

EBU

OPERATING EUROVISION AND EURORADIO

PUBLIC SERVICE MEDIA **CONTRIBUTION TO SOCIETY**

DECEMBER 2015



PUBLIC SERVICE MEDIA CONTRIBUTION TO SOCIETY

PRODUCED BY THE MEDIA INTELLIGENCE SERVICE (MIS) OF THE EUROPEAN BROADCASTING UNION

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MEDIA INTELLIGENCE SERVICE

The EBU's Media Intelligence Service (MIS) provides your broadcasting organization with the latest market data, research and analysis needed to plan your future strategies and stay ahead of the game.

Our experts cover a broad range of topics, including TV and radio trends, new media developments, market structure and concentration, funding and public policy issues.

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FOREWORD

Making the case for public service media (PSM) and supporting Members in crisis situations are key objectives of the European Broadcasting Union. As a professional association, we strive to maximize the benefits of sharing expertise as well as offer our Members an international perspective on the issues they face. While the differences between countries and Members make it impossible to define one-size-fits-all solutions, there are common challenges to address and lessons to share. The EBU is ready to facilitate that exchange of knowledge, and carry out suitable research to offer operational frameworks, guidelines and recommendations.

In the current context of increasing competition, internationalization and fragmentation, public service media face new challenges to remain relevant, prominent and findable. Society and its citizens are changing, and so are their needs and expectations of media. Their consumption habits are evolving beyond traditional television viewing and radio listening as they rapidly embrace new media. In parallel, the ongoing economic crisis and the waning trust in public institutions across Europe have reinforced those contesting the remit, role and legitimacy of PSM and demanding a review of their activities and budgets.

In response to this, in January 2015 the EBU launched the PSM Contribution to Society project. Run by the Media Intelligence Service (MIS), its main goal is to define a conceptual and operational

framework that enables EBU Members to assess their contribution to society and communicate about it. The contribution to society concept includes not only PSM output and reach but also their impact on other areas of activity as well as the benefits for the citizens. We are convinced that it will become an essential element of any PSM advocacy strategy.

The findings compiled in this report are the result of a strong collaborative effort that has brought together a significant number of people from the EBU, its Members and academia during an entire year. Initially, an advisory panel of EBU Members helped the project management team to set the boundaries and priorities of the research, and they also contributed to it by sharing their own experiences in several workshops. Additionally, the Hans-Bredow-Institute for media research at the University of Hamburg provided its academic perspective and advice. We have also benefited from the valuable input and feedback of those who took part in our awareness activities or attended our EBU Knowledge Exchange event. We are therefore confident that this report takes into account the diversity of PSM across Europe and of the EBU membership.

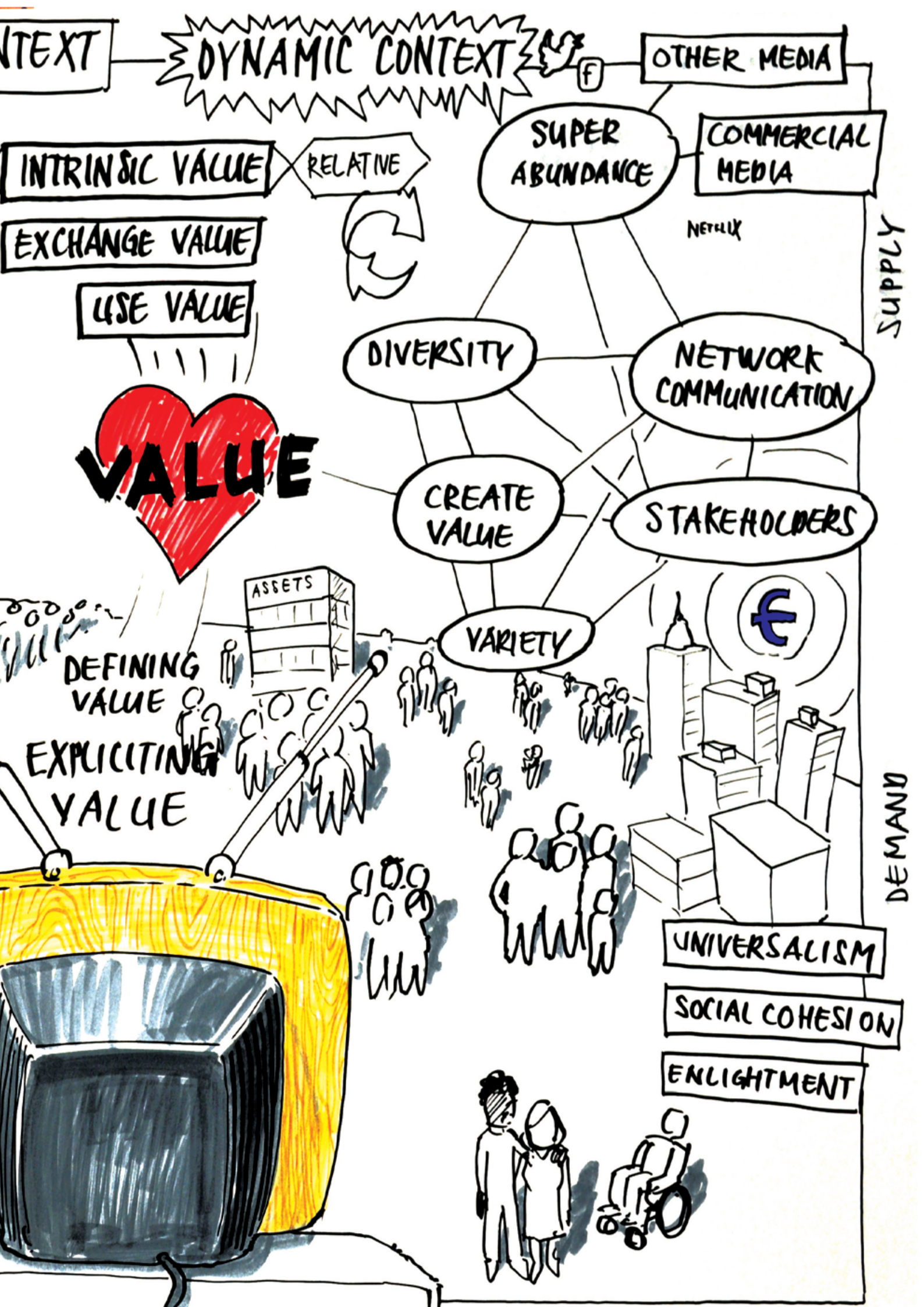
First of all, research focused on identifying the main vectors of change on the media market and the resulting challenges for EBU Members. Following that context analysis, the aim was to understand and classify the current issues surrounding the legitimacy of

public service in the media sector, which is directly related to the assessment and perception of the value and benefits delivered by PSM organizations.

The project explored potential methodologies and tools for evaluating PSM performance, going beyond the traditional measurement and reporting approaches already applied, and focusing on impact assessment. Special attention was paid to mapping the areas where PSM can deliver significant value, including the economy, technology, culture and democracy. In addition, we also addressed the need for PSM to improve relations with their stakeholders along with their public communication techniques. In this connection, we provide practical recommendations about how to build new convincing and meaningful narratives about the value of public service media and their contribution to society.

Our aim has been to define and promote a new mindset and to deliver a framework – including tools, guidelines and best practices – that will help EBU Members design and implement their own strategies for assessing and communicating their contribution to society. We are convinced that this is a crucial step in maintaining the legitimacy of PSM and reinforcing their social, market and political support, in other words, for them to remain relevant with a secure future.

Dr Roberto Suárez Candel
Head of the Media Intelligence Service



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1. THE CONTEXT

GROWING COMPLEXITY



THE SPEED OF CHANGE AND THE DISRUPTION CAPACITY OF NEW PLAYERS IS FORCING THE REVIEW OF WELL-ESTABLISHED BUSINESS MODELS, INCLUDING PSM



Driven by technological innovation and the deployment of broadband networks, the media are currently undergoing many different changes that are making it an increasingly complex sector.

The entire value chain, from content production to distribution and consumption, is being altered by new processes and emerging players. The boundaries of traditional media are gradually dissolving, giving rise to an environment in which the life cycles of content accelerate and multiply,

abundance appears unlimited, and new platforms and providers are emerging. Frontiers between sectors and countries are also becoming blurred, and national markets are now more interdependent than ever before.

Such a context, together with the speed of change and the disruption capacity of external players, is forcing well-established business models to be revised. Public service media are not an exception and cannot ignore the following vectors of change.

INTERNATIONALIZATION

From the growth in the number of TV and radio services as well as online and on-demand audiovisual offers, to the decline of the relative importance of European companies in their national markets or the international arena, there are many indications of increasing internationalization in the media business. This means that national companies, public and commercial, compete with global players that are able to establish economies of scale, diversify their investments and risks, and realize content and financial synergies across markets. Similarly, European media conglomerates are expanding their footprint across the continent. As a result, national broadcasters, and especially public service media, which are limited to national territories, find themselves in a less competitive position with regard to their access to financial resources and talent. Their capability to produce content as well as their opportunities to acquire valuable broadcasting rights are also compromised. At the same time, internationalization fosters the gradual propagation of new services, platforms and content catalogues from market to market, increasing competition for users' attention and budgets. As a result, the visibility and sustainability of national players, and therefore the national audiovisual industry, is endangered.

MARKET CONSOLIDATION

Alongside internationalization, vertical and horizontal concentration are resulting in more consolidated markets. While technological innovation, digitization and the development of the internet promised easier and more democratic access to the media business, reality has evolved to some extent in the opposite direction. Nowadays, with the blurring of borders between business sectors, big corporations are continuously expanding their fields of activity and are eagerly positioning themselves across the entire value chain. As a result, the diversity enabled



by the abundant offer is in some markets just an illusion when actually the media arena is controlled by a handful of companies. In addition, complex ownership structures reduce transparency, making it almost impossible to find out who holds the business and has editorial control of many media outlets. In that context, market entry barriers are still high for newcomers, and traditional broadcasters, public and commercial, face an increasing amount of obstacles to remain competitive. While media and competition authorities try to address these issues, the length of regulatory or legal processes jeopardizes their effectiveness and the damage caused cannot be easily repaired.

NEW PLAYERS AND NEW GATEKEEPERS

Technical convergence and internationalization, alongside sustained growth in media consumption, and the possibility of operating in expanding markets, have attracted greater interest in the media from companies in other sectors. Besides financial investors, companies from adjacent areas, such as telecommunications, device manufacturing, publishing or internet services, see audiovisual services as a natural way to expand their activities and to better control or improve the monetization of their core activities. Thanks to their greater financial resources, they are easily able to acquire existing companies and talent, or launch new services that directly compete with

traditional broadcasters. While this is perfectly legitimate, it should not be ignored that in many cases, due to their location or business definition, these new players do not operate within the same legal framework. This results in a clear competitive disadvantage for national broadcasters, public or commercial, and poses a threat to the sustainability of national media systems and the related industry.

Additionally, equipment manufacturers and platform operators are becoming strong gatekeepers owing to the increasing role of devices and access platforms as two-way intermediaries between content providers and users. They have gained substantial, if not critical, influence over technical specifications, access modes, consumption patterns and business models. This redefines the value chain of the media sector and threatens the prominence, visibility and operational models of traditional broadcasters. To some extent, there is a serious risk of the latter being made an outcast amid the increasing abundance of content providers.

FRAGMENTATION AND NEW CONSUMPTION TRENDS

The multiplication of standards, devices and distribution platforms results in greater technical fragmentation that increases development and implementation costs. Together with the speed and volatility of the markets and technology, this poses a serious threat to the viability of those services or companies that are not able to operate globally and implement economies of scope or scale. Moreover, technical fragmentation might discourage innovation at national level, due to the higher risk of a local service or solution becoming obsolete very fast or remaining marginal.

In parallel, the extent and speed of socioeconomic and cultural change in our societies result, on the one hand, in the disappearance or weakening

of traditional institutions/concepts (family, religion, politics), and on the other hand, in the proliferation of new social groups and identities with new interests and specific media needs. This is characterized by increasing complexity in the demand side of the audiovisual business, making it more difficult for public service media to fulfil their traditional functions, such as providing universal access or fostering social cohesion, and these are even called into question. However, as many of those social groups are not commercially profitable due to their size, fragmentation might at the same time become an opportunity for public service media, which may be more needed than ever before in an environment where global or international business models tend to target only mainstream and massive audiences.

Changes in society bring parallel changes in consumption trends. The appearance of new needs and consumption patterns makes it more difficult for any company to offer, at the same time, a range of services that reach large audiences and cater for increased diversity. This results in a crossroads for public service media, which are forced to redefine their scope, and reconsider what universality and public interest mean.

EVOLUTION TOWARDS A DATA PARADIGM

In the current technological context, the ability to obtain data from any activity, including media consumption, opens the door to an era where algorithms and big data processing will become essential to understand the audience and devise and market an appealing offer. This is already resulting in a change of paradigm, as media content is made available through recommendations and consumed on demand.

The challenge for traditional media companies includes not only the need to hire the right talent, such as data engineers, but also to embrace new

PSM ARE FORCED TO REDEFINE THEIR SCOPE, AND RECONSIDER WHAT UNIVERSALITY AND PUBLIC INTEREST MEAN



production and distribution strategies beyond their linear broadcasting. This will certainly require restructuring as well as staff training, which most probably will initially arouse internal resistance. However, if public service media succeed in rising to this challenge, they will not only boost their attractiveness but also better fulfil some of their functions and use their resources more efficiently.

REGULATION

Being a public policy instrument, public service media have traditionally relied on regulation, which has defined their operational conditions as well as their position and scope in the market. Frequently, measures such as must-carry obligations, allocation of spectrum or funding mechanisms have favoured the development and visibility of PSM. Nevertheless, these measures have been accompanied by requirements regarding content production and distribution, programming, coverage, and so on.

