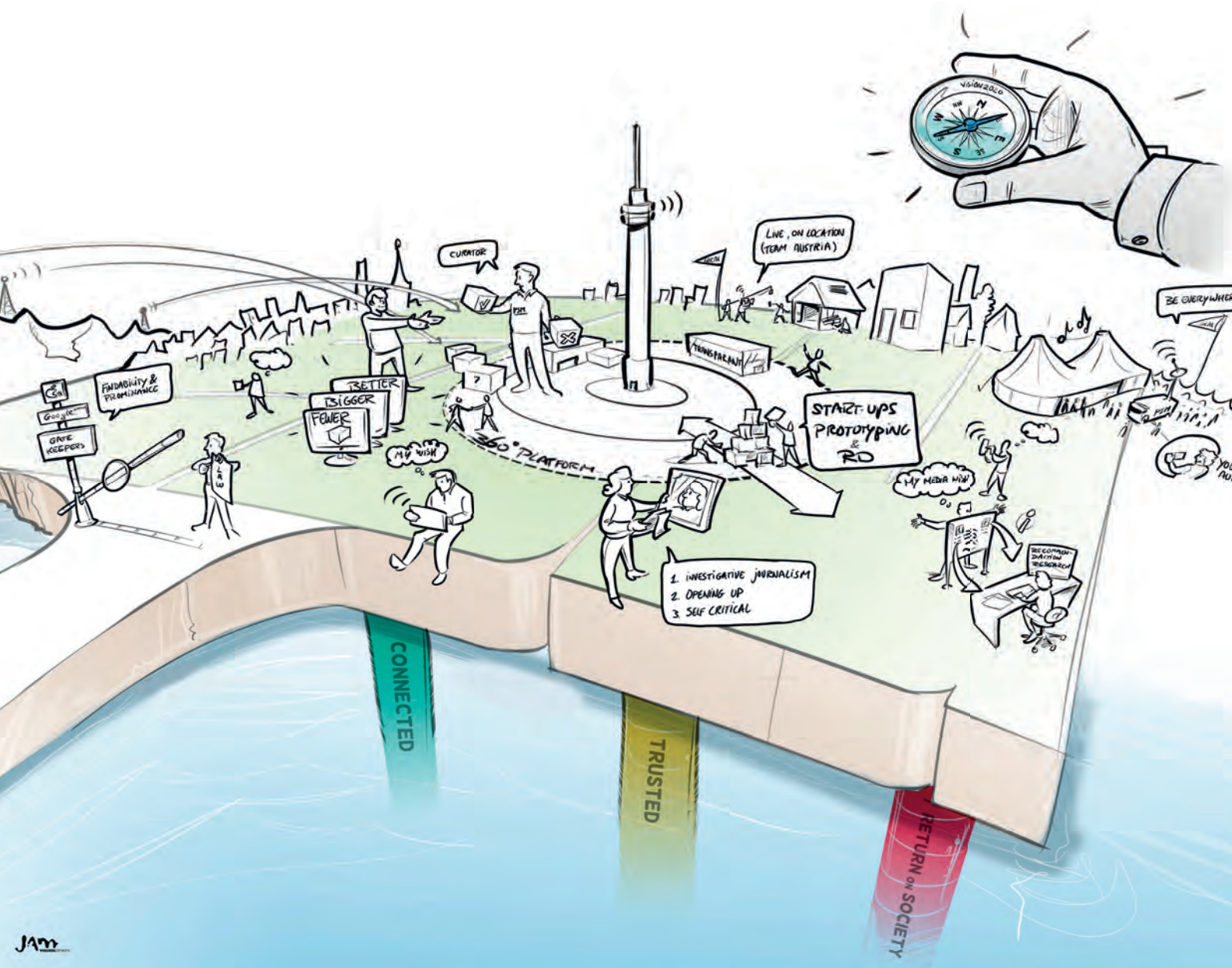


# VISION2020

AN EBU PROJECT



## CONNECTING TO A NETWORKED SOCIETY

CONTINUOUS  
IMPROVEMENT OF TRUST  
AND RETURN ON SOCIETY

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# INTRODUCTION

How should we respond to fundamental and on-going changes in audience behaviour, technologies, media markets and societies – challenges faced by every member of the EBU community?

To help public service media (PSM) plan for these changes, in October 2012 the European Broadcasting Union (EBU) launched VISION2020. The goal of this ambitious project is to identify how PSM can remain indispensable to audiences and stakeholders in the years ahead. It was also the logical next step in defining the future of PSM, following the adoption of an EBU declaration in Strasbourg 2012 that identified the core values shared by Europe's public service media. The results of this quest are summarized in this report: ideas, recommendations and examples to inspire and support Members.

From the outset, VISION2020 has been a collaborative process. We have tapped into the shared knowledge of the EBU community and organized debates among Members on how best to face the challenges ahead; we have used market research and other means to analyse trends in media consumption and media markets, and to identify and interpret challenges, opportunities and strategic dilemmas for PSM; we have gathered insights from interviews with PSM management and external experts. These findings were debated and assessed by three experts groups made up of 60 EBU delegates who met three times in the course of 2013. More than 150 Members of the EBU community participated in crafting strategies at the Trends Conference in Brussels on 31 May 2013.

This document integrates and summarizes the main findings of the project to date and includes 10 recommendations. Following the winter General Assembly on 5 & 6 December 2013, this document and the underlying analyses and supplementary support materials will be developed into an eReport and an application, to be launched in spring 2014.

The eReport will be multi-layered – intended to be read linearly from beginning to end or in a non-linear way. Readers can, for instance, select topics of particular relevance and access links to annexes and examples that provide background or elaborate on points from the main report. It will continue as a living document and be updated regularly.

The final results of the project will be presented at the EBU General Assembly in June 2014, including the last phase of Vision2020 (a strategic analysis of the development of the EBU itself as a service organization).

The eReport, together with the material stored on [vision2020.ebu.ch](http://vision2020.ebu.ch), offers a source of inspiration for Members as they craft their individual strategies. It will be a digital catalogue of ideas and examples that Members can use for self-assessment and change, according to their priorities, context and pace.





# A VISION ON 2020



# EXECUTIVE SUMMARY

## 1.1 A CALL FOR ACTION

Every day we search for fresh answers to fundamental questions: what makes PSM 'indispensable' in the eyes and ears of their audiences and stakeholders? How do we win their hearts and minds in the run-up to 2020?

Although being indispensable is an unachievable aspiration for almost everything in life, in this report we present recommendations that offer inspiration for EBU Members seeking relevance to the lives of European citizens and stakeholders.

Once, PSM were taken for granted; their services were regarded as 'guaranteed and essential' components of European societies. From the other side, PSM at times considered themselves and their position of privilege with a sense of entitlement. Nowadays, nothing can be taken for granted. Many of us are under pressure in terms of editorial independence, budget constraints, remit, or all three. Although Greece represents an extreme example, a number of countries including the Netherlands, Spain, Portugal, Ireland and Belgium have also suffered painful financial cuts.

The future of PSM is unfolding against a backdrop of turbulence. Forecasts about Europe's future predict massive change. Some social scientists foresee a radical transformation of society. Whether this turns out to be the case, we are already experiencing some big trends: globalization, worldwide financial pressures, climate change, a shift in global economic power away from the

developed G7 economies towards the developing BRIC countries – Brazil, Russia, India and China; the aftermath of the Arab Spring; a hike in the cost of commodities; the rise of individualization; an erosion of democratic trust; and technological innovations such as the 'internet of things'.<sup>1</sup>

The media world is experiencing its own seismic shift: fragmented audiences, an explosion of content on new platforms, convergence, competition from 'the new kids on the media block', new gatekeepers, media concentration, commercialization of services, tabloidization and the decline of newspapers, deregulation, and neo-liberal policies for media.

For many Members, such trends represent more a threat than an opportunity. However, these trends also offer promise for PSM, although it may not appear so at first sight. We have the chance to serve audiences better and to be recognized as a trusted source in an even more confusing world; to be an important driver for the European creative industry and (co)producer of culture; to deliver a bigger return on society and to offer greater proof of our *raison d'être*.

VISION2020 is about these chances and the call for action they entail. New opportunities for PSM are realistic if we treat the call seriously and do our homework. In the spirit expressed by one of our Members at the Brussels Trends Conference: "It's easy to change if you know who you are!"

## 1.2. DIVERSITY OF EUROPEAN PSM AND THE PHILOSOPHY BEHIND THE PROJECT

The key questions posed:

- How should PSM respond to changes in media consumption?
- How do we define the PSM portfolio and content in an increasingly competitive, content-driven market?
- How do we remain accessible and prominent in a crowded platform market?
- What should be our future role?

What have we learned from this process?

- EBU Members are very committed to the debate concerning future PSM.
- As a community, we possess a mountain of knowledge that we are only now beginning to exploit and share. The deeper value of VISION2020 is not only in the results summarized in this report. It also lies in the process it has

<sup>1</sup> A global network infrastructure, linking physical and virtual objects through the exploitation of data capture and communication capabilities.



initiated: bringing Members together and establishing a framework to improve strategy development and knowledge sharing between Members in the years to come.

- Despite individual differences between Members (in terms of legal base, market position, funding, culture, etc.) we share more than anticipated: many of us face similar challenges and share similar ambitions.
- It is not optimal to formulate a one-size-fits-all future strategy for European PSM –nor is it in the scope of this project or even that of the EBU to formulate models for each Member. From the material collected, however,

there has emerged a number of ideas about the future direction PSM should take. The key is to open our organizations and connect with a networked society by continuously building trust and Return on Society (RoS).<sup>2</sup>

The final report, which will be delivered in early 2014, will include all the analyses, documents and background material gathered. In this summary we take a step back, and examine this material through fresh eyes – seeking the direction our journey will take in the next decade, and defining the key recommendations for action.

