

# **Strategic Innovation and Public Value in European Public Service Media**

The case study of Italy and the Netherlands

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## A comparative case study of Italy and the Netherlands

### **ABSTRACT**

In an era of disruptive digital innovations across the media landscape, Public Service Media (PSM) are threatened like never before in their history. Commercial streaming platforms are a dangerous competitor on the content side, while most of the media consumption is shifting from linear channels to social media. In this scenario, the legitimacy and sustainability of the large publicly owned media corporations have been questioned. This thesis investigates how PSM in Europe are taking advantage of digitalization to strategically innovate and increase their public value outcome for contemporary societies. To do so, a qualitative multiple case study was conducted, taking into consideration two countries with two very different media models and public service broadcasting systems: Italy and the Netherlands. Innovation strategies by the two PSM companies, Rai and NPO, have been assessed through a deductive analysis based on mixed methods data collection: in-depth interviews with experts and strategy documents by the organizations. To analyze the data, a conceptual model of analysis was developed selecting concepts from the existing literature. Social, cultural and political were considered as the most relevant dimensions of public value for PSM, and therefore included in the model. Findings showed that public value across those three dimensions is improving thanks to digitalization processes and strategies carried out by the two broadcasters. In Italy, Rai has just started an ambitious transition to become a digital media company, a process that will require significant restructuring in the organization, In the meantime, Rai is trying to implement new content and offering strategies on its streaming platform, and coordinate and reorganize its social media activity more strategically. In the Netherlands, NPO can just act as a coordinating body of several different independent broadcasters, each of them having its own strategic approach toward digitalization. However, they are all carrying out innovative projects on topics such as Artificial Intelligence (AI) or the Metaverse, driven by the competition against each other for new audience. In both cases, achievement of public value seems to be positively influenced by innovation strategies. Italian and Dutch PSM are succeeding in making their services more accessible and equal (*social dimension*), providing high-quality content, stimulating new talents and providing educational tools (*cultural dimension*) and offering more widespread and accessible news without losing information quality and integrity (*political dimension*). The thesis' conclusion is that, despite the undergoing media revolution, European PSM are heading in the right direction to keep their role relevant, legitimate and sustainable for today's societies.

**KEYWORDS:** *Public Service Media, Digitalization, Strategic Innovation, Public Value, Society*

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# 1 INTRODUCTION

## 1.1 The present scenario

Public broadcasters have been the most impactful media in Europe for decades, influencing public debate and shaping national societies. They have fulfilled a role of social cohesion and education, contributing to giving structure to democracies in the old continent. From the early 2000s, authors started considering the shift from Public Service Broadcasting (PSB) to Public Service Media (PSM) as the core challenge for the public sector in media. This transition was meant to move beyond the old transmission model, towards a demand-orientated multi-media approach (Lowe & Bardoel, 2007, p. 9). The media landscape at that time was starting to expand from a sender-to-receiver model (communication as a transmission) to a more complex system of media creation, consumption, and remixing (communication as participation) (Aslama, 2010, pp. 87-100). In the shift from PSB to PSM, a new definition of public media was reached, having to comprehend the wide scope of the new media environment without losing the public value mission necessary to public organizations' existence. PSM can therefore be defined as “the services provided by public broadcasters, via different devices and technologies, that contribute to the democratic, cultural and social objectives of society” (Donders, 2019, Introduction section).

Since then, the digital revolution has continued transforming the production, distribution and consumption of video content, reshaping the competitive environment of the market (Schauerte et al., 2020, Introduction section). PSM in Europe have evolved and occupied a position in the digital space. The groundbreaking technological innovations of the media convergence process brought European broadcasters to expand their activity on multiple platforms, launching streaming services, social media accounts and other digital activities.

However, in the ever-evolving scenario of the media market, the identity and role of PSM are constantly questioned and critically mined. Linear television's primate over entertainment and news is strongly challenged by social media (European Union, 2023, Key Findings section; Ellerbeck, 2022, para. 2), media consumption is ever more switching to mostly private and extra-European digital platforms (Schneeberger, 2023, pp. 3-6), and the digital sovereignty in Europe is *de facto* held by multinational corporations (Floridi, 2020, p. 372). Not only do the big tech companies dominate the digital space of social media; European PSM current core activities of audiovisual production and distribution is also threatened. Streaming operators have seen their revenues grow by a factor of 6 only from 2016 to 2021. Most of them are US-based or are streaming services of US based broadcasters: US interests now weigh for up to 30% of the top 100 audiovisual companies in Europe for revenues (Ene, 2023, Key Insight section). Their expansion has occurred through M&A operations all over European territories: 18% of all TV channels and 39% of all VoD services in Europe are US-based (Schneeberger, 2023, p. 7). PSM has suffered the most the consequences of this scenario. Their revenues have grown by 7% (under the inflation rate) from 2016, compared to the +22% registered by the private sector. Their market share, considering the top 100 European

AV players, diminished by 3% and it is now around 30% (Ene, 2023, Key Insight section), going down to 18% when considering the top 50 players (Schneeberger, 2023, p. 7). Only 1 TV channel out of 10 in Europe is public, just as only 3% of the VoD services (Schneeberger, 2023, p. 6).

Adding to these figures, projections show which are going to be the most promising entertainment media businesses of the future: free ad-supported streaming services (FAST), gaming, live sports and e-sports streaming, and AI-powered content and experiences (PWC, 2023, para. 2). At the same time, news, information and culture are ever more switching from linear to digital and social media.

Given all these conditions, European governments and society are raising concerns about whether PSM should still be considered of fundamental public interest and therefore publicly funded (Patella, 2023, para. 2; NL Times, 2023, para. 1).

## **1.2 Strategic innovation and public value**

It is therefore evident that, for surviving, PSM must be able to adapt and be competitive in this new dynamic environment, without losing the legitimacy and trust that are at the base of their existence. In order to survive in rapidly changing competitive markets, it is necessary for a company to consider its strategy, i.e. its ability to be perceived as different in the market (Porter, 1996, I section). The starting assumption of this research is that public nature of PSM is what can still differentiate them from their competitors in the media industry. Therefore, it is stressing their public identity that PSM can keep playing a relevant role in the media landscape, and thus in the society, maintaining sustainability and legitimacy to the citizenship. However, the distinguishing features of PSM must be used as a leverage to innovate strategically, keeping up with the evolving media environment and trying to intercept new audiences, developing new products and communicating their identity in a new way. For this reason, this study is considering the theoretical framework of strategic innovation to assess how European PSM are using public value to differentiate themselves in the market. Strategic innovation is here meant as the ability to create new value innovating products, business processes or practices (Drejer, 2006, p. 145; Varadarajan, 2018; p. 152). Definitions and approaches by these scholars will be analyzed in the theory section, as well as the *strategic triangle* model proposed by Moore (1995, as cited in Alford & O'Flynn, 2009, p. 173). Given the digital nature of the innovative forces that are changing the media competitive scenario, the theoretical framework of this research project will especially focus on digital innovation literature. Major relevance will be given to the way digital innovation has impacted the public encounter for public organizations (Lindgren et al., 2019, p. 428) and how it affects the fundamental principles of media public value that were found by McQuail (Deuze, 2020, pp. 203-221).

However, before that, public value definitions will be identified reviewing the existing literature (Kelly et al., 2002; Meynhardt, 2009; Bryson et al., 2014), as well as the public value dimensions for PSM and the measurements that have been proposed by Faulkner & Kaufman (2017) and Chivers & Allan (2022).

This theoretical work will then bring to the construction of a conceptual model of analysis for the research.

### **1.3 Research Question**

It has been proposed as an assumption that, to keep playing a relevant role and to be competitive in their evolving market, PSM must innovate strategically, differentiating themselves from privately-owned commercial competitors by leveraging their unique feature of carrying public value. In this view, digitalization must be seen as a strategic opportunity, rather than a threat, to improve PSM's outcome achievement and create new public value in society. Hence, this research is aiming to answer the following research question:

*RSQ: How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome?*

The distinguishing elements of public value identity will be identified in theory, grouped into three public value dimensions, and thus used to develop a conceptual model of analysis, linked to two further research sub-questions.

### **1.4 Structure of the thesis**

The research will follow the methodology of a qualitative multiple case study, taking in consideration the two different cases of the Netherlands and Italy. The thesis will analyze the digital innovation strategies by the two countries' PSM organizations, assessing how and on what extent they are improving their public value outcome.

The theoretical framework of public value creation for PSM and strategic innovation will be provided in chapter Two. Elements from theory will be selected to develop a conceptual framework that will guide the following analysis.

Chapter Three will explain the thesis' methodology. Data will be collected by two main types of sources: in-depth interviews with current and former innovation figures from the companies and strategic, programmatic and assessment documents by the two organizations. Concepts will be operationalized following two codebooks of analysis, and sources will be then analyzed through a deductive thematic analysis.