As stated before, in the current context of rapid technological innovation, internationalization and consolidation of markets, regulatory processes – national and European – tend to be too slow compared to the speed of the market. Consequently, there is a growing perception among broadcasters, even public ones, that regulation is not only

failing to address crucial issues on time, but also becoming an obstacle for their own development. The characteristic complexity of regulatory frameworks in Europe is seen as preventing European companies from following the innovation rhythm of their international competitors.

Whether this will result in a new wave of deregulation is not yet clear. Nevertheless, public service media need to be prepared to operate in a context where regulation may no longer protect their interests and position.

IMPACT ON PSM

The context of change previously described results in social and economic conditions very different from those that gave rise to public service broadcasting. Consequently, it is no surprise that the PSM concept is currently contested and under close scrutiny.

In fact, public service media have always been the subject of a lively debate. Whether because of new technology, commercial players, and business opportunities, or due to changes in the political arena, the discussion about PSM has focused on what the concept of public service means, what kind of company should deliver it, what type of programmes and services should be offered, or what operational elements are required (structure, funding, accountability).

However, given all the changes, the debate is livelier than ever. This is partly due to the fact that it is extremely focused on whether the benefits delivered by technology and the market cancel out the arguments for the legitimacy and need for PSM.

Additionally, the current economic crisis has made public service media a prime target of the austerity measures taken by national governments. This has not only resulted in a reduction in their resources,

but has somehow provided momentum for those advocating smaller PSM or their abolition altogether.

This requires PSM to follow two lines of action.

First, adapting to the new context. This involves making changes to their structure, operating conditions, and content and services. However, although important and necessary in maintaining the relevance of PSM, this challenge is neither a surprise nor the most fundamental. Facing changes has always been part of the daily routine and strategy of PSM organizations. The critical factor in this case is finding the right formula for continuing to offer a high-quality portfolio with fewer resources and in an increasingly complex environment, as described above.

The major challenge, which could become a serious threat if ignored, is PSM's legitimacy. This goes beyond the constant discussion of the *raison d'être* of public service media that is very popular in academic or legal circles. In the current context, in order to maintain or even renew their legitimacy, public service media need more than ever to demonstrate their value and the benefits they deliver to their multiple stakeholders, including not only politicians but also other market players and most importantly the citizens. Nowadays, other types of value provided by PSM (individual, use, or exchange value) need to occupy a greater place in the public discussion about their existence, role and scope. Their intrinsic or moral values, although still important, are no longer enough for them to gain the political, market and social support they need.

This project has explored the ways in which PSM could address such a complex task. As a result, we are convinced that PSM need to embrace a new mindset, the Contribution to Society mindset.

PSM NEED TO BE PREPARED TO OPERATE IN A CONTEXT WHERE REGULATION MAY NO LONGER PROTECT THEIR INTERESTS AND POSITION



2. A NEW MINDSET FOR PSM – **CONTRIBUTION TO SOCIETY**



PSM NEED AN
INSPIRING AND
MEANINGFUL
NARRATIVE ABOUT
THE VALUE THEY
DELIVER FOR THE
WHOLE OF SOCIETY



ISSUE OF LEGITIMACY

As detailed in the previous chapter, the current economic, political, technological and social characteristics of our societies are now very different from those that resulted in the creation of public service broadcasting.

Immediately after World War II, when socio-democratic ideals reached their peak in Europe, it was broadly accepted that public intervention would ensure that media would deliver positive outcomes, contributing to the economic, political and social aspects of public interest. Furthermore, avoiding the negative consequences of the recent misuse of mass media were also clear

goals. Nation states therefore became directly responsible for providing radio and television services by setting up publicly owned operators and defining their remit and goals. But in any case, European national industries were not ready to deliver all the services needed for a complex and expensive activity such as broadcasting, so public monopolies proliferated, controlling almost the whole value chain of the sector.

In addition, public service broadcasting corporations were legitimized by the concept of market failure, according to which the market is incapable of delivering all the potential benefits of



an activity or service owing to conflicts of interest among stakeholders. Among the most recurrent conflicts of interest in the broadcasting sector we can mention spectrum scarcity, which limited the number of operators that could enter the business, the difficulty in ensuring the diversity, pluralism and social representativeness of the media offer, the high entry barriers for new players, or the disproportional relationship between investment, quality, audience and economic profitability. The creation of highly regulated public service media also aimed to avoid political and commercial parallelism.

However, as a result of national and international structural and economic crises, since the late 1970s the political culture in Europe has seen socio-

democratic ideals replaced by neoliberal ones. It has been assumed that economic profitability is a necessary condition and cause of social welfare. This has implied a gradual transformation of the role of the state with regard to the delivery of merit goods and services. From being a direct provider, the state first became a market regulator, and then an enabler of private initiative.

In the media sector, public service monopolies have been abolished. The gradual commodification of media has reinforced the pre-eminence of its economic and industrial goals. Even more, the need for the media, and even their suitability, to contribute to the fulfilment of social goals have been questioned. In short, the legitimacy of public service media is strongly contested.

Such a criticism has been effectively expressed in various arguments:

- PSM legitimacy is challenged by neoliberal theses supporting the idea that the abundance of content and services, together with the choice enabled by technological innovation, empowers individuals to obtain whatever they need from the competitive and now convergent market.
- Public policy for the media and public service broadcasters are therefore considered totally unnecessary and even inappropriate, as they distort competition.
- Thanks to its self-regulation mechanisms, the market becomes the best arena for the free expression of ideas, values and interests, as it is capable of satisfying all users' needs.

PSM organizations are also strongly criticized because of their:

- Structure, described as over-sized, inefficient and poorly governed
- Accountability, seen as lacking in transparency and responsiveness to all stakeholders, especially citizens

- Funding, claimed to be disproportional to their activities as well as a major cause of market distortion
- Offer, for not being distinctive enough and often beyond the PSM remit, hindering private initiative

Finally, the most elaborate criticism brings together all these elements to directly question the real value delivered by PSM. They are accused of wasting large amounts of public resources as well as being protected by regulations that hinder the development of the national industry and, in exchange, not providing a distinctive enough offer. In fact, nowadays many commercial operators claim that they could even replace PSM, providing greater value in a faster, more dynamic and more efficient way.

All this has created a general mindset that is not at all beneficial to PSM organizations. PSM are frequently seen as an unnecessary social expense that not only does not give good value for money but also hinders competition while depriving national commercial operators of the opportunity to develop properly and maximize the value they could provide, preventing them from being competitive in the global scenario. PSM are considered a Keynesian social welfare tool that has become obsolete.

CONCEPT OF CONTRIBUTION TO SOCIETY

In order to address the scenario described above, respond to criticisms, renew their legitimacy, and bolster their political, market and social support, PSM need to craft a comprehensive set of fact-based counter-arguments. These should be well-structured and holistic, covering all the issues in a particular way, yet also building a solid and convincing ideological framework. This should result in a renewed, inspiring and meaningful narrative about the value and benefits of PSM for the whole of society.

But, at the same time, this discourse needs to be accompanied by changes in PSM corporate culture and strategies.

PSM need to urgently understand that their relevance largely depends on delivering real, tangible value. The concept of value is fairly relative, as it shaped by the consumers' perception, i.e. whether, in their eyes, that service meets a particular need. Consequently, finding out and understanding what the needs of PSM stakeholders are must be a priority.

PSM organizations therefore need to change their positioning with regard to the market and the citizens, evolving from content providers to service providers. Such a huge challenge involves:

- Redefining goals and modifying internal structures and processes accordingly
- Moving from a performance analysis based exclusively on the measurement of output to an assessment of the outcome and impact of PSM services and activities
- Overcoming a perspective that focuses PSM's efforts on merely fulfilling their legal remit, in order to adopt a new approach to the PSM mission, based on satisfying stakeholders' needs
- Embracing a new management style, in which managing the budget is not only about covering costs but also planning how to invest the available resources in order to deliver the highest value possible

Altogether, these elements make up a new mindset for PSM based on the concept of Contribution to Society, which can be defined along the following lines:

- **Contribution to society emphasizes that PSM have an impact on society**
Beyond just offering what might be regarded as quality content, and assessing its reach, PSM try to make sure that their content and additional activities actually generate an observable outcome and have a positive impact on the community they serve.

- **Contribution to society emphasizes PSM's accountability to society as a whole**

Based on the awareness of ongoing societal changes, PSM do not limit their activities to certain target groups but embrace a strategy that strengthens their links to all their stakeholders, paying special attention to society.

- **Contribution to society emphasizes the active role of PSM in stimulating public discourse on society's communication needs and how they should be satisfied**

This reinforces the role of communication as a tool to bring PSM closer to their stakeholders.

NEW MINDSET FOR PSM

This new mindset therefore requires PSM organizations and staff to consider several questions: Who are we? Why are we important? What is expected from us? How do we make a difference to everyone's lives? What are the effects of the content we offer? Besides our content, how do all the other activities we carry out have an impact on the industry, on other sectors, on society?

Bearing these questions in mind and using them to develop critical thinking about the role of PSM in society needs to be accompanied by a change of perspective in terms of accountability, which will later result in an overall transformation of the company.

Until now, most PSM organizations have applied what could be called 'backwards' accountability. Their performance assessment and reporting efforts have mainly focused on publishing annual reports, or conducting the required ex-ante evaluations. The goal was to provide their political stakeholders with the necessary data to confirm that they had fulfilled their legal remit. That was perceived as enough to ensure the continuity of their budget.

However, as PSM organizations have reported only to their political

stakeholders, who define their remit, they have tended to forget their market stakeholders and the citizens. Both are still named in the discourse about the raison d'être of PSM, but in practice, the efforts to keep them well informed about the benefits they can obtain from PSM are still insufficient. Consequently, market players and citizens do not care about PSM. As previously mentioned, the result is that PSM organizations across Europe are witnessing how their market and social support is vanishing.

To redress this trend, the contribution to society mindset advocates 'forward' accountability. While fulfilling the remit can obviously not be ignored, PSM organizations need to carry out a multidimensional analysis of the impact of their content and activities. As pointed out, this is about going beyond measuring their output and trying to find out the effects and the benefits of PSM's existence. It is about identifying the real and tangible value delivered to each and every PSM stakeholder.

We foresee that PSM organizations may initially apply this new mindset case by case, and usually in reaction to the criticism they receive. But we also expect that, if integrated into their corporate strategy, the contribution to society framework developed by this project can deliver relevant benefits:

- It will enable PSM organizations to develop a new corporate assessment strategy, which will give a more comprehensive and multidimensional picture of the value they provide, supported by strong fact-based evidence. Such a strategy should include proactive monitoring of societal needs and this will determine what is valuable.
- If that information is then fed into the decision-making and planning chain, the contribution to society approach will provide valuable input for transforming the corporate culture and the way the company is run. It will enable PSM managers to take decisions, set priorities and define

goals according to their stakeholders' needs and aim to satisfy them. As a result, PSM content and services will become more relevant and valuable.

- It will force PSM organizations to become more proactive in their public communication and more transparent. Both of which will support their legitimacy. Besides, more evidence and better arguments will enable them to construct not only convincing but also meaningful narratives about the value delivered by PSM. This will be essential in building the case for PSM.

If such a mindset is adopted and the organization transformed, the concept of public service media will become more flexible, more responsive to the needs of society, and adapted to changes in the media sector. This will make PSM more relevant and sustainable.

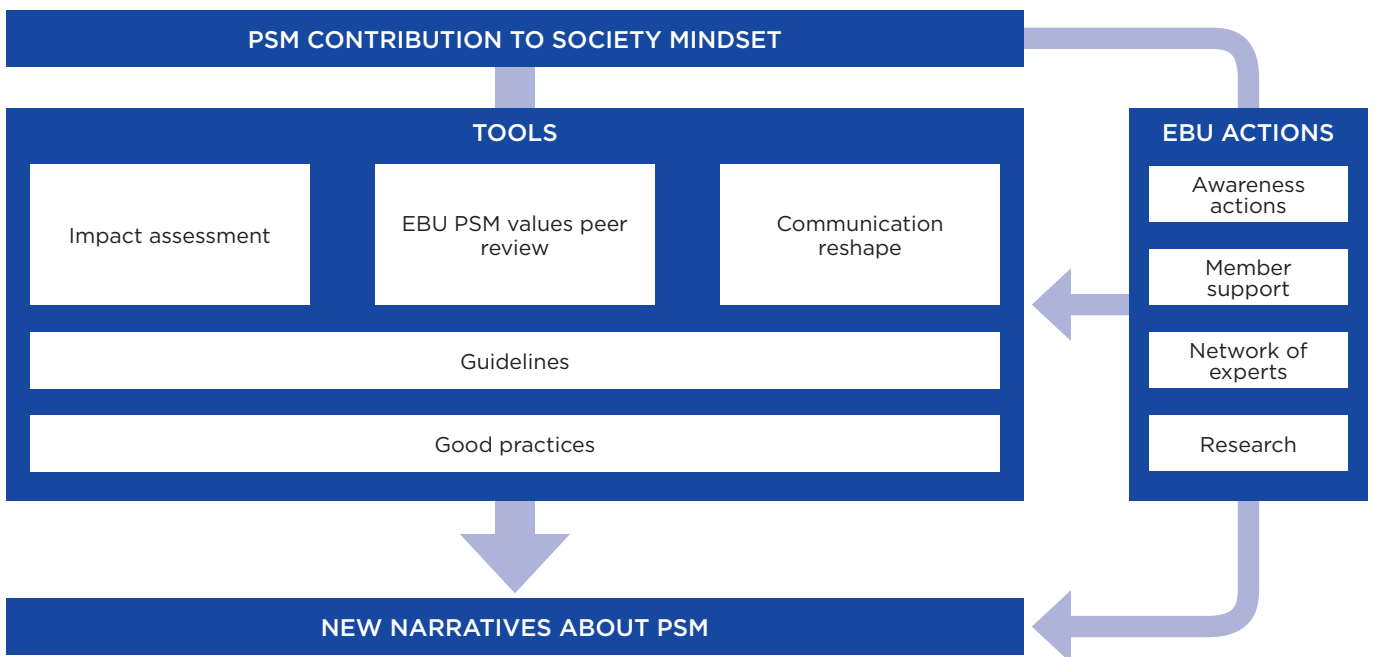
PSM CONTRIBUTION TO SOCIETY FRAMEWORK

The PSM contribution to society framework contains all those concepts, ideas, tools, information and actions that EBU Members could use to try and change their assessment, accountability and communication strategies in order to demonstrate the value they deliver to society as a whole.

