust digital strategy, particularly regarding the development and management of its **digital brands**.

Innovation is embedded in the vision and strategy of EITB's management structure, although its presence is more limited in the overall governance. According to EITB's Director of Strategy and Research, Lontzo Sainz, "the Basque corporation's innovation management model follows a traditional approach, as it does not have a specific department in charge of mainstreaming innovation". As a result, innovative initiatives are managed hierarchically, starting at the board level and filtering down through various departments. EITB currently focuses on five fundamental strategic areas.

1. Increasing the **consumption of online content** in Basque and Basque production. EITB seeks to establish itself as a digital reference for Basque language and culture through its streaming platform PRIMERAN, the MAKUSI universe and its new digital information brand, ORAIN_berriak.

2. Connecting with **audiences under 30** by renewing its digital offer.

3. Adapting content to mobile consumption through the development of applications.

4. Ensuring the use of advanced technologies for content distribution. To this end, the Basque corporation is implementing the latest technological trends to adapt its audiovisual content to the digital environment, ensuring distribution with the highest quality standards.

5. Specialising in the creation of audiovisual and audio content. EITB is working on the development of a strategy of original and exclusive content to continue increasing registrations and building community loyalty on its platforms.

Fostering a culture of innovation

EITB promotes a culture of innovation through fluid internal communication, led by the general management team through collective Zoom meetings. In addition, participatory processes have been established that allow the direct involvement of workers in innovation projects.

From an organisational perspective, EITB is developing a new technology management strategy aimed at maximising the use of its **internal capabilities and resources**. This hybrid approach blends the use of internal competencies (in-house expertise) with the integration of **external products and services** (outsourcing), to optimise its operation. Moreover, technology watch mechanisms are implemented to stay ahead of industry trends. EITB collaborates with the Gartner consultancy firm, which offers specialised support in scenarios of greater uncertainty or complexity.

Structural barriers to innovation

Outdated job classifications and the obsolescence of professional profiles are among the main barriers limiting innovation management at EITB. As in many other regional public corporations, EITB is currently immersed in the reform of its collective bargaining agreements to modernise and unify professional categories, though this process is expected to take up to four years.

To address this challenge and key needs, EITB has incorporated four **new strategic profiles** that are central to its digital transformation process: a Media Technology Manager, a Data Expert for the Audience Department, a new OTT Platform Manager and a Chief Data Officer. Although these positions were filled via direct appointments, the bureaucratic procedures inherent to the public system led to delays of up to six months in finalising the recruitment process.

The lack of a specific budget dedicated to innovation is another challenge facing the organisation. However, there are financial allocations for specific projects, such as the creation of the OTT platform and other technological and information content developments.

Effectiveness of strategies and new technologies: challenges and differentiating values

EITB measures the effectiveness of its strategies on a per-product basis. The OTT platform follows suit, relying on metrics such as the number of subscribers, reproductions and watch times. To evaluate the results, the Basque corporation uses **quantitative and qualitative methods**, including focus groups and surveys conducted in collaboration with research companies, as well as the University of the Basque Country. Additionally, EITB has an innovation laboratory where new formats are experimented with.

Furthermore, EITB analyses the social impact of its media group through a **qualitative audience observatory**, evaluating the extent of audience interaction. Its commitment to the production of content in the Basque language and of Basque origin, in line with its public service function, is a key differentiating value.

Looking ahead to 2024, EITB's main challenge is the operational consolidation of its new digital brands, such as PRIMERAN, ORAIN, MAKUSI and GUAU, throughout the year.

HIGHLIGHTS

- *The Basque corporation moves towards the consolidation of its new digital brands to strengthen its presence in the digital ecosystem.*
- *EITB overcomes structural barriers by incorporating new strategic profiles.*
- *The production of content in the Basque language and of Basque origin continues to be a defining pillar of EITB's digital strategy, reaffirming its public service function.*

3.3.16. IB3 launches its digital department with the challenge of reaching new audiences

In May 2024, the public broadcasting corporation of the Balearic Islands, IB3, created its **first-ever digital department**, ocusing on innovation in a 'post-digital' era to reach new digital audiences and create exclusive content.

Marisa Candia, Director of Corporate Communications and Digital Media, is tasked with leading a team of fifteen people in its initial phase, with plans to incorporate digital content creators and journalists over the next two years. The newly formed department will report directly to the General Director of the corporation, in the same way that the Radio and Television divisions do.

IB3's digital department wants to foster innovation from all angles: 1) internally, by creating **new in-house formats** in collaboration with the company's journalists, based on current events; 2) externally, particularly with **youth-focused projects** aimed at reaching younger audiences who no longer watch traditional TV.

Currently, one-third of IB3's innovation comes from **external sources**. In furtherance of this, the corporation is in contact with the Balearic Association of Audiovisual Producers to present its new operational model and encourage the creation of exclusive content for public digital media. The corporation aims to commission bold and experimental projects, departing from conventional radio and TV formats. In this regard, IB3 is working closely with the Balearic Institute of Cultural and Audiovisual Industries on launching grants for digital productions that will support these innovative efforts.

The department still does not have a specific budget for 2024, given that there are funds available for digital coverage and outsourcing content. The department is expected to have its own budget by 2025.

Artificial Intelligence and Digital Transformation

IB3 is currently experimenting with Artificial Intelligence tools, using **Happy Scribe for transcriptions** while exploring other tools, such as applications to convert horizontal videos to vertical formats and reduce production times. So far, these tools are being used in production rather than distribution.

Technically, since 2011, IB3 has changed television formats by incorporating **backpack** technology that allows for simpler and more cost-effective live broadcasts from anywhere in the world—an affordable alternative to traditional mobile units and satellite setups. The corporation is also investing in a 4K horizontal format to scale images for vertical viewing on social media platforms.

These aesthetic improvements mark a transition away from outdated images and formats.

The shift to 4:3 formats and the introduction of 4K quality have presented challenges in the managing of IB3's **historical archive**, which dates back to the corporation's founding in 2005. These technological upgrades have also required significant investments in new, much larger, and consequently more expensive storage drives.

Human Resources and Training

The General Directorate is prioritizing a shift towards digital in 2024, while maintaining its traditional radio and television output. The corporation is encouraging innovation among the new management team and the Balearic **cultural and creative industries**, with the goal of using languages, narratives, and media that reach new audiences.

The Digital Media Department, composed of 15 people, represents a small fraction of the 400 workers at IB3. It's a "very low" percentage according to the director. Nonetheless, there are occasional collaborations with journalists from TV and radio news. The creation of this department aims to resolve past challenges from when digital content was published by employees that lacked the proper knowledge or training.

In addition to hiring new staff, management deems it essential to provide **training opportunities** within the corporation to upskill both young employees and technical personnel, particularly in camera operation and production control rooms.

Hiring, however, is a challenge in the public sector, although specific positions for content creators have been established. The process is slow, but substantial staffing requests will be fulfilled by 2025.

The Human Resources Directorate is negotiating these issues with the works representation, while also integrating editorial teams. Until 2023, the corporation operated with a subcontracted news service, whereby only editors and managers were IB3 employees. However, following long-standing demand, all subcontracted news personnel have been integrated into IB3's ranks over the last two years. This process of integration is ongoing, with negotiations over **job categories and positions still in progress**.

Challenges and Difficulties

The primary challenge is reaching **younger generations** who are increasingly suspicious of traditional media. To address this, IB3 is willing to adapt to new communication styles and create relevant, innovative content, even by collaborating with influencers to explore new narratives.

The main difficulty lies in recruiting the right professionals, even though the corporation's workforce is relatively young, with an average age of 35. However, to truly connect with younger audiences, they need **digital-native professionals** who can bring fresh narrative styles. IB3 also sees it as crucial to compete with social media content creators, who often have millions of followers and the capacity to spread misinformation much further and faster.

HIGHLIGHTS

- *"IB3 has just launched its first innovation department".*
- *"The main challenge is reaching younger generations".*
- *"It is essential to train the workforce in innovation".*

Marisa Candia, Director of Corporate Communications and Digital Media

3.3.17. Citizens at the centre of CEXMA's adaptation process to the digital ecosystem

The Extremadura Audiovisual Media Corporation (CEXMA) is approaching innovation management through the restructuring of **two previously existing key areas**. The Technology and Systems Department has been transformed into the Digital Transformation, Technology and Systems Department, while the former Innovation and Multimedia Department has evolved into the Innovation, Multimedia and Business Development Department. Despite these efforts, the CEXMA's initiatives aimed at digital transformation have been largely reactive, lacking adequate systematisation and coherent strategic planning.

According to Project and Citizen Participation Manager, José Carlos Macías Moreno, the organisation must confront a critical challenge: "to establish a clearly defined digital strategy". The rapid growth of new media channels and continuous technological innovations demand a constant search for strategies to adapt content production to the digital ecosystem, so as to ensure sustainable content production and maintain relevance within the community. For this reason, **a digital transformation plan** has recently been designed at an internal level, structured around four priority axes that drive innovation:

1. The digitalisation of corporate services.
2. Improving the **user experience**.
3. Optimising the employee experience.
4. Creating a **business intelligence environment** and comprehensive dashboards that facilitate data processing and are conducive to informed decision-making.

The aforementioned objectives, together with the development of an OTT platform, seek to strengthen CEXMA's capacity to adapt to the new digital landscape and enhance its competitiveness in the audiovisual sector.

Strengths and weaknesses in CEXMA's innovation process

One of the main strengths of the Extremadura corporation is its **young and enthusiastic workforce** that demonstrates a positive attitude towards innovation. Both staff and management show a high level of adaptability, and the organisation is recognized for its effective leadership. Additionally, there is no significant resistance to change, which facilitates the implementation of new methodologies and processes. Although greater adaptation challenges may arise as workflows are modified, no such issues have been detected thus far.

Another key strength is CEXMA's close contact with its **audience**. Active interaction between the media and the public is promoted through multiple participation channels. In 2023 alone, the corporation received 1,709 communications from viewers, all of which were effectively addressed. This commitment strengthens the relationship with the audience and inspires new content aired by the channel, demonstrating a high degree of receptivity and adaptability to the audience's needs and preferences.

Despite the aforementioned positives, Macías points out that CEXMA faces significant barriers that limit its capacity to innovate. The corporation's **budget,** which has remained stagnant at under €30 million since 2012, restricts the ability to improve both staff salaries and production costs. Additionally, **excessive bureaucracy** within the organisation slows down processes, hindering the flexibility needed to implement effective changes.