Results of the two cases' analysis will be provided in Chapter Four, where a comparison section will also be provided. Discussion and conclusions will be the objective of final Chapter Five.

## 2 THEORETICAL FRAMEWORK

### 2.1 Public Value

It has been already stated that is leveraging on the uniqueness of being public that PSM must differentiate themselves in the market. It is therefore fundamental to define public value, to review relevant literature around PSM and public value, and to understand how to measure and assess it.

#### 2.1.1 Defining public value and public value creation

On general terms, public value refers to “the value created by government through services, laws, regulation and other actions” (Kelly et al., 2002, p. 4). Looking at public value as a relationship between the individual and society, public value can be seen as “about values characterizing the relationship between an individual and “society,” defining the quality of this relationship” (Meynhardt, 2009, p. 206). The definition of this value, in democratic countries, is ultimately up to citizens. Citizens express preferences, that are reflected by the decisions of elected politicians. Public value has its origin in the desires and perceptions of individuals and is the result of evaluations of the needs of individuals, groups and the society as a whole (Moore, 1995, as cited in Meynhardt, 2009, p. 196). Subsequently, public value creation consists in the production, delegated in democratic societies to public governance, of something that those individuals and groups evaluate or consider to be good (Bryson et al., 2014, p. 446).

#### 2.1.2 Public value for PSM

PSM exist to represent societies that are ever evolving and changing; therefore, they must constantly be able to adapt and align to the new political and cultural preferences (Martin & Lowe, 2014, p. 27), i.e. to what is considered as public value by a certain society. Changing political priorities, deriving from mutating circumstances in society, make hard to define, calculate and evaluate public value produced by PSM in a given context (Martin & Lowe, 2014, pp. 27-28). Since the end of the public monopolies, European broadcasters’ policies have always highlighted social imperatives as the core of their mission, aiming to protect moral values, cultural traditions, pluralism and democracy (Simpson, 2000, as cited in Lowe & Bardoel, 2007, p.10). With the transition from PSB to PSM, public media ceased to be only broadcasters and gradually transformed into aggregators of public value content across different platforms, in a scenario in which citizens were becoming ever more users and producers, rather than just recipients of content. (Leurdijk, 2007, p. 71). The various public service tasks carried out by PSB progressively expanded on the digital space. Quality entertainment and information spread on streaming and on-demand, new channels available to enhance the “anything, anytime, anywhere” paradigm, while linear content was enriched by digital interaction, just as education and public debates on digital platforms (Jakubowicz, 2007, p. 36). At the same time, the shift towards this new model changed the way PSM must consider their public mission. New market-based economic sensibilities in society require PSM to legitimate themselves more explicitly than



before. Governments started considering whether investments made in PSM would guarantee a good return in terms of political, social and cultural outcomes. PSM are ever more evaluated according to their efficiency and economic and accountable performances (Martin & Lowe, 2014, p. 20). They must, therefore, be able to demonstrate that they produce positive externalities and evident public value to compensate for their “market failure” (Lowe & Bardoel, 2007, p.14). However, PSM, although now corporatized, structured like enterprises and operating in a business-like way, are not supposed to be a business. Sometimes their mandate includes providing services to groups that are not commercially attractive, and to produce a content that may not always be of value for the majority (Martin & Lowe, 2014, p. 21).

The complexity of evaluation led to several attempts to create new tools for measuring outcomes, projects and strategies in PSM, trying to evaluate both the value for the public and the commercial value created. A frontrunner and notable instrument was the Public Value Test (PVT) introduced by the 2005 BBC charter. The charter required that every new BBC service had to pass the PVT, confirming its contribution to public interest as well as and assessing its impact on the commercial market (Lowe & Bardoel, 2007, p.12). In the first step, BBC Trust would have decided whether the project was of public interest. Subsequently, the Office of Communication (OFCOM), would have deliberated over its fairness and desirability in terms of market impact. This approach has later been adopted in other European countries, although, ironically, often criticized for its lack of efficiency and for its costs (Martin & Lowe, 2014, pp. 25-26).

### 2.1.3 Public value’s measurement and dimensions for PSM

Following these first approaches, several studies were conducted, aimed to identify dimensions of public value and techniques to measure them. Categorizing the areas of impact of PSM in modern societies can help governments and regulators assessing organizations’ performances and outputs. Measuring the extent to which public value is created is fundamental for fulfil external accountability requirements, set a clear and significant mission for the public organization and to promote a sense of internal accountability (Moore, 2007, as cited in Faulkner & Kaufman, 2017, p. 70). Despite the great number of studies on the subject, no commonly used measure has been found for public value (Faulkner & Kaufman, 2017, p. 70). The present study is reviewing the state of literature on public value dimensions, as these are going to be used as elements for the research’s conceptual model of analysis. Trying to understand which of these dimensions are the most relevant for PSM differentiation strategy, and how to strategically innovate them, is the key objective of this study.

A comprehensive meta-study on public value measurement was conducted by Faulkner & Kaufman (2017), trying to identify measurable dimensions of public value. Four were finally identified by the authors: (1) outcome achievement, (2) trust and legitimacy, (3) service delivery quality and (4) efficiency. “Outcome achievement” refers to the improvement of publicly valued outcomes provided by a public body. “Trust and legitimacy” refers to the perception by the public and by key stakeholders that public organizations and their

activities are legitimate and trustable. “Service delivery quality” refers to the extent to which public services are perceived to be delivered in high quality. Finally, “efficiency” is about being able to achieve maximal public benefits with minimal resources. (Faulkner & Kaufman, 2017, pp. 77-79).

The concept of “outcome achievement”, referring to the general improvements in public value, can be deepened by looking at the recent study on the case of BBC by Chivers & Allan (2022), identifying public value dimensions for today’s PSM. Six of them were found. (1) “Social Value” consists of providing free and equitable access to the media content, and it is built around the concepts of *universality* (i.e. providing programmes and services that represent diverse needs and interests of a national community) and *accessibility* (i.e. ensuring that the services are not limited by individuals’ ability to pay, geographical location or device used). (2) “Cultural Value” for audience is created providing high-quality original content across all formats and genres, also focusing on original local content, so reflecting issues and experiences relevant for all the national audiences. (3) “Economic Value” is provided impacting positively with publicly funded interventions to the commercial media markets, stimulating employment, spending and investments. In the debate around economic value is fundamental to consider legitimacy and sustainability of public funding, depending on how audiences evaluate their transactional relation with the media providers. (4) “Industrial value” is provided to the whole media industry through infrastructure creation, technological innovation, formation of skilled workforce, growth in quality and dimension of the creative industries. (5) “Representational value” is provided by ensuring that the multicultural society is represented, accurately reflecting the nation’s composition and its minorities and encouraging diversity in the talent and staff employed by the industry. (6) Finally, “Civic value” is provided empowering the public to participate in the democratic process, by informing individuals and raising awareness about important issues. (Chivers & Allan, 2022, pp. 208-216).

Also, crucial concept among the above-mentioned ones, is “trust and legitimacy”. The research by Faulkner & Kaufman (2017, p. 79) identifies 3 further sub-elements of it, referring to the extent to which the public (1) trusts the particular institution, (2) trusts the programs or services delivered by the institution and (3) perceives an institution to be delivering services transparently and fairly.

## **2.2 Strategic Innovation**

Among the previously listed elements of the public value dimension, two will be later selected as of key elements of the present research, together with related sub-themes. The key issue will be to understand how PSM can innovate these value dimension to make them strategically relevant in the future European media landscape. To do so, it is necessary to investigate the concepts of strategic innovation and strategy in PSM.

### 2.2.1 Defining strategic innovation

Existing literature has defined strategic innovation in various ways. Drejer (2006, p. 145) defines it as: “the ability to create and revitalize the business idea and concept of the company by changing both the market of the company and the competencies and business system of the company. In this way, strategic innovation is concerned with developing the entire company.” This vision stresses the aspect of being able to create value in a new market, while still being able to do the same in the current one. Under this perspective, strategic innovation is mostly a matter of strategic management, with the goal of revitalizing the company and its whole system of activities and competencies. Varadarajan (2018, p. 162), builds on a previous conceptualization, proposing that strategic innovation is: “the creation of value by using relevant knowledge and resources to implement an idea for a new product, process, or practice with the potential to have a major transformational effect on the evolution of markets and industries”. Here, the emphasis is on the potential transformations that new ideas from within the company can have on the market. This definition also indicates three areas of strategic innovation: product, process or practice. Finally, another relevant work on strategic innovation was carried out by Schlegelmilch et al. (2003), which defines strategic innovation as: “the fundamental reconceptualization of the business model and the reshaping of existing markets (by breaking the rules and changing the nature of competition) to achieve dramatic value improvements for customers and high growth for companies. (Schlegelmilch et al., 2003, p.118). Here, the definition is centered on the reconceptualization of the business model to reshape the existing market. The goal is focused on value improvement for customers and growth for the company. In their vision, strategic innovators must look not only to rivals within their strategic group and market, but they must look across substitute strategic groups and substitute markets, inventing new market spaces for the company. A core aspect is that strategic innovators must go beyond the paradigm of matching internal resources and capabilities with external opportunities. They must instead imagine an ideal future scenario and understand what is necessary in the present to reach it.