Taking into account the variety of problems and challenges faced by the EBU membership and described in this report, we do not aim to offer a single solution or action model. Consequently, the concept of framework has been chosen because it provides enough flexibility and adaptability and users can decide what elements to adopt when tailoring their own solution to suit their particular needs and resources and taking account of the context in which they operate.

FORWARD ACCOUNTABILITY IMPLIES ADDRESSING EACH AND EVERY PSM STAKEHOLDER

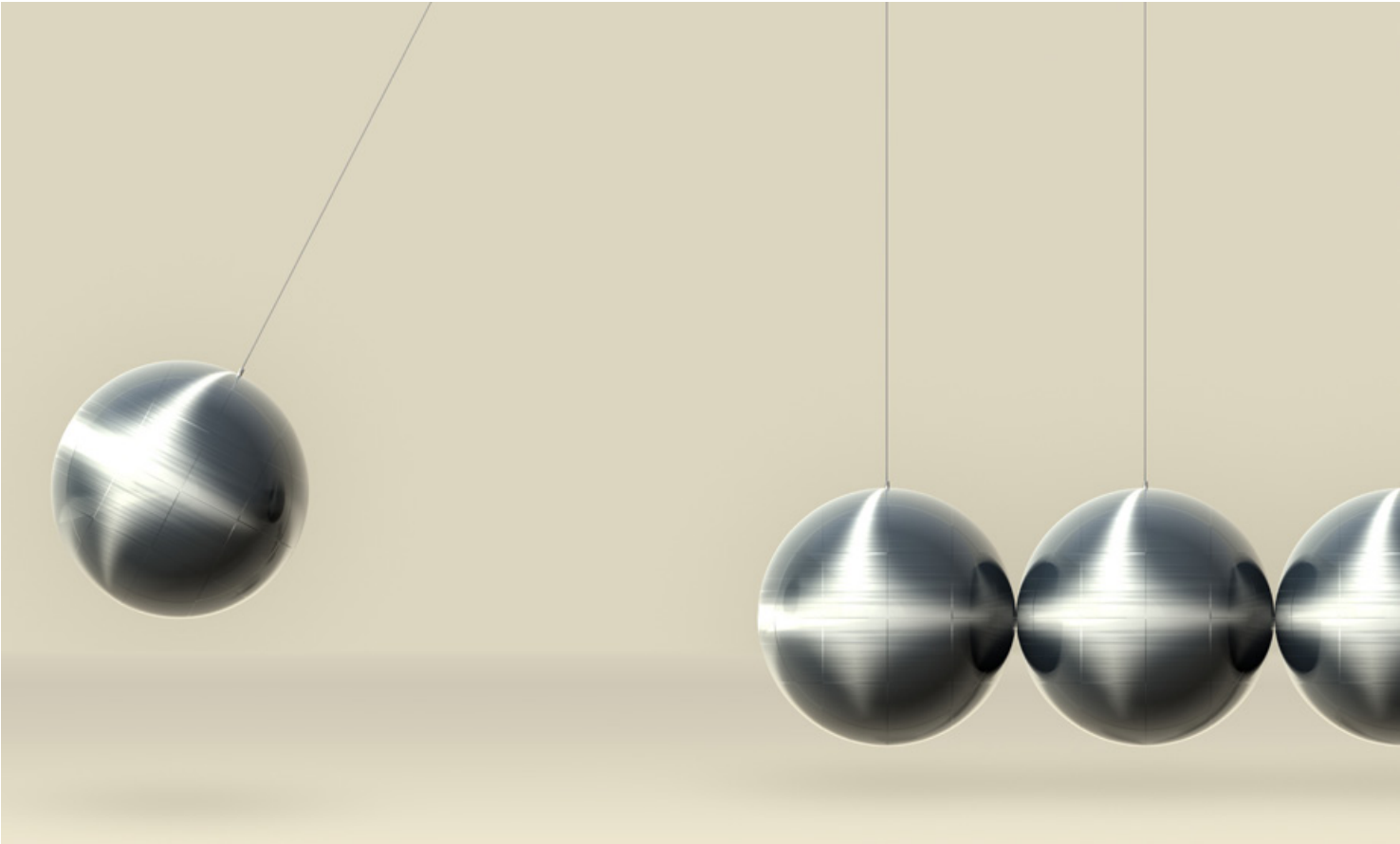
CONTRIBUTION TO SOCIETY FRAMEWORK



Each of these tools and actions are described in the following chapters.

3. TOOLS

IMPACT ASSESSMENT

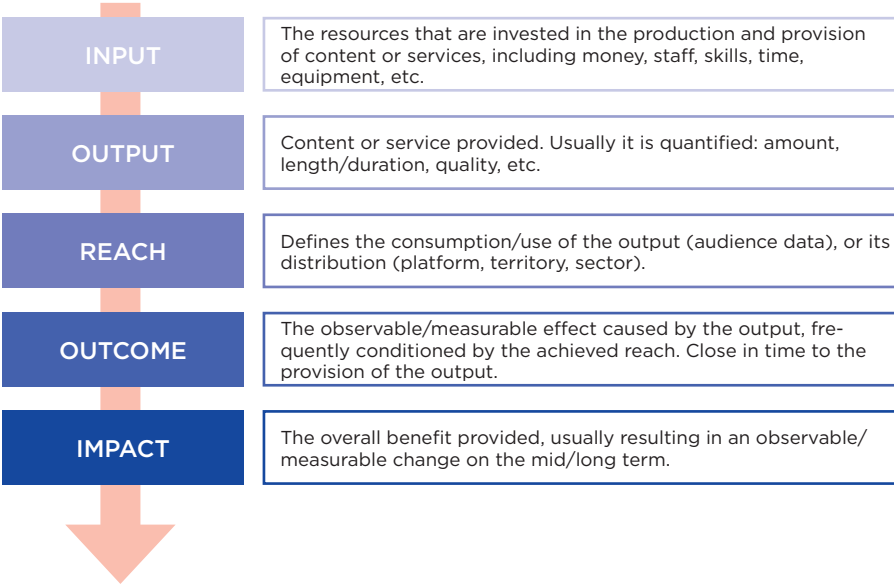



WHAT IS AN IMPACT ASSESSMENT?

An impact assessment is a tool that can be used to determine the value delivered by PSM organizations. It analyses how the output of a certain activity generates an observable effect (outcome), and how the latter results, in the medium or long term, in a significant change (impact).

Impact assessments analyse the following elements:

FROM INPUT TO IMPACT: ELEMENTS INCLUDED IN THE IMPACT ASSESSMENT METHODOLOGY





IMPACT
ASSESSMENT IS
A CRUCIAL TOOL
TO DEMONSTRATE
PSM'S VALUE IN
A CLEAR AND
CONVINCING WAY



with the results of social programmes and charity events. The result has gradually been to provide additional information beyond output and reach, focusing on the benefits delivered. Yet this approach has not yet been consolidated, and media companies, particularly public service media organizations, are far behind the value assessment and reporting practices in other sectors.

Impact assessment has become especially relevant to the investment sector and non-profit organizations. Even cultural institutions, such as libraries, museums, or theatres, or the sports sector are using it intensively. The reason for these organizations to use impact assessment is that this methodology enables them to demonstrate their value in a clear and convincing way to raise funds, support or engagement. Their strategies have prioritized a better knowledge of their stakeholders and their needs, which define what is valuable for them. Adapting to the changing reality is an important part of their strategies, and impact assessment is a very suitable tool for this.

In the case of public service media, as mentioned in the previous chapters of this report, the 'backwards' accountability tradition has not encouraged impact assessments. Reporting on output has been generally enough to secure the budget. However, as a result of increasing challenges to the legitimacy of PSM, impact assessments are likely to become an essential tool of the PSM Contribution to Society framework proposed here.

Some powerful media conglomerates, such as RTL or Sky, are already using impact assessment to create narratives about the value they deliver to society, going beyond their own economic profitability. As a result, these commercial players are claiming to be first-class providers of social benefits and value. This of course has a negative impact on the public image of PSM.

It is, however, important to bear in mind that it is not always possible to establish direct and unique causality between input, output, outcome and their final impact. As contextual variables also have a strong influence, the impact frequently results from multiple causes.

Nevertheless, the impact assessment methodology is robust enough to allow us to attribute the contribution of an agent to the impact identified. To achieve this, the analysis must always be based on strong factual evidence.

There are various ways of carrying out impact assessments. Some of the most recognized are:

- Social accounting
- Social impact assessment
- Economic impact assessment

- IRIS - Impact reporting and investment standards
- SROI - Social return on investment

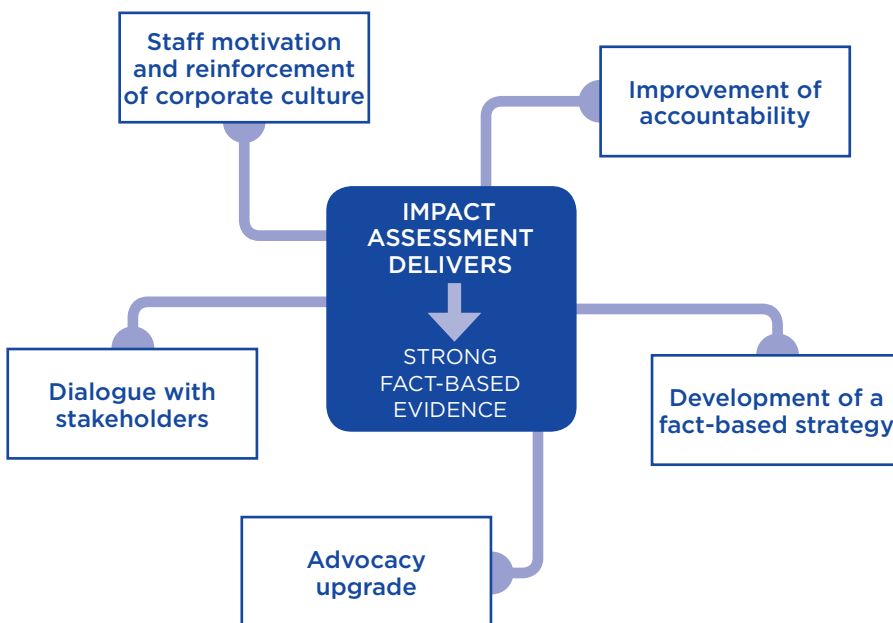
Each of these offer different solutions that determine their suitability for a particular sector of activity.

In the media sector, the traditional accountability of public and commercial operators has not been so focused on identifying the value delivered as in other sectors. Until now, media companies have mostly relied on their traditional annual reports, which include data about the use of resources as well as their output and reach. However, the growing popularity of corporate social responsibility has resulted in the addition of new analyses to these reports, including information about staff and environmental policies together

BENEFITS

Owing to their complex, multidimensional structure, impact assessments deliver multiple benefits:

POSITIVE OUTCOMES OF IMPACT ASSESSMENT



- Improvement of accountability

An impact assessment results in a substantial volume of data on the organization's performance and facilitates connections between the output and outcomes/impact. The first benefit is strong fact-based evidence about both the value delivered by PSM organizations beyond their output and their impact on certain sectors of society. Such information can be extremely valuable for enhanced reports during accountability processes, which could result in better perception by stakeholders and reinforce their support. Overall, impact assessment can change how accountability is perceived and implemented, turning the in-house monitoring that it requires into a learning opportunity.

- Development of a fact-based strategy

The data obtained and the connections established between input, actions, output, outcome and impact are essential to gain a better picture of the organization's performance and assess extent to which the strategy achieved its goals. If the information is properly analysed and fed into the company's decision-making chain or strategy, it will help to identify inefficiencies so that processes can be improved. In addition, the knowledge can help set new goals, priorities and action plans based on strong evidence. Developing such a fact-based strategy should result in more relevant and valuable content and services to meet the needs of PSM stakeholders.

- Advocacy upgrade

One of the main reasons for adopting the PSM Contribution to Society mindset and carrying out an impact assessment is to obtain additional facts and arguments to construct new, stronger narratives about PSM. These are necessary to build a more understandable, appealing and compelling case for PSM.

- Dialogue with stakeholders

Impact assessments involve mapping the network of PSM stakeholders and identifying their needs. These stakeholders must then provide data or opinions about how satisfied they are and how they perceive the service. This provides an opportunity for a new dialogue with them, focused on their requirements. Nevertheless, as a dialogue is a two-way exchange of information, this is also an opportunity to promote the relevance of PSM services, helping stakeholders to find out more. PSM should not miss this chance, as it could improve the stakeholders' perception and consequently their support.