In terms of technological implementation, CEXMA has begun integrating some emerging technologies into its operations. Among them, they have started working with **Power BI and generative artificial intelligence** for report creation and simple data analysis. However, high costs have obstructed the adoption of more advanced technologies such as Virtual Reality (VR), Augmented Reality (AR), and 360° video.

Another significant obstacle is the rigidity of the labour agreement, which has yet to be revised due to time constraints. This rigidity inhibits the incorporation of new **specialised professional profiles** that are essential to the new digital ecosystem, such as engineers, data analysts, and business intelligence experts. Consequently, though CEXMA counts on Business Intelligence tools, the lack of skilled personnel limits their effective use.

Finally, the absence of a clearly defined framework mandate and program contract hinders long-term strategic planning, as these instruments are essential for setting action lines and securing the necessary budget allocation for innovation.

HIGHLIGHTS

- *The attitude of the workforce and the organisation's leadership provide a strong foundation for innovation.*
- *Encouraging citizen participation is a defining positive characteristic that strengthens CEXMA's relevance within its community.*
- *Formalizing the framework program and program contract is essential for improving competitiveness, and ensuring adequate funding to enable a genuine digital transformation.*

3.3.18. Multimedia integration: CMM's strategy to strengthen its position

Throughout its more than 20 years of history, the regional broadcaster of Castilla-La Mancha has experienced three distinct phases, each characterised by a strong connection to the region's traditional audiovisual consumption habits. In September 2016, coinciding with the beginning of its third governance phase, the corporation reinvented itself as a **multimedia brand** under the name Castilla-La Mancha Media (CMM), steering its strategy toward the digital realm.

CMM Director of Digital Content, Isaías Blázquez Rosales, explains that innovation management at the Manchegan corporation is seen as a comprehensive process that includes the research and development of **new ways of creation, distribution, and organisation**. Without a specific department dedicated to innovation, it is driven by general management, which selects projects and assigns teams for their development. Additionally, each department can propose ideas that, once evaluated, may be transformed into **collaborative projects**, complimenting the overall objectives.

To establish and monitor annual goals, which are communicated both internally and externally, the public corporation uses **Key Performance Indicators** (KPIs) that include digital metrics such as unique users and the number of visits to the website and the **OTT** platform, *CMM Play*. The latter is considered to be the corporation's most significant recent innovation. Although the website and OTT platform are the main windows for digital content distribution, CMM also closely monitors its presence across major social media platforms, where it has accumulated around 1.5 million users.

Digitalization and emerging technologies

CMM's digital content team is made up of around 20 individuals, out of a total workforce of approximately 500 employees. **Professional profiles are diverse**, with journalists and administrative staff responsible for content distribution. The team's impact is significantly amplified through collaboration with other areas of the public entity.

To further drive digitalization, Blázquez indicates that **collaborative tools such as WhatsApp groups** have been introduced in the digital news area, facilitating the coordination of key topics between various branches. This working method has enabled the development of virtual newsrooms for decision-making and information exchange. While Blázquez acknowledges that there is still room for improvement, these changes reflect progress regarding the corporation's digital transition.

In regards to emerging technologies, the implementation of a new Content Management System (CMS) in November 2022 was a milestone in improving team integration and workflow. However, the migration process presented several technical challenges, which have now been resolved, such as content loss and issues with advertising systems. Additionally, the use of **VMIX**, a technology for managing sports events and internal presentations, has proven to be highly effective, with no major issues reported.

Commitment to Artificial Intelligence

In 2023, CMM integrated **artificial intelligence** (AI) into several innovative projects. These efforts included generating **soundbites and graphic** elements for the *Play Podcast* platform. Additionally, the corporation organised events focused on AI, among them the *Forta Radio Forum* and an exhibition at the Albacete Fair.

One of the most innovative projects was the experimental program *Duelos y Quebrantos*, in which a presenter competed against an AI to determine who knew more about the region. In this project, ChatGPT was used to obtain AI-generated answers, accompanied by a synthetic voice and a physical robot named Felicia. The initiative also led to the creation of podcasts like *AI for Everyone and Metapodcast,* consolidating CMM's commitment to cutting-edge technologies.

Key challenges for innovation

Blázquez points to the corporation's organisational structure as the main obstacle to innovation, due to its rigidity and **resistance to change**. This internal resistance, linked to the long-established organisational culture, limits CMM's ability to adapt to new technologies and to evolve content consumption habits. Adopting these changes requires reconfiguring work dynamics and production processes, which poses a constant challenge for the organisation.

Blázquez emphasises the importance of efficiently managing available human, technological, and financial resources so as to remain competitive in the media market. Despite not having incorporated **new professional categories** into the labour agreement in recent years, there are ongoing proposals under negotiation with unions. Meanwhile, CMM has focused its efforts on training and upskilling its existing staff, covering areas ranging from legal regulations to platform management and digital content creation to facilitate the transition toward more digitised operations.

Finally, from a budgetary standpoint, digital production at CMM receives a smaller allocation compared to television, which represents the corporation's largest expenses. The budget for digital production is primarily allocated to covering sports events, with a smaller part dedicated to creating texclusive content for **social media** and other occasional events, limiting the scope and development of innovation in this area.

HIGHLIGHTS

- *The corporation has shifted its strategy towards the digital environment, with the creation of the OTT platform CMM Play as its main milestone.*
- *CMM demonstrates a clear commitment to experimentation and the use of cutting-edge technologies, integrating AI into its digital innovation strategy.*
- *The implementation of virtual newsrooms and the use of tools like WhatsApp have facilitated coordination in the creation of digital content.*

4. SOCIAL NETWORKS AND DIGITAL AUDIENCE

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4.1. Digital content and platforms

The responses to the question *'Does the corporation offer different contents for linear TV and digital environments? If so, what content(s) and specific formats has it developed only for digital purposes?'* (Q28) show there is a growing interest in being present in the wide range of existing digital platforms and social networks, and in working with native content adapted to these digital media.

Content diversification for digital platforms

Most of the responses confirm that broadcasters have developed exclusive content for digital environments, which shows an effort to adapt to new forms of media consumption. The most frequently mentioned content distribution formulas include podcasts, streaming, and short videos adapted to social media formats.

10 of the broadcasters mention podcasts, while OTT or proprietary platforms occupy the second place with six mentions. Four broadcasters bring up short videos and in the rest of the answers, there is a dispersion with values equal or lower than three that mention formats and content indistinctly. These include promotional or entertainment clips, cultural and specialised thematic content (e.g., festivals, sports, minorities), streaming, news and visual reports (9:16 format), young audiences, vlogs (less than 15 minutes), interactive/customizable content (such as playlists), WhatsApp, children's content and archive content adapted for digital platforms.

In this sense, content created for digital platforms is mainly aimed at capturing younger audiences. This is reflected in projects such as Makusi and Gaztea Universe launched by EITB, which are designed to attract young Basque speakers through cultural, musical, and entertainment content.

Content on linear TV and in the digital environment

Several broadcasters state that they have transformed their linear content (TV or radio) into more accessible and attractive formats for digital platforms, such as short videos for social networks, summaries, or interactive adaptations. This suggests a holistic approach that is not only aimed at creating new content but also at maximising existing content's value.

The adaptation of longer formats into shorter, more visually appealing pieces, such as vlogs or 9:16 news for mobile devices, is a clear trend that responds to social media users' fast paced consumption patterns.

Innovation in Digital Services

Some broadcasters have launched innovative digital platforms or services such as PRIMERAN and EITB's Orain, which focus on specific audiences with very clear needs. PRIMERAN, for example, is a platform focused on content in the Basque language for those under 30, which aims to ensure the digital presence of this language and attract the relevant audience. These efforts demonstrate a targeted and strategic approach to cultural preservation and youth empowerment.

Other examples include France TV's Okoo platform, created for children's audiences, and news services via WhatsApp, which show how broadcasters are leveraging mobile technology and messaging platforms to deliver content in an accessible and personalised way.

The rise of podcasting

The podcast format is mentioned as one of the new formats developed exclusively for the digital environment. This is in response to the growing consumption of audio content on podcasting platforms, which allows broadcasters to engage audiences when their attention to visual content is limited (e.g., when they are driving or doing exercise).

Some broadcasters have launched specialised podcasts on cultural topics, such as music and art festivals, national minorities, and sports, demonstrating a strategic use of this format to explore more specific and niche topics that would not necessarily find a place on linear television.

Audience segmentation

The responses show a clear audience segmentation between linear and digital TV content. While linear television continues to attract audiences with higher age profiles, digital environments are mainly designed to attract young people, with more interactive, and dynamic content adapted to their interests.

A clear example is the divide between more traditional, adult audiences—who prefer television—, and the young public, who are more likely to consume content through digital platforms. In this sense, the Gaztea Universe uses YouTube, Instagram, and TikTok to connect with young people.

Although many broadcasters are implementing advanced digital strategies, some responses reveal that there are still corporations in the early stages of digital content development, limiting their digital offerings to basic elements such as written news or small promotional clips.

Two respondents acknowledged that they do not produce digital-specific content. This suggests that the transition to digital has not been uniform across Europe, possibly due to budgetary constraints or a lack of specialised staff.

The responses to this question show that most European regional broadcasters are making significant efforts to offer content adapted to digital contexts, with a clear distinction between linear and digital content. Formats such as podcasts, short videos, and mobile services, along with specialised platforms such as PRIMERAN and Makusi (EITB), stand out as innovations designed to capture the attention of younger and more diverse audiences.

However, it is also clear that not all broadcasters are moving at the same pace in this digital transformation. Some continue to rely heavily on traditional formats and have not yet developed robust strategies to create unique digital content. This highlights the need to continue exploring and adapt new ways of telling stories and delivering content in an increasingly digitalised world, with a focus on audience segmentation and user experience personalization.

Regarding the digital platforms used by European regional broadcasters to distribute their content (Q29), the responses provided reveal the trends, technological impact, and dissemination strategies adopted by these corporations.

As for the content analysis, the responses on each type of platform or specific format have been organised from highest to lowest.