### 2.2.2 Strategy and strategic innovation in the public sector and PSM

As already mentioned, public organizations, and especially PSM, operate in an economic environment, other than political, and therefore require a managerial and strategic approach, just like private companies. Strategy in the public sector is often conceptualized as the way to improve performances and provide better services, although with more constraints than in the private sector, due the different nature of the companies (Andrews et al., 2012, pp. 1-2). For this reason, literature about strategy in public organizations is not particularly developed, and the main studies on the field are still the ones by Mark H. Moore at the end of the twentieth century. Moore (1995, as cited in Alford & O’Flynn, 2009, p. 172) analyzed public organizations’ activity from a new managerial perspective, stressing the concept of efficient and effective public organizations, operating justly and fairly for society. He introduced an innovation-oriented vision of the public sector that can be linked to strategic innovation, as he considers managerial

success in the public sector to mean reshaping public enterprises to increase their value both in the short and in the long run. To obtain that, a strategic model to be followed by public managers was introduced: the one of the *strategic triangle*. The model proposes three requirements to be met by public organizations: (1) to create something valuable (i.e. public value) and doing so (2) being legitimate and politically sustainable (i.e. receiving support from the authorizing environment and operating under within a mandate) and (3) being operationally and administratively feasible (i.e. operating with the constraint of available resources). Public managers should define their strategy seeking to maximize these three purposes or to find a workable trade-off between them (Moore, 1995, as cited in Alford & O'Flynn, 2009, pp. 172-173).

While it is usually more difficult for public organizations to implement usual strategic practices (such as switching to new markets or expanding or relocating to a new geographic location) (Andrews et al., 2012, p. 2), PSB and PSM are usually considered as drivers of innovation in society, and a breeding ground for innovation and talent (Bardoel & d'Haenens, 2008, p. 343). It has been tested as innovation in the media industry can come from creativity and an internal sense of progress (Chan, 2020, as cited in Donauskaitė, 2022), as well as from the fear of becoming irrelevant in the market, with a defensive approach often caused by digital innovations (Nguyen, 2008; Kung, 2015 as cited in Donauskaitė, 2022).

Literature has also tried to identify the main areas of strategic innovation in media companies. Donauskaitė (2022, p. 616) reports the findings by Storsul & Krumsvik (2013) and Dogruel (2015), which detected four main types of media innovation: (1) product or service innovation (i.e. on the content and how it is presented to the audience), (2) process innovation (i.e. on the organizational processes of the organization), (3) position innovation (in the market and on how the brand is perceived by the public) and (4) paradigmatic innovation (i.e. the radical change of organizational values and philosophy (Storsul & Krumsvik, 2013 and Dogruel, 2015, as cited in Donauskaitė, 2022, p. 616).

### **2.3 New kinds of public value for PSM through digital innovation**

Despite the negative market trends for PSM in Europe outlined in Chapter one, this research argues that opportunities, other than threats, can come for PSM from the development of digital technologies. It has been tested that, across all public organizations, digitalization has drastically changed the *public encounter* of public services (i.e. the interaction between citizens and public officials) (Lindgren et al., 2019, p. 428). In many cases, this change can go in the direction of improving efficiency and service quality, reducing service times, increasing transparency and offering seamless service provision. In the case of PSM, that means that the public service can be provided more easily, to more people, and across several different channels. This is a fundamental aspect behind the public value of *diversity* in media, as defined by Denis McQuail and reported by Deuze (2020, pp. 210-214). The principle of diversity in media consists in the fact that the audience should be provided with a maximum variety of content through the more possible different channels of communication. In this way, different types of media firms, and therefore media channels, can reflect all the geographical, language, ethnic, political and religious aspects of society. Digital media can

certainly represent a very effective tool in providing the most diverse content to the broadest and most diverse audience. However, as McQuail (Deuze, 2020, pp.213-214) warns, too much diversity can also be dysfunctional, leading to social fragmentation. This threat is easily recognizable in the current digital media system, where the hyper-segmentation of target audiences and the increasingly dominant role of algorithms can affect PSM possibility of effectively representing societal diversity online. The impact of digitalization is also strong on the extent of the *equality* principle in the media landscape. At the structural level, media equality means that diverse and opposed interests in society should be guaranteed the same opportunity to send and receive messages and content. That is executed at performance level guaranteeing open, equal and proportional access to media (Deuze, 2020, pp. 209-210). Digitalization has impacted the capacity of PSM to create relevant public value in this sense. Social media platforms can be seen as a great tool for equal expression and access for all citizens and interests. However, the role of PSM is here bypassed, since the new channels of equal communication are private and operate only with commercial logic. Also, although they guarantee freedom of expression, the logic behind which content is shown to the audience doesn't necessarily follow equality, proportionality and neutrality, but it is subject to forces such as algorithms and sponsored content.

Another framework of analysis for digitalization effects on PSM is the one developed by the European Broadcasting Union (EBU). This value system, meant to be more operationalizable to face challenges posed to PSM by the digitalization of media, identifies six core values and public service obligations for PSM: universality, independence, excellence, diversity, accountability and innovation (EBU, 2012, pp. 4-5). This model has been tested on three European countries by Sehl (2020, p. 364), focusing on the audience's perception of PSM performance in news and information. The result was that respondents attributed high rates to PSM offering across all the value categories. The information quality of PSM was rated higher than that of all the other digital media. Particularly, findings were that PSM enjoys a relatively strong position in terms of perceived media performance as distinct from other media. This result is an interesting first step towards the definition of innovation strategies aiming to make PSM distinguish in the digital media landscape leveraging on differentiating elements of public value in their performance. At the same time, reports such as the one by Schulz et al. (2019, p.7) report that, despite the undergoing media digitalization, European PSM news struggle to reach a different and wider audience compared to the one they already have on linear broadcasting channels. Therefore, in many countries, PSM fail to meet the ambition of delivering near-universal news coverage, particularly online.

## **2.4 Conceptual model**

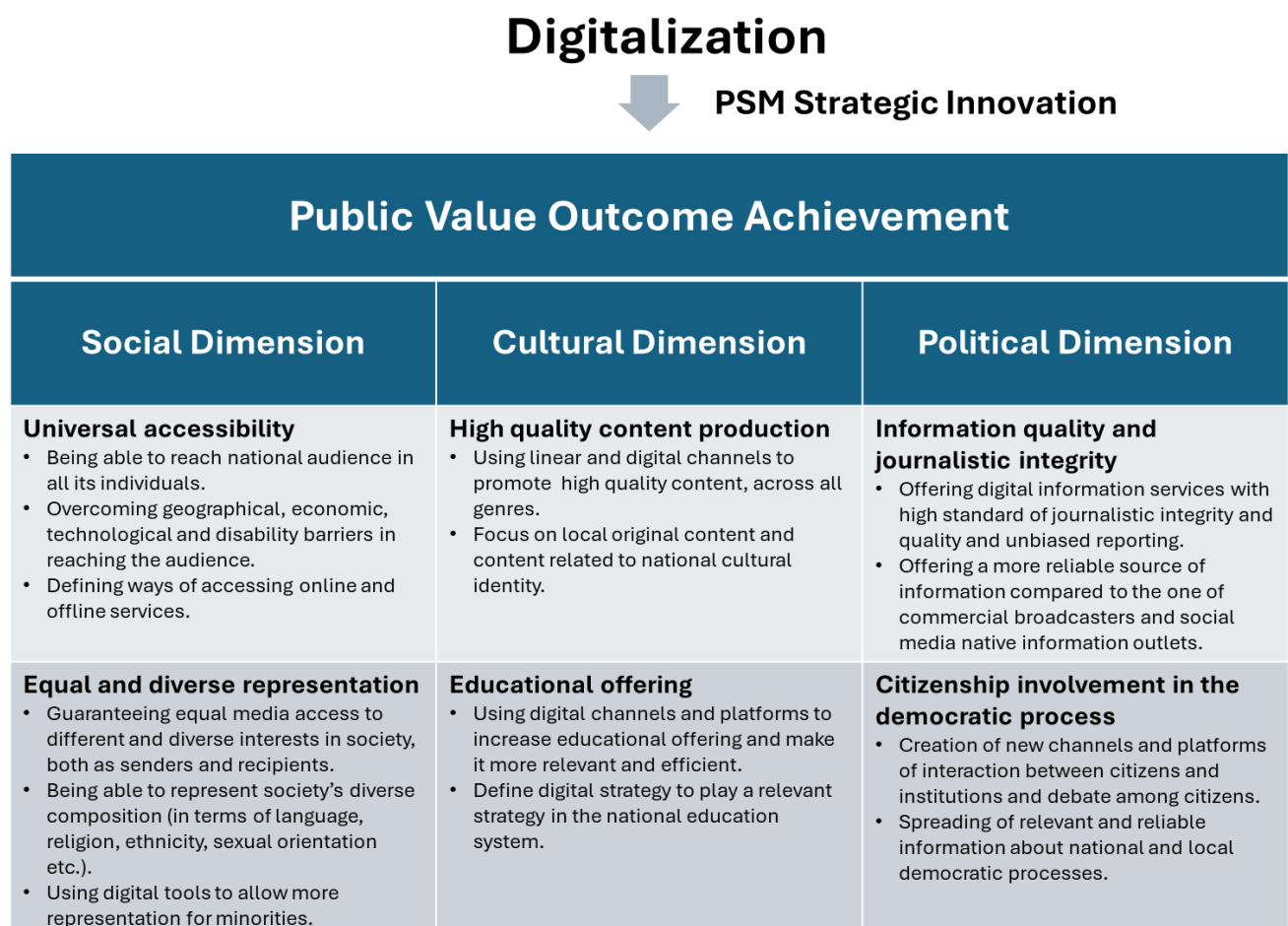
Having reviewed the most relevant literature around public value and strategic innovation in PSM, a conceptual model can be developed around the main identified concepts, to be used as a codebook of analysis for the collected data.