- Staff motivation and reinforcing corporate culture

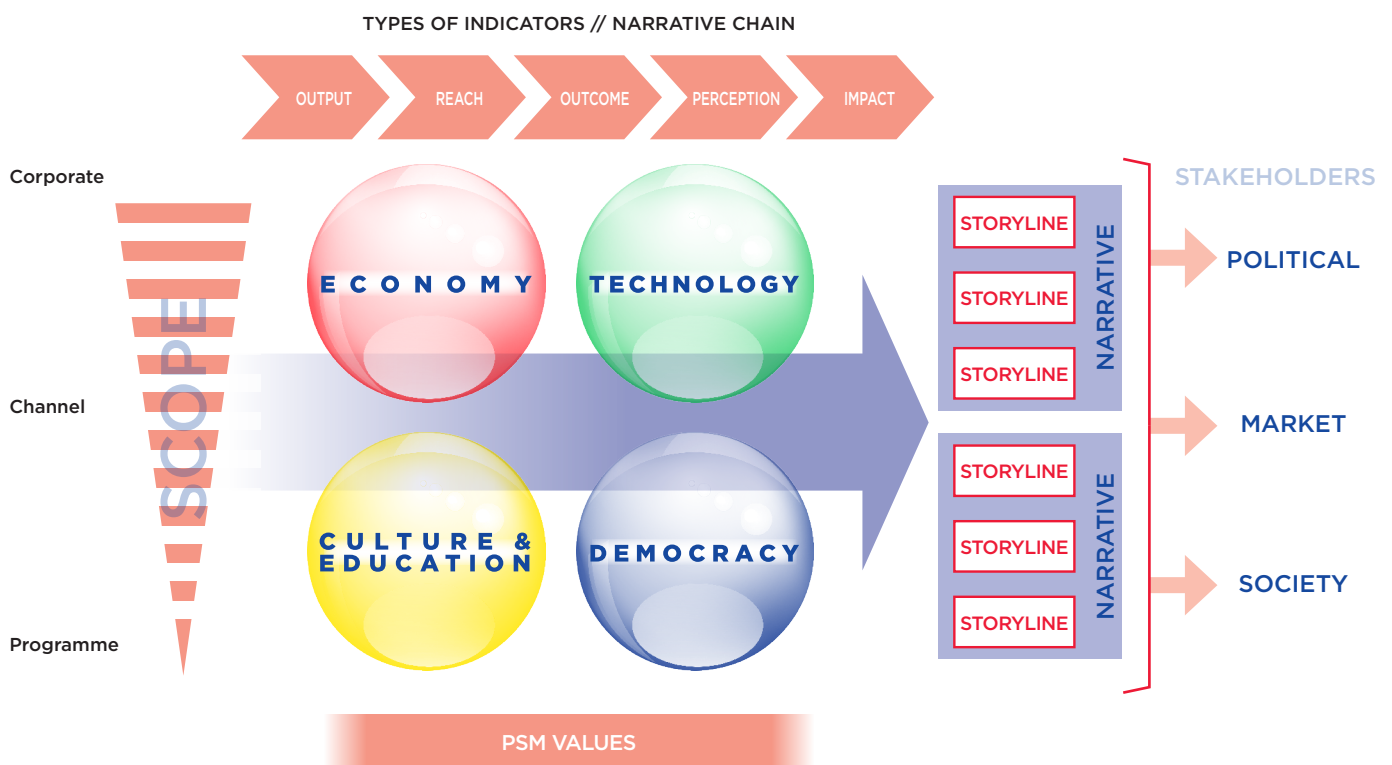
Identifying the value delivered and communicating it in-house helps reinforce staff motivation, engagement and pride. This enables them to appreciate collective achievements beyond their daily work and routines. It also shows how the organization's vision and mission become real and tangible, helping the staff to relate to the corporate culture.

IMPACT ASSESSMENT MODEL FOR PSM

Taking into account the complexity of impact assessment methodology, the lack of experience applying it within PSM organizations, and the diversity across the EBU membership, one of the main goals of this project is to define an implementation model suitable for PSM.

After reviewing a significant amount of methodologies, taking into account the characteristics of the media sector and the particularities of PSM organizations, and holding six workshops with EBU Members to discuss their understanding of value and operational priorities, we propose the following PSM impact assessment model.

IMPACT ASSESSMENT MODEL FOR PSM



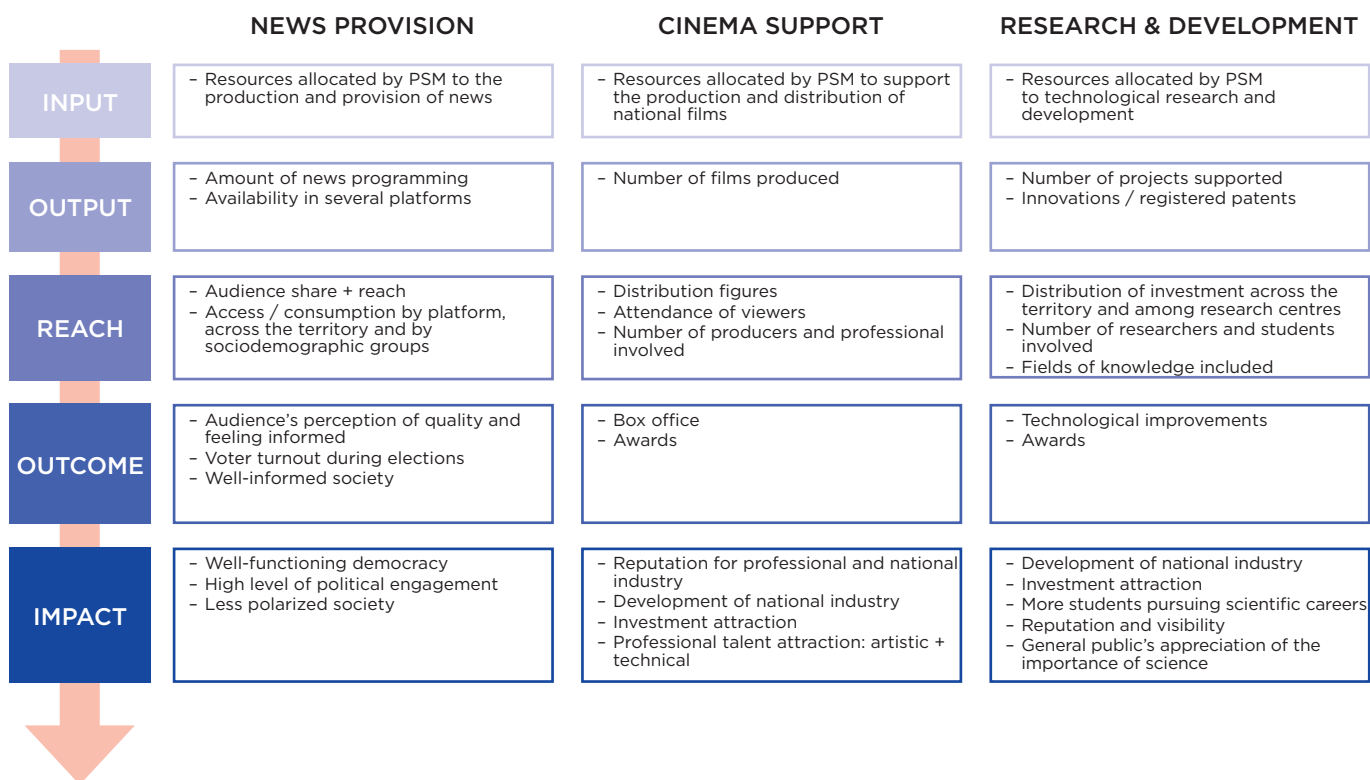
- Scope

The methodology proposed can be applied from corporate to programme level. Some organizations may prefer to assess the contribution to society from specific content or a specific channel, while others may need to communicate their impact as a corporation. The scope will influence what areas of impact are selected for analysis and what indicators should be used.

- Types of indicators - Narrative chain

Impact is not necessarily measured by a single quantitative indicator. In fact, in most cases, impact is a narrative construction. It is a combination of the data from quantitative or qualitative indicators that assess a broadcaster's output, the reach of that output, the outcome, and the audience's perception.

EXAMPLES OF IMPACT ASSESSMENT OF PSM ACTIVITIES



Note: Other concrete examples of how to assess the impact of PSM and create narratives about it will be available on the Knowledge Exchange platform on PSM Contribution to Society. Find out more about this initiative by joining in at: www.ebu.ch/psm-contribution-society

As previously stated in the report, the impact assessment will not only evaluate or quantify a broadcaster's output, i.e. content. The broadcaster's actions to produce and distribute that content also have an impact on the market and society. Broadcasters also carry out

many additional activities that are not directly related to their content, such as supporting other cultural institutions. Finally, in line with the values that guide their actions, PSM may also act as a reference for staff development

or environmental and corporate social responsibility policies, raising the standards of the market. All these types of activities should be considered when assessing the PSM contribution to society.

PSM ACTIVITIES TO BE INCLUDED IN IMPACT ASSESSMENT



- Areas of impact

Traditionally, public service media's *raison d'être* and their advocacy discourse have included many arguments about the benefits they provide for culture, education and democracy. While these sectors are still important, current changes in politics, the media market and society make it necessary to evaluate PSM's impact on the economy and technology.

All these areas of impact are interrelated. In fact, one of the aims of any impact assessment is to establish connections between indicators in different categories to maximize the sense of the value provided and create more appealing narratives. For example, connecting the amount of cultural content provided to economic development, or finding out whether a technological contribution can have an impact on democracy. Obviously, these correlations cannot be arbitrary and must be based on clear evidence. The purpose is to go beyond the immediate output, outcome or impact that a certain activity or action can deliver in one area of value, to achieve a more holistic view.

As explained in the next section (PSM impact map), four subcategories have been identified within each area of impact. For each of them, multiple indicators can be selected to assess the output, outcome and impact of PSM.

- Storylines and narratives for stakeholders

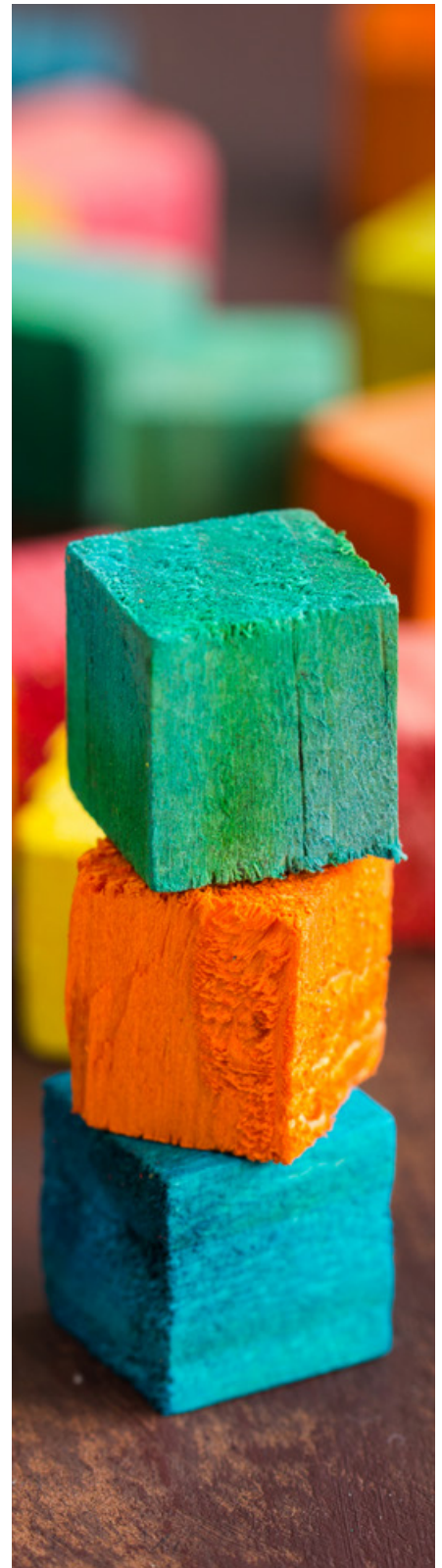
By establishing connections between the quantitative or qualitative data delivered by the indicators selected for each area of impact, new storylines can be created about the value provided by PSM and their contribution society. And by putting these storylines together, new and compelling narratives can be built for use in advocacy activities.

An important issue to consider is that each stakeholder, whether political, social, or another market player, needs to be addressed in a specific way. Consequently, the storylines need to be adapted to their characteristics and needs (for more details, read chapter 5 about communication strategies).

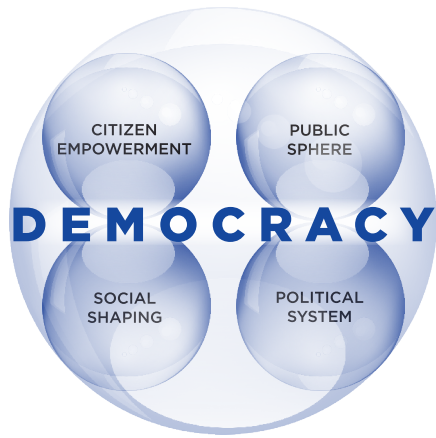
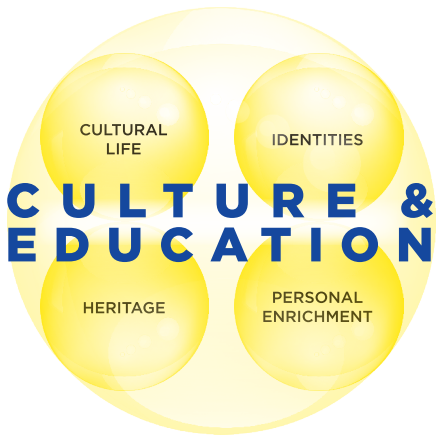
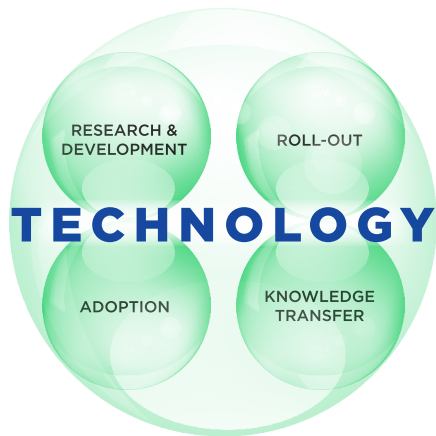
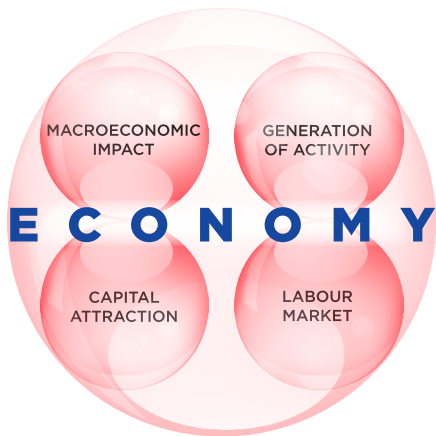
- PSM values

Adopted and publicized by the EBU in 2012, PSM values (universality, independence, excellence, innovation, diversity and accountability) largely determine how public service media organizations work and have a major influence on the value they deliver. The same thing from a commercial operator might not have the same outcome and impact, as the goals and conditions would be different.