- **OTT platforms** (mentioned 21 times)
- **YouTube** (mentioned 15 times)
- **Facebook** (mentioned 14 times)
- **Instagram** (mentioned 14 times)
- **TikTok** (mentioned 8 times)
- **X - formerly Twitter** (mentioned 7 times)
- **Spotify** (mentioned 5 times)
- **Websites—own platforms** (mentioned 5 times)
- **Apple Podcasts** (mentioned 3 times)
- **Google Podcasts** (mentioned twice)
- **Twitch** (mentioned twice)
- **iVoox** (mentioned twice)
- **LinkedIn** (mentioned once)
- **Threads** (mentioned once)
- **HBBTV** (mentioned twice)
- **Netflix, Amazon Prime, HBO, Disney+** (mentioned once overall)
- **Radioplayer** (mentioned once)
- **Whatsapp** (mentioned once)
- **DVB-T, DAB** (mentioned once overall)

Social networks, as a whole, are the most mentioned distribution method (63), followed by proprietary platforms (21). Podcasting services appear to have considerable relevance (13), while global streaming platforms have a lower reach (1). Despite the interest and economic, management, and technological efforts put into the development of proprietary platforms, the distribution of proprietary content in the digital area remains derived from social networks, relegating distribution to the regulation, organisation, and structuring (algorithm, trends, banning, etc.) of third parties.

Most regional broadcasting corporations use a combination of in-house and external platforms to distribute their content. This reflects the need to adapt to the fragmentation of audiences, who consume content through multiple digital channels.

Many respondents mention the creation and use of proprietary platforms, such as OTT (Over-The-Top) and websites. Examples include RTSH's streaming platform, CMMPlay, Yle Areena, and Francetv.fr, suggesting a strategy to have control over content distribution and monetization.

Social networks such as Facebook, Instagram, YouTube, and TikTok are ubiquitous. These platforms allow broadcasters to reach a wider audience, especially younger viewers who prefer interactive and mobile content.

Some responses, such as SVT's, reveal how social networks are used not only to distribute content but also to encourage dialogue and audience engagement, a key strategy for staying relevant within a competitive digital ecosystem.

Some corporations mention collaboration with global streaming giants such as Netflix, Amazon Prime, HBO, and Disney+. While these partnerships can increase content visibility, they also represent a challenge in terms of competition and differentiation.

Podcasting is a trend

In addition to audiovisual content, many corporations are also distributing audio content through platforms such as Spotify, Apple Podcasts, Google Podcasts, and iVoox. The use of audio streaming platforms demonstrates there has been a change in content consumption and the growing market for on-demand and on-demand content, such as radio through digital platforms.

Fragmentation challenges

While diversification is positive, it also poses challenges in terms of the management of multiple channels as well as the need to create optimised content for each platform. Platform fragmentation can weaken marketing efforts and complicate audience measurement and return on investment (ROI). This may explain why several organisations, such as France Télévisions and RTVSLO, mention proprietary platforms as an important resource for maintaining control over their audience.

In contrast, some responses show limited reliance on external platforms, as in the case of those limited to their own websites or OTT platforms. This could reflect budgetary or technological constraints or a conservative view of the transition to the digital realm.

Analysis of the responses suggests that European regional broadcasters are diversifying their digital distribution strategies, adapting to changes in content consumption habits, and using a combination of in-house and external platforms. Social media and OTT platforms play a central role in their strategies, but they also face challenges related to audience fragmentation and competition with global platforms.

4.2. Programs by time slots

To identify the most important content in the daily schedules of CIRCOM's member broadcasters, they were asked about the programs with the highest number of viewers throughout the day. Their answers are divided into the following 7 categories that are based on time slots: Early Morning, Morning, Early Afternoon, Afternoon, Prime Time, Late Evening, and Night (Q30 to Q36).

There is a general trend toward news programs among the most watched programs in the Early Morning slot (Figure

28). Programs such as Nyhetsmorgen (NRK, Norway), TPA Morning News (RTPA, Spain), Ylen Aamu (YLE, Finland), and Guten Morgen Österreich (ORF, Austria) are clear examples of this type of approach.

In this sense, the presence of morning magazine-based programming is noticeable. These programs update viewers on what is happening in their territory, mixing information and entertainment. For example, 'Al día' on IB3 (Spain) is a programme based on interviews and discussions with renowned analysts and specialists from different areas of society. It focuses on the most relevant pieces of news of each day through analysis and entertainment (IB3, n.d.). Other examples of morning shows are Mirëmëngjesi Shqipëri (RTSH, Albania), Dobro Jutro (RTCG, Montenegro) or Uno Mattina (RAI, Italy).

Another trend in morning programming is hybrid formats. Programmes such as 'Primera Hora' (CEXMA, Spain) or 'Al Día' (IB3, Spain) foster synergies between radio and television, thus reaching the different audiences of both media.

Finally, it is worth highlighting the space for religious content offered by TVR (Romania) with 'Bucuria credinţei', and CyLTV (Spain) with 'Santa Misa'. Both corporations aim to reach a specific audience group of practising Christians, in very different ways. While 'Santa Misa' broadcasts the Sunday mass from one location in the autonomous community every weekend, 'Bucuria credinței' offers interviews on Romanian Christian history, culture, faith and spirituality (TVR, n.d.-a).

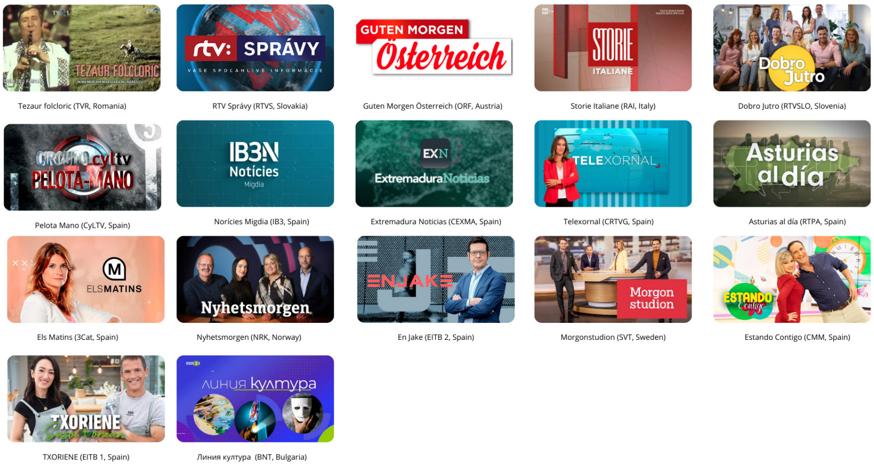
Figure 28. *Programmes with the highest audience share in the Early Morning slot*

Source: Own production.

Regarding the Morning time slot (Figure 29), news and magazine programmes occupy most of the programming. This shows there is a shared tendency to start the day by informing audiences about t current events, both at local, national, and international levels. Other examples of programmes with these objectives are 'Els Matins' (3Cat, Spain) and 'Telexornal' (CRTVG, Spain).

However, there are broadcasts with a different approach. For example, EITB's 'Txoriene' is a Basque food program that highlights local and seasonal products (EITB, n.d.). Other channels, such as TVR, draw attention to music with formats such as 'Tezaur folcloric', a compilation of popular customs, songs and traditions within Romanian folklore (TVR, n.d.-b). On the other hand, the Bulgarian channel (BNT) broadcasts the programme Линия култура, which informs viewers about Bulgaria's cultural life. Lastly, channels such as CyLTV opt for morning sports programming with productions such as 'Pelota Mano', which broadcasts pelota mano (a traditional Basque handball game) competitions in Castilla y León and neighbouring communities (CyLTV, 2024).

Figure 29. *Programmes with the highest audience in the Morning slot*



Source: Own production.

In the Early Afternoon (Figure 30), news programmes lead the programming grids, with programmes such as 'Telenotícies Comarques' (3Cat, Spain), 'Telejurnal' (TVR, Romania), 'La 8 Noticias' (CyLTV, Spain) and 'TPA Noticias 1ª edición' (RTPA, Spain). The presence of magazine programmes is noticeable since, in many cases, they occupy an important part of the afternoon schedule, as is the case with 'Quen anda aí' (CRTVG, Spain).

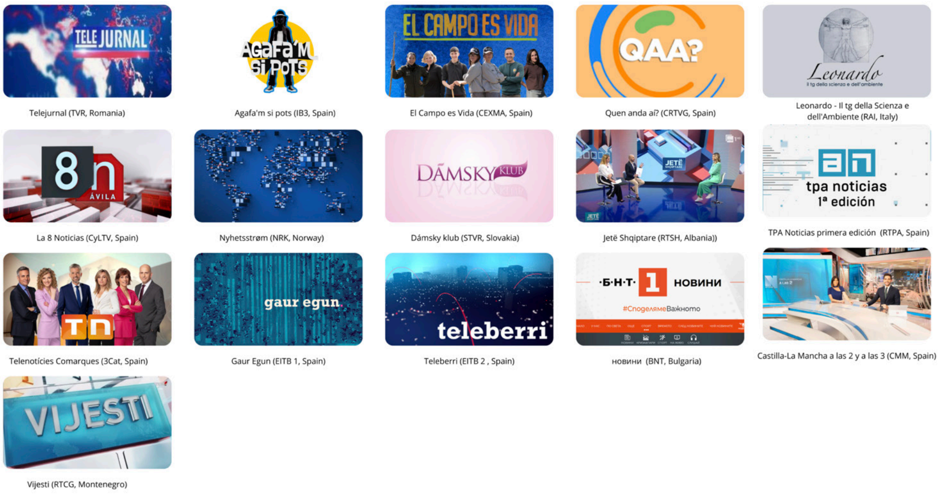
However, other channels have decided to diversify their content. This is the case with 'MTVA' (Hungary), which broadcasts sports, films and news, depending on the channel and the day of the week. The same applies to 'YLE' (Finland), which focuses on talk shows and reruns of films.

Other corporations seek to penetrate specific audiences, among them STVR (Slovakia) with the daily programme 'Club for Ladies', which is primarily aimed at women.IB3 (Spain) has something similar with 'Agafa'm si pots', a dynamic quiz show for families in which the viewer is invited to participate from home (À Punt Mèdia, n.d.).

In contrast, several broadcasters are taking advantage of this time slot to broadcast educational content aimed both at children, as in the case of Macedonian television, and at an adult audience, including the Italian RAI, with 'Leonardo', which focuses on science, technology and the environment.

Finally, lifestyle is another topic that has received broadcasters' attention. For example, CEXMA broadcast programmes such as 'El Campo es Vida', which brings their audience closer to the customs and daily work of local farmers and stock breeders (Canal Extremadura, n.d.).