## 1.3 THE NETWORKED SOCIETY AND THE ROLE OF PSM

The most pressing and fundamental change facing PSM amid the social and cultural development of European societies is the ongoing emergence of a networked society. This is due to the combination of two major trends: fragmentation and digitization.

Fragmentation stems from a combination of factors: the rise of individualization, globalization and urbanization combined with an erosion of fixed and long-lasting bonds enshrined in traditional institutions such as the family and belief systems relating to religion, democracy, and labour relations. Looser and temporary networks emerge.

The best metaphor for this trend is ‘free jazz’ – a fluid and constantly changing ‘composition’, hallmarked by improvisation within certain rules and tacit agreements. Communities and ad hoc groups congregate around values, tastes, lifestyles, interests, issues, and opinions, propelled by the

possibilities offered by digitization and fast broadband to connect, share and interact via (social) media, anytime and anywhere and to jointly create content. These communities are increasingly diverse, plural, loosely organized – if at all. The unifying factor may be nothing more than a trending topic on Twitter.

Although linear radio and TV will remain strong for the foreseeable future, and a substantial part of audiences will still be off line, we must prepare for a gradual shift towards a networked society with substantial numbers of digitally empowered citizens.

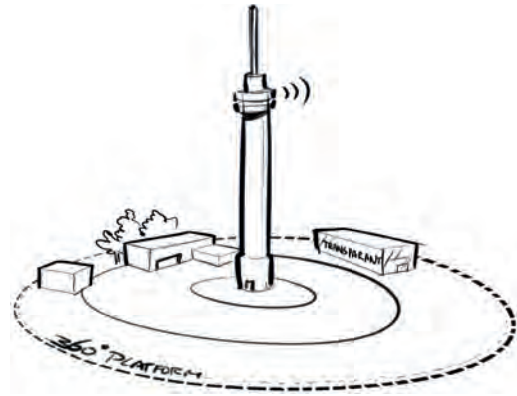
For EBU Members, these developments in themselves raise huge immediate challenges. Additionally, we must face other important changes with potentially disruptive effects:

- The shift towards more personalized and on-demand media content,<sup>3</sup>

<sup>2</sup> We use the term Return-on-Society (RoS) to describe the various positive effects PSM can have on society. It is the social equivalent of the economic term return-on-investment (RoI), that measures the revenues weighed against a company's investments. Return-on-society is not yet well defined, but can encompass various dimensions. The proposal is to develop this concept and coin (an equivalent of) this term in order to make the case for PSM.

<sup>3</sup> Trends in audience behaviour in general show a dual development. On the one hand a growing active use of online platforms and services, on the other hand resilient linear viewing and listening habits. Linear TV viewing time is expected to decline slightly until 2020. At the same time, the total viewing time is rising, as well as the share of non-linear viewing in total viewing time. However, the shift to on-demand seems bigger in countries where Netflix has launched its online video services and among specific audience segments, such as young people. The average total radio listening time is expected to decline gradually as well, mainly because people will spend more time on the internet.

<sup>4</sup> Increasing competition for content and talent comes from large, mainly US-based media, telecom and internet companies. Information and communication technologies (ICT) and telecom companies in particular will increasingly operate as gatekeepers between audiences and PSM content, affecting the prominence of PSM services on opening screens, in electronic programme guides, search engines and recommendations.



- The arrival of new global media players, increasing competition for content and talent and/or threatening to disrupt the direct bond between PSM and their audiences.<sup>4</sup>
- Pressures on public spending including PSM budgets are unlikely to lessen; PSM will be expected to deliver more value for money.
- Institutional trust is eroding, potentially undermining the legitimacy of PSM.

In this environment PSM, as a media organization and cultural institution, can play an even more critical role: to provide a market square where every level of society can meet and exchange and where national and regional identities are reflected. PSM embody one of the (few) uniting and integrating forces in a fragmented, complex, and sometimes polarized society.

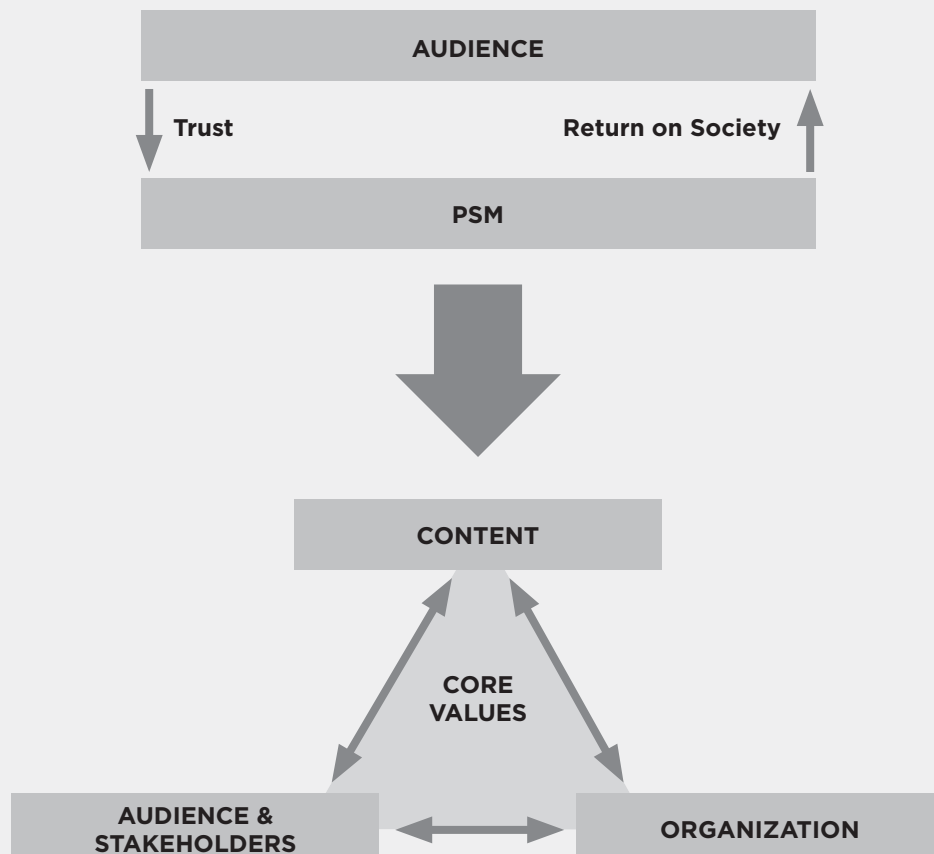
With their broad remit – a mission based on the agreed core values and a wide reach – PSM fulfil this role, provided that they evolve into a networked organization. We must reinvent PSM, in the sense that we translate the values and

the remit to inform, educate and entertain, within the new context of a networked society. We must develop new roles, we must empower, curate and share, and connect with audiences, public institutions, cultural industries and areas of civic society that deliver public value.

Future scenarios for PSM based on preserving the status quo or on developing a complementary position to a dominating commercial media market are not an option.

In the first scenario, whereby we continue down the pathway of classic PSM, we miss out on the opportunities a networked society has to offer. In the second scenario, in which we deliver targeted content to niche audiences, societies will lose the ‘common town square’ advantages PSM offer – ‘of everyone and for everyone’, to balance the impact of fragmentation, polarization and consumerism.

## CONTINUOUS IMPROVEMENT OF TRUST AND RETURN ON SOCIETY





The choice for developing into a networked organization is not a clear-cut scenario or strategy. It is a direction that we must explore, step by step, with trial and error, continuous innovations, grappling with the risks and the constraints imposed, for example, by present regulations. The key words that indicate the direction of the transition into a

networked organization are 'Connecting, Trust and Return on society.'

Among young people, the decline in viewing and listening time will be more marked, and their use of mobile devices for media consumption will increase.

## 1.4. CONNECTING WITH A NETWORKED SOCIETY

In this transition the focus shifts:

- from an emphasis on PSM as a 'deliverer' to a two-way approach that fosters dialogue and interaction
- from 'one-to-many' to a more personalized approach that satisfies a wider range of needs for varied quality in a diversified society
- from a closed, or fortress-like institution to one that is open and connected to networks of people, communities, cultural organizations and civic society
- from exclusive, professional production to joint creation, curation, sharing and partnerships embedded in the national creative industry

- from standardized workflows to more emphasis on innovation and flexibility
- from a focus on law and institutions as the main sources of legitimacy to engagement with the audience – in the knowledge that, in the end, legitimacy always needs to be 'institutionalized' in regulations and public funding

The intention is that PSM not only strive to have the audience engage with their services, but also that they themselves strive to engage with the audience.

## 1.5. TRUST

The most important element in the relationship between PSM and their audiences is trust. Public trust is the key currency, and goes beyond being 'loved' or 'liked'. Ultimately, the licence to operate must come from the audience. Being trustworthy and reliable must shape every aspect of our approach, from content to organization. Extreme measures may be required.

The need for trusted sources of information will only grow. Global issues are increasingly complex. Guidance is required to help put international developments in perspective at national and local level, where links to additional sources are based on editorial integrity, and become a matter of curation, not algorithms. At a time when quality journalism is increasingly at risk, the obligations and opportunities for PSM are tremendous.

## 1.6. RETURN ON SOCIETY (ROS)

The term Return on Society relates to the various positive effects that PSM deliver to a specific society, group and individual: the idea that PSM is much more than a bunch of broadcasters delivering content to a wide audience measured in terms of market share and reach. It relates to our *raison d'être*, i.e. to the positive impact of content and services on:

- Societies – by offering a platform for information and democratic debate, reflecting the diversity of national and

cultural identities, supporting social cohesion, providing a guarantee for plurality, producing and promoting European and local cultural productions, and preserving cultural heritage

- Individuals – by supporting citizenship (information, representation, participation)
- Cultural organizations, other public institutions, the media eco-system, the economy, and employment

When we connect to the networked society we create more opportunities to deliver public value – to empower citizens, to enable communities to deal with social issues, to bridge the digital divide, and liaise with other parts of society that create public value.