Consequently, the PSM values need to be taken into account when defining a set of indicators to assess PSM's impact and in creating narratives about their contribution to society. In addition, what PSM organizations do to fulfil these values can also be assessed. This is why the EBU's peer-review initiative has been included in the tools in this report (see chapter 4).



PSM IMPACT MAP

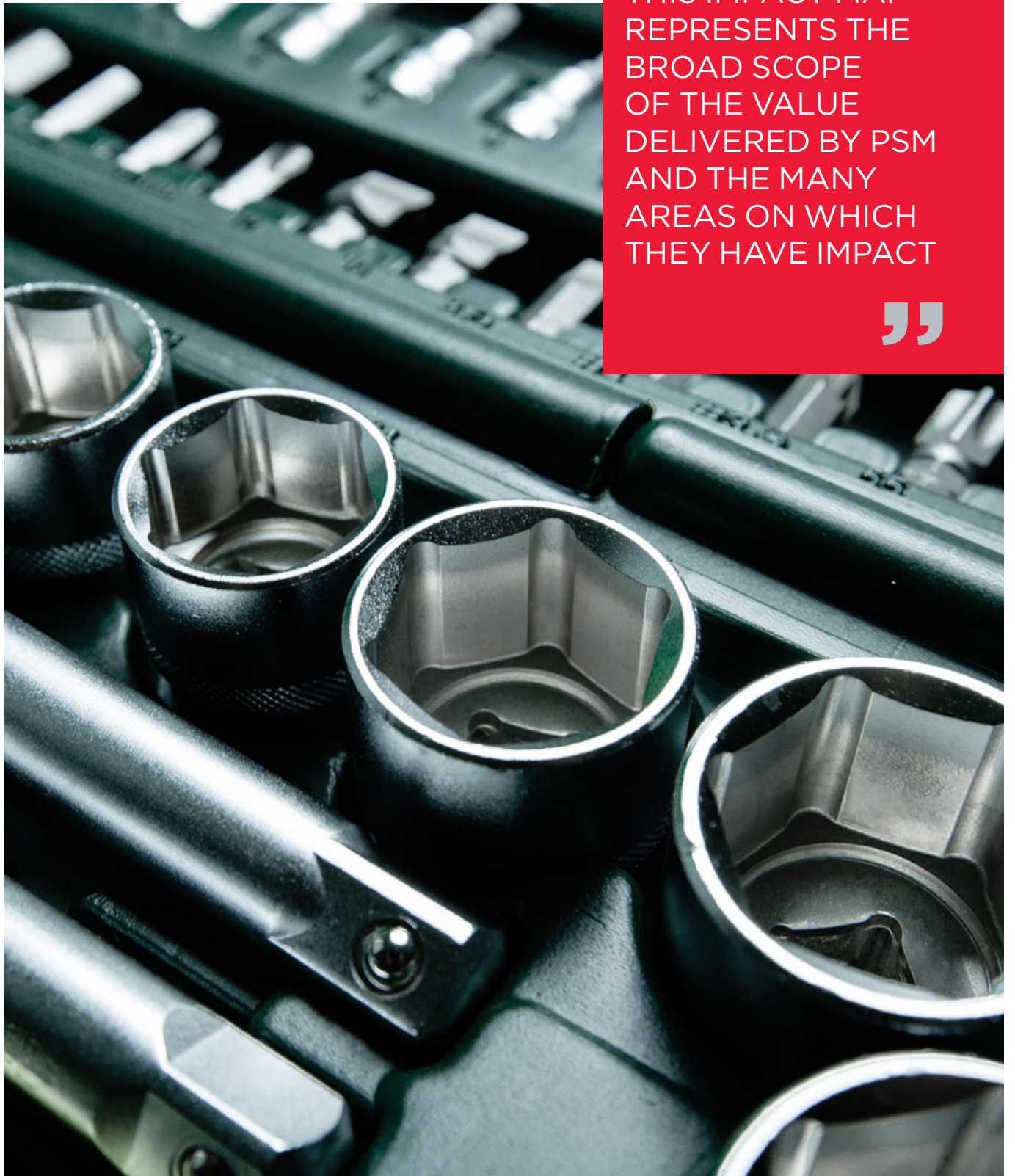


PSM IMPACT MAP

One of the main difficulties PSM organizations may face when preparing an impact assessment is deciding what to assess. As stated before, while public broadcasters are used to monitoring their output and producing arguments about the value they deliver in culture or democracy, they have many other activities that have an impact on the market, the political system or society.

We have created the following PSM impact map to help Members overcome the initial blank-page syndrome and guide them during the process for designing their assessment strategy. Besides defining each of the areas of impact, and the subcategories included in each of them, the map also includes examples. It is, however, important to bear in mind that the list is not exhaustive. As assessing impact is an exercise that needs to be customized depending on each organization's own characteristics and goals, and taking into account the large diversity across the EBU membership, it was never the project's intention to provide a complete definitive lists of indicators.

This impact map is intended to inspire EBU Members, helping them to understand the broad scope of the value they deliver as well as the many ways in which they might have an impact.



THIS IMPACT MAP REPRESENTS THE BROAD SCOPE OF THE VALUE DELIVERED BY PSM AND THE MANY AREAS ON WHICH THEY HAVE IMPACT

”

IMPACT ASSESSMENT ECONOMY

PSM organizations have a significant impact on the national economy as a result of their business volume, the diversity of their activities and the variety of their partners. Their positive influence is not limited to the broadcasting or media sectors, but spills over into other areas of activity through positive economic externalities.

MACROECONOMIC IMPACT

PSM can be important contributors to the national GDP in addition to the business volume of the media sector. Besides, they pay a significant amount of taxes, which directly benefit the national economy and society too. In this area, it is also important to assess the economic multiplying effects of PSM: their budget and activities stimulate further investment and actions by other players, generating a productive dynamic that goes beyond the media sector and has a positive impact on national economic growth.

Sample of indicators:

- Contribution to national GDP, media sector economy
- Contribution to gross value added (GVA)
- Taxes paid
- Volume of business generated for each unit of local currency invested in PSM

GENERATION OF ACTIVITY

PSM organizations carry out a broad range of activities and collaborate with a significant number of market players. Due to their central position in the media value chain, they become powerful generators of business in terms of volume and value, and on both the supply and demand sides of the whole media industry, including cinema. Business is usually generated beyond the

boundaries of the media sector and has a positive impact on other sectors across the national economy and territory. In addition, by applying certain standards to the way of doing business, PSM can have a positive influence on the way the market functions.

Sample of indicators:

- Volume of original programming
- Volume of programmes produced in the country
- Investment in cinema: amount invested in film production and/or acquisition of rights, number of films supported, box office revenue generated by the films supported by PSM, and so on
- Volume of external activity generated, number of providers and their distribution in the territory
- Direct impact on revenue and volume of activity in the tourism sector
- Direct impact on attendance, revenue and volume of activity of sport events

CAPITAL ATTRACTION

Thanks to the quality standards applied by PSM, they deliver high-value and well-recognized content and services. This generates positive intangible assets, such as reputation, trust, certainty or engagement, which are crucial to any market. As a result, PSM are able to attract very different types of capital to the media sector, from investments by other sectors and countries to highly qualified professional talent. Besides, they also generate positive spill-overs in other sectors, so their potential to attract different kinds of capital has an overall positive influence on the dynamism, volume and value of the national economy.

Sample of indicators:

- Volume of foreign investment in the national media market
- Attracting highly qualified workers
- Generating intangible assets, such as reputation, trust, and so on
- Examples of success: awards, achievements

LABOUR MARKET

PSM have a direct impact on the job market through the creation of highly qualified jobs. As generators of business at both the demand and the supply ends of the value chain, PSM create jobs and sustain a significant volume of direct, indirect and induced employment. PSM can also have a positive impact on the quality of labour by applying fair labour policies that raise the standards of the market. Furthermore, thanks to their in-house and outside training programmes, and as they are in many cases the first rung on the career ladder for successful individuals that will later pursue their careers in other companies or create new initiatives, PSM organizations have a positive impact on the skills and abilities of workers in the national media sector.

Sample of indicators:

- Number of direct, indirect and induced jobs
- Contribution to reducing unemployment or integrating certain social groups
- Number of hours of training (also per employee)
- Number of participants in training / apprenticeship schemes
- Investment in training schemes
- Pioneering role in developing family-friendly policies
- Gender balance and social representativeness
- Efficiency and sustainability plans

EXAMPLE 1



We work with **338** production companies across TV, digital and film

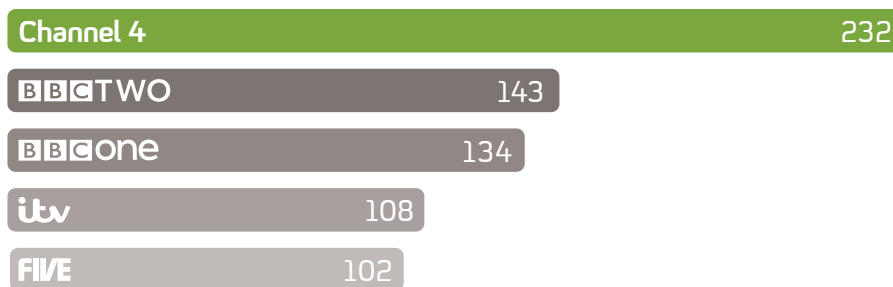


We have set up a **£20m Growth Fund** to invest in small and medium sized UK independents to support the sector

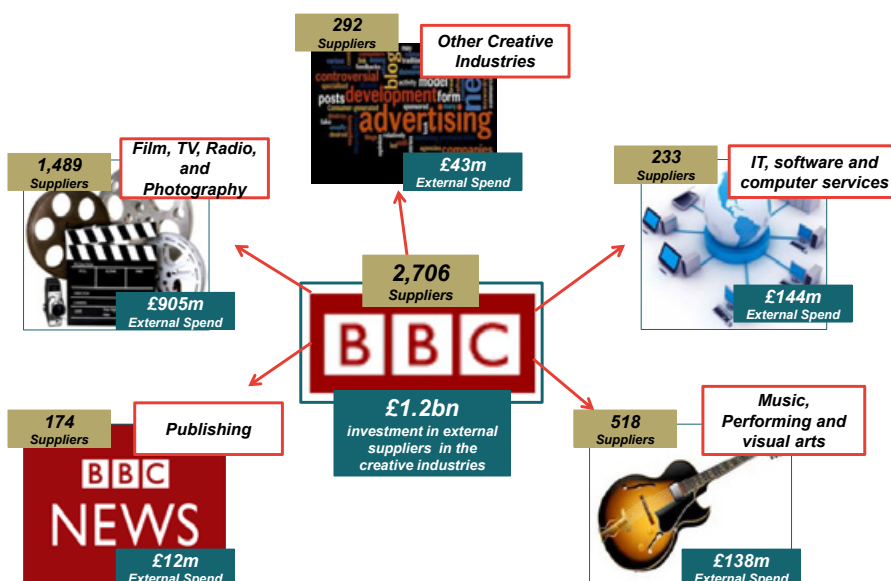
In 2014 Channel 4 launched the Growth Fund, a three-year initiative to invest in small independent producers for a period of up to five years, supporting their expansion. It has benefitted a substantial number of companies across several sectors, funding and supporting their activities.

Source: Britain's Creative Greenhouse. A summary of the 2014 Channel 4 Annual Report and other key facts

The number of independent TV production companies we work with



EXAMPLE 2



The BBC supports a wide array of suppliers in different areas of the British cultural industries and the ICT sector. It transfers a substantial share of its budget to them, having a strong impact on the revenues and generation activity of several sectors.

Source: Frontier Economics, The contribution of the BBC to the UK creative industries

IMPACT ASSESSMENT TECHNOLOGY

PSM organizations can play an active and guiding role in developing, introducing and adopting technology in two ways. First, as they are non-profit they can take more risks, try more potential innovations and be more creative without fearing for their profitability. Second, as key players in their national markets, with a high reach and frequent contact to the population, PSM are properly placed to attract the critical-mass audience that new products or services require to be profitable before being adopted by commercial players.

RESEARCH AND DEVELOPMENT

Although basic research is mostly carried out nowadays by ICT companies, PSM still contribute to this sector through partnerships with third-parties, adding their expertise and human resources or making their facilities and material resources available. They usually take part in joint research projects, such as those funded by the EU, and help standardize broadcast technologies through the EBU and other organizations, for example DVB or WorldDAB.

Sample of indicators:

- Volume of investment in R&D
- Participation in externally funded R&D
- R&D collaboration with market players and universities
- Participation in standardization processes
- Participation in tests / trials of new technologies
- Support for start-ups / spin-offs
- Participation in and contribution to innovation campuses

ROLL-OUT

As PSM have a prominent position in their national markets, they play a central role in the initial deployment of technical innovations or services that will later be adopted by other market players. The non-profit approach of PSM and their service orientation enable them to be pioneers, which is beneficial to both the citizens and the market. Examples include pushing for higher quality standards in production and distribution, such as UHD TV, digitizing and upgrading traditional broadcasting platforms, or developments in the new media sector, such as providing on-demand services.