Public Value is the overarching principle of the framework. Its outcome achievement in the goal, in this framework’s vision, is to be reached by PSM through strategic innovation taking advantage of the ongoing digital revolution. Three value dimensions of public value have been extracted by theory and included in this conceptual model: *social, cultural and political*. These three theoretical concepts have been obtained by considering, selecting and combining the elements of public value found and elaborated by Faulkner & Kaufman (2017), McQuail (Deuze, 2020) and other relevant literature from the theoretical framework. Each value dimension materializes in two sub-categories of activities and practices by PSM: *Universal accessibility* and *Equal and diverse representation* for the social dimension, *High-quality content production* and *Educational offering* for the cultural dimension, *Information quality and journalistic integrity* and *Citizenship involvement in the democratic process* for the political dimension. Through strategic innovation, European PSM should be exploiting new digital technologies and solutions to transform and enhance those value dimensions, thus achieving new public value outcome.

The conceptual model here described, is below illustrated in Figure 1

**Figure 1**

*Conceptual Model*



Having described the conceptual model at the foundation of this research, it is now possible to develop three research sub-questions. These questions are the main question's declination following each one of the three public value dimensions included in the conceptual model. Therefore, the research's sub-questions are:

*RSQ1: How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome of social dimension?*

*RSQ2: How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome of cultural dimension?*

*RSQ3: How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome of political dimension?*

### 3 METHOD

#### 3.1 Qualitative research approach

This research is intended to investigate strategic innovation in PSM in Europe, and therefore answering the research question *How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome?* and the correlated sub-research questions *How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome of social dimension?; How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome of cultural dimension?* and *How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome of political dimension?*

The chosen research approach for this study is qualitative, carried out by conducting a multiple-case study research. Qualitative research is the more suitable method for this kind of research, as it allows researchers to investigate behavior of people (in this case, organizations) in their context, considering social, economic and cultural influences (Hennik et al., 2020, p. 10). Such is the case of this study's analysis, focusing on organizations' behavior in an evolving national and supranational context. Conducting qualitative research allows to interpret and make sense of phenomena, and the meanings that people bring to them Through qualitative analysis it is possible to reach a contextualized understanding of phenomena (in this case, PSM strategy in the evolving media context) and identify relevant processes (Hennik et al., 2020, p. 17).

#### 3.2 Research design

##### 3.2.1 Multiple-case study

Case study is an empirical method of research that investigates a contemporary phenomenon in depth and within its real-world context, particularly when boundaries between phenomenon and context are not evident (Yin, 2018, Chapter 1). The case study research method particularly suits this research, as it is the preferred strategy when posing "how" or "why" questions on real-world contemporary phenomena and events over which the investigator has little control Yin (2018, Chapter 1). Case study research is even more appropriate when the boundaries between the phenomenon and its context are less evident, such is the case of strategic innovation in national and supranational media systems. The proposed research question directs this study towards exploratory research, for which the method of case study is particularly suitable. The considered events are contemporary, and the relevant behaviors cannot be manipulated. Moreover, contextual conditions have to be included in the analysis, as they are necessary for its comprehension.

When a case study includes more than one single case, the research gets a multiple-case study design (Yin, 2018, Chapter 1). This research design is considered to be more robust and able to collect more



convincing data. When selecting cases for a multiple-case study, attention must be put on the replication logic to follow: either similar results (*literal replication*) or contrasting results for anticipable reasons (*theoretical replication*) are predicted for each single case in relation to the others.

For this research, to answer the research question at European level, three European national media environments, and their relative PSM were analyzed, and therefore a multiple-case study approach was chosen. The two selected national cases, the Netherlands (case study of NPO), and Italy (with the case study of Rai) are examples of two different media systems existing in Europe: the North/Central European model and the Mediterranean or Polarized Pluralist model (Hallin & Mancini, 2004, p. 11). The differences in these models lead to differences in the structure and identity of the PSM operating in each country, as it will be later further examined. Given these existing differences, the expected outcome of this multiple-case study was one of theoretical replication. Contrasting results were expected to be found due to the three different contexts in which the analysis was going to be conducted.

### **3.3 Validity and reliability**

Validity and reliability are the two parameters with which it is possible to evaluate the quality of an empirical social research design. Four tests, *construct validity*, *internal validity*, *external validity* and *reliability* have been developed to assess it (Yin, 2018, Chapter 2).

Construct validity consists of identifying the correct operational measures for the concepts being studied. In the present research, construct validity is accomplished by defining the concepts of public value, further divided into sub-elements, and strategic innovation. In the operationalization section, it will be shown how these concepts were measured across interviews and document analysis. Multiple sources of evidence (multiple interviews and documents for each of the three case studies) were collected to further increase the study's construct validity. This also gives the study the validity benefits given by the triangulation of sources (see data collection chapter).

Internal validity, in the case of the present research, is mainly an issue of the correctness of the inferences done during the cases' investigation. This has to do with the logic of theme deduction, and it is built in this study with pattern matching and explanation building during the deductive thematic analysis, as mentioned in the previous paragraph.

External validity relies on the possibility of generalizing the research's findings beyond the immediate study. Theoretical replication logic, as explained above, is followed in this sense, as well as the formulation of the research question in the form of a "how" question.

Reliability consists in minimizing errors and biases in a study, so that the research could be repeated, arriving at the same findings and conclusions. To achieve this, procedures of data collection must be clearly and explicitly reported. A case study database is developed for each case, cataloging all the collected data.

The operationalization section will also show which protocol has been followed for document analysis and interviews.

### **3.4 Case selection**

As explained in the previous chapter, the two cases were selected following a theoretical replication logic. Therefore, PSM from two countries with two different European media models were identified: the Netherlands and Italy. Great differences do exist in the two national contexts and in the structure of their PSM organizations, as shown in the following paragraphs, as well as the level of digitalization of the two countries (see results section).

Dutch media system differentiates from any other in Europe, as it reflects the complexity and cultural differences of the Netherlands. No broadcaster has a monopoly of the public service. Instead, several public broadcasters are present, under the governing body of the NPO (Nederlandse Publieke Omroep) foundation (Omroep.nl, 2013, para.1). NPO activity is regulated by the Dutch Media Act of 2008 and administrated by a board of directors, appointed by a board of supervisors which is nominated by Royal Decree. 11 broadcasting associations are currently active in the Netherlands, representing different political and religious groups of interest of the Country. These associations broadcast their programs on the public channels (NPO1, NPO2, NPO3, plus three thematic channels) (NPO, n.d., *Wie we zijn* [Who we are] section). Regional channels are also publicly funded. Unlike most of the European systems, the Dutch public television is financed by general taxation and there's no TV license fee.

In the Italian broadcasting system, Rai (the fifth largest broadcasting group in Europe) operates as the monopolist of the public broadcasting service. It is financed by a television license fee, and its board members are appointed mainly by the Italian parliament and the Italian government (one member is appointed by an employee's assembly) (Rai, 2023, *Statuto* [Charter] section).

Data were for the analysis were selected from these two cases and the two media context, through documents' analysis and experts' interviews, as explained in the next paragraph.