Developing the concept of RoS offers a strong instrument for measuring success and defining priorities in our

programmes and services. It allows us to focus more on fundamental issues, relating to the lives of citizens and the future of humankind.

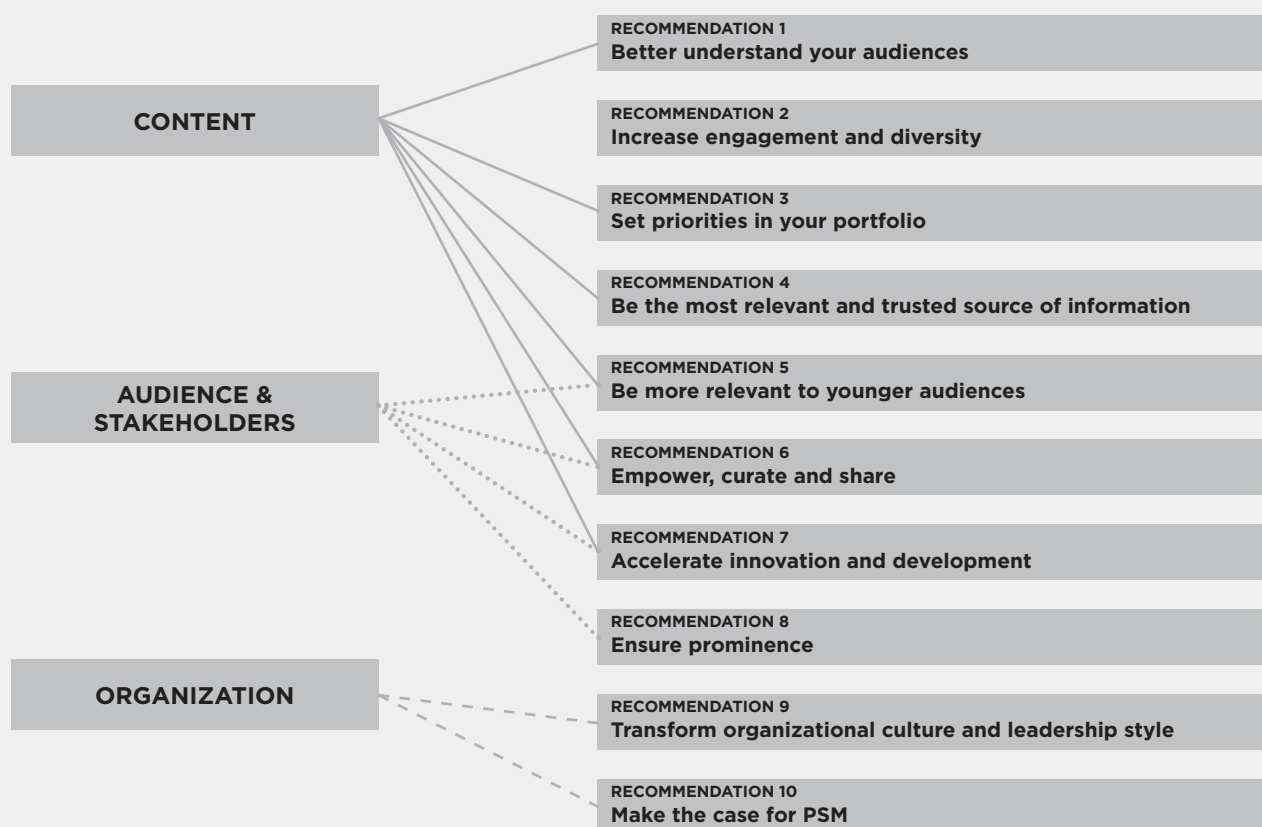
It can also strengthen the legitimacy of our activities. In an increasingly competitive environment, we have to be more distinctive, deliver greater value for money, and perform more effectively.

## 1.7. CONTINUOUS IMPROVEMENT AND DEVELOPMENT

To connect with the networked society, we need to continuously and consistently strive to deliver trust and RoS. It is a step-by-step process, and we must learn along the way. Over time, we will achieve significant results and improvements, though it is evident that the pace and scope of change will differ for every EBU Member.

This transition to a networked PSM organization has an impact on multiple levels: their content, their relationship with audiences and stakeholders, and their internal processes. Members are invited to select those recommendations that provide them with a source of inspiration for crafting their individual strategies.

### CONNECTING TO THE NETWORKED SOCIETY: CONTINUOUS IMPROVEMENT OF TRUST & RETURN ON SOCIETY





# 1 BETTER UNDERSTAND YOUR AUDIENCES



Creating a mutual relationship with audiences and developing a more personalized media offer requires a much deeper knowledge of audiences.

Expand audience research to gain insight into the composition of your society and audiences (lifestyles, communities, interest groups, themes), media behaviour and needs (motives, type of content, when, where, devices, personalization, interactivity).

Include research on (perceived) social and cultural exclusion and barriers to people's participation in the online world.

Access audience feedback and user data from your digital services so that you can better shape

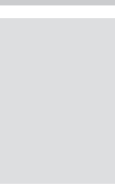
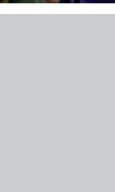
your content. Where data are in the possession of third parties or gatekeepers, develop negotiating power through cooperation nationally (e.g. via a joint industry committee) and internationally (with support from the EBU). As PSM, we will treat user data differently. While there is growing concern over how governments and companies treat personal data, we guarantee user privacy. Our purpose is to serve audiences better (e.g. in navigation), without regard to commercial gain.

## CASES

VRT/Mediamomenten



## Exploring the psychology of media moments: weekdays



# TOP 10 RECOMMENDATIONS

## 2 INCREASE ENGAGEMENT AND DIVERSITY

If we want audiences to engage with us, we need to engage with audiences. This requires a diversity strategy and new ways of communicating. Diversity is viewed in a broad sense (age, social/cultural, ethnicity, plurality, gender, lifestyle, region, religion, etc.).



Develop a systematic approach to making your content and staff more diverse, based on a deeper knowledge of your society and your audiences.

Experiment with the boundaries of mass media in a fragmenting society. Make conscious decisions about content to target specific groups. Be flexible and use the concept of 'innoversity' (diversity as a source of content innovation to develop new formats).

Shape internal recruitment methods accordingly, establishing new criteria for selection. Train

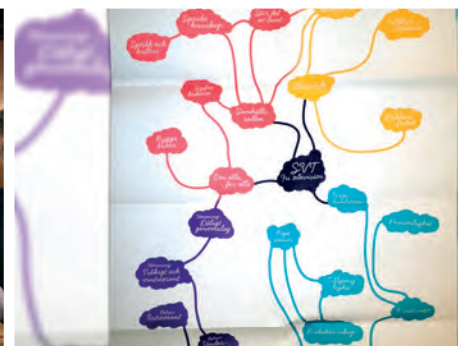
employees to be more service-oriented and editorial staff to foster dialogue and engage in greater plurality and diversity.

Engage audiences through social radio, social TV, and audience networks. Treat audience reactions as an opportunity. Encourage editors to use social media, and support them with training and advice.



## CASES

SVT/Diversity. SR/Network+Social Media Handbook. RAI/Parla con noi. NTR/Innoversity. RTS/Reseaux-Sociaux linges-directrices. SR/Correspondents event. ARD/Türkisch für Anfänger.



# TOP 10 RECOMMENDATIONS

## 3 SET PRIORITIES IN YOUR PORTFOLIO

We need to continuously improve and develop our programmes and services in terms of quality, diversity, interaction, personalization and context, while responding to budget pressures.

Balance the increasing need to be distinctive with the necessity for substantial size, market share and reach, which are conditional to being universal, inclusive and relevant as a connector for audiences and a partner for stakeholders.

Apply the idea of 'Fewer, Bigger, Better' to the portfolio, programmes and services. This implies tough choices and careful prioritization based on criteria that improve trust and RoS. The overall result: becoming more distinctive and achieving greater impact.

Develop cross-genre formats based on the notion 'Making good programmes popular, and popular programmes good', allowing greater focus on value-based content and distinctive genres without losing attractiveness. Develop new inclusive formats that reach different audience groups. Create internal competition to boost creativity.

Aim to be the market leader in local production and in outstanding programmes. Increase the

amount of Wow! moments in the home. Invest in being excellent at defining moments (national events, crises) and in landmark programming, at the cost of mediocre programmes. Reduce the amount of different programme titles.

Develop courageous programme concepts that deal with the big issues in our lives and societies in a high-profile manner; it's possible to attract substantial audiences using this method.

Invest in owning your content (intellectual property) by for instance, talent-scouting and developing formats with value-based content. Set aside a fixed percentage of your yearly budget (consider 5% or more) for content innovation.

Experience proves that size is not a determiner. Smaller EBU Members offer examples as centres of excellence. Speed up the learning curve, exchanging experiences between Members on formats, presentation, multi-layered storytelling, 360-degree content production, marketing,





coproduction and exchange, based on regional interests and taste. Launch a joint format factory for each region. Co-create with audiences and industry in format labs.

Apply the 'Fewer, Bigger, Better' concept also to your role as producer of culture, in order to focus on excellence, agenda setting, cultural innovation, diversity and talent discovery.

Liaise with cultural organizations. Make your orchestras and choirs more self-supporting, and/or shift from in-house music maker to cultural facilitator.

Revitalize 'high' culture (classical music, ballet, literature) with cross-genre formats.

Gradually shift the balance in your dual portfolio strategy:

- Increase step-by-step resources for 'liquid' content (suitable for multi-platform use and



personalization from the outset) and hybrid services with new ways of storytelling, within an overall branding strategy.