Figure 30. *Programmes with the highest audience in the Early Afternoon slot*



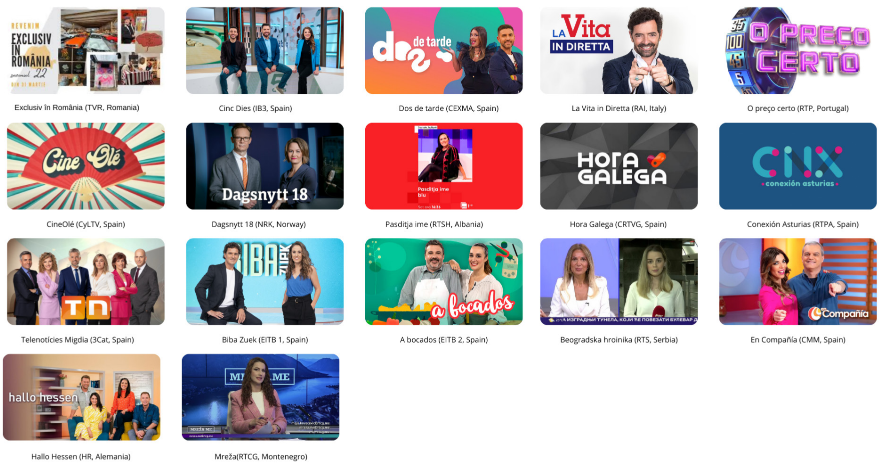
Source: Own production.

During the second part of the Afternoon slot (Figure 31), the prevalence of current affairs magazine programmes is notable, with an average duration that can cover a large part of the slot. This is the case of ‘La Vitta indirecta’ (RAI, Italy), ‘Viva Zuek’ (EITB, Spain) and ‘Cinc Dies’ (IB3, Spain).

Other common programmes are those dedicated to gastronomy—such as ‘A bocados’ on EITB (Spain)—, sports—such as the broadcasting of the OTP Bank League on MTVA (Hungary)—, culture—with programmes such as ‘Exclusiv’ on TVR (Romania) and ‘Cine Olé’ on CyLTV (Spain)—, or current affairs—among them, ‘Conexión Asturias’ on RTPA (Spain), ‘Dagsnytt 18’ on NRK (Norway) and ‘Dnevnik1’ on RTCG (Montenegro).

The presence of quiz shows, such as ‘O preço certo’ on RTP (Portugal), is significant too.

Figure 31. *Programmes with the highest audience share in the Afternoon slot*



Source: Own production.

For their part, one of the trends observed during Prime Time (Figure 32) is programmes broadcast sporadically during the year. This is the case of the Festival di Sanremo, broadcast by RAI (Italy) at the end of February and beginning of March, where the national representative for the Eurovision Song Contest is chosen. This is also the case of the fireworks display broadcast on Hungarian National Day (20 August) by MTVA (Hungary).

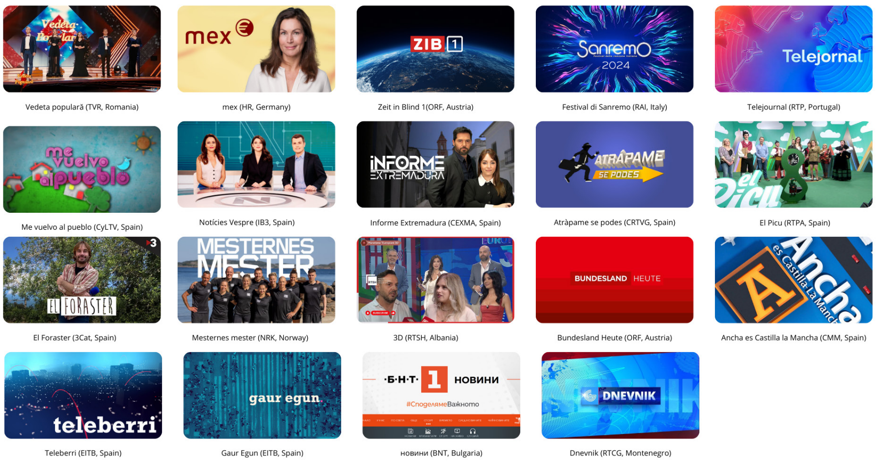
In contrast, some broadcasters prefer to keep the focus on current affairs through analysis and debates, such as Hessischer Rundfunk (Germany) with 'Mex' and RTSH (Albania) with '3D'.

Another strategy used by broadcasters such as RTS (Serbia) and STVR (Slovakia) during prime time is to air original and national fictional series.

In addition, talent and quiz shows such as 'Vedeta populară' on TVR (Romania) and 'Atrápame se podes' on CRTVG (Spain) are a result of RTP's decision to offer a space for disconnection and entertainment within the channels' daily programming.

Lastly, culture and local identity formats have a notable presence. 'Me vuelvo al pueblo' on CyLTV (Spain) and 'Ancha es Castilla-La Mancha' on CMM (Spain) are examples of how channels use prime time to stay close to their local audience.

Figure 32. *Programmes with the highest audience share in the Prime-Time slot*



Source: Own production.

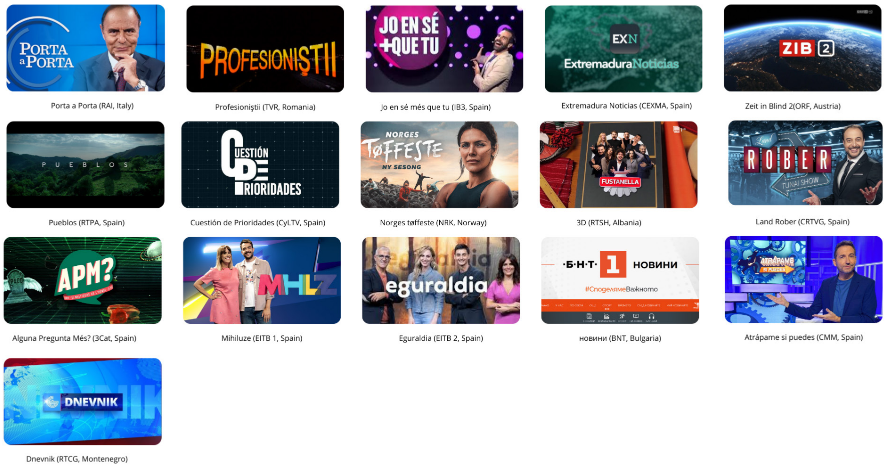
In the Late evening slot (Figure 33), there is a clear inclination towards lighter and more entertaining programmes. Several broadcasters such as MTVA (Hungary), RTS (Serbia), CRTVG (Spain), RTSH (Albania) or MKRTV (North Macedonia) acknowledge that it is this format attracts the largest audiences. In this time slot, a wide variety of content can be observed, ranging from talk shows—such as 'Land Rober' on CRTVG (Spain)—to comedy, parody or satire programmes 'Fustanell'a on RTSH (Albania) and 'Alguna Pregunta Més?' on 3Cat (Spain)—quiz shows—such as 'Mihiluze' on EITB (Spain) and 'Jo en sé més que tu' on IB3 (Spain)—and reality shows—'Norges tøffeste' on NRK (Norway).

Some channels prefer to continue broadcasting news programmes. This is the case of 'Extremadura Noticias 2' on CEXMA (Spain), and 'Zeit im Bild 2' on ORF (Austria).

Other broadcasters, however, feature debate-centred programmes in this time slot. 'Profesioniştii' on TVR (Romania) and 'Cuestión de Prioridades' on CyLTV (Spain) are examples of it.

Lastly, broadcasters such as YLE (Finland), RTVSLO (Slovenia), STVR (Slovakia), and MTVA (Hungary) focus on cultural and documentary programs of films in their late evening programming.

Figure 33. *Programmes with the highest audience share in the Late Evening slot*



Source: Own production.

In the last time slot, the Night (Figure 34), the aforementioned Late Evening trends persist. Entertainment occupies a large space of the schedule. 'El Conquistador', 'Herri txiki, infernu handi' (EITB, Spain) and 'La batalla de OP' (RTPA, Spain) are good examples of this.

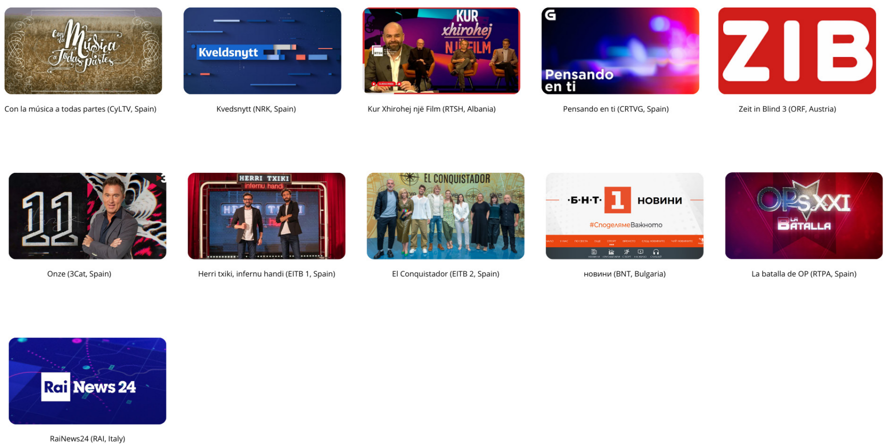
RTS (Serbia), IB3 (Balearic Islands), TG4 (Ireland), CMM (Spain) and MKRTV (North Macedonia) all air films and TV reruns. Similarly, there are also programmes focused on the film world, such as 'Kur Xhirohej një Film' on RTSH (Albania).

Music content also occupies a prominent place on radio and television stations' Night slot with the broadcasting of concerts, like that of 'Elena Gheorghe' on TVR (Romania), or the programme 'Con la música a todas partes' on CyLTV (Spain).

Other broadcasters stick with news programmes, as is the case of 'RaiNews24' on RAI (Italy) and 'Kvedsnytt' on NRK (Norway).

Finally, there are those that air sports content, such as 3Cat (Catalonia) with 'Onze' and RTCG (Montenegro) with their news and sport section.

Figure 34. *Programmes with the highest audience in the Night slot*



Source: Own production.