### **3.5 Data collection**

Six sources of data collection are listed by Yin (2018, Chapter 4) when referring to case study research: documentation, archival records, interviews, direct observations, participant observation and physical artifacts. All of these sources are complementary, and relying on as many sources as possible is a fundamental condition for a good case study. A case study needs to rely on multiple sources of evidence, and the collected data need to converge following the scheme of triangulation (Yin, 2018, Chapter 4). For this research, the analysis relies on two data collection methods, specifically documentation (document analysis) and interviews (in-depth interviews with industry experts). This dual approach of analysis guarantees both the collection of data from official companies' reports and the in-depth commentary of the selected media environments and companies given by experts. This way of triangulating sources gives more credibility and

reduces bias in the research's findings (Tracy, 2010, p. 843). These two ways of data collection provides elements to the following data processing and analysis.

### 3.5.1 Documentation

Collecting evidence through documentation can be particularly useful, as documents can provide specific details to corroborate information from other sources (Yin, 2018, Chapter 4). The analysis is mainly carried out on companies' recurrent reports, where corporate strategy is communicated to the stakeholders. As this research is aimed to investigate PSM strategic innovation, this kind of report is a primary source of data, as it directly outlines medium- and long-term company's strategy and innovation goals. For this reason, documents such as Rai's *Piano Industriale* [Industrial Plan] or NPO's *Terugblik* [Retrospective] were collected and carefully analysed according to this research's conceptual model. Other documents under analysis were statements reported on companies' websites and relevant news or academic articles. Documents were selected for their relevance and date of issue, giving more attention to the latest available.

### 3.5.2 In-depth interviews

Interviews are one of the most important sources of case study evidence (Yin, 2018, Chapter 4). They are particularly helpful, as they can suggest explanation of events, concepts and processes, helping to answer the "how" and "why" questions of a case study research. The experts being interviewed can provide important insights about the study's object. However, they are not free of bias, as the responses can be subject to common source problems, as well as poor recall of events by the interviewee and poor or inaccurate articulation (Yin, 2018, Chapter 4). For this reason, in this study data obtained by experts' interviews were corroborated with information from other sources, specifically documents.

The interviewed experts have different backgrounds and roles, ranging from journalism to business management, from consultancy to technical positions. Their areas of activity are therefore diverse and cover all the three value dimensions of this study's conceptual model. For each case, two interviewees are currently working within the organization, while one has a previous experience and is now external to it. This triangulation of sources, from in and out the PSM companies, gives more validity to the research. In total, 6 interviews, three for the Dutch case and three for the Italian case, were conducted via on-line call, from May 13<sup>th</sup>, 2024 to May 30<sup>th</sup>, 2024, with an approximate duration of 45 minutes.

Maike Olij (*Teams* interview, May 17<sup>th</sup>, 2024) is an independent journalistic advisor and creative consultant. She previously worked in the NPO Strategy & Policy department of and as a journalistic advisor at NPO news outlet NOS. As an independent consultant, she now works for public broadcaster KRO-NCRV, the European Broadcasting Union (EBU) and the Dutch Journalism Incentive Fund (SVDJ), among others.

Geert-Jan Bogaerts (*Teams* interview, May 21<sup>st</sup>, 2024) is the head of the Innovation & Digital Media department of public broadcaster VPRO, and founder and chairman of the PublicSpaces Foundation. Before

that, he was a lecturer in New Media at the Master's program in Journalism at the University of Groningen, a freelance consultant, and a journalist for de Volkskrant for twenty years.

Matthias Vann Turenout (*Teams* interview, May 30<sup>th</sup>, 2024) is the Head of Digital of public broadcaster EO. He has a background in user experience design and interaction design.

Fabrizio Salini (*Zoom* interview, May 13<sup>th</sup>, 2024) is an Italian media companies' manager. He has been Rai's CEO from July 2018 to July 2021. Under his management, Rai made its first approaches to digitalization of content and offering. He is currently active in TV production business, and still involved in PSM debate in Italy.

Maurizio Imbriale (*Teams* interview, May 15<sup>th</sup>, 2024) is the Head of Digital and Transmedia Content at Rai. He has been working at RaiPlay platform since 2019, holding the position of Vice Director from 2020 to 2022.

Andrea Gerli (*Teams* interview, May 30<sup>th</sup>, 2024) is the Digital News Manager at Rai's Editorial Division for News Offering. He has been working as a journalist for Rai since 2013, first at all news channel Rai News 24, later at Rai main news bulletin TG1, and now at Rai3 talk show *In Mezz'ora*. He is specialized in digital communication, online journalism and new media.

### **3.6 Units of analysis**

Units of analysis of this study include all the documents and interviews' transcripts that were analyzed for the research. That consists of documents issued by the two PSM organizations and transcripts from the experts' interviews. The list of the analyzed documents is provided, other than in the bibliography, in Appendix A.

### **3.7 Operationalization**

The guiding concepts of the collected data operationalization are the ones extracted from the theoretical framework and summarized in the conceptual model in Figure 1. These concepts are tested in the in-depth interviews through specific questions posed to the experts, and in the documents' analysis through coded units of measurement. Appendix B and Appendix C show, respectively, how operationalizations of relevant concepts was carried out during the interviews, and in the documents' analysis.

### **3.8 Data analysis method**

The deductive approach to data analysis consists of drawing codes from the existing literature on the research's topic. This requires the assumption that concepts that are going to be found in the data are already present in the existing literature (Azungah, 2018, p. 391). Therefore, this study's analysis was based on pre-existing theory, leading to the outline of a conceptual model, as shown in the theory chapter. The analysis put in practice was also *thematic*. Thematic analysis is the method for analyzing and interpreting patterns of

meanings (i.e. the themes) with qualitative data (Clarke & Braun, 2016, p. 297). The operationalization chapter will show how themes from the conceptual model (public value dimensions and their sub-elements) were measured across interviews and document analysis. Such themes provided the framework for the analytic observation and interpretation of data, and for the identification of patterns across different data and different cases. This pattern matching and explanation building are also fundamental to give the study internal validity (Yin, 2018, Chapter 5).

### **3.9 Research Ethics**

All the interviewed experts gave their consent to participate in the project, giving oral approval to the informed consent form. Participants were furthermore informed about the nature of the study and of their contribution and gave consent to be identified with their names in the paper. No type of harm or discomfort for the interviewees was detected.

The analysed data are publicly available, and they can be freely consulted on the organizations' websites, without the involvement of any individual.

## 4 RESULTS

### 4.1 Netherlands

The model of the Dutch public broadcasting system is unique in the world, as it doesn't feature one main public broadcaster but several ones, under the umbrella of the administrative body Nederlandse Publieke Omroep (NPO). Each broadcaster is independent and represents a specific target group, a social, religious, or philosophical movement (NPO, n.d., *Wie we zijn* [Who we are] section). These divisions represent fragmentations of Dutch society that emerged in the first half of the last century, and broadcaster associations are strongly rooted in the country's society. The purpose of the Dutch public broadcasting system, as regulated by the Media Act, is therefore to provide a pluralistic and varied media offering, reflecting these diversities in society (NPO, n.d., *Wie we zijn* [Who we are] section).

#### 4.1.1 Digitalization and innovation strategies by NPO

The Netherlands is one of the most advanced countries in Europe in terms of digital progress and digitalization of society. It ranks third out of 27 EU countries in the EU 2022 Digital Economy and Society Index, with scores far higher than EU average on parameters such as digital skills, broadband coverage, and digital technology integration in business. It also performs above the average on digital public services, also driven by a national digital strategy (DDS, adopted in 2018), and a government digitalization agenda for public services (NL Digibeter Agenda, adopted in 2020) (European Commission, 2022, pp. 3-5).

For these reasons, navigating the digital for a broadcaster is easier in the Netherlands than it could be in other European countries. Therefore, according to Olij, NPO is, in Europe, ahead of many PSM when it comes to digitalization of its service.

According to the Media Act, the obligation for NPO concerning innovation consists in:

“stimulating innovation in media content, monitoring and stimulating technological developments and exploiting the possibilities of providing media content to the public through new media and distribution techniques” (Media Act 2008, p.3).

Embracing change and exploiting technological developments are explicit goals posed by the Board of Directors in the 2022 Annual Report, aiming to catch up with a media world that never stands still (NPO, 2023, pp. 4-5). Complying with this mission, NPO counts today one free digital on-demand platform (NPO Start), a premium service (NPO Plus), to watch content after it has expired, a joint distribution platform with RTL and Talpa (NLZiet) and a podcast and digital radio platform (NPO Luister) (NPO, 2023, p. 8). Since March 2022, an important change has been made, with the introduction of the “integral programming”. This approach follows what has already been done by other European PSM (like Rai and BBC), dividing budget not anymore among networks, but among genres, with different indications of expenditure for linear, on-

demand and online channels) (NPO, 2023, p. 13).