- Develop targeted services based on audience knowledge and structured prioritization.
- Involve the audience in creating content. Splitting content into bite-size segments to facilitate peer recommendations via social media. Use 'internet first' to develop and promote linear programmes (such as comedy and drama).
- Focus on 'urgency and live' as the drivers for linear channels to enhance shared experiences. Develop social radio and TV on these channels to engage the audience directly.

Focus on acquiring the rights for live free-to-air sports events that create public value, news and social cohesion. Develop a structured, consistent, long-term approach in collaboration with the EBU to strengthen our position in the rights market, taking the various needs of groups of Members as starting point.

## CASES

FT/Dialoguefeed. NPO/3FM. Lego. Nordvision. DR/Drama. NRK/Utoya. ABC/Open. Eurovision TV Lab. Radio Lab. SR+BBC+NPO/FBB strategies. BBC/World War One. VARA/DWDD (University, music discovery). EBU Creative Forum. VRT/At War. BBC/Connected Studio + In Our Time. ORF/Ski game. EBU/The Spiral. In Therapy. BBC/The Code+Open Minds. Adapting fiction formats/The Bridge-The Tunnel. RTE/comedy. ORF Eins/Open Innovation + . BBC/Infinite Monkey Case. SR/Institutet + El Sistema + Passa Boken. BNT/The Promise+History+Referendum. ARD/Türkisch für Anfänger. BBC/Stargazing. Book by Alessandro Baricco: The Barbarians. BBC/Delivering Quality First.



NORDVISION





Counter the trend of superficial journalism, and invest in agenda-setting investigations, specialization, data journalism, and correspondents. Provide greater context, offer more angles, and provide deeper analysis. Avoid hype, scoreboard journalism and scapegoating.





Raise qualifications and the recruitment standards of editorial staff. Invest in 'awareness' and foster the diversity and plurality skills of editorial staff.

Open up your newsrooms; be transparent and involve audiences in journalistic processes from the outset.

Be self-critical on air; investigate and report in a journalistic way on your own journalistic output and on issues relating to your own organization. Collaborate with Members of the EBU community on topics of investigative journalism and current affairs (more and more issues have cross-border implications, increasing their complexity).

Collaborate with regional and local media (e.g. CIRCOM members), to enrich global stories with local perspectives.

Apply journalistic standards to sports programmes (reports, background stories, investigations).

## CASES

SR/Journalism3.0+Public networks+Investigative journalism. NRK/News on mobile devices. NCRV/AW Monitor. HUMAN/Medialogica. NOS/Net+Internet First. EBU/Pitch investigative journalism. Vice.com. EBU Toolkit on Diversity Factual Programs. TROS/Radar. BuzzFeed.com. NOS/Nieuwsuur Academy. ARD/Das Ding. BBC/Newsbeat. RTVE/En lengua de signos. Multiple Journalism. Book Nick Davies: Flat Earth News.



# TOP 10 RECOMMENDATIONS

## 5 BE MORE RELEVANT TO YOUNGER AUDIENCES

Although young people represent a relatively small part of our audience, they require a special strategic focus. Firstly, it's part of our remit; secondly, programming for these highly connected people will speed up PSM's progression towards becoming networked; thirdly, they are our future.

Stay authentic, true to your values and quality, but adapt to their needs and media behaviour. Conduct in-depth research into the diversity of their needs and behaviour; compare the results with those of other PSM. Develop specific portfolio strategies per age group (3–6, 6–12, 12–18, 18–34) and lifestyle.

Deliver your content on the platforms and services that young people use.

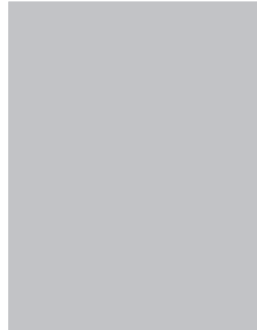
Invest in: targeted online content, suitable for mobile and sharing; all kinds of short forms (clips,

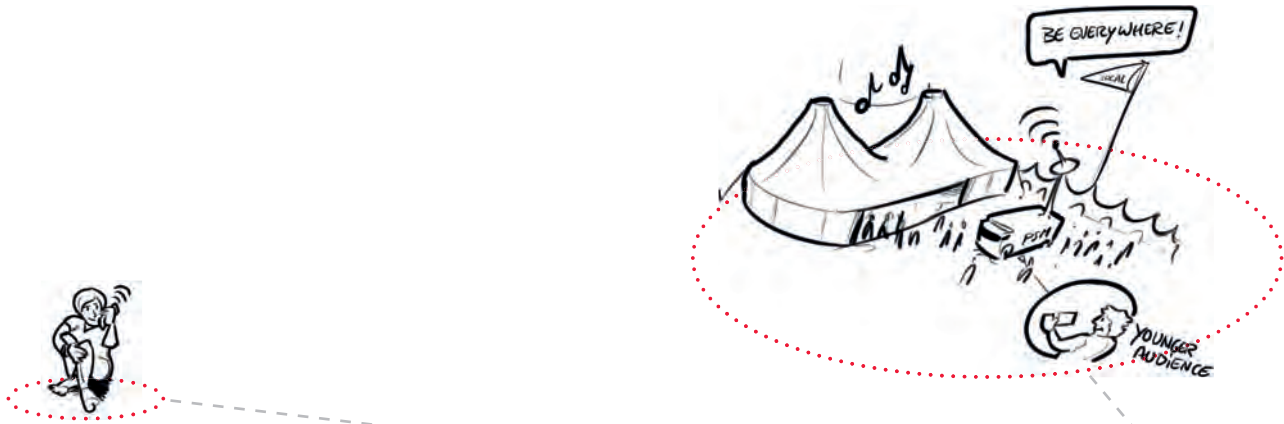
fragments); 'liquid' content formats; attractive storytelling (based on speed, immediacy, entertainment value, special angles, gaming). Facilitate dialogue, self-expression, peer-approval and interactivity.

Develop specific and credible cross-media branding.

Monitor consumer cost of broadband connectivity, as one of the criteria for deciding on specific investments in (mobile) audiovisual online content.

Build 360-degree cross-media brands around your





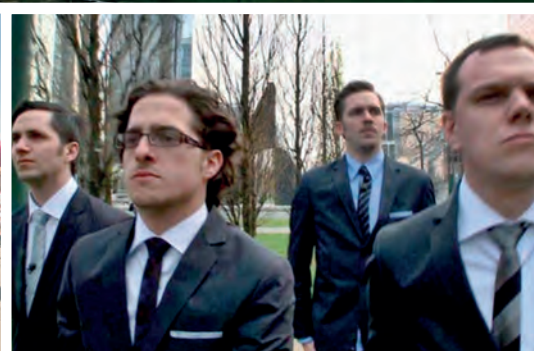
radio stations aimed at younger audiences and extend to other platforms. Be present at music festivals. Develop awards and special events. Be a guide to music discovery and foster talent. Journalism and serious information require new formats, with age-group-related angles, direct rewards (feedback, linking, sharing), suitable for peer-sharing.

Expand linear channels with social radio and TV. Develop inclusive and cross-genre formats on linear channels with multi-layered storytelling,

targeting both younger and older audiences. Develop knowledgeable subcultures within your organization. Choose credible presenters that double as ambassadors and role models.

## CASES

YLE/#lovemilla. BBC/iCreate. VRT/Basta. SR/P3 Dokumentär, Musikguiden. NPO/3FM. Vice.com. NCRV/Spangas. Cross genre formats (10th of Tijl, Lowlands, Ali B). VRT/news start up. RTE/Comedy. BBC/Connected Studio. NTR/Innoversity (Dino Show+Ab en Sal).



## 6 EMPOWER, CURATE AND SHARE

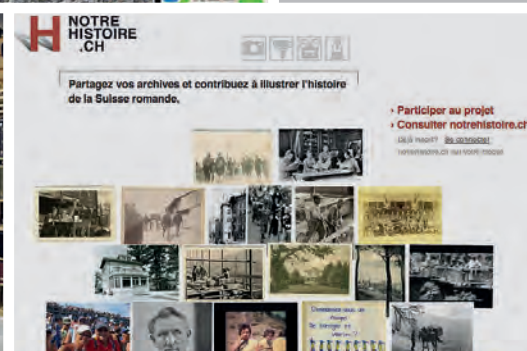
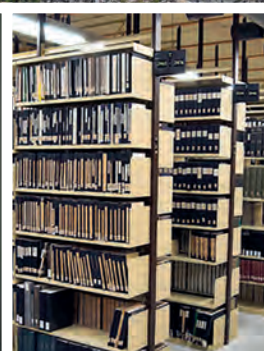
PSM have huge opportunities to create added-value and RoS for audiences in a networked society. Through experimentation, we will redefine what 'public service' is to PSM.

Be open (in principle) to sharing content, in the knowledge that there are many issues to be solved (rights, market distortion, exploitation, itemizing, abuse, cost). Digitize and open up archives as much as possible. Differentiate between business models (tariff setting in relation to genres, timing, signal quality, rights, platforms, partnerships), where needed.

Play a positive role in the media ecosystem. Advocate cooperation with newspapers (e.g. by offering your embedded player). Cooperate with the (local) creative industry (e.g. by opening up your premises).

Develop your role as trusted curator, while being aware that more and more public value content is available online, and that audiences need to be guided through a plethora of information. Be prepared to create links outside your domain, e.g. to newspapers and other creators of public value content

Empower your audiences. PSM have a tradition of supporting communities, for example by helping them to cope with natural disasters, social problems and other issues of public interest (such as literacy), on an ad hoc basis. These are areas in which PSM are supremely qualified.





Structure these activities and prioritize issues and communities, based on intensive audience research.

Help to bridge the digital divide.

Build partnerships, alliances and coalitions with universities, sports unions, cultural organizations, publishers, consumer organizations and creative industries wherever feasible and relevant, while taking adequate measures to secure editorial independence. Support 'digital commons' to create greater public value.