Sample of indicators:

- Investment in facilities
- Working with market players to deploy new technologies
- Development of new media services
- Producing content to support new media platforms

ADOPTION

Often backed by a successful track record of innovation, PSM organizations can play an important role as prescribers, positively impacting on the perception of usefulness and reliability of a new technology. By using and promoting a certain innovation, PSM send a strong message both to the market and to end-users, fostering professional take-up as well as driving its domestic adoption.

Sample of indicators:

- Creation / participation in awareness campaigns about new technologies
- Transfer of value and audience to a new platform / technology by providing appealing content
- Giving credibility to new services
- Professional and domestic penetration and perception of innovations launched by PSM

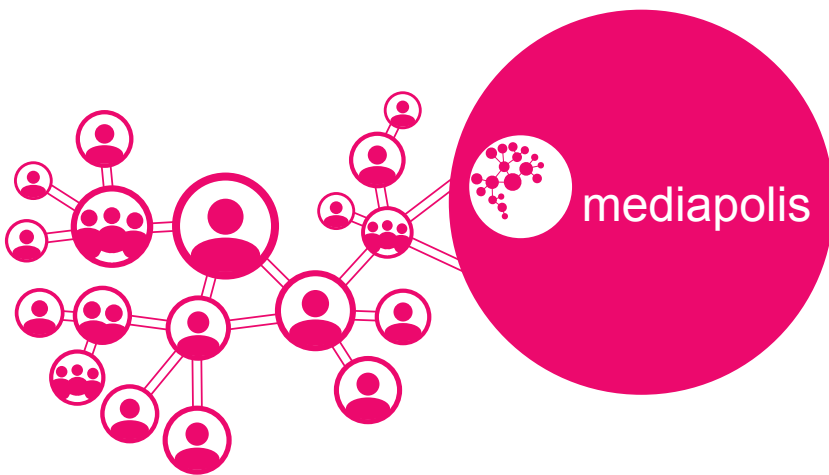
KNOWLEDGE TRANSFER

PSM have a long history as pioneers in the field of technological innovation. This requires significant investments in staff training, managing know-how, and promoting knowledge acquisition and exchange. As a result, and also thanks to their non-profit orientation, many PSM organizations have become key agents for knowledge transfer in the media sector at national and international levels. On many occasions, PSM actions or partnerships in this field are not limited to the professional area; they also take part in educational activities or carry out information/awareness campaigns aimed at citizens. Altogether, PSM can play a significant role as providers of knowledge, all the way from the highly specialized and professional end of the spectrum to the public end.

Sample of indicators:

- Number of staff trained in new technologies
- Number of hours / days of training in new media provided for staff / external partners
- Number of hours and ratings of programmes about new technologies
- Collaboration with academic institutions to transfer knowledge to students and scholars: number of agreements, participation in regular courses, number of students attending the courses, etc.

EXAMPLE 1



Mediapolis is the innovation campus promoted by Yle in Tampere. Yle's resources are made available to partners, promoting open data and collaboration with start-ups and educational institutions. With its contribution, YLE invigorates the exchange of knowledge among players and contributes to the economic viability of new companies.

Source: Yle

EXAMPLE 2



Impulsa Visión is a programme launched by RTVE to help freelancers and small enterprises to develop innovative audiovisual and digital projects through training, technical support, networking and funding. With this programme, RTVE contributes to the attraction of talent and the transfer of knowledge, having a positive impact on the technological side of the Spanish media sector.

Source: RTVE

IMPACT ASSESSMENT

CULTURE AND EDUCATION

Fostering the cultural and educational development of their countries has been a core mission for most, if not all, PSM organizations. The PSM remit usually includes a variety of cultural goals and covers a broad range of fields, from traditional arts, music and education to sports, history or cookery, to name but a few. A detailed analysis of PSM activities reveals four ways in which they can have a positive impact on culture and education.

CULTURAL LIFE

Cultural life is a broad concept that includes content production, support and promotion, dissemination, and consumption of culture. PSM organizations are usually not only one of the main content producers on each national market, but also very important commissioners, packagers and distributors of cultural content. Their impact is therefore not limited to audiovisual content, either for radio or television; they also support and promote other cultural disciplines or industries by showcasing their production, scheduling related content, sponsoring their events, etc. As a central player of the information society, with an outstanding ability to amplify the visibility and reach of cultural products, PSM also become an essential tool for citizens to discover and access all kinds of cultural disciplines and activities.

Sample of indicators:

- **Number of cultural events sponsored by PSM**
- **Perceived value of cultural events organized or sponsored by PSM**
- **Attendees at events organized by PSM and spread across the territory**
- **Hours of minority sports on air**
- **Amount invested in local sports content**

- **Hours of minority arts on air**
- **Value perceived by the audience of how PSM represent national culture / identities**
- **Investment in national drama: number of series, ratings, format and programme sales abroad, perception of value by audience, etc.**
- **Number and length of cultural pieces on the PSM news programmes**
- **Awards received by PSM programmes / productions**
- **Support, use and dissemination of nationally produced music**

IDENTITIES

PSM have traditionally been considered a force in helping to define, preserve and develop national identities. To do so, their programming usually includes content related to the national languages, regions, music, etc. Nowadays, taking into account the diversity of our modern societies and the large numbers of new social and interest groups, as well as growing internationalization and the increase in travel and emigration, there are greater opportunities for PSM to grow. They can be a tool not only for each of these groups to grow and celebrate their identity, but also a mechanism to foster social cohesion, facilitate integration and raise awareness about the others, enabling mutual understanding and coexistence in highly diverse and multicultural scenarios.

Sample of indicators:

- **Number of programme hours in minority languages**
- **Hours of regional programming broadcast at national level**
- **Hours of programming for migrant groups**

- **Number of drama characters / news anchors from ethnic minorities on air**
- **Scores in surveys of public perception of representation / normalization of minorities / identities on air before and after that minority / identity is prominently displayed in a successful PSM programme**
- **Diversity of staff: number of ethnic minorities working for the PSM (and % of total workforce)**
- **Contribution of PSM drama characters to the perception of different sexual orientations**

HERITAGE

Thanks to their historical background, PSM usually keep archives of audiovisual content that reflect not only the evolution of broadcasting but also changes in society and its culture. By using archive material in their productions or making it available to other creators, citizens or researchers, PSM help keep the heritage of the country, its collective memory and its history alive. In addition, thanks to digitization, PSM also play an important role in promoting and disseminating the heritage curated by other cultural organizations.

Sample of indicators:

- **Openness of the PSM archive: availability of material, accessibility, etc.**
- **Number of consultations / downloads of archive programmes**
- **Number of professional requests for using archive material in content production**
- **Actions (and their results) in collaboration with other players to protect and promote heritage content**

PERSONAL ENRICHMENT

PSM strongly contribute to the personal enrichment of individuals in terms of acquiring knowledge, awareness of political and economic issues, and access to all forms of culture. To do this, PSM programming offers a broad range of genres, including non-mainstream content that commercial operators would never broadcast despite its high cultural, political, social or educational value.

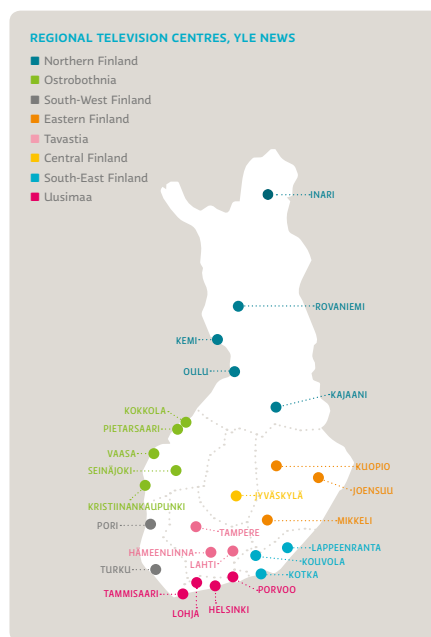
Furthermore, in a context where both the speed of technological innovation and the complexity of the media system are growing exponentially, PSM play an important role as promoters of media literacy, while combating the digital divide and social polarization. They also have the opportunity to remain a trusted source and become a prescriber of high-quality and added-value content.

Sample of indicators:

- **Volume and reach of programming on science, culture, factual information, etc.**
- **Number of collaborations with educational institutions: participation of PSM employees in courses and conferences, number of attendees, geographical spread of the courses**
- **Size of audiences at concerts given by PSM orchestras and choruses**
- **Media literacy actions**
- **Percentage of population claiming that PSM foster participation in cultural events**

EXAMPLE 1

YLE IN FINLAND AND ABROAD



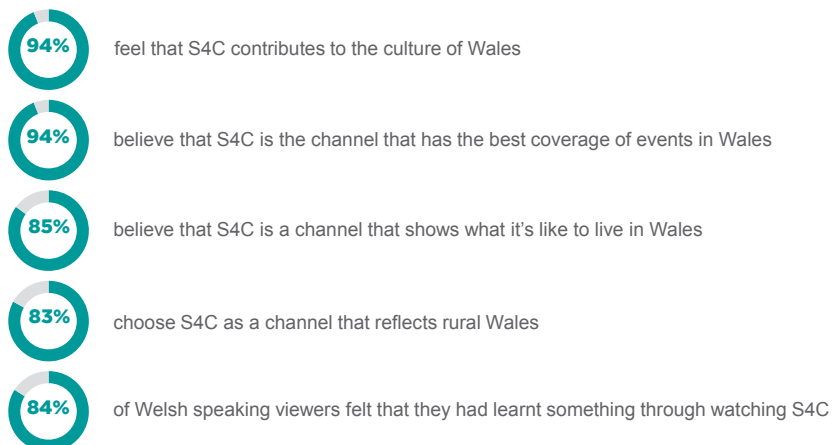
Thanks to its network of regional centres, Yle is able to provide an extensive picture of the cultural diversity of Finland, including news and events in the three languages of the country: Finnish, Swedish and Sami.

Source: Yle's Year 2013. Corporate responsibility report.

EXAMPLE 2

The Future of Welsh Language Television

Base: S4C viewers, 2013. Source: SPA



S4C plays a key role in showing Welsh identity on screen and its perception surveys illustrate how its audience appreciate and value its contribution to their culture, including Welsh language.

Source: S4C. The Future of Welsh Language Television

IMPACT ASSESSMENT DEMOCRACY

Besides referring to a political system, democracy implies an entire set of particular values, a specific lifestyle and a certain type of societal organization. As PSM abide by principles that are essential to democracy, by providing content and services for all citizens they become a cornerstone of democracy. They can positively contribute to the following areas.

CITIZEN EMPOWERMENT

PSM can empower civil society groups such as NGOs, charities, professional associations and unions in multiple ways. They can report about them, raising awareness and interest in their activities among the population. They can also offer them airtime or make PSM facilities and expertise available, providing them with resources otherwise out of their reach. PSM also play an important role when society needs to be mobilized or during crisis, as they still enjoy a high level of trust among citizens. Through new media, PSM also have the chance to help individuals connect with society, providing them with an opportunity to share their opinions and exchange ideas.

Sample of indicators:

- **Number of collaborations / agreements with civil society organizations**
- **Special programmes on social issues: collected money, number of volunteers, number of attendees, number of projects funded, charities benefited, etc.**
- **Perception of specific social issues before and after they are portrayed and discussed in PSM programmes**
- **Number of people mobilized for joint creation / participatory projects**

- **Coverage of crises: hours of transmission, journalists mobilized, etc.**
- **Results and perception of PSM initiatives fostering citizens' social engagement**

PUBLIC SPHERE

PSM are essential for personal opinion-building and to foster the public debate. They play a crucial role as agenda-setters, raising awareness and disseminating relevant information. They also give visibility to individuals and groups, ensuring pluralism and diversity. Their political and economic independence enable them to do so, and position them as key contributors to modern and well-functioning democracies.

Sample of indicators:

- **Volume of news programmes**
- **Coverage of major national and international events**
- **Accumulated audience for major national events**
- **Buzz generated in social media by PSM programmes**
- **Performance of programmes focusing on major causes**
- **Results and perception of PSM actions fostering diversity, pluralism and social representativeness**

SOCIAL SHAPING

Media have a remarkable capacity to portray society, its structure, relational dynamics, conflicts or general agreements. In addition, media messages have a strong influence over the individual and collective perception of reality as well as on political, economic and societal bargaining processes, even shaping their outcome.

This potential should not be underestimated, and media must be regarded as important agents in shaping society. Thanks to their independence, service orientation and high-quality performance, PSM can become active contributors to balanced and fairer societies.

Sample of indicators:

- **Volume and reach of content on social issues: poverty, marginalization, integration of minorities**
- **Citizens' perception of PSM as a trusted source of information on social issues**

POLITICAL SYSTEM

PSM are an important part of any political system. By providing general and specialized information, often through dedicated parliamentary channels and programmes, they help raise awareness about political issues. In addition, by monitoring, analysing and reporting on politics, they contribute to its control and accountability. This watchdog role is complemented by their ability to promote, improve or ensure the diversity and pluralism of the political system, and therefore strengthening its health.

Sample of indicators:

- **Hours dedicated to coverage of the elections and the political parties**
- **Hours of parliamentary debates broadcast**
- **Audience perception of election coverage or news programmes provided by PSM in terms of independence, depth, impartiality, informative value, etc.**
- **Volume and reach of content on the portrayal and discussion of action taken by political stakeholders**

EXAMPLE 1

Citizenship purpose: all statements

Source: NatCen for BBC Trust, *Purpose Remit Survey UK Report*



Base: All participants, autumn '13 (2251)

Perception surveys carried out by the BBC Trust show how citizens think the BBC contributes to their comprehension of and engagement in British politics and political processes. The results demonstrate the key role the BBC plays in the well-functioning of democracy.

Source: NatCen for BBC Trust, *Purpose Remit Survey UK Report*

EXAMPLE 2



Serious Request is a yearly radio and multimedia fundraising event launched by NPO's 3FM in the Netherlands. The project raises awareness about a social issue, and collects a significant amount of money for charities. This is a good example of how PSM can provide visibility and relevance to civil organizations and also contribute to the agenda-setting regarding social issues.