At the organizational level, the digital platforms NPO Start (video), and NPO Luister (podcasts and digital radio) are respectively under the Video and Audio divisions, while a different department deals with strategy and innovation (NPO, n.d., *Organisatie* [Organization] section). The department helps the public broadcasters with innovation, and it works as a sharing point for information and technologies, for knowledge building and sharing. It facilitates and stimulates innovation activities across media institutions and NPO departments. Every year, the department works on an innovation agenda, giving direction to innovation projects and experiments, exploring the future of devices and the changes in media users' needs. The agenda works on a two to three-year time span, investigating trends in technology and social media (NPO, 2023, p. 14). In the 2022 edition of the agenda findings on new target audiences and new relevant technologies for public service broadcasting were released, together with new possible methods to increase accessibility (e.g. a way to distribute podcasts among deaf users). An overarching strategy process was launched by NPO at the end of 2022 in cooperation with the broadcasters, trying to jointly work in answering some fundamental questions: how does public broadcasting remain relevant, impactful, visible, findable and recognizable for every Dutch person, in a changing society and what is needed to achieve this? The joint definition of this overarching strategy is still under discussion (NPO, 2023, p. 9).

The peculiar structure of Dutch public broadcasting affects the way digitalization strategies are developed and implemented. Each broadcaster is responsible for its own projects and approaches to digitalization and innovation. This diversity of approaches is a cornerstone of the system and a fundamental aspect of the system, according to all the interviewees, even if more coordination and scale could benefit NPO innovation in terms of human resources, knowledge, skills, and funding (Bogaerts). According to Olij, a disadvantage of the system's layout is the strong competition between broadcasters, each having to reach a certain monthly threshold of traffic and competing with others to reach more possible users. This way, the audience is invited to join not one single public digital space, but multiple multiples (not only the NPO Start platform, but all the other websites, platforms and digital spaces developed by the broadcasters). Differences between broadcasters exist not only in terms of projects, strategies and technologies but also in the very first approach towards new technologies. This clearly reflects the different philosophical and political backgrounds at the core of each broadcaster's identity. As an example, Vrijzinnig Protestantse Radio Omroep (VPRO), following its social liberal nature, has an open but also critical and cautious approach towards technological developments, while Evangelische Omroep (EO) is bolder on adopting new digital media. Differences in approaches and innovation strategies by these broadcasters will be further investigated in paragraph 4.1.3.

#### 4.1.2 NPO's public value obligations according to the Media Act

NPO's mission, according to the Media Act, is to provide a media offering that is *accessible* for

everyone, *multiform* or offering multiple perspectives, *independent* from politics and commercial interests, of *high quality* and *trustworthy* (NPO, n.d., *Waar we voor staan* [What we stand for] section). These values are shared by all the member broadcasters and included in their statutes (Bogaerts), as they are jointly responsible with NPO for the Dutch public broadcasting statutory remit. The NPO's Board of Directors gives direction and promotes cooperation to carry out the public media mission (NPO, n.d. *Organisatie* [Organization] section). The organization's activity is driven by the pursuit of social relevance and a meaningful impact across different aspects of value propositions.

In terms of social dimension of public value, NPO defines itself as “bound for the whole of the Netherlands”, meaning that social issues and important themes must be shared with all components of society, creating a sense of solidarity and connection across the society (NPO, n.d., *Wat we betekenen* [What we mean] section). Differentiation from commercial players is explicitly mentioned by the *Jaarverslag 2022* [Annual Report 2022], where NPO is defined as a pre-eminently public media organization, standing out from all other players on the media market because of its values and its goals (NPO, 2023, p. 7).

In terms of cultural dimension of public value, being the country's largest cultural platform, NPO stimulates art and culture across all genres, driving cultural participation from the audience and serving as a springboard for new talents. NPO programming also has educational value, to be widely used in education and contribute to the personal growth of Dutch individuals. Online and digital tools are explicitly mentioned, with the platforms SchoolTV and NPO Kennis as providers of educational content for all ages (NPO, n.d., *Wat we betekenen* [What we mean] section).

In terms of political dimension of public value, NPO defines itself as a “driver of social debate”, acting as a journalistic watchdog, contributing to social debate from multiple angles through the broadcasters, and contributing to voters' opinion formation with news and insights.

Finally, innovation is at the core of NPO's activity. The broadcaster innovates continuously its technologies and its programming, responding to the changing ways of media consumption by the audience and, in turn, stimulating media innovation. Collaboration with start-ups is mentioned as one of the ways of innovating and enhancing innovation. Three cases of three different broadcasters, VPRO, EO and Nederlandse Omroep Stichting (NOS) can provide an overview of how digitalization is approached by different broadcasters, and how they are using it to enhance their public value creation.

#### 4.1.3 Digitalization and social and cultural dimensions of public value. The case of VPRO and EO.

VPRO is the social liberal broadcaster of the Dutch public media system, mainly focused on arts and creative movies and documentaries. In terms of values, VPRO believes in free and creative thinking, considered to be necessary for societal development (Bogaerts). As already mentioned, VPRO's approach to technology and innovation is open but critical. The organization aims to be as innovative as possible, always



trying to embrace new opportunities in the digital space. However, technology must always be seen, and therefore used, as a tool, never as an end itself (Bogaerts). Two main examples of technologies embraced with cautiousness and a critical approach by VPRO are Virtual Reality (VR) and Artificial Intelligence (AI). The broadcaster is already implementing these technologies both in content distribution and production, but with important precautions and limitations. Regarding VR, Bogaerts points out that is not always a good thing for spectators to get completely lost in the media they are using. Public broadcasters always need to consider that their audience must distinguish facts from mediated reality. This is easy when the engagement happens via radio or television, but harder when immersive devices such as VR visors are introduced. PSM's role must always be to let the audience aware of the media they are using, even if with the more immersive experience the most engagement can be expected by the user. When approaching AI, VPRO adopted the policy of always having a human in charge and in control. Even though AI is already used by the broadcaster in its editorial process and technical operations, the result of those manipulations is never directly shown to the audience, but always checked by a human. Bogaerts still points out the great help that AI can provide to editorial work, mainly in research and investigative journalism. It is fundamental, however, to always be transparent with the audience about its usage.

In terms of target audience of digital innovation, VPRO does not differ from the other broadcasters, and it is mainly focused on a younger audience. While the main demographic for linear programming by the organization is over 50 years old, the online strategy is predominantly addressed to target the younger generations. In that sense, VPRO's strategy when approaching online offer is not that of bringing the existing TV audience online, but to engage with a new audience, focusing on titles and programs that can be more attractive for the youngsters. In doing so, VPRO is very strict in always producing its content in the same way, regardless of its online or offline consumption. Titles' formats and languages have not changed. Length of the titles, for instance, has never changed from the approximate 50 minutes of the linear offering. That demonstrates, according to Bogaerts, that young audience still demands this kind of content, and it can get engaged not only by short formats. Above all, VPRO is not keen on compromising on its values and its distinctive offering. In fact, this is expressively the way it tries to attract younger audiences online.

Finally, regarding VPRO's activity on social media, a very critical attitude is expressed too by Bogaerts. He is aware of the fact that the organization needs them because of the large usage of them made by their audience. However, at VPRO there is a lot of skepticism towards global, privately owned digital platforms, and it is for this reason that alternatives are actively sought. Chapter 3.1.5 will contain VPRO's future strategy on social media and its work towards the creation of publicly owned digital platforms to create engagement, debate and interaction for society.

EO is the evangelical broadcaster of the Dutch public media system, focused on "telling stories about God and Jesus to everyone" (EO, n.d., *Over de EO* [About EO] section). Starting from the organization's mission, as it is stated on EO's website, Van Turenout points out that the only way to reach "everyone" in

the Dutch market is going digital. For this reason, EO is conducting a determined targeting campaign to reach the largest possible portion of Dutch population online, choosing to target the middle class and politically centre-oriented segment of the national audience. With this purpose, between 2018 and 2019 EO started its digital transformation, that brought it in a few years to become one of the most innovative public broadcasters in the Netherlands. EO is actively working on VR and AI project, having already developed an internal AI guideline and experimenting advanced applications to offer to its audience. EO's goal is to be able to create digital communities where the evangelical message can be told and shared, attracting online both the existing TV audience and new targets. This strategy is working also on the older core of EO's audience: the YouTube streaming of Saturday and Sunday live ceremonies is already registering more views (1.5 million per month) than the linear one (circa 70,000 TV spectators) (Van Turennot). Therefore, Van Turennot is optimistic in the capacity of building digital communities for youngsters and elderlies, although reaching the 18-35 is still a difficult mission. For this reason, a strategic use of social media is necessary: Van Turennot believes in the indirect conversion model of engagement from social content to EO's section on NPO start, and this is the way social content is conceived and produced. Content produced for social media cannot be compared to the linear ones, also because of evident budget and production value issues, but they can be helpful enough to attract audience to EO's digital platforms.