## CASES

CT/Open Archive. Channel 4/Make Bradford British. YLE/Mediapolis. YLE/Sports Federation. YLE/Cultural fitness. ABC/Open. ABC Arts. BBC/The Space + Partnership with cultural institutions. ORF/Team Austria, Neighbour in Need. ZDF+SR+NPO/Serious Request. RTE/Local Heroes, SRG/Glückschiff. BBC/Red Nose Day. NRK/Partnerships (trekking, weather). BBC/Digital Production Partnership. SR+BBC+NPO/Embedded player newspapers. BBC+SR+NPS/Music talent development. RAI + Channel 4/Media literacy. RAI/Fiction+Cinema. BNR/Radio Binar. BBC/Manchester Blog. RTS/En Ligne Direct+Notre Histoire.



# TOP 10 RECOMMENDATIONS

## 7 ACCELERATE INNOVATION AND DEVELOPMENT

We need to adapt our infrastructure to the new media environment and become (one of the key) pathfinders in value-based innovation.

Develop an organization-wide strategy and road map for multi-platform production and delivery, including the smart use of standards, metadata and algorithms.

Define a limited number of areas where we as PSM are willing and able to be at the forefront of innovation and technological development; intensify cooperation within the EBU in these areas. Accept to be a follower of the market in other areas.

Set aside a substantial portion of your yearly budget for innovation at the crossroads of content development, production and distribution (e.g.

3% or more, not including fixed costs), based on a flexible project plan. Encourage initiatives, involve outside creatives and communities.

Use start-ups and prototyping. Involve audiences from the outset. Accept failure and cannibalization. Speed up learning processes, step by step. Share successes and failures with the EBU community.

Invest in higher technical picture and sound quality, but only where it makes sense (such as for sports, drama, live events). In other areas (such as in radio, news) adopt production techniques that are flexible, fast, mobile and cheap(er); this





facilitates the production of content without the need for studios, on the spot, close to the action and the audience.

Embrace interactive radio features, such as RadioDNS.

Intensify cooperation on standards to make innovation more effective and reduce costs. On a European level, PSM can substantially influence the industry.

Combine R&D activities of European PSM as much as possible, and share knowledge with others in the media industry to ensure economies of scale and impact. Compete on content, not technology.

Closely monitor new technologies, such as 'the internet of things', to assess their impact on content production, distribution and consumption. Make the case for reducing restrictions on our remit, whenever they slow down innovation. Strengthen the arguments for a short(er) time to market new services.

## CASES

VRT/news start up. CERN/Atlas. RTS/innov@RTS. ABC Triple J. NPO/hackaton. YLE/Mediapolis+Pasila Studios. BBC/Workshop + Britain in a day + Playlist + Visual radio. CT/Remit. NRK/Metadata-bank. VPRO/Collapsus + Taxodus + Film It Yourself. SR/Flexible radio. BNR/Radio Binar. Book Ben Hammersley: 64 Things You Need To Know Now For Then. Book by Eric Schmidt and Jared Cohen: The New Digital Age.



# TOP 10 RECOMMENDATIONS

## 8 ENSURE PROMINENCE

Maintain universal coverage, meaning that our main linear channels are available for all and free at the point of reception. Follow our audiences, by being available and prominent across all relevant platforms.

Redesign distribution strategies, balancing the need to be easily accessible and findable on relevant new platforms against the extra costs involved.

Seek and maintain direct independent access to audiences (e.g. through digital terrestrial television, content delivery networks and the open internet). This will improve the negotiation position with distribution partners and allow you to know your audience better (user and usage data).

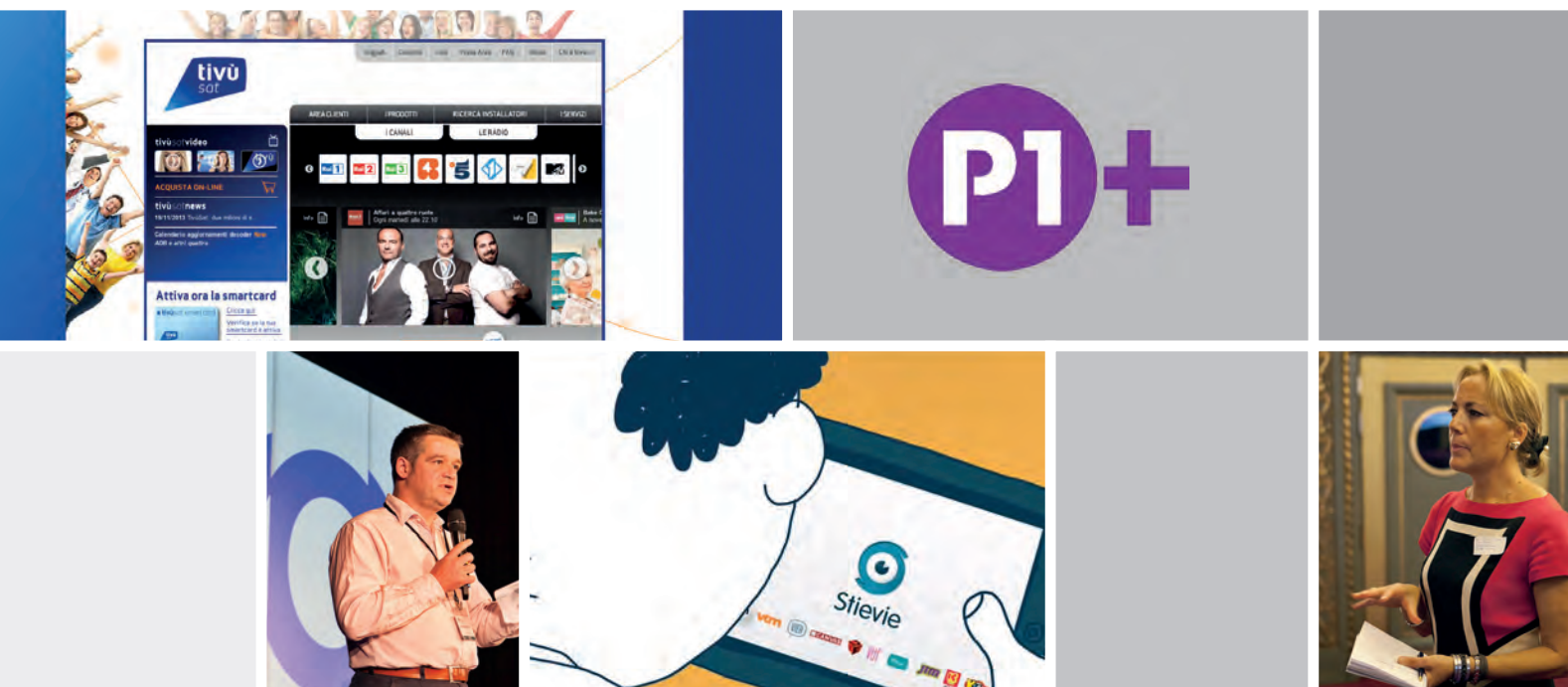
Consider a nationwide over-the-top (OTT) service (together with all broadcasters in your country). Investigate a European OTT player for PSM-owned

content, supported by automatically translated subtitles.

Fight for an adjustment of spectrum that takes full account of media policy objectives and for the integration of broadcast receivers into mobile devices (Euro-chip and DAB+ for radio reception).

If free-to-air digital radio broadcasting is part of your distribution strategy, develop a migration policy involving government support for a mandatory switch-over. Create new services and support marketing campaigns.

Adopt an open attitude towards partnerships with





third parties. Try to influence the design of new platforms, allow trial and error, and react fast.

Explore opportunities to negotiate income from redistribution. Investigate and experiment in compensating extra cost of delivery and rights with subscription video-on-demand (where possible in the local context).

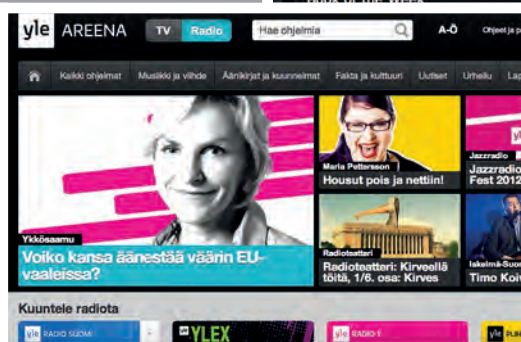
Seek to maintain regulatory safeguards: for signal and content integrity in the distribution chain, net neutrality, access to platforms, and due prominence on user interfaces, portals, electronic programme guides, etc. of services that are of particular value for society.

Make the case for modernizing and simplifying the copyright licensing framework, ensuring that PSM can offer and expand their services on all platforms.

Invest in research & development, where it concerns production tools, user interfaces, recommendation algorithms, automated audience tracking, and other tools for personalization and navigation. Cooperate within the EBU community, to achieve standardization and economies of scale.

## CASES

VRT/Stievie. YLE/Areena. SVT/mediaplayer. UK/Radioplayer. RAI/TIVU-Sat+TIVU-On. NRK/P1-Plus and NRK Classic. BBC/i-Player.



## 9 TRANSFORM ORGANISATIONAL CULTURE AND LEADERSHIP STYLE

The transition to a networked organization entails a gradual yet fundamental shift in the corporate structure and culture of PSM.

Develop a corporate culture that supports public values, interaction, and partnerships. Invest in changing mindsets and training your employees to become more flexible, agile, communicative and service-oriented.

Apply the principles of independence, responsiveness and effectiveness courageously. Adopt the highest possible standards in your governance.