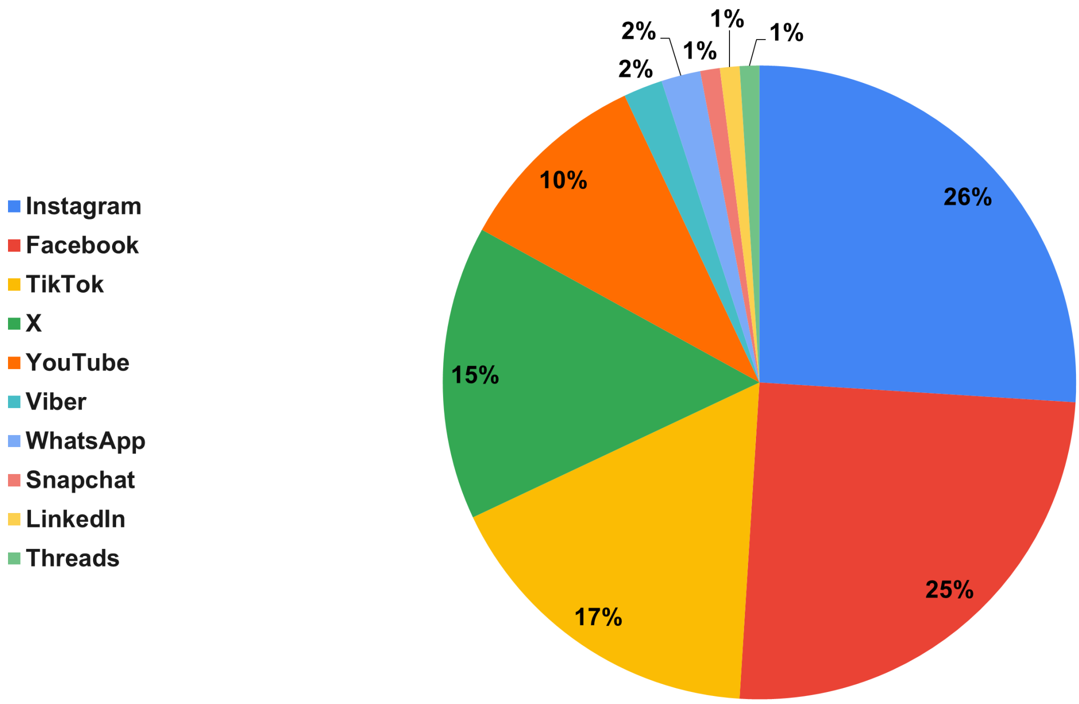
4.3. Trends in content dissemination

Respondents were asked about the platforms used for the promotion, feedback or content distribution through their channels (Q37). The results obtained show a clear trend towards multiplatform, targeting different audiences depending on the social network.

Figure 35 shows how Instagram is positioned as the priority platform for broadcasters to disseminate their content (26%), followed by Facebook (25%). The third position is occupied by TikTok (17%), while X and YouTube represent 15% and 10% respectively. Finally, the limited presence of other platforms, such as Viber (2%), WhatsApp (2%), Snapchat (1%), LinkedIn (1%) and Threads (1%) can be observed.

As a result, broadcasters are focusing on more visual and video content, with platforms such as Instagram, YouTube or TikTok, while other messaging media such as WhatsApp or Viber are relegated to a secondary role in terms of priority for promotion and communication.

Figure 35. *Priority platforms for the promotion and dissemination of content.*



Source: Own production.

The question '*What kind of content(s), programs and profiles have the highest performance and social media reach?*' (Q38) produced a wide range of responses that reflects both the differences between European regional broadcasters and the digital platforms, and types of content that work best in each region. An analysis of the 28 responses reveals some key trends, but also underlines the lack of uniformity in strategies and audience preferences.

Digital presence as a key factor

The most mentioned platforms are YouTube, Instagram, X, Facebook and TikTok, making it clear that social media presence is a key factor in maximising reach.

Some profiles, such as that of EITB have a presence distributed across multiple networks, which allows them to segment their audience by age and interests. For example, the most popular content on YouTube includes entertainment programmes such as 'El Conquistador/Gaztea' and series for young people such as 'Go!azen', while on X and TikTok, news channels and specific programmes are prominent.

Leading news content

Many participants highlighted that informative content, especially news, politics and events, perform well in terms of reach and engagement. This is consistent with the nature of public broadcasters, whose information role is crucial to their respective communities.

Examples such as the success of news channels in X or political current affairs programmes highlight the importance of news content. That many answers mention this type of content suggest that users continue to turn to these broadcasters' social media channels to stay informed.

Entertainment and virality

Entertainment content, which includes humour, music programmes, sports and curiosities, appears as a strong source of interaction. RAI highlights how the Sanremo Festival has been a powerful driver of audience engagement on social media. National series and comedy programmes underline the audience's appeal for fiction and entertainment content on social media.

This highlights how seasonal or one-off television shows have great convening power and audience concentration both in linear television and in digital, which is translated to phenomena such as double-screen viewing and audience participation.

Weather and sports

Sports and weather-related content are consistently mentioned, suggesting that followers are interested in topics of daily interest. Summaries of sporting events, in particular, appear to be successful on platforms that favour short videos such as Instagram and TikTok.

Local and specialised content

Several participants refer to the success of content that has a local or community dimension, such as that related to small-town life, farming or local industry. This focus on the region reflects a trend among broadcasters to capitalise on their connection to the communities they serve, positioning themselves as key sources of locally relevant information and entertainment.

While most participants refer to clear trends in the type of content that performs best, one broadcaster noted that it does not have a measurement system that allows it to give an accurate answer to this question. This highlights a common challenge for many regional broadcasters: the lack of resources or adequate infrastructure to systematically analyse and optimise their social media performance.

Platform dependency and adaptability

Some responses show that content performance is highly dependent on the platform on which it is distributed. For example, several broadcasters state that videos dealing with controversial topics or topics of immediate public interest, such as crimes or exclusive interviews, tend to perform well on platforms with algorithms that prioritise virality, such as X or Facebook.

Alternatively, others mention the importance of merging all content into a single profile to simplify management, a strategy that seems more efficient in terms of consolidating audiences.

Overall, the answers obtained show that success on social media depends on a combination of factors. Among them are the type of content (news, entertainment, sports), the personality of the presenters, the ability to adapt to different platforms and the focus on local interests. However, they also reveal challenges, such as the lack of accurate measurement systems and the need to adopt more unified or customised strategies depending on the platform. For European regional broadcasters, the key to success on social media seems to lie in their ability to balance high-value news content with entertaining and locally relevant content.

4.4. Presence and profiles on social networks

The investigation of the social media profiles of the European regional broadcasters who are members of the CIRCOM network has led to an in-depth analysis of how regional media manage their digital presence and how different networking approaches affect audiences' interaction and engagement. The study has revealed different patterns, discussions and conclusions that are key to understanding the role of social networks in the context of regional media.

4.4.1. Brand or product

In the analysis, one of the most recurrent discussions was related to the model that regional broadcasters should follow to establish their presence on social media. The main question that arises is whether to centralise the digital presence under a corporate profile, or whether individual programmes or singular spaces should own their independent profile.

Corporate profiles tend to represent the channel's brand as a whole, while single profiles, whether news or specific programmes, focus on a more specific target audience. This debate prompts a reflection on digital spaces' management and ownership, as programmes with stand-alone profiles can often generate greater interaction, though this may weaken the overall corporate profile.

Two main approaches to managing social media profiles were identified during the study:

- Branded profiles. In this model, the broadcaster's main profile dominates its digital presence, and while there may be secondary profiles for news, the corporation's identity remains unified. This is common in regional broadcasters and national TV channels delegations.
- Product profiles. In this model, broadcasters or production companies that own a program develop a profile for each piece of content. This approach atomizes the audience, allowing for a more targeted and specific reach.

CIRCOM network broadcasters have several clear objectives: to reach linear audiences, to attract audiences through OTT platforms, to market advertising space and to fulfil their public service responsibilities. In this context, social networks can play different roles depending on the strategic focus of each corporation.

Linear audiences are essential for many broadcasters, but the transition to OTT and digital platforms has led to greater investment in social media as a way to attract users. However, the relationship between these spaces and social media advertising marketing poses a challenge, as many regional TV channels cannot, or are not allowed to, advertise on their profiles.

4.4.2. Advantages and disadvantages of Digital Presence types

Digital presence, whether through a brand or product model, has advantages and disadvantages that directly affect engagement and corporate objectives.

- In the brand model, channels can project a coherent and strong image, which favours global recognition, although it may not fulfil the interaction potential of more specific profiles.
- In the product model, greater personalisation and connection with the audience interested in specific content are achieved, although there may be a dispersion of resources and a decrease in the strength of the overall corporate profile.

One of the key questions to come out of the analysis is whether it makes sense to replicate the same content (such as video cuts) across product and brand profiles. Often, the same promotional videos appear on both types of profiles, raising the question of whether this approach is effective or could cause confusion or redundancy.

The lack of a differentiated strategy between the two types of profiles may make it more difficult to achieve the objectives in each area. As such, content personalisation according to profile type could be a solution to optimise performance.

4.4.3. The Event Profiling Model: Sanremo Festival Case Study

In addition to the brand and product profile models, the study identified a third model, called event profile, in which a specific event has a specific social media profile. A prominent example during the analysis period was the Sanremo Festival, which featured across on social networks.

Festival and large events can generate a high level of interaction in a short period, which demonstrates the effectiveness of this model in capturing attention and generating massive engagement, albeit occasional.

4.4.4. Profile management and ownership

Another relevant aspect of the study was the debate on the management and ownership of social network profiles. There is uncertainty as to who should control these digital spaces: should it be the corporate channel or those responsible for individual programmes? This question is important as it has an impact on the overall strategy and on how resources are distributed to maintain an active and coherent presence on social media.

4.4.5.Leads, ROI and Social Listening

The study also revealed a concern about the origin of social media leads and the lack of a clear connection between social media interaction data and ROI. Many of the accounts analysed rely on organic strategies with no advertising budget, which limits the potential for transforming leads into revenue.

Another important finding is that social networks are mostly used by regional broadcasters in a one-way manner, without taking full advantage of social listening tools to capture audience opinions and improve the content strategy based on their interests.

4.4.6. Linear vs. streaming audiences

The analysis also included a comparison between linear and digital audiences in product profiles. While prime-time programmes tend to dominate traditional television, they are not always so popular on networks. This suggests that social network strategies do not always capture the potential of these slots.

5. CONCLUSIONS

5. CONCLUSIONS

5.1. Conclusions from surveys

Innovation is, in essence, a corporate culture that manifests itself through specific behaviours within an organisation. It is not just about generating new ideas, but about effectively implementing those that generate value. In our analysis, we have assessed these behaviours and attitudes to measure the presence and promotion of a culture of innovation within the broadcasters participating in the study.

Through the observation of values, norms, and practices, we have identified how these organisations promote or limit their capacity to innovate, reflecting their commitment to transformation and adaptation in a constantly evolving media landscape.