Unlike other broadcasters, EO has a very positive and direct approach towards technologies such as VR and AI. In Van Turennot's view, virtual spaces are just a new way of communicating with people and make them interact. He does not even see any contrasts with the evangelical mission of its channel and the religious content they are sharing:

“...from the beginning of EO, 17 years ago, we have always looked for ways to tell something about God's love on television. Most Christians didn't even have a television in their home because they thought it was a form of the devil. We are always finding new ways to use the newest technologies to share something about God's love...”. (Van Turennot).

Following this purpose, EO is now experimenting a metaverse church, starting on an open-source platform, but with the goal of reaching the global metaverse gaming universe Roblox. Virtual focus groups for the audience and AI-generated TV hosts, are just other projects carried out by EO. These innovations are implemented both producing in house and acquiring external competencies and technologies. Collaboration with start ups and other broadcasters are also implemented, like in the case of the accelerator program at the IBC conference. AI applications in the production and editorial process include video editing, voice over and subtitling, all following EO's guidelines on AI use (EO, n.d., pp. 1-3).

#### 4.1.4 Digitalization and political dimension of public value. The case of NOS

Unlike VPRO and EO, NOS is not a broadcasting association, but rather a task broadcaster. The two task broadcasters, NOS and NTR, are fixed members of Dutch public broadcasting, each with a specific task

(news coverage the former, education and culture the latter). They do not have paying members but do have their own statutory remit. NOS digital activities include the news online platform, the on-demand content (news bulletins, debates and analysis) available on NPO Live and the social media channels. According to Olij, huge progress have been made by NOS in the last years in terms of digitalization and strategic innovation. NOS approach towards digitalization is one of constant experimentation, through a dedicated digital development team and an experimental lab for new technological solutions. On social media, NOS presence started a few years ago under the responsibility of one intern only, and has now become a structured reality, with 70 people working on it. NOS is present with huge results across all social media platforms, with millions of followers. On Instagram only, the NOS official account has 1 million followers, just like NOS Stories, the account sharing news and investigations for a younger audience, while the programs NOS op 3 and NOS Jeugdjournaal have respectively 179,000 and 475,000 followers. NOS is also present on YouTube, Tik Tok and Twitch. An online public direct information service also exists people can contact NPS via email, X or WhatsApp to ask questions about relevant domestic or foreign news. During 2022 only, almost 70,000 questions were sent across the three platforms (NPO, 2023, p. 86). Thanks to this strategic and capillary presence on social media, NOS was able to create a very strongly connected community online. According to Olij, NOS was successfully able to claim a space in the digital world in which younger audiences have trust and with which they connect, although not watching the linear news anymore. For being able to reach younger audiences, a great help was given by the decades-long experience by NOS in producing a news bulletin for young people, and by the serious approach to the goal by NOS' top management. Having dedicated content to young audiences and to less educated targets, sometimes picking slightly lighter topics to cover was the key factor for becoming competitive on social media, and that didn't affect the overall journalistic level and quality of NOS offering, Olij says.

#### 4.1.5 NPO's self assessment on its public value outcome achievement: the 2022 Review

Every year, NPO publishes the *Terugblik* [Review], an analysis of the activities carried out during the previous 12 month and the results by the organization in terms of public value output. This tool, together with the online inventory presented online by the broadcasters since 2017, aims to reinforce the public broadcasting accountability to society measuring the produced public value. The document has been analysed to understand on what extent are these questions answered and public value goals achieved, and which role is played in this process by digital innovation.

The 2022 Review declares the necessity by NPO to be findable, relevant with high quality offering and impactful for Dutch audience, "focusing on a digital future" (NPO, 2023, p.3). On 2022 only 11% of video and 14% of audio spending were for online and on-demand content, while all the rest went to TV and radio linear production. The budget for digital content, however, still marks a 5% increase compared to the previous year. 77% of the audience declare to be very satisfied with the NPO Start service, and its use has increased by 11% compared to the previous year. Pursuing the goal of an ever-easier findable service, NPO

has been focusing on partnerships to bring the service available on all digital platforms. During 2022 the service has expanded its presence on app stores, smart boxes and smart TVs, becoming now “available to everyone in the Netherlands with access to the internet” (NPO, 2023, p. 40).

In overall public value terms, the review shows how 74% of the audience thinks NPO has an impact, ranking with a 8.3/10 of public value score its TV programmes (based on criteria like reliability, pluralism and social relevance, and assessed through the so-called Public Value Measurement (PVM)). A new tool introduced in 2022 is the impact perception meter, aimed to assess the impact of NPO’s programmes on audience’s 1) feeling 2) knowledge, 3) contribution to society. Results of the survey are a 74% overall impact score, with higher results for “contribution to society” (79%), and lower for “feeling” (74%) and “knowledge” (72%). (NPO, 2023, pp. 4, 39).

As for the social dimension of public value, the Review shows results from the assessment of cultural diversity and gender representation across its programming categories (news & current affairs, Journalism, Knowledge and Education, Human Interest). The assessment measures the results of the Diversity and Inclusion Action Plan, elaborated jointly by broadcasters, that includes goals and targets of diverse representation. From 2021 to 2022, the average score for cultural diversity has increased from 12.2% to 14%, with a set goal of 15% for 2026. Slower progress has been made for female representation, which passed from an average of 42,2% to 43%, although the target for 2026 is closer: 50% of representation. Where digitalization can particularly help in obtaining a higher outcome achievement is on accessibility. The Review states that, with NPO being present on every possible channel, over 83% of all Dutch people older than 13 come in contact with public service content at least once a week (on TV, radio or online). This data is within the target range set by the organization of 77 to 85%. Young audience in the age range 13-34 is reached with a rate of 67.9%, lower than all of the other categories (reach on the over 65 is above 95%), but within the target range set by NPO (35-39%). Internet’s role in reaching a vast segment of the Dutch population is shown by the fact that 51% of NPO's audience is also (or exclusively) on online channels, while only 33% of it only uses offline channels (TV and/or Radio). The average audience’s age for the online platform is much lower compared to the linear TV one (47 vs. 60), showing how digital content is effective in attracting a much younger audience than traditional TV. Accessibility of NOS programming has also been increased with new services of audio description, news bulletins for low-literates and the digital platform NPO Kennis, contributing informal learning by making existing public broadcasting material accessible online, provided with an educational layer. (NPO, 2023, pp. 8, 11).

Focusing on cultural dimension of public value, the Review shows how 57% percent of NPO TV budget and 69% of its programming is dedicated to journalism, culture, knowledge, education, and human interest. As for content quality, NPO scores 8.6/10 in terms of the perceived value of the work behind its titles. The best scoring genres are lifestyle (8.9), documentary (8.8) and knowledge and education shows (8.2). As for perceived public value and impact perception, lifestyle, documentaries and knowledge and

education are top of the list as well, while journalism lags behind, scoring approximately one point less. In terms of new talents development, the Review indicates 65 shows produced in 2022 as specifically aimed at talent development, while both NPO and the broadcasters opened academies and created funds for new creative talent to rise. 39.9% of NPO annual programmes budget in 2022 was spent in independent productions' projects. (NPO, 2023, pp. 14, 20).

In terms of political dimension of public value, for 67% of the audience journalistic programmes by NPO contribute to the functioning of democracy, and for 76% of them NOS is the most reliable news source in the Netherlands. The increased use of NPO start benefitted the diffusion of NOS news, and journalistic content grew from 23% to 25% of the total online programming in two years. (NPO, 2023, pp. 6, 34).

#### 4.1.6 Future strategies and problems of NPO digitalization and public value outcome

Favoured by a contest of highly digital society and farsighted governmental digitalization strategies, the Dutch broadcasting system is today leading in Europe in terms of innovation. Its content and services reach most of the national population and are generally well considered by the audience, as showed by the 2022 Review results. However, issues exist about the possibility for NPO and its members to keep on being competitive in the future landscape of digital media, and to keep innovating in a strategic way.

The first crucial issue for future innovation strategies by the Dutch PSM is the extent on which these strategies will be drawn and implemented collectively by the broadcasters, together with NPO. All the interviewees agree on the fact that having diverse approaches and visions by the different broadcasters is necessary to the plurality of the system and it is inextricably linked to the nature of Dutch society. However, disagreements do exist on the possibility of moving towards a more centralize, less competitive approach. Bogaerts recognizes the crucial importance of the pluralistic model, and the impossibility of adopting a “one-size-fits-all” approach. Nevertheless, he also points out the great advantage in terms of people, knowledge, capabilities, experiences and money, that scaling up would have on the whole system. The trend he sees for the future is of preserving the beneficial aspects of the pluralistic model while trying to coordinate and scale up more between broadcasters. Olij recognizes that a lot of knowledge is shared between the broadcasters thanks to the coordination of NPO Innovatie, but also points out that competition for online audience has a negative effect of the overall system. Completely different is the vision by Van Turennot, who defines himself as a “firm believer that competition is truly helpful”, as it brings different broadcasters to fight for specific target groups (political or socio-economic), therefore actively trying to poach audience from commercial media and innovating more.