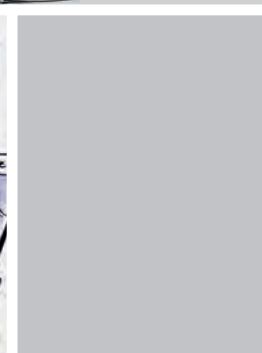
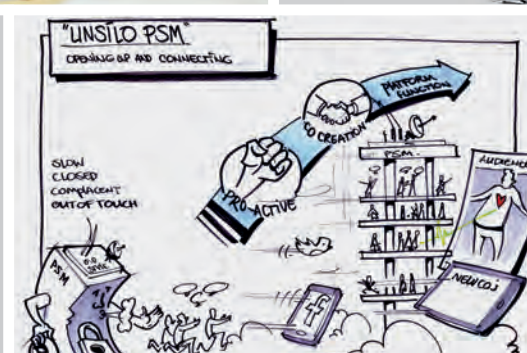
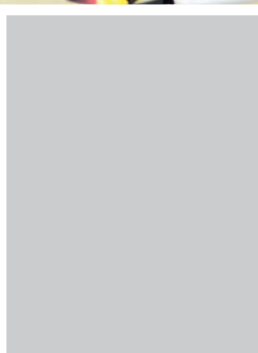
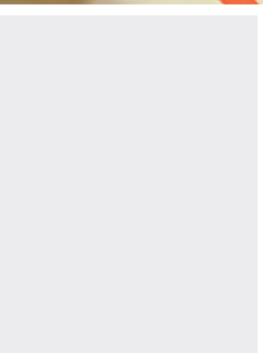
Be ready to act, be open to development and innovation, addressing the unconscious fears

of the unknown among programme staff and management. Replace fear with curiosity and a spirit of trial and error.

Open up your premises, be part of a media campus. Share your knowledge and skills.

Raise trustworthiness at every level of your activities, continuously and consistently.

Improve effectiveness and operational excellence, in the knowledge that this is one of the main drivers for trust. Plan internal cooperation to





support convergence, 'unsilo' your staff and programme departments.

Give proof of effectiveness. Be the best in class in your local institutional environment for financial transparency. Use benchmarks for publications on financial priorities in platforms and genres.

Shift the focus of leadership from control to inspiration, delegation, diversity and the management of paradoxes. 'Walk the talk' as an

organization, and as leaders (motivate your staff to achieve excellence through your own example).

## CASES

YLE/Mediapolis. ORF+RAI/Code of conduct.



# TOP 10 RECOMMENDATIONS

## 10 MAKE THE CASE FOR PSM

As with other public organizations, PSM are subject to changing views on the relationship between governments, markets and society. PSM management needs to adapt their legitimacy to the emerging new context.

Develop more tools for measuring Return on Society. Use the results to prioritize within your portfolio, content production, innovation and distribution strategies.

Develop a long-term view on the positioning of public organizations within the government-market-society triangle, and the unique potential of PSM as a distinctive media organization and an important producer and promoter of culture.

Develop soft advocacy to raise awareness that Return on Society and the production of local quality content are worth support. Advocate stable funding, while laying the groundwork for transforming your organization. Support the claim that the success of a networked PSM delivering RoS and trust requires a substantial level of financing, with regard to the limits of concepts like 'Fewer, Bigger, Better' and cost management.





Promote better curriculums in schools and universities on media education, including the role of PSM.

Invest in 'audience ownership' by involving audiences in events, format development, off-air meetings, and the support of communities.

## CASES

CT+ORF+BBC+VRT+RTE/ Reports on public value and impact. SVT/The Hero. SR/Correspondents event. YLE/ Case on Funding. ARD+ZDF/Case on Funding. Cultural institutions/Friendship projects. Book by Peter Cushion: The Democratic Value Of News, Why PSM Matter. Rai/ Qualitel+Corporate Reputation. ZDF/Unsere Mütter, Unsere Väter.



Why the audience trusts Rai

Some key findings of "Rai Corporate Reputation" survey // Spring 2013



# **ANNEXES**

# **SUMMARIES**

# **OF EXPERTS**

# **GROUP REPORTS**

# ANNEXES

## EXPERTS GROUP I CONTENT & AUDIENCES

### 1. OVERVIEW

Public service broadcasters are facing a number of challenges related to changes in audience behaviour caused by the disruptive power of the internet and the proliferation of connected devices.

This has created an environment of abundant choice where the need for PSM is sometimes questioned. Future challenges fall into two broad categories: firstly, the need to serve greying audiences while reaching younger people; secondly, audience fragmentation and 'individualization' driven by the shift to online and mobile consumption.

Moreover, PSM are no longer the exclusive packagers and distributors of content. They face increasing competition: from commercial broadcasters and on-demand video providers for content rights and talent; from online content providers for 'eyeballs' and time; from intermediaries, such as Google (search engines) and Facebook (social networks); and from network providers for rights to films and major sports events. They are also facing competition from start-ups and private individuals, since the internet is not only removing geographical constraints on distribution, but also lowering the barriers to entry by means of no-cost publishing.

All of this is happening against the backdrop of a global financial recession which has increased the pressure on PSM budgets. Newspaper publishers and commercial broadcasters have accused PSM of distorting the market through unfair competition and some politicians, albeit a small number, have rallied to their support. They question the need for a complete programme

offer from public service broadcasters and argue that if left alone, the market will provide.

Ultimately, therefore, PSM are unlikely to receive additional funding to pursue whatever strategic choices they make. On the positive side, comparatively inexpensive technologies are making it possible to deliver high-quality content in return for modest investments. Smartphones and other connected devices are already transforming the media landscape.

### 2. TRENDS: OPPORTUNITIES & CHALLENGES

#### 2.1 Screens

There is a new emphasis on visual content and interfaces: smartphones, data journalism, new forms of video content (e.g. TED) and games. This is reflected in the trend towards bigger screens on smartphones because we are making fewer calls and using more data for music and video streaming services, in addition to surfing and checking email. The bigger screens underline the importance to radio of embracing technologies such as RadioDNS to develop a hybrid content strategy.

#### 2.2 UGC & social networks

Cheap technologies are already increasing the opportunities for citizens to generate high-quality content. One of the runners taking part in the 2013 Boston marathon, Jennifer Treacy, who was wearing a helmet fitted with a video camera, captured the most valuable footage of the bomb attack. Augmented-reality glasses will

become widely available in 2014 and are likely to increase opportunities for capturing content. In order to be able to separate the news from the noise, PSM will need to invest more resources in verifying user-generated content, ensuring that it is well-sourced and supported by strong evidence. At the same time, it is important for editorial staff to make better use of social networks and to become more collaborative in producing stories.

#### 2.3 Engaging with audiences

There is evidence that so-called 'second screen' activity is providing an important boost to television. Although it is true that many people use second screens to check their email or to surf for information not related to the programme they are watching, others enjoy voting in song contests, participating in quizzes or discovering complementary information to increase their understanding of complex issues, or to enhance their enjoyment of a drama show. Some degree of ownership of second-screen apps will be crucial if broadcasters want to maintain any degree of control over their content. Of course, they may decide to be happy if people are interacting and playing with their content in ways they had not foreseen, but this may mean relinquishing all control.

The internet also makes it easier to reach younger audiences. Mature audiences generally prefer the in-depth and longer form content available on general interest broadcast channels. Younger viewers and listeners usually prefer watching short video clips on social networks such as YouTube, Vine, Tout or Keek. This gives broadcasters the opportunity to reach young people with bite-sized content for mobile devices. Examples of bite-

# ANNEXES

sized content include nowthisisnews.com (e.g. “Lance Armstrong’s Oprah confession in 160 seconds. Pretend you saw all 90 minutes by watching this.”). In the UK, ITV is providing a similar service on its website. Swedish Radio has produced 4-minute comedy clips and other speech radio for the Spotify platform.

There is some evidence that YouTube and other social networks, together with the growth of streaming music services, such as Spotify and Deezer, are having an impact on youth listening. The launch of iTunes Radio is expected to intensify this situation. A survey by RAJAR in the UK suggests that people listen less to radio after having experienced streaming music services. There is also further evidence of the continued declining role of radio in music discovery.

Some broadcasters are putting a lot of effort into engaging with viewers on social networks. For example, a social marketing campaign resulted in the BBC production of *The Voice* attracting 200,000 Twitter followers before the programme had even aired.

## 3. STRATEGIC CHOICES & DILEMMAS

### 3.1 Fiction

The fact that high-quality drama is now available on a range of platforms, including YouTube and Netflix, has led some to question whether PSM should withdraw from this genre to focus on more distinctive programming, such as high-quality news, investigative journalism, and more local or regional

coverage. The answer is likely to be dictated by cost rather than the inability to compete. The lavishly praised series *House of Cards* shown on Netflix, for example, was a remake of a BBC drama. DR’s *The Killing* and *Borgen* show that even a small, non-English-speaking broadcaster can compete with the best in the world, while ITV’s *Downton Abbey* has had a more profound impact on popular culture and enjoyed greater success than any original drama produced by one of the new players.

### 3.2 Sport

Something similar is happening in the world of sport, where non-traditional players, including network service providers, are competing for rights and driving costs ever higher. Many PSM are under public pressure not to invest huge sums of money in acquiring top sports properties. There is a widespread popular view that such investments should not be made using public funds, but should rather be left to the commercial sector.

Some experts have suggested a PSM content strategy in which the number of productions would be limited, but would place an emphasis on quality and be chosen carefully for their impact on audiences: “fewer, bigger, better”. Many PSM might even be forced into adopting this strategy when they no longer have any funds available for niche sports after acquiring exclusive, top events. However, this places companies in another dilemma: how to offer a variety of sports when the lion’s share of budgets goes towards covering a couple of major events? A diversity strategy doesn’t come without problems either. In some countries it has proved difficult to find airtime for minor sports and public interest is marginal.

It makes little sense to face these challenges alone. The public service community is stronger than individual broadcasters. EBU membership provides financial guarantees, central access to the largest, pan-European free-to-air platform and eliminates expensive intermediaries. The community shares common values and is more interested in sport itself than in sport as a commercial product. The EBU member community has a strong track record as a reliable partner to all the major sport federations.