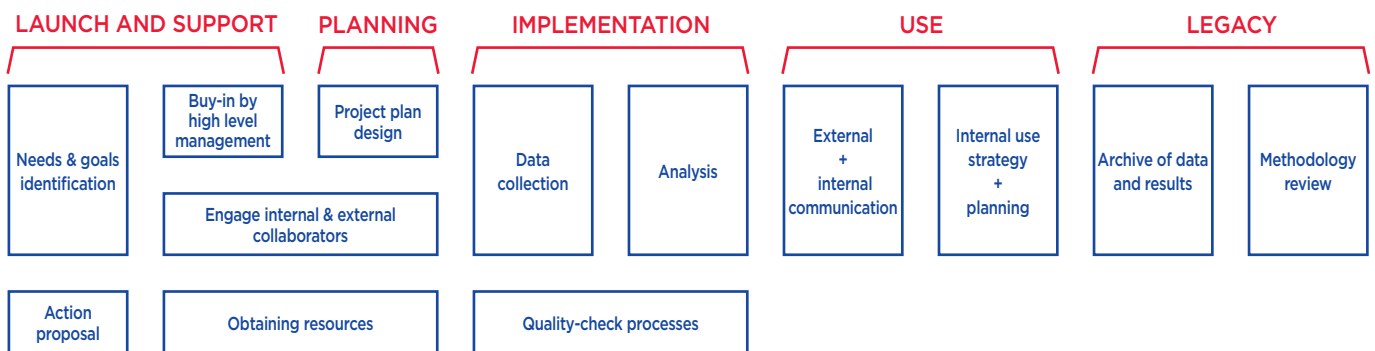
Source: NPO

CARRYING OUT AN IMPACT ASSESSMENT: GUIDELINES

An impact assessment is a complex process. It can include multiple data collections and analyses that need to be selected and adapted depending on the characteristics of the sector or activity under review. Consequently, very specific skills, substantial resources and thorough planning are required.

First of all, it is important to understand the process involved in impact assessment research as well as the requirements of each step.

IMPACT ASSESSMENT PROCESS



LAUNCH AND SUPPORT

- The purpose of the assessment needs to be very clearly defined and connected to the activities and strategy of the company. This is essential to choose the right set of indicators, data collection processes, and analysis strategy as well as to obtain meaningful results for the broadcaster.
- As impact assessments require a large amount of human and material resources, their success is directly connected to support from top management. Their buy-in and sponsorship is absolutely necessary to establish strong leadership and obtain the required in-house and outside collaboration as well as resources. A brief but clear and very convincing proposal will be needed.

PLANNING

- The project design phase is crucial. It involves taking decisions about the research strategy, drawing up a schedule and delegating responsibilities. Poor planning is most of the times the cause of all kind of problems during the implementation of the project, leading to irrelevant results.
- The level of detail and the scope of the project should be defined according to the goals, the team's expertise and the availability of resources. Being excessively ambitious usually leads to implementation difficulties and unachieved goals.
- During this phase, the project design, resources and collaboration will shape each other. Having clear goals will help you to take the right decisions.
- If the project is carried out by an external collaborator, it is advisable to involve it in the planning phase.

IMPLEMENTATION

- As PSM organizations will probably not have enough staff with the required skills and availability to collect the data and carry out the analysis, they need to decide whether to outsource this phase, hiring a consultancy company with the right expertise. However, to ensure that the results are relevant, it is absolutely necessary for the project to be properly designed, involving the consultants, and for implementation to be monitored continuously.
- Hiring a third-party to help design and implement the project may also be advisable to avoid issues of legitimacy and credibility.
- Projects that are divided into several stages, with intermediate deliveries, milestones, and appropriate quality check procedures, are more likely to be completed successfully and on time.
- Foreseeing potential obstacles to data collection or analysis and devising contingency plans avoids stress, delays, extra costs and failure to achieve objectives.

USE

- The results need to be communicated in-house and outside not only after completion but also during the project, depending on the delivery schedule. Without a proper communication plan, targeting as many stakeholders as possible with suitable messages, the outcome of the project will not generate the expected impact.
- The results of the project need to be fed into the decision-making chain of the company. They will be valuable input for building operational strategies, shaping the corporate culture and taking management decisions.

LEGACY

- The project is not over when the results have been communicated or used to design the company's strategy. After that, the data collected and the deliverables need to be properly archived for future use. As impact assessments tend to be iterative processes, not completing this step properly will compromise future longitudinal analyses, or will result in additional costs or difficulties.
- Additionally, to improve the efficiency and outcome of future projects, the research process needs to be evaluated. The conclusions should be available right at the start of the next project, during the planning phase.

- Creating legacy also ensures continuity if some of the staff are no longer involved. The cost and time involved in replacing staff as well as the impact on the outcome of the next project should not be underestimated.

Besides the recommendations from each of the implementation phases, there are a few other general guidelines to observe.

- PSM organizations implementing an impact assessment for the first time will most probably adopt a reactive and evaluative approach. Reactive in the sense that the exercise will usually be motivated by a problem of accountability or legitimacy. And evaluative, in the sense that the purpose will be to understand how the company performed in the past.

However, if PSM organizations want to make the most of the impact assessment, it is advisable for the reactive approach to soon be replaced by pro-active implementation. This means that the methodology will be included in the corporate strategy, executed regularly and therefore planned before the assessment period. This makes information collection more efficient and the analysis richer.

Once a company has acquired substantial expertise in implementing the methodology, and it is perfectly

embedded in the corporate strategy, internal planning and reporting processes, there is the option of carrying out a prospective impact assessment that will provide insight into the potential impact depending on the decisions and the goals.

- When a company applies the impact assessment for the first time, it is advisable to be realistic and somewhat conservative when it comes to the scope of the analysis. Aiming to collect an excessively large and detailed volume of data, or covering too many aspects, will most probably generate an unforeseen workload, discourage the collaborators, and jeopardize the completion of the project. The complexity of the impact assessment should be increased gradually as expertise is acquired and depending on the resources and skills available.
- The quality and detail of the results increase once the impact assessment becomes iterative. The knowledge and data compiled enrich the analysis and enable a historical perspective, making it easier to identify the impact of the activity under review. Consequently, as stated before, PSM organizations should decide fast to move from one-off exercises to an assessment routine.

This will make the process more efficient and provide more valuable results and insight.



KEY SUCCESS FACTORS AND OBSTACLES

As with any other research methodology, being aware of a project's key success factors and its potential obstacles is essential if the project is to be viable.

KEY SUCCESS FACTORS

Launch and support

- Obtaining the buy-in of high-level management
- Engaging the right internal and external collaborators on time

Planning and implementation

- Ensuring detailed and accurate project design
- Defining realistic goals, according to priorities and resources
- Implementing systematic quality check procedures

Use

- Using cases to illustrate complex results
- Visualizing of data and results to increase understanding
- Presenting results using an assertive narrative, and clearly connecting them with the goals and the strategy of the company
- Presenting clear, transparent and proportional results
- Avoiding over-claiming

Legacy

- Implementing tools that enable staff and collaborators to provide continuous feedback to improve the project
- Conducting an evaluation of the project at the end
- Archiving the data and the results properly

MAIN OBSTACLES

Launch and support

- Lack of support and sponsorship by high-level management
- Lack of commitment by internal or external collaborators

Planning and implementation

- Organizational culture: lack of cooperation and low transparency could threaten access to data and information
- Insufficient resources (financial, time)
- Inaccurate planning and/or scheduling and lack of contingency plans
- Staff lacking the necessary skills

Use

- Lack of plan for the exploitation of the results
- Poor stakeholder management during the implementation or the communication phases

Legacy

- Lack of continuity of the project and/or legacy strategy (poorer results and work redundancy)
- Obtaining the buy-in of high-level management
- Engaging the right internal and external collaborators on time

IMPACT ASSESSMENT
CAN DELIVER
VALUABLE INPUT
FOR BUILDING
OPERATIONAL
STRATEGIES,
SHAPING
CORPORATE
CULTURE AND
TAKING
MANAGEMENT
DECISIONS

”





4. TOOLS

EBU VALUES REVIEW



In 2012, the EBU and its Members approved the Declaration on the Core Values of Public Service Media. These 6 core values define and shape the way EBU Members operate and distinguish themselves from other media organizations.

OUR SIX CORE VALUES

- UNIVERSALITY
- INDEPENDENCE
- EXCELLENCE
- INNOVATION
- DIVERSITY
- ACCOUNTABILITY

By adapting their internal procedures and the services they provide to fulfil these values, public service media can improve the benefits they provide for the citizens.

Consequently, by analysing the actions taken we can identify valuable facts, figures and arguments to help us build the case for the legitimacy and role of PSM in modern societies.

All these elements are also essential in creating a new narrative about the PSM contribution to society.



PEER-TO-PEER REVIEW

To help its Members assess how they comply with the PSM values, the EBU launched a peer-to-peer review that assesses organizational aspects and the content offered using a holistic approach.

From September 2014 to June 2015, the organizations that carried out the review are CT (Czech TV), Yle, RTS (Switzerland) and RTBF.



BENEFIT FOR MEMBERS

Once they have carried out the PSM Values peer-to-peer review, EBU Members obtain the following outcomes:

- Quantitative and qualitative data regarding their fulfilment of the six PSM values
- Identification of best practices, strengths and weaknesses
- Recommendations for managerial and organizational improvement
- Suggestions and inspirational comments

Similar to the impact assessment tools, the PSM Values peer-to-peer review offers EBU Members a significant amount of valuable input that they can use to craft new narratives about their contribution to society. In addition, it provides information and insight for substantial corporate development if they are properly fed into the organization's strategy and decision-making chain.

HOW IT WORKS

1. APPLICATION

The peer-to-peer review is voluntary and available to any EBU Member. Any organization interested should contact Nathalie Labourdette (Labourdette@ebu.ch), who is in charge of the EBU secretariat for the review.

2. SELF-ASSESSMENT REPORT

Using a questionnaire and data provided by the EBU, the Member prepares a report on its performance, including quantitative and qualitative aspects. The report identifies its managers' perceptions of the corporation along with its strengths and weaknesses. On average, this step takes one month.

3. PEER SELECTION AND FIRST REVIEW

A panel of 'peers', including top managers and professionals from other public service organizations, is selected by the EBU. Over a period of 6 weeks, they will first review the self-assessment report provided.

4. PEER VISIT

Following the review of the self-assessment report, the EBU and the Member agree on a date for a two-day on-site visit by the peers. During this visit, the peers have the opportunity to meet not only top management but also middle-managers and staff. They observe internal dynamics, work procedures and practical aspects to help them gain a better understanding of the operational reality and the corporate culture in each organization.

5. REVIEW REPORT

Taking into account the analysis of the self-assessment report and the insights obtained during the visit to the Member, the peers deliver their conclusions, comments and recommendations to the review secretary. Using that material, the secretary drafts a review report within about two months.



The self-assessment, peer visit and final report are all structured according to the six values:



5. TOOLS

COMMUNICATION

RESHAPE



Communicating the value delivered by public service media is an essential part of the PSM contribution to society mindset, and is also crucial in maximizing the results of the tools described in this report, the impact assessment and the EBU peer-to-peer review.

This chapter identifies the main challenges in how PSM organizations communicate their value. In addition, it defines guidelines based on the outcome of a workshop carried out with the EBU Voice of PSM group, comprising our Members' heads of communication. These guidelines relate to two main issues: managing the network of PSM stakeholders, and the strategy and communications techniques to use when addressing them.

ISSUES TO ACKNOWLEDGE

- Unappealing narrative

While the rationale behind the creation of public service media is well known, especially in political and academic circles, we need to accept that most of the current narrative about PSM is neither surprising nor inspiring. On the one hand, the 'old rhetoric' is not of interest to most people, and it is not communicated attractively. On the other hand, the connection between the purpose and work of public service media and the current political and societal goals is, in some cases, far from evident. Consequently, many people do not understand what public service media do for them.

- Poor communication and lack of control of the debate about PSM

It must be acknowledged that many PSM organizations are not especially active or good when it comes to communicating their successes, the good things they do for the citizens and what they do for the market. Consequently, their value frequently goes unnoticed. This not only results in a missed opportunity to raise the profile of PSM, which could result in greater acceptance and support, but it also opens the door to a worrying situation: it is not unusual for commercial operators in many European countries to claim that they are the ones providing services and value that have traditionally been inherent in the PSM remit.

MARKET PLAYERS, CIVIL ORGANIZATIONS AND CITIZENS ARE NECESSARY ALLIES FOR PSM



could eventually end in the demise of the organization.

It is therefore high time for PSM organizations to react. Although a challenge, it is crucial to address the above issues and encourage a new mindset with regard to their contribution to society. Public service media should not only see the current level of opposition and criticism as a threat. The current context provides them with an opportunity to assess how ongoing changes impact their remit and role on the market as well as how to renew their contract with society. In fact, PSM managers should be more worried if the debate does not occur at all in their country, as that might mean they are already seen as irrelevant.

GUIDELINES TO ADDRESS STAKEHOLDERS

Assessing how their network of stakeholders is managed and addressed is an essential task for PSM organizations. In the context of change described, market players (commercial broadcasters, producers, professional associations, etc.), civil organizations and citizens are necessary allies in redefining and repositioning public service media.

Consequently, the following guidelines should be taken into account.

- While political stakeholders should remain one of the main targets of PSM's communication about their contribution to society because they are able to directly define PSM remit, budget and accountability, this should not prevent PSM from addressing market players or civil society. This remains crucial. Focusing too much on the political establishment could even be counterproductive, as it might negatively affect their independence and transparency.
- Unlike political stakeholders, which may change every four years or so, market and societal players should be valued for their relative stability.