Below are the main conclusions of the results obtained through the surveys and interviews conducted with the heads of the regional public TV stations that belong to the CIRCOM network:

- **Adaptation to new viewers and young audiences**. The profile of the average consumer of audiovisual and television content has changed dramatically, as there is now a greater demand for personalised and multiplatform content. 62.5% of the new products or formats developed are aimed at young audiences, which reflects a clear understanding among the corporations that younger generations are key to the future sustainability of the industry. Public television must adapt its formats and distribution channels to attract young audiences, utilising emerging technologies to offer personalised content adapted to their tastes. Innovation is a fundamental lever to achieve this adaptation and satisfy the new profiles' demands.

- **Cross-cutting innovation within the organisational culture.** There is a belief that innovation is not only a technological issue, but that it has been integrated into the organisational culture. This suggests that some organisations understand innovation to be a continuous process that has to be rooted in the way the entire company operates.

- **Innovation in formats and platforms.** An important trend in the last three years has been the creation of specific content for own digital platforms (37.5%) and the combination of broadcasts with digital platforms and social networks (31.3%). This highlights the efforts of television stations to adapt to changes in viewers' consumption habits.

- **Diversity in innovation approaches.** Diverse approaches to innovation are observed, including the creation of new formats and content (20%), adaptation to changing market demands (16%), and compliance with public service objectives (16%). This proves that the participating television stations not only innovate to remain competitive but also to fulfil their public service responsibilities.

· **Different approaches regarding the need for innovation departments and heads.** A key finding is that 70% of the broadcasters do not have a specific department or person responsible for innovation. The lack of a formal structure may limit the coordination and effectiveness of innovative initiatives. There is a need for more centralised leadership in this area. There is also a clear geographical disparity in terms of innovation management. While broadcasters in Western Europe are more likely to have innovation managers, broadcasters in Eastern Europe are at an earlier stage in this process.

· **Different levels of innovation investment.** Most respondents from Eastern Europe consider their organisations as “traditional” when it comes to embracing innovation, with minimal resources allocated towards it. Additionally, there is a notable variation in innovation investment levels across European regions. Most television stations in Western and Northern Europe have taken steps toward social innovation and cultural diversity, by featuring content that represents various ethnic groups to broaden their audiences. In contrast, approximately one-third of stations in Eastern Europe have not yet implemented such measures. Furthermore, the survey revealed that cross-cutting innovation is underdeveloped in regional broadcasting. Over half of the respondents reported a lack of internal procedures or incentives to foster innovative practices. Factors such as financial constraints, legal obstacles, and staff resistance to change emerged as notable obstacles to innovation within these organisations. Furthermore, the survey pinpointed future key areas for innovation, such as using AI to engage younger audiences and introducing streaming services.

· **The predominance of technological innovation, although with different priorities.** A significant percentage of the responses (44%) associate innovation mainly with technological development. This reflects the priority that CIRCOM broadcasters give to technological progress as a key factor to maintain their competitiveness in a digital environment, with significantly less effort being put into other types of innovation. Furthermore, 25% of the organizations surveyed have developed their own OTT platforms, indicating a move towards independence in content distribution. In addition, the use of AI (12.5%) for content creation and personalization shows a focus on implementing advanced technologies, although adoption is not yet widespread. When analysing innovation by geographical regions, a great variety and fragmentation of innovation initiatives can be seen, both in the countries and TV stations of Northern and Eastern Europe. In contrast, Western and Southern Europe appear to have adopted a more focused approach, prioritising the development of proprietary OTT platforms, tailored digital network offerings, automation processes, the implementation of AI and Metadata and all aspects related to multimedia transformation (28%).

These results also compliment the priorities, projects, and innovation programs implemented by the broadcasters. In particular, the ongoing bidding process for OTT services across different broadcasters suggests plans for implementation on multimedia devices. This includes offering hybrid television services that integrate traditional broadcast content and web-based offerings via broadband.

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· **Hexagonal model. North and West versus East.** A disparity in focus, geography, and investment is also observed in the six items of the hexagonal innovation model. Most television stations present the highest level in terms of their recognition and capacity for TEC (technological) innovation and high in OPEN (openness) and CO (collaboration and cooperation). However, they display moderate levels for TRANS and low levels in PROTO. In the hexagonal analysis as a whole, the greatest capacities recognized by public broadcasters are in Technology (47%) and capacity for external openness (46%), with the lowest capacities in Technology and Openness (24%) and Transversality (17%). This shows the great disparity that exists between high and low capacity for technological for innovation and openness to innovation among the different broadcasters..

· **Bureaucracy in the South.** A similar pattern is evident regarding the capacity for agility, flexibility, and dynamism (FAST), which involves overcoming bureaucratic inertia. Significant heterogeneity is also observed in this area. Comparing geographical areas, the countries and television stations of Northern Europe have the highest percentage across all six items of the hexagonal model, with scores ranging from 66% to 100%. In contrast, Western broadcasters give percentages between 40% and 50% for all items. Southern television stations lead in TEC (50%), OPEN (44%), and CO (40%), while their lowest scores are found in TRANS (30%), PROTO (20%) and FAST, which records a mere 10%. Eastern television stations rank lowest across all items, with the highest percentages falling between 30% (in TEC, PROTO, and TRANS), 20% (CO and FAST), and 10% (OPEN). Likewise, Eastern corporations demonstrate significant variability between the different television and radio stations in this area.

· **Little external openness to innovation, while internal is more pronounced.** Responses from broadcasters that claim to have implemented innovation plans show that few television stations engage in external collaborations—specifically, partnerships research projects with universities and requests for aid from European programs. This is despite the willingness and openness shown in the HIP model items related to these issues. Conversely, greater openness is observed at the internal level, with 61% of radio and television stations in the CIRCOM network stating that innovation is included into their thematic agenda.

· **Audience engagement.** Research into the social media profiles of CIRCOM members has uncovered a variety of approaches and challenges in managing digital presence. CIRCOM-Regional and its members are navigating a rapidly evolving communication environment, where digital platforms and social media play a key role. This study reveals that though most regional broadcasters have identified social media as a key channel to engage with their audiences, a consistent method for facilitating this dialogue remains absent.

· **Centralised vs. decentralised approach to digital presence.** A key challenge for corporations is the debate over whether to centralise social media profiles. In some cases, broadcasters opt for a unified structure, where a single account represents the entire organisation or several programs and services. This can facilitate digital presence management by concentrating resources and efforts, allowing for more coherent and controlled communication. However, other channels opt for a more decentralised approach, creating individual profiles for different departments or programs. This strategy allows for greater specialisation and can facilitate closer and more targeted communication with particular audiences. However, it also presents challenges in terms of coordination, brand consistency, and resource efficiency. Additionally, this diversification often results in certain accounts performing poorly.

· **Social media and efficiency.** Another crucial aspect is the importance of resource optimization in social media management. Many regional corporations have small teams and must manage multiple digital platforms with minimal resources. This means that strategic planning, the efficient use of automated tools, and prioritisation of efforts are essential to maximise the impact of their social media presence. Furthermore, there is a need for continuous training in the latest trends and best practices for managing these platforms, since social media is constantly evolving.

5.2. Conclusions from qualitative interviews

· **Appeal to Public Value:** the public service media (PSM) organisations examined in this study appeal to public value when presenting their innovation projects. The implementation of new tools and corporate cultures is at the core of public value. The corporations analysed, regardless of their geographical location, closely associate public value with the following elements:

- Cooperation: This includes the development of business strategies involving institutions, other broadcasting organisations and audiovisual enterprises. Cooperation is particularly relevant in the case of public services offered by regional PSMs (SVT, EITB, CRTVG).

- Diversity: It is reflected in a multidimensional way, linked to programming but also to production sources, and audience representation. Diversity underscores the importance of reflecting on territorial identity and culture, while catering to the specific needs of culturally differentiated citizens and guaranteeing pluralism (SCT, STVR, BNT, ORF, RTVSLO).
- Social engagement: This component entails satisfying the audience's needs for information, entertainment, and education (STVR, EITB, CEXMA).

· **Different levels of Innovation Management:** Primarily, regional public broadcasters in Europe approach innovation management through one of two approaches. The first involves the creation of specialised innovation departments that are formally integrated into the organisational structure (SVT, STVR). The second model involves appointing coordinators who manage the implementation of the changes required by the organisation with the support of departmental links or nodes. Factors such as the size, structure, and budget of each corporation influence the innovation management model adopted. Some regional public broadcasters, such as Sveriges Television (SVT) or Omroep Brabant (RPO), supported by stable formal structures, demonstrate a high level of commitment to innovation. In contrast, other corporations, such as the Romanian public television (TVR) or Albanian public radio and television (RTSH), face resource limitations that hinder their innovation development.

· **Innovation Culture, a fundamental value**: The advancements of organisations ultimately depend on the professionals who form them and their willingness to embrace new processes and technological advances. Several of the interviewed entities understand innovation culture as a fundamental pillar for fostering continuous improvement at all organisational levels. The responsibility for promoting this new work culture, oriented towards innovative production and distribution models that empower staff, mainly falls on the management teams. They outline the following key strategies:

- Establishing a circular innovation management model based on cross-functionality (SVT, RPO, CRTVG). The head of a specialised department with a strategic profile collaborates internally with the directors across all areas of the organisation to design a corporate strategy, set clear objectives, reorganise human resources, and create an annual budget aligned with the organisation's needs.
- Creating agile innovation units that promote continuous improvement outside of daily operations, such as innovation labs (RTS, EITB).
- Developing open innovation with specialised consultants and other institutions that facilitate the incorporation of advanced technologies, strengthening their adaptability in complex contexts (EITB, CRTVG, SVT, RPO).

- Providing continuous training to staff (CRTVG, EITB, CMM) to foster adaptation to the platform era through constant skills and knowledge updating.
- Generating fluid internal communication and participatory processes (TVR, EITB, CRTVG) with the goal of involving workers in innovative projects.
- Incorporating strategic professional profiles that drive innovation (EITB) and new professional profiles that understand the digital environment (RPO, RTSH).
- Creating "creative centres" equipped with high-tech systems to foster creativity and experimentation (STVR).

· **Availability and demand for Emerging Technologies**: the interview results reveal that, despite the heterogeneity that characterises the regional public audiovisual system in Europe, corporations are at a similar point of transition toward digitalization. In the technological field, the strategic orientation of innovation is evident in the availability and demand for emerging technologies. The following features are noted:

- The implementation, development, or stabilisation of OTT platforms, often designed for different target audiences.
- The application of AI-based technologies, such as 'text to speech' or "Happy Scribe" for transcriptions. Some corporations have integrated AI into their daily operations, using automatic subtitling tools or virtual presenters to attract younger audiences and enhance content production. The more advanced ones are exploring the development of their own generative AI applications, while others are opting for a more cautious approach, limiting experimentation to simple administrative tasks.
- The use of VMIX technology.
- The development of mobile applications.
- News services through instant messaging applications.
- The use of big data for content personalization and recommendations on streaming platforms.
- The renewal of digital production systems.
- New content management systems (CMS) to create, manage, and modify digital content without requiring advanced programming skills.