### 3.3 Multiplatform News

In the connected society, users must be able to access the latest news when they want and on any device. Users are increasingly turning to smartphones and tablets to hear, see or read the latest news. While the larger screen size makes tablets especially suitable for video content, the challenge for radio is to reach listeners via smartphone apps, of which there are many examples. Amid concerns about data capping, it is of critical importance that radio stations persuade manufacturers to include broadcast radio chips in their devices to encourage users to listen more.

Several broadcasters have developed widgets to make it easy for newspapers or bloggers to embed audio and/or video news content on their websites. Such a strategy not only extends reach, but may also help to improve relations with publishers.

A successful multiplatform strategy requires not only cultural change, but also a radical re-think of newsgathering and news output. It is vital for online producers to play an active part in daily editorial meetings – not only listening, but also setting the agenda. The NOS Video First project is a good example of how one public service

# ANNEXES

organization is developing a more efficient workflow that entails updating news throughout the day, outside primetime bulletins.

### 3.4 Linear vs. on-demand viewing & listening

Although a lot of fiction is now consumed on demand, linear viewing has been growing in recent years. The average viewer watches around four hours a day in the Big 5 European nations (France, Germany, Italy, Spain and the UK) and even more in the USA, according to figures from IHS Screen Digest. These figures are expected to grow to new record-breaking highs. At the same time, non-linear viewing is also likely to grow. According to IHS Screen Digest, non-linear viewing will account for one-fifth of total viewing time in at least one of the Big 5 countries by 2020. On-demand content has been less successful on radio and currently only accounts for around 1% of listening, although this figure is expected to increase.

### 3.5 Partnerships

A major strategic decision will be whether to confront all of these challenges alone, or to seek allies by forging partnerships with commercial broadcasters or non-traditional content providers. In Belgium, the Dutch-language broadcaster, VRT, has developed a joint online video player with commercial partners. In the UK, the BBC, Global Radio, Guardian Media Group, Absolute Radio and RadioCentre created Radioplayer to serve radio audiences by making all radio content available on the same player. Following its success, Radioplayer has been exported to other countries. Some broadcasters, including BBC and SR, have made their news content easy for newspapers and others to embed on their websites,

both as a way of placating some of their fiercest critics and to extend their reach.

Broadcasters must decide whether to compete against streaming music services or to collaborate with them. Some broadcasters see collaboration as a marketing opportunity and a way of attracting elusive younger listeners to radio. Examples of collaboration include sharing playlists, embedding limited amounts of original content in streaming sites and even sharing demographic data.

### 3.6 Music

The way forward for radio may be to focus on the “collective experience” with the personal involvement of DJs. This is radio’s core strength.

More than ever before, broadcasters need to deliver quality content and allow listeners to easily share this content and recommend it to their friends. They need to develop new ways of engaging with listeners and give them opportunities to interact via social media and develop new ways for listeners to contribute information and to give their opinion. The focus should be on simplicity, reliability and easy and instant access of content.

relevance and their legitimacy. As for the content that PSM create and the rights they acquire, future activity is likely to be dictated by costs. A possible strategy could be to put quality first and to do fewer things better.

## 4. CONCLUSIONS

More organizations and people than ever before are actively creating content, but how will audiences know who to trust? PSM may choose to become islands of sanity in an information and media jungle, or they may decide to assume the role of curators, or trusted guides. This could ensure both their

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## EXPERTS GROUP II DISTRIBUTION, TECHNOLOGY & AUDIENCES

### WHAT IS THE PROBLEM WE FACE, AND WHAT IS THE SOLUTION?

The problem is that technology continuously evolves, and this changes the world around us. Whether we like it or not, society and its needs are affected by technology. The trajectories can change gradually or suddenly. Who would have predicted the success of the iPad or Twitter five years ago? Who foresaw that the gestation of HDTV would take 20 years? There are clues, but no certain road ahead.

The solution is to constantly follow and understand what is happening in the world, be able to adapt your organization and its output to the changes, change the tools we use to fulfil our mission, and shape the future ourselves with ideas and innovation. Members need to arrange their organizations to enable this. EBU members need to work together, and share what we know and learn, to try to overcome the financial restrictions of PSM.

### THE WORLD OF 2020

*Two things – large high-quality thin lightweight TV screens and tablets – will become the tools with which public service media providers reach their television audience in 2020.*

For the TV service, broadcasters will have two directions to exploit. The first is towards better technical

quality. Technology is bringing gradual increases in image quality. The greater the technical quality, the more involved the viewer feels, and the longer he or she will watch a given programme. Better technical quality is a win-win situation for broadcasters, set-makers, and viewers, and is an inevitable trend.

The second direction is towards adding what the industry terms features. These can be used to augment the broadcast, or possibly substitute it. The main features arise from the technology of hybrid broadcasting – connecting the internet to the television set. This can be used for programme guides, auxiliary information about the programme, or video-on-demand, including catch-up TV. Features can also be provided for tablets, so the viewer's experience can be via the tablet alone, or a combination of a TV programme/service and the tablet, the latter offering multimedia and social networking. The lounge viewing experience for many people will become the simultaneous use of the large screen and the lap-mounted tablet, but viewers will also use tablets at any time, and in any room, to watch TV programmes or other web content, whenever convenient for them in private. The content choice the viewer makes will be influenced by recommendations (suggestions about what to watch or listen to) from a variety of sources. Intermediate size TVs will gradually become less popular.

For Radio, FM remains the most-used delivery platform in Europe. Live radio is also popular on the internet where the producers are able to swiftly apply possibilities of different (social) platforms in an interactive mix. As radio channels are available on different platforms (also connected TVs) their audience can stay in touch during the

day with the DJ or reporter in the field. But unless there are, in a given country, national policies about a digital radio switchover, the main delivery will stay analogue.

It may be (and we may hope that it is so) that digital broadcast radio capability will be included in some tablets and smartphones, and we may therefore see a progressively greater use of digital broadcast radio. The inclusion of FM radio in mobile phones in India created an explosion of radio broadcasting there, and the same effect might happen in Europe.

### WILL WIRELESS BROADBAND INTERNET EVER BECOME A SUBSTITUTE FOR BROADCASTING?

In terms of providing universal coverage that is freely available to all, the answer is 'no', but it will be attractive to many users, and for some users the answer will be 'yes'. Public service media will provide both broadcasting (using whatever broadcast spectrum is left nationally) and broadband services. Much new media software and ideas for innovative applications look set to continue to come from the United States and virtually all higher quality hardware will come from the Far East.

In programme production, broadcasters will increasingly change to systems that use information technology, and they will find they are confronted with a tsunami of data to be stored, as IT

# ANNEXES

programme production takes hold, and producers demand that every scrap of shot material – be it even UHDTV – is kept and stored. Broadcasters will use external internet clouds to help them with programme production and delivery. Slowly but surely all television production will be HDTV and this will become the only type of production equipment available. HDTV will be superseded by UHDTV in the next few decades. Increasingly, broadcasters that are responsible for TV, web, and radio services will combine their technical infrastructure for news.

The experts group has put together a substantial series of about 50 recommendations. These include the encouragement to develop a company-wide strategy road map that encompasses programme-making and delivery, for all delivery platforms, and adapts to the evolving media environment. They also include encouragement to collaborate more with other EBU Members, to share knowledge and experience of working in a current climate of diminishing PSM funding, while adding new services and more internet distribution infrastructure.

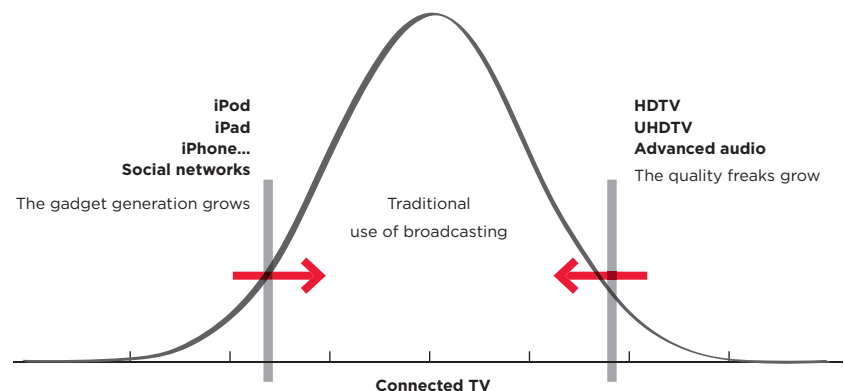
The group also recommends that a successful migration to DAB+ will require the broadcaster to persuade the national government of the need for a national governmental plan for radio. Digital radio broadcasting will only be successful if there is a national mandatory plan for analogue switchover (as for TV).

In summary, the underlying trend for public service media between now and 2020 will be the increasing use of the internet as one of the tools to reach our audience and, at the same time, higher image quality options will become available, which will

increase emotional involvement and do justice to larger TV sets. This will be accompanied by necessary changes to programme production. Radio will continue as a staple of the public, but the speed of the transition to digital radio, and its potential partner internet radio, is difficult to predict.

Finally, the experts group recalls that the best way to predict the future is to make it yourself. With bold and adventurous ideas between now and 2020, we can do so.

## THE NEW NORMAL



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## EXPERTS GROUP III GOVERNANCE, ROLE, REMIT & FUNDING

The three issues of Role and Remit, Governance, and Funding are fundamental to the legitimacy and sustainability of public service media. To win these battles, PSM will have to show real vigour in arguing for, and justifying, a renewed remit. They will need real determination to secure political independence, balanced by stronger accountability to audiences and citizens, and a deep-seated commitment to openness and transparency. They will also need a forward-facing approach to future funding, including being open to replacing technology-specific modes of public funding. And their management will need to be prepared to put funding where it will most benefit audiences.