In addition, many PSM organizations do not control either the agenda of the current debate about them or its direction and tempo. As a result, they do not steer it either, and take part as mere followers, occasionally just reacting defensively. As a result they damage their public image.

- Not addressing all stakeholders

Traditionally, PSM have mainly focused on communicating the results of their work to their political stakeholders. While this corresponds to a traditional accountability process that remains necessary, it is of the greatest urgency for PSM to understand that, due to changes in the market and society, there are many other stakeholders that require equal attention. Otherwise, it is improbable that PSM will be successful in dealing with their legitimacy issues.

As a result of these three issues, even when PSM are identified as contributors to our modern, networked societies, the general perception is not particularly positive. Political, market and social stakeholders do not fully understand the broad range of benefits and value delivered by public service media in traditional fields such as culture or democracy, and even less so in areas such as the economy and technology.

The result of such a lack of understanding can only be a decline in their support for PSM, which becomes a very serious threat for their legitimacy. Depending on the characteristics of each national market, or the size and history of each PSM organization, less support will mean fewer resources, less favourable operating conditions and consequently less value. This is a negative spiral that

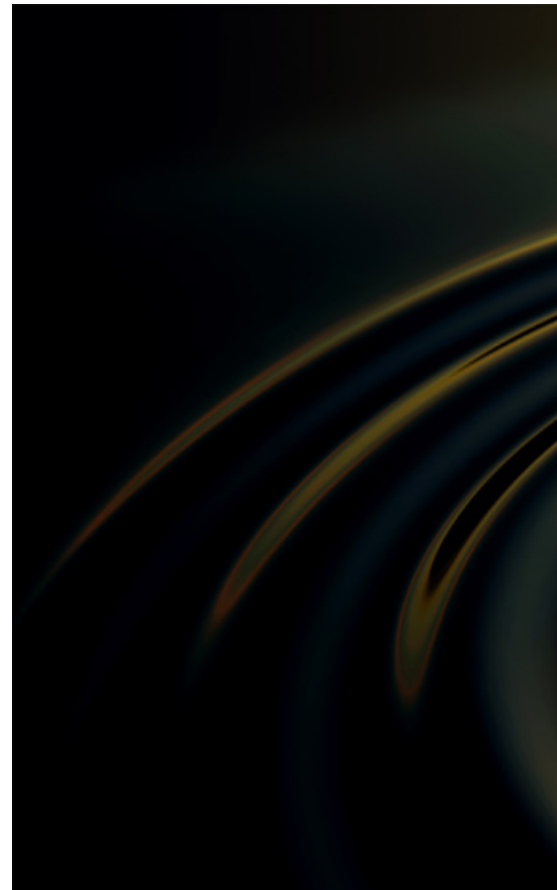
Consequently, they can not only be turned into strong supporters but even PSM ambassadors, helping to raise general awareness about PSM's contribution to society as well as build their case. Nor should the potential of these stakeholders to influence politics be underestimated.

Furthermore, the market and societal stakeholders can also be key providers of information not only during the impact assessment, increasing the value of the results, but also in general, as their feedback on the content and services offered by PSM can be a very valuable asset in improving them.

- For greater collaboration with market or societal stakeholders, it is essential to find common ground and emphasize how PSM can help achieve them. Depending on the culture of each country, even finding a common threat can be a useful strategy for creating a partnership. In addition, PSM need to ensure that both types of stakeholders are included in these processes from the very beginning.
- Responsiveness should become a key concept for PSM when managing their network of stakeholders. Besides monitoring their stakeholders' needs, public service media organizations need to adapt their public relations and communication strategy. This is the only way for stakeholders to have the feeling that they are important to PSM, and this is essential to ensure their support.
- As we are suggesting adding new stakeholders rather than replacing the current ones, the communication effort required will be greater too. This implies more financial and human resources, which must be seen as a strategic investment instead of a growing cost.

GUIDELINES ABOUT COMMUNICATION TECHNIQUES

- The main problem for PSM is not that they do not have anything to say, but that they do not think and invest enough in assessing how to be heard and how to differentiate themselves from other players with similar messages. PSM's communication needs to be clearer, more concrete, more direct and more honest.
 - It is crucial to enable recipients to identify with our messages. To achieve this, it is advisable to use concrete examples to illustrate difficult concepts, find a good balance between fact-based evidence and emotional messages, and even resort to humour.
 - We should not overestimate stakeholders' understanding of what PSM do. PSM need to be more educational by providing comprehensive information about their activities. This also requires PSM to adapt their messages to each stakeholder, so they understand what value PSM provide for them individually.
 - Any institutional or paternalistic approach must be avoided. Defensive attitudes and messages, which tend to harm an organization's public image, should be replaced with a more proactive, positive, collaborative and transparent attitude and communication.
 - One way communication techniques need to be replaced with a real dialogue between PSM and their stakeholders. This requires PSM to become better listeners and strive to understand the various realities and needs of their stakeholders. Without understanding the needs of individual stakeholders, it is impossible to send the right message about the value provided.
- Involving and engaging stakeholders should be key goals for PSM's communication. New platforms can be of great use in achieving this, but traditional ways, such as face-to-face communication and events should not be forgotten, although they might need to be rethought. In addition, joint messages in collaboration with stakeholders are an option that deserves to be explored. Traditional platforms are still effective in terms of audience reach and impact but the requirements and results of each platform need to be analysed more accurately together with their potential synergies.





PSM SHOULD
EXPLAIN HOW
THEIR CONTENT
AND SERVICES
HELP TO ACHIEVE
SOCIETAL GOALS



- Reinforcing personal relations is always a good way to build trust and gain support, especially in the case of political and market stakeholders. However, measures must be taken to avoid damaging PSM's independence and transparency.
- PSM should have a strong global communication strategy, which should be part of the corporate strategy and include a detailed plan. This will enable them to be coherent and more active in order to regain control over the debate about them as well as influence the bargaining processes that define their remit and resources. In a more complex and networked society, isolated communications are a waste of time and resources.
- To avoid dispersion and confusion and to increase their effectiveness, it is advisable for PSM to reduce the amount of topics they communicate about and invest more resources in adapting a selection of key messages to the specificities of each stakeholder.
- PSM should avoid communicating only about their output or their actions, but give priority in their discourse to their stakeholders' needs. Following the contribution to society mindset, PSM should explain how their content and services are in fact helping to meet these needs as well as achieve societal goals. Similarly, PSM should be active and even lead the debate about the role of quality media.

If PSM embrace the contribution to society mindset, implement the proposed tools to assess their impact and take into account these guidelines to manage their network of stakeholders and renew their communication strategies, they will be able to generate the facts, arguments and storylines that are needed to build a new narrative about how they bring value to society.

This is a crucial step not only to address the growing opposition to their legitimacy but also to become more responsive to the changing context. Contribution to society must become the new paradigm to redefine and reposition public service media as a core asset of our modern, networked societies.

6. NEXT STEPS 2016

Following the results of our research in 2015, and considering the feedback and recommendations from our Members, the PSM contribution to society initiative will be developed in 2016 following these four areas of activity:



1. AWARENESS ACTIVITIES

This project promotes a complex new mindset that involves overcoming strong beliefs and preconceived ideas about what PSM are and how they should perform or be managed. A major effort will therefore be required to help our Members' managers and staff understand what PSM's contribution to society means, and encouraging them to use the tools provided by the project.

In 2016, we will continue to promote the contribution-to-society mindset, through visits to Members, participation in events and conferences, and communication activities.

2. MEMBER SUPPORT

We feel confident that Members are ready and willing to apply the methods and tools we suggest. We are, however, aware that adopting a new perspective is not always easy. Consequently, the Media Intelligence Service will be prepared to assist and advise those Members intending to develop their understanding of the initiative and carry out related activities, like assessing their impact on a certain area of value or improving their communication by using more facts-based evidence. Our help can range from in-house workshops, providing information on request and assisting during the design of research project to presentations for your top-level management, regulators or parliament. Contact us to discuss what we can do for you.

3. NETWORK OF EXPERTS TO SHARE KNOWLEDGE AND BEST PRACTICES

As a professional association, the EBU can play a key role in enabling its Members to network and exchange experiences. This is crucial not only to raise awareness about this initiative but to foster Members' confidence on it. Taking into account the feedback received from the awareness activities, visits to Members and the EBU Knowledge Exchange 2015, we will broaden the scope of our advisory group, offering all EBU Members the opportunity to join the initiative, building a community of experts on PSM contribution to society.

We will create a platform to disseminate the results of our work and facilitate collaboration as well as exchange of knowledge and best practices among Members. Once this is up and running, it will be essential for this community to be invigorated if we are to achieve the desired impact.

4. RESEARCH

Compiling knowledge and best practices about how to assess and communicate our Members' contribution to society is not a one-off action. As the research hub of the EBU, the Media Intelligence Service will continue to explore the methods, tools and trends relating to this topic, while monitoring what is happening in other sectors and what other players are doing. We will also follow what universities are producing, reinforcing the bridge between academia and our Members. And, through regular communication activities throughout the year, we will strive to ensure that all this results in added value for our Members.

7. THE PROJECT

SPONSOR



GUILLAUME KLOSSA
Director of Public Affairs & Communications, EBU

Guillaume Klossa is responsible for digital strategy, media research, knowledge management and strategic events at the EBU. He also launched the media strategy group which identifies future key media trends. He has worked in the media sector for many years, as editor-in-chief for the European daily *Métro*, and developing and presenting programmes on several French TV channels.

MANAGER



DR ROBERTO SUÁREZ CANDEL
Head of the Media Intelligence Service, EBU

Dr Roberto Suárez Candel leads the research unit at the EBU. His team's main goal is supporting European PSM across Europe in their daily operations, advocacy activities and strategic planning. Previously, he worked as an academic researcher in Germany, Sweden and Spain, focusing on communication public policy, PSM and ecology of the media sector.

TEAM



DR DAVID FERNÁNDEZ QUIJADA
Senior Media Analyst, EBU

Dr Fernández Quijada has worked at the EBU since 2013, where his research focuses on PSM, media industries and policies and communication technologies. Previously, he was Lecturer at the Autonomous University of Barcelona. He is currently the Vice-Chair of the Media Industries and Cultural Production Section of the European Communication Research and Education Association (ECREA).



RUURD BIERMAN
EBU consultant

Ruurd Bierman is a long-term professional in the Dutch and European media world, holding senior management positions and delivering strategic projects and key note speeches. Between 2012 and 2014 Ruurd was Project Manager of EBU VISION 2020, defining future strategies for European PSM. Ruurd previously worked for Dutch public service broadcasting NPO.



PROF DR UWE HASEBRINK
Director, Hans-Bredow-Institute for Media Research

Prof. Dr Uwe Hasebrink is Professor of Empirical Communication Research at the University of Hamburg. He has participated in many comparative research projects on European media, particular on audiences, media performance and public service media.

MEMBERS ADVISORY PANEL



COLLABORATION

During the project, we were grateful for collaboration from other EBU departments and units, including the Legal Department, the Public Affairs office in Brussels and the Communications Unit. They provided valuable input for our research.

In addition, those taking part in the various workshops and our Knowledge Exchange helped us with their feedback, comments and ideas.

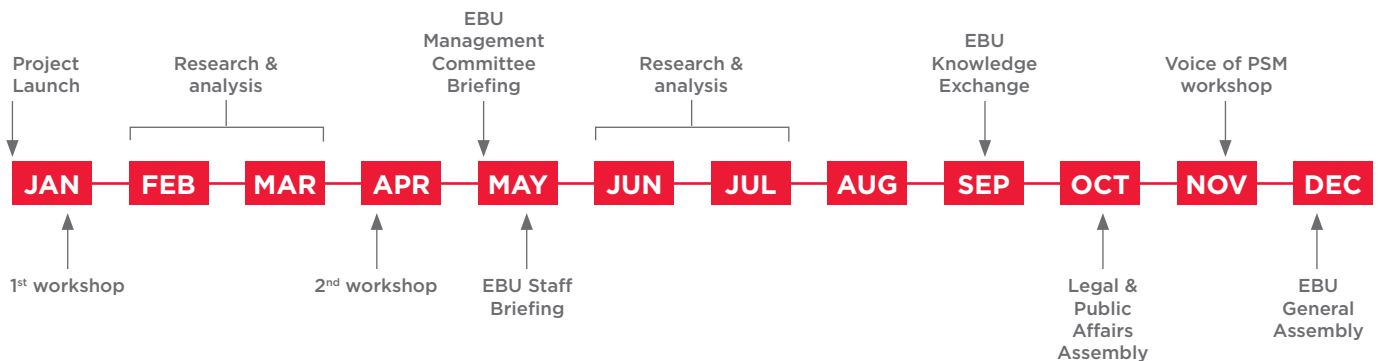
GOALS

In 2015, our work focused on defining a conceptual and operative framework about PSM's contribution to society. Our goals were:

- Identify the main vectors of change in the media sector and the resulting challenges for PSM
- Define a new mindset regarding PSM's contribution to society
- Map the areas and activities where PSM deliver significant value
- Identify methods and tools to assess the impact of PSM, with guidelines for how to use them
- Analyse how EBU Members could improve their communication, with practical recommendations
- Collect best practices from EBU Members and other players

PROJECT TIMELINE 2015

In addition to our research, in 2015 we carried out various activities to raise awareness of the project and its contents, involve EBU staff and Members, obtain input from third-parties and disseminate the results.





KNOWLEDGE EXCHANGE

EBU Knowledge Exchange is an event organized by the Media Intelligence Service for Members, academics and media professionals to discuss issues that impact PSM. This year's event focused on PSM's contribution to society. More than 100 delegates from 31 countries and representing 33 EBU Members heard 14 speakers share how their organizations have approached the task of assessing the positive impact they have on society and communicated the value they provide for citizens.



All presentations, interviews, videos and the event report available at www.ebu.ch/kx15





Follow the project at: www.ebu.ch/psm-contribution-society

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