· **The understated and gradual adoption of Artificial Intelligence:** Artificial Intelligence has quietly and slowly made its way into PSMs, mainly due to concerns regarding the ethics of its use, the public potential of these tools, budgetary needs, and staff training on new tools. The AI projects developed in 2024 were as follows:

SVT is focusing on AI for online news video captioning, facial recognition, and geolocation; a new search function in the archive; remote broadcasting technology for program transmissions, a verification desk within the news division, and a CMS for web publishing. About a year ago, the company started an AI council, which has provided sharp and wise guidance in navigating new services and opportunities. Now, they are taking the next step by recruiting an AI manager.

BNT has implemented AI-based technologies such as "text to speech," software for extracting content from their video stream, creating images, and sending posts to social networks.

TVR has many journalists using ChatGPT and other generative AI tools.

STVR is immersed in the "Creative Centres" project, which aims to create creative spaces equipped with high-tech systems for journalists and students.

HR is acting "cautiously" and only uses AI as support to respond to emails or calls from the audience. On one hand, AI is used to create graphics and animations in production processes, and on the other hand, as a community management tool.

ORF is currently testing AI in the newsroom to make journalists' work easier (producing news for radio, headline suggestions, podcasts, online texts, etc.). They are not yet employing AI in the distribution process.

RPO uses Artificial Intelligence on a daily basis for its operations. The company had to subtitle all videos for accessibility, using AI to do so across all platforms. Another example is that RPO has implemented an AI presenter who completely automates the task. They were the first to do this in the Netherlands.

RAI is experimenting with using AI for live automatic subtitling, as they cannot afford errors given that they are a public service. Similarly, they have implemented tools on their news website for automatic tag suggestions (auto-tagging, metadata), headlines, and text modifications. In the short term, they aim to pre-edit agency footage based on text using AI.

RTS is focusing on transcription, facing challenges due to the language barrier. In connection with this project, they are experimenting with artificial intelligence tools, though two uncertainties loom: ethical concerns about using AI for journalistic work to free up journalists for more creative tasks, and budgetary needs.

RTSH has just started using AI software to create the cover for a children's podcast and to enhance posters.

IB3 is currently experimenting with Artificial Intelligence. For now, they use Happy Scribe for transcriptions while exploring other tools that could be helpful, such as converting horizontal videos to vertical formats and reducing production times. So far, these tools are being used in the production phase, not in distribution.

CEXMA has started working with Power BI and generative artificial intelligence for report creation and simple data analysis.

CMM has integrated artificial intelligence into several innovative projects, with various objectives, such as generating soundbites and graphic elements for the Play Podcast platform.

• **The creation and Distribution of Digital Content, a strategic priority:** The distribution of digital content has become a strategic priority for regional public media outlets in Europe. In order to attract younger audiences, many of the interviewed corporations are focusing on the creation of digital content for both OTT platforms and major social media networks, implementing the following strategies:

- The creation of a specialised department for digital transformation or digital media (SVT, RTSH, CRTVG, CMM, IB3).
- The integration of teams specialised in digital technology and distribution strategies to promote innovation in content creation (SVT).
- The development of native digital content to increase the reach and visibility of the offering (RAI, CRTVG, SVT, RPO, RTSH).
- Embracing distribution strategies tailored to audience segmentation on major social media platforms (SVT).
- Opting for a "digital first" policy that prioritises the publication of content on digital platforms (SVT, NPO, RTVSLO, RTSH).

• **Ideas for Strengthening Human Resources**: one of the main challenges faced by the corporations analysed in the context of innovation is the rigidity of their structures due to various factors, including an ageing workforce, resistance to change, lack of training, or rigid negotiating processes with labour unions. In this scenario, innovation is also incorporated into governance and efforts to motivate their staff:

- The empowerment of staff (SVT).
- The creation of new professional profiles: data journalism, fact-checking, social media, and AI experts (SVT, STVR, TVR, ORF, RPO, RTPA, EITB, IB3, RTS, RTSH).
- Recognition systems to reward new ideas (HR).
- Training (RAI, CRTVG, CMM).
- External services (CRTVG, RAI).
- Reforms to collective agreements or professional reclassifications (EITB, CMM).

6. CHALLENGES AND OBSTACLES

6. CHALLENGES AND OBSTACLES

The interviews revealed that most entities face multiple obstacles whenever they attempt to implement changes or improvements within the organisation. The most significant are:

- **The rigidity of the labour framework.** One of the main challenges highlighted by the interviewees is the discrepancy between the demands of innovation and the limitations imposed by the current labour framework, especially those regarding professional categories. They argue that current labour laws and jurisprudence often inhibit what is required to foster innovation. In this context, the necessary adaptation to the new digital ecosystem, such as incorporating new professional profiles, is hindered by the structural rigidity and labour framework of public companies.
- **Resistance to change**. Related to the above, the interviewees argued that an older public workforce means more to resistance to change from workers less familiar with new technologies. This generational divide poses a challenge for innovation, as older employees may be less inclined or willing to adopt the technological advancements essential for digital transformation.
- **Institutional bureaucracy.** Interaction with external organisations, on which these institutions often depend, adds complexity to the transformation process, sometimes slowing down the implementation of innovative solutions. In other cases, the bureaucratic procedures inherent to the public system cause delays when hiring incorporate strategic roles that are urgently needed.
- **Budget limitations.** Although the interviewees acknowledge the existence of budget allocations for technological updates and digitalization, they unanimously express concern over the insufficiency of these funds. High fixed costs are given as a factor that limits the capacity for investment in emerging technologies. This lack of budget is seen as a significant obstacle to keeping pace with the innovation needed to modernise public media organisations.

7. 20 RECOMMENDATIONS

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1. **Innovation must become the accelerating axis of the entire internal organic transformation** (creativity, production, management and governance), as well as of relations with the external audiovisual industry and of communication with the society to which each corporation is addressed.

2. **Experimentation is key.** Create open laboratories for immersive experimental television, encouraging audience participation and interaction as media prosumers (e.g., BBC Taster).

3. **Foster a digital culture that integrates the second screen and multi-screen experience** encouraging interaction and complementary content across multiple devices for a deeper and more immersive connection with audiences.

4. **Strengthen relationships with local audiences through content that addresses their specific interests.** In an environment of disinformation and news avoidance, foster trust by implementing new tools for transparency and verification.

5. **Study and analyse your audience's consumption habits** and available time so as to offer them **podcasts** tailored to their topics of interest and preferences. Podcast has revealed as one of the main trend so it would be a line to develop.

6. **Inform, train, and always entertain**. In the face of growing news fatigue and news avoidance, it is essential to offer young audiences more diverse content and entertainment formats. Assert the defence of the public audiovisual service as a democratic cornerstone that champions pluralism, social cohesion and the identity of the citizenship that each corporation represents.

7. **Create open innovation strategies that enhance collaboration among CIRCOM members and external agents, regardless of the organisation, since external talent often exceeds internal resources.** Establishing an open innovation network would facilitate the exchange of knowledge, resources, and technologies, complementing any existing training and development programs. This network could include co-produced content, joint research and development projects, and alliances with universities or research centres to explore emerging technologies such as AI and big data and their applications in the media landscape.

8. **Facilitate dialogue, exchange, and foster internal collaboration between broadcasters in the different geographical areas within the CIRCOM Regional network.** This would help address the previously highlighted imbalances and differences between Northern, Southern, Western and Eastern regions.

9. **Act as a lobby with EU institutions** to advocate for audiovisual legislation that supports the interests of CIRCOM Regional, the European Committee of the Regions, and the defence of social innovation, culture, and the regional languages represented by CIRCOM Regional.

10. **Promote new ways and forms of monetisation that align with each corporation's legal framework** and utilize new technologies such as digitalisation, big data and artificial intelligence.

11. **Collaborate to develop continuous training programmes that increase innovation capacity.** Human capital has been identified as key to the successful implementation of innovation. Therefore, it would be beneficial for CIRCOM Regional to develop continuous training programs for employees in areas related to technological innovation, content production for digital platforms, and management of innovative processes. Investing in these initiatives can help corporations stay competitive in an ever-evolving landscape.

12. **Strengthen the fight against disinformation.** CIRCOM-Regional can lead initiatives that strengthen the broadcasters' fact-checking capabilities and encourage the creation of spaces dedicated to verification and debunking, using advanced technological tools such as blockchain and AI to support these efforts.

13. **Seek the most efficient way to face the challenge of innovation** nd create departments dedicated to innovation and the adoption of emerging technologies that generate value. The lack of formal innovation managers and/or departments in many corporations, along with geographical disparities, presents a significant opportunity for improvement.

14. **Involve the corporations' stakeholders in the process** of identifying the challenges and key areas of value generation, which will help pinpoint the areas where innovation strategies and policies should be intensified.

    The predominance of technological innovation seems to come from internal agents who determine priorities to optimise the allocation of resources. Ensure that innovation responds comprehensively to the needs and expectations of all interest groups would be key.

15. Align TV KPIs with digital KPIs. One of the main areas for improvement is the alignment between traditional TV KPIs and digital KPIs. Often, TV stations are still focused on linear audience metrics, such as share or rating, while digital KPIs focus on interactions, reach, and engagement. Measuring awareness and audience transfer between traditional media and social networks can be key to this alignment.

16. Leverage the potential of social listening. Social networks have enormous potential for audience listening. Social listening strategies should be implemented to help TV stations adjust their programming and content strategy based on viewers' interests and opinions.

Many regional TV stations are not fully taking advantage of this functionality. Social listening allows for the capturing of audience real-time conversations, which would help social networks generate more personalised content, improve programming personalization, and obtain valuable insights for planning future projects.

17. Generate and study new communities and audiences. Social media offers the opportunity to reach specific communities that would otherwise not tune in to linear programming. TV and radio stations should delve deeper into the analysis of their digital communities and explore how to create content that appeals to these new groups, especially younger ones, who consume content differently. Creating specific program profiles can help capture segmented audiences and build loyalty.

18. Enhance the transfer of awareness between individual products and overall brand profiles. Successful programs can serve as vehicles to attract new audiences to the corporate profile, thus reinforcing the corporation's global identity. A coherent cross-promotion strategy between profiles will allow leveraging the success of leading programs to enhance the broadcaster's global presence.