The context within which these battles must be won is one where PSM face at least three very significant challenges. While broadcasting as a delivery mechanism remains strong, technology and audience behaviour have fed a desire among audiences for new opportunities to access content and new types of content more effectively tailored to their interests. At the same time, audiences as citizens want the public service to be more responsive and focus on meeting their needs, whereas institutions, and especially public sector institutions, are widely viewed as old-fashioned, slow and unresponsive, especially when compared to flexible new media services. Funding models are at best vulnerable to market and political pressure; at worst, they may be linked to particular transmission technologies, which could leave them stranded yet facing the prospect of a vigorous public debate about the extent to which they should retain all the funding in future, especially if it is refocused on a broader range of media.

To meet these challenges, EG III has developed a number of recommendations, supported by a wide range of case studies and examples of best practice, to help PSMs develop the arguments and effect real and substantive change and reform. These recommendations seek to strike a balance between core principles and the discretion needed for PSMs facing very different political and market conditions. Best practice examples should give guidance to organizations both big and small, while the identification of common principles will bolster the arguments PSMs can use to secure their future resources and independence. The final report will contain as an annex the full EGIII report, including all EGIII recommendations.

Given that these issues depend, to an even greater extent than the issues considered by the other two experts groups, on gaining the consent of politicians, the recommendations strike a balance between those actions necessary to win the argument externally and inspire action or support from the state and other EU institutions and those actions wholly within the grasp of PSM management to bolster their position and prepare them for the battles ahead.

For Role and Remit, there is a balance between external and internal priorities. To win the external argument for broadening the remit to include on-line and innovative services, PSMs must demonstrate that they have well grounded justifications for including these new services, and the staff and skills to provide them. But even more than that, a new spirit of partnership and collaboration is likely to be needed if PSMs are to ensure the best possible range of services for audiences and citizens. Examples of best practice

include working with market players to build new open platforms, while mutually beneficial arrangements with publishers may also be explored. Discussion of governance is often limited to a narrow examination of the formal rules around supervisory bodies and appointment processes. But in fact, as the recent CoE Recommendation makes clear, it is a much broader issue, involving all the ways in which PSM bolster their independence and legitimacy. External requirements for independence are crucial: the boundary between the state and the editorial freedom of PSM needs constant vigilance, and every effort needs to be made to strengthen these protections. However, many of the recommendations here are about organizational transformation: at a time when institutions themselves are mistrusted, the challenge is for PSMs to demonstrate, in both their organization and their culture, that they are outward-facing, responsive and open organizations where the interests of the audience come first and foremost.

The recommendations regarding funding focus on winning the eternal external argument. Public funding is an increasing proportion of revenue for EBU Members – unsurprisingly, perhaps, given the depth of the recession and its impact on advertising, yet all the more so because of pressure on politicians from competitors seeking to reduce the commercial activities of PSM. While overall funding has fallen in real terms, the proportionally fastest growing element of overall PSM revenue is derived from direct funding by the state, although a licence fee model has been increasing – with obvious implications for the risk of political motivation behind how the funds are allocated. Alongside a welcome move

# ANNEXES

to ensure that direct contribution models of public funding (such as the licence fee) are reformed in a socially fair and technology-neutral way, this requires renewed energy in the debate about stabilizing and future-proofing public funding. However, many PSMs are dependent on more than just public funding for their revenues. So arguments need to be developed for these PSMs to have the opportunity to seek commercial funding that is tailored to match their new, on-line remit, so that market-oriented opportunities to fund services in support of the public service remit are within their scope.

Taken together, these recommendations are a mix of the practical – in terms of internal reform; cultural – in terms of remoulding the approach; and advocacy – for a new role, and the funding to support it. The Experts Group believes that these recommendations go with the grain of both internal and external arguments about the enduring role of PSM, and submits them to the Executive Board for consideration.

# ANNEXES

## CONTENT & AUDIENCES - EXPERTS GROUP I

### Charlie Beckett (Chair)

Dieter Boen (VRT)	Sven Lescuyer (FT)
Asun Gomez Bueno (RTVE)	Josef Lusser (ORF)
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Arild Hellgren (NRK)	Gerard van den Broek (NOS)
Frans Jennekens (NTR)	Jan Westerhof (NPO)
Glen Killanne (RTE)	Jan Weyrauch (ARD)
Christa Kurzweil (ZDF)	Patrick Younge (BBC)
Mike Mullane (EBU)	

## DISTRIBUTION, TECHNOLOGY & AUDIENCES - EXPERTS GROUP II

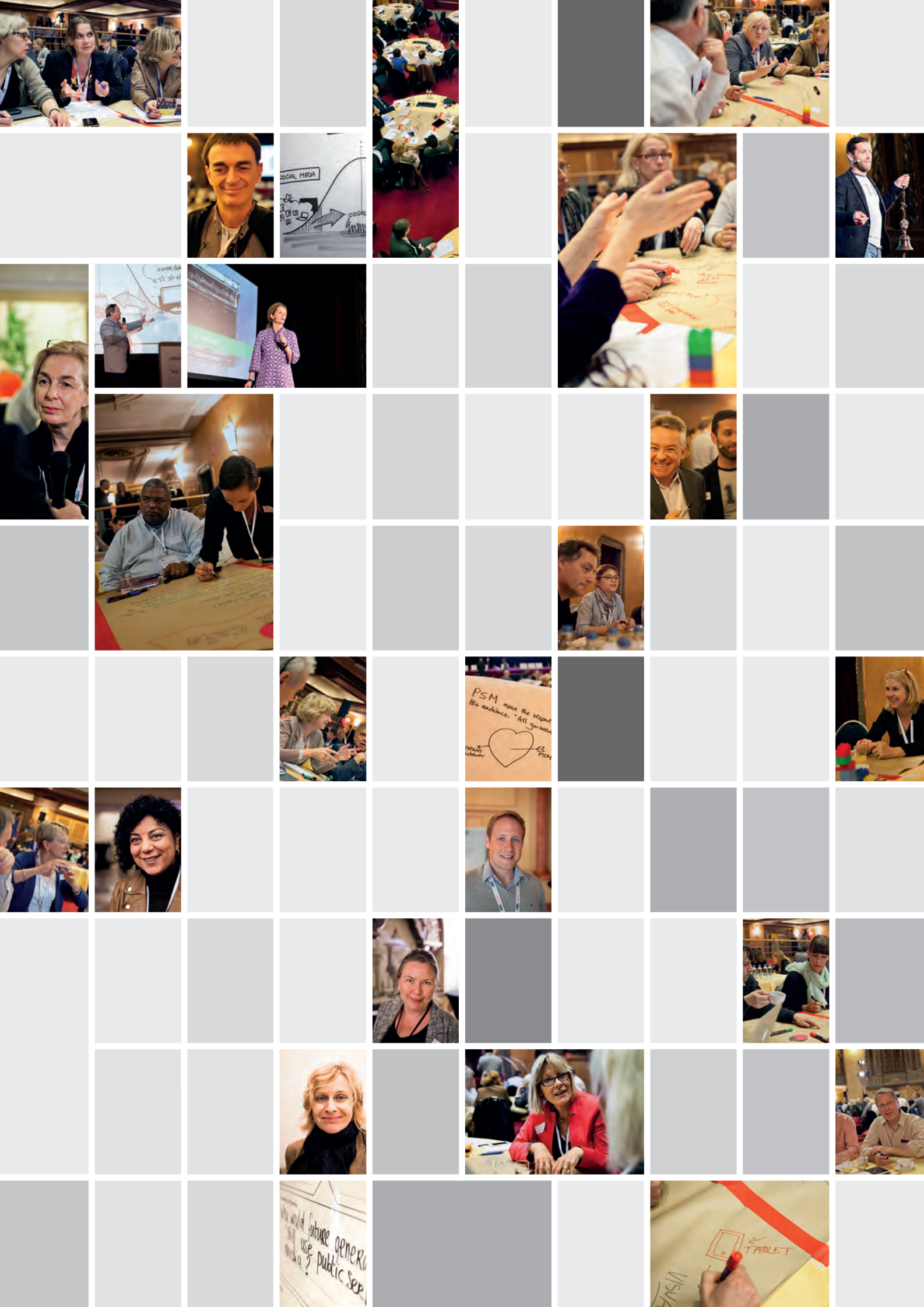
### David Wood (Chair)

Benoit Balon Perin (RTBF)	Bram Tullemans (EBU)
Lene Einang Flach (NRK)	Franz Manola (ORF)
Sylvie Courbarien Le Galle (FT)	Gunilla Ohls (YLE)
Andrea Fabiano (RAI)	Thomas Saner (SRG)
Robert Foster (BBC)	Marc Savary (SSR)
Christoffer Godt-Hansen (DR)	Eric Scherer (FT)
Francis Goffin (RTBF)	Lut Vercruyse / Jan Bruyneel (VRT)
Tomas Lindhe (SVT)	Egon Verharen (NPO)
Klaus Illgner-Fehn (ARD/IRT)	Peter Weeber (ZDF)
Khalid Hadadi (Channel 4)	Daniel Wilson (BBC)
Kazimir Bacic (HRT)	

## GOVERNANCE, ROLE, REMIT & FUNDING - EXPERTS GROUP III

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Jürgen Burggraf (ARD)	Ekaterina Orlova (RTR)
Jean Copsidas (FT)	Jan Petersson (SR)
Karen Donders (VRT)	Gunilla Ohls (YLE)
Morana Kasapovic (HRTV)	Klaus Unterberger (ORF)
Simona Martorelli (RAI)	Petr Vitek (CT)
Zoran Mihajlovic (HRTR)	Viktor von Oertzen, (ARD)
Olav A. Nyhus (NRK)	Krzysztof Wojciechowski (PRT, TVP)
Michael Wagner (EBU)	



# VISION2020

AN EBU PROJECT

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