19. Improve collaboration and cooperation among the radio and television stations that make up the CIRCOM network following the hexagonal model of innovation items CO (collaboration, cooperation) and OPEN (openness). While some internal collaboration is noted, there is a definite lack of external collaboration, particularly from an institutional point of view (such as with universities, the European Commission Aid, and the EU government).

20. Improve the openness, image, and status of the CIRCOM-Regional network. Exploit its potential as an entity in political-institutional, academic, and public spheres both internally (among employees and professionals within the network) and externally.

8. CUC PROPOSALS FOR THE FUTURE

8. CUC PROPOSALS FOR THE FUTURE

9. REFERENCES

9. REFERENCES

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10. ANNEXES

10. ANNEXES

10.1. Survey questionnaire

21/10/24, 10:51 SURVEY 2024

CIRCOM UVIGO CHAIR

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SURVEY 2024

As you may know, we have signed an agreement between CIRCOM Regional and the University of Vigo (Spain), for the elaboration of a report, focused on how regional television stations of the CIRCOM Regional network address aspects such as innovation, social networks and the audience in the current era of media transformation

The report will be delivered to all CIRCOM Regional partners and presented at the next Annual Assembly to be held on May 23 and 24 in Poland.

The more responses we get, the more representative the results will be. We thank you in advance for your answers.

The approximate time to fill this survey is 10 minutes. We thank you in advance for your participation.

* Indica que la pregunta es obligatoria

Correo *

Channel: *

https://docs.google.com/forms/d/e/1FAIpQLScTDl_rPGQQ1tB32lt9NUshRxZlFQqwMxxbwL3UXDnn5n9yHQ/viewform 1/12

Country: *

Role: *

Innovation and Management

1. How does the corporation you work for understand and define innovation? (Both)

2. Is there a specific department and/or a person responsible for innovation? What is it called? (identification and denomination)

3. If so, how many people are part of it, what is the name/job position of the person/people in charge, and which is their profile? What department or senior management do they report to, what other departments do they coordinate with (structure, organigram)?

21/10/24, 10:51 SURVEY 2024

4. Has the organisation you work for developed new formats in the last three years? Describe which ones.

5. Has the organisation developed new content in the last three years? What kind of content? What type of audience was it aimed to?

6. Point out in which of the following areas the organization you work for has innovated in the last three years:

- [ ] Organization and structure: workplace or the company's external relations
- [ ] Incorporating new professional profiles
- [ ] Personnel training
- [ ] Business models, products, and services
- [ ] Marketing, promotion, and distribution

7. Now describe the areas you have chosen in the previous question

8. Has the corporation you work for implemented new technologies in the last three years? If so, please indicate which ones.

https://docs.google.com/forms/d/e/1FAIpQLScTDI_rPGQQ1tB32lt9NUshRxZIFQqwMxxbwL3UXDnn5n9yHQ/viewform 3/12

9. Has the organisation developed any social innovation/cultural diversity-related process?

10. Are there any established procedures for cross-cutting innovation flows within the organisation?

11. Describe the economic, organisational, knowledge, competitiveness, and social factors that have driven or hindered innovation within the corporation in recent years.

12. What aspects of innovation is the organisation currently focusing on? In your view, which ones should be expanded in the future? (trends and future)

13. How does the corporation consider itself in terms of innovation? (Mehrad Baghai et al.)

- Traditional
- Emerging: regarding its offer and online access, with continuous innovation,
- R&D&I on future trends with research and incubation: Web 3.0, AI, metadata (YLE model from Finland)

14. Which of the following three innovation models do you think the public corporation you work for corresponds to?

- One or two coordinators/managers with hardly any structure or budget
- Medium-sized department: between 3 and 4 members
- Large department: more than four members (indicate how many)

15. If you have chosen large department, indicate the number of members

16. Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): **OPEN: opening organisations and establishing collaboration networks with suppliers, competitors, users, and audiences.**

0 1 2 3 4 5 6 7 8 9 10

17. Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): **TRANS: mainstreaming and creating project teams and "circles" that work as a network, combining ideas and skills.**

0 1 2 3 4 5 6 7 8 9 10

18. Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): **FAST: making more flexible and accelerating processes, breaking down bureaucratic barriers, tearing down departmental walls, improving internal and external communication.**

0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

19. Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): **PROTO: aligning visions, inspiring changes, turning prototypes into projects.**

0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

20. Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): **CO: promoting collaboration, cooperation, co-creation, collective intelligence, creating learning and innovation communities**

0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

21. Rate, from 0 to 10 (Likert scale), how the organisation's contribution is (based on the Hexagon for Public Innovation Model, HIP): **TEC: boosting digitalisation and personalisation**

0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

22. How does the organisation generate innovation?

- ◯ Closed: from inside to inside, with labs, departments, and internal structures
- ◯ Internal: in a closed way, from inside to outside, from the corporation
- ◯ External: Through alliances, agreements
- ◯ Hybrid: a mixture of the two above
- ◯ Social: from outside to inside, incorporating citizens into the process
- ◯ Circular: in all directions, by establishing nodes involving all agents –including the audience– and shared co-creation processes

23. Regarding innovation processes, does the organisation receive any funds or subsidies? If so, indicate the specific program(s) (at regional/national/European level)

24. Does the organization have a thematic innovation agenda?

- ◯ Yes
- ◯ No

25. If the previous answer was yes, which of these topics is it involved in? (multiple choice)

- [ ] Multimedia transformation
- [ ] Evolution from DTT to the era of universal access through IP (technological scenario currently under discussion for after 2030)
- [ ] Archive digitization, native content production and broadcasts (digital first)
- [ ] Creation of own OTT platforms and specific offer for digital networks
- [ ] Evolution from the linear free access model to managing and identifying user databases (subscription)
- [ ] Automation, metadata, and AI
- [ ] Verification systems (fact-checking)
- [ ] New narratives, public service algorithms, and metaverse
- [ ] Content personalization
- [ ] Young audiences recovery
- [ ] Evolution from traditional radio to audio (podcast)
- [ ] Improvement of internal and external corporate communication regarding the value of public audiovisual service
- [ ] Incorporation of public audiovisual service to social innovation
- [ ] Otro: ______

26. What is the main innovation project/program (currently in place within the organisation) you would highlight?

______

27. What aspect(s) would you value most –as public value(s) within the corporation–, compared to other state corporations?

Audience and Social Networks:

28. Does the corporation offer different contents for linear TV and digital environments? If so, what content(s) and specific formats has it developed only for digital purposes?

29. What digital platforms does the corporation use for content distribution?

30. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Early morning**

31. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Morning**

32. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Early afternoon**

33. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Afternoon**

34. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Prime Time**

35. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Late evening**

36. Indicate the program with the highest audience in the corporation's linear TV service within the following time slot: **Night**

37. What social media channels does the organisation use for promotion, announcements, crowdsourcing, (getting) feedback or distributing content? Which one is a priority?

38. What kind of content(s), programs, and profiles have the highest performance and social media reach?

39. How does the corporation measure/what is the methodology used for calculating the "numbers" on its social media channels?

Envíame una copia de mis respuestas.

Enviar

Página 1 de 1

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10.2. Interview script

INTERVIEW SCRIPT

GO1. Study innovation and digitalisation processes within European regional broadcasters that are members of the CIRCOM network:
SO1.1 Analyse technological innovation as a transversal axis in the development and digitisation of European regional media.
SO1.2 Identify the current needs and the most-required professional profiles in the audiovisual sector.
SO1.3 Understand content production processes regarding linear broadcasting and dissemination through social networks and digital platforms.

GO2: Analyse -qualitatively speaking- the type of content that regional television channels offer through different social media platforms:
SO2.1 Analyse post engagement on regional television channels' social media sites.
SO2.2 Analyse whether regional television channels encourage citizen participation and interaction, spark conversation among users or remain a one-way communication channel that neither encourages participation nor dialogue.
SO2.3 (Linked to the previous one) Examine whether the posts published on social media sites generate conversation through dialogic principles (simple interface, helpful information, keeping visits, generating repeated visits, and maintaining dialogic loop) and assess the degree of user interaction.

1. How does the corporation you work for understands and defines innovation?

2. Is there a specific department and/or a person responsible for innovation? What is it called?

3. If so, how many people are part of it, what is the name/job position of the person/people in charge and which is their profile (graduate or post-graduate, specific area)? What department or senior management do they report to, what other departments do they coordinate with (structure and organisational chart)?

4. How do you think innovation should be generated and produced: from the top/bottom, bottom/top, from inside the entity to the outside, from the outside to the inside, from the bosses/employees, company/society?

5. What emerging technologies has the organisation you work for incorporated in the last five years?

6. What are the objectives of implementing them?

7. What difficulties/challenges has the corporation faced during the process, and how has it overcome them?

8. How does the corporation you work for measure its innovation strategies' effectiveness?

9. How does the corporation foster a culture of innovation within the organisation?

Universidade de Vigo

10. Have digital production and distribution affected workflows and how? What percentage of your staff is dedicated to producing and distributing digital content (news or programmes) through the web, digital platforms and social media channels?

11. Has the organisation you work for incorporated artificial intelligence (AI) tools in the last two years?

12. (If the previous answer is yes), has it implemented it within production processes, distribution processes, or both?

13. Has the organisation incorporated new professional profiles in the last three years? What kind of knowledge, training and/or specific skills do they have?

14. (For corporations whose collective bargaining agreements prevent it) Has the corporation made progress in negotiating new contracts to create the necessary new job categories?

15. (If the previous answer is yes), what has been the response of the company's social representation?

16. When (what year) did digitisation started within the organisation? What percentage of the corporation's budget is allocated to digital content production and distribution?

17. From a social perspective and regarding cultural and linguistic diversity, what is the added value the corporation you work for offers that makes it different from its competitors?

18. What are the main challenges regarding innovation the organisation will have to face in the future?

19. What is the main obstacle the organisation is tackling when developing innovative processes (legal, financial, production, human resources, professional profiles, labour and trade union pressure)?

CIRCOM+UVIGO CHAIR

TRENDS IN INNOVATION AND ADAPTATION TO DIGITAL TRANSFORMATION IN REGIONAL PUBLIC EUROPEAN BROADCASTERS RESEARCH

NOVEMBER 2024

Universidade de Vigo
circom European Association of Regional Television / Association Européenne des Télévisions Régionales
crtvg Compañía de Radio-Televisión de Galicia
CIRCOM UVIGO CHAIR