Issues can also arise from the internal structure of NPO and the broadcasters in terms of technological development. The lack of an internal technology development division leads NPO to rely on contracts with commercial organizations. Also, the user friendliness and functionality of the NPO Start player are still poor compared to the ones by the big global platforms, and this constitutes an important

constraint to NPO's possibility of competing in the streaming market (Olij).

All the interviewees agree on the fact that the media industry will rapidly keep changing in the next years. According to Bogaerts, within 3 years digital media consumption in the Netherlands (linear and on-demand) will have overtaken the offline. According to Van Turennot, in the next 5 to 10 years the boundaries between virtual and real will be very blurred, and that's why, as Head of Digital at EO, he is betting hard on VR experiences for its audience (on the other hand, for the same reasons, Bogaerts is more prudent regarding VR applications by VPRO). Olij is more cautious, thinking that the future of media won't be single tracked, but digital will continue to coexist with linear and offline channels.

In particular, Olij thinks that live content will still be a relevant attractiveness for the audience towards linear programming. In case of big news, with national or international relevance:

“...people turn to TV, people turn to radio, let's not forget that power that it has. The unification is much stronger with any kind of linear, because the whole idea of linear is that you are doing it together” (Olij).

Live content is stronger in its sense of togetherness, also because it is less polarized, bringing the audience directly into the facts with fewer possibilities of intermediation and manipulation. Big news can be, therefore, a strong element in favor of public broadcasters, as it was, for instance, during the Covid-19 pandemic, a moment of huge despair in which the Dutch population turned back to television. However, Olij continues, apart from sports or entertainment events, large occurrences are not predictable and not continuous, making strategizing on them impossible. In that sense, a crucial mission for NPO (and especially NOS) will be to reaffirm the exclusivity of the national narrative. Olij provides the example of commercial broadcaster RTL, that with the news bulletin RTL Nieuws is successfully claiming a role of representativeness of the nation and its spirit. Something that should belong to the public service alone, and that public broadcasting should not lose. New metrics of public value impact measurement should be implemented according to Olij, trying to understand more the qualitative impact of PSM programming, rather than just the number of views or audience reach. Metrics of quality should be introduced, along with those of volume, to understand how a certain narrative has impacted the viewer, or how a single programme has changed their perception of reality and their opinions,

Regarding the social dimension of future public media, Van Turennot and Bogaerts agree on the fact that the game will be played on the development and management of online communities. This is particularly true for EO, for which digital communities will be the key issue of the next years (Van Turennot). Being able to create places for people where to meet, interact, and therefore share the values and the religious messages of the organization, will be the primary goal of EO innovation across the next 5 years. The media model of EO will thereby move far beyond broadcasting; from this point of view, strategic innovation towards virtual universes will strongly improve the organization's public value output. Bogaerts

faces the subject from another angle, focusing on the ownership of digital spaces. VPRO's presence on Meta-owned social media is a necessity dictated by the market, but Bogaerts would rather avoid it. VPRO is among the founders of the Public Spaces Foundation, a private think tank aiming to bring more digital autonomy to the people, moving away from big tech towards publicly owned spaces. The organization is actively participating in the experimentation of new, independent social media platforms, such as one developed by the Dutch public libraries. Bogaerts identifies that access to a large audience and access to exclusive content are the two necessary preconditions to reach a network effect and become successful as a social media. Dutch public broadcasters have both, and it would be therefore possible to develop a well performing social media platform, even though big investments in technology and marketing would be necessary. His long-term vision of PSM goes beyond broadcasting, streaming and on-demand services, and it is of "...a 360-degree presence in people's lives, to be accessible and open to them, to facilitate community building, interaction, discussion, public debate..." (Bogaerts). Van Turenout shares this vision, but he also believes that, for the moment, big tech companies are not beatable on this field.

Finally, all the considerations regarding the future of Dutch public media system are bounded to the capability by NPO of resisting political pressures. In the past years, NPO has been found unable to manage public funding for broadcasting efficiently (Netherlands Court of Audit, 2019, para. 1), while future financing, and even the next public service license duration is unclear, given the uncertainties linked to the new Dutch government (NL Times, 2024, para. 1). A situation of instability for the public broadcasting governing body could negatively affect long term innovation strategies of the member broadcasters and of NPO itself.

## 4.2 Italy

As previously introduced, Rai is the exclusive concessionary of public media broadcasting in Italy, with long running generalist and thematic linear TV and radio channels, and two digital streaming platforms, RaiPlay (video content) and RaiPlay Sound (audio content). Rai's mission and duties as public media provider in Italy are outlined in the *Contratto di Servizio* [Contract of Service], signed with the Italian Ministry of Business and Made in Italy. The 2024 version of the contract affirms, for the first time, the necessity by Rai to complete the transition from linear broadcaster to a *Digital Media Company*.

### 4.2.1 Rai's first approaches to digitalization. From RaiPlay to the Digital Media Company

As reported by both Salini and Imbriale, Rai's first approaches to digitalization as a strategic tool were done around 2018. It was at that time that Rai's management started "putting the digital dimension of the organization at the core of Rai's strategy" (Salini). According to Salini, two main aspects must always be considered by PSM when dealing with strategic innovation: the available technological solutions and infrastructure, and the actual accessibility of them by the audience. In 2018, a technological platform was already existing, Rai's streaming player RaiPlay, and it was exclusively working as a simulcast streamer of

linear offering. In terms of accessibility, a huge gap was existing between the platform and Rai's audience, of advanced age and lacking digital education. According to Salini, this kind of situation could only be solved by putting the user at the centre of the strategy, trying to offer something that could drive the audience from one media channel to another. In 2018, this was done with *Viva RaiPlay*, the first live-streaming entertainment show produced for the platform only, hosted by one of the most famous Italian TV personalities. With three months of three-time a week live streaming, the show was a first successful attempt to bring the usual offline Rai audience to the online (Salini; Imbriale). Covid-19 pandemic was another crucial moment, in which the audience's habits in terms of media consumption changed drastically and digital platforms started seeing their numbers rapidly growing. This was a pivotal step for Rai as well. In 2021, the new Industrial Plan, the document outlining Rai's strategy, defined a new layout for the organization's management. Following what had already happened in France and UK, Rai shifted from a "vertical" management set up (with a managing director for each linear channel) to a "horizontal" set up, with managing directors divided by genres (News, entertainment, culture, etc.) across all linear and on-demand channels, offline and online (Imbriale). This shift was propaedeutic to a completely different approach to the organization, having in mind a way to manage the company in a transmedia way, aiming to reform the very essence of Rai and leading it to become a digital media company. This change has been officially declared and put into action with the 2024 Contract of Service.

#### 4.2.2 Rai's strategic innovation plan. How to become a Digital Media Company

As stated before, Rai's mission in the Italian media landscape, and therefore guiding values and strategic objectives, are defined and regulated by the *Contratto di Servizio* [Contract of Service]. After each approval of a new version of the contract, the new nominated management of Rai must draft and lead to the approval a strategic document, the *Piano Industriale* [Industrial Plan]. This plan defines the resource allocation to accomplish the goals and objectives stated in the contract. The latest approved version of the Contract of Service hasn't yet been published in the *Gazzetta Ufficiale* [Official Law Gazette], but a draft is already available for consultation (Senato della Repubblica, 2023).

In the previous edition of the contract (2018), the word "digitalization" was never mentioned. The document only bound Rai to "make its content available on multimedia platform, in linear and non-linear form, according to the new trends of consumption" (Rai, 2018, p. 5). Rai's obligations in that sense were only to develop specific multimedia products particularly for news, culture and kids' content, to valorize archive materials, to increase interactive participation on its digital media platforms, to promote technological innovation and digital education. In terms of specific obligations, Rai's only explicit duties regarding multimedia offering were: a) to offer at least 90% of its TV and radio offering via streaming; b) to develop innovative content across all genres of programs; c) to gradually increase the offering of archive's programming; d) to develop cross-medial products for radio valorization; e) to gradually increase the offering of products and formats specifically meant for the digital platform. As it can be deduced from the



contract's analysis, Rai had no binding obligation in defining specific strategies for digital innovation, until this year. (Rai, 2018, p. 17).

The biggest innovation in the contract in that sense is the mentioned shift from *linear broadcaster* to *digital media company*. If the previous contract divided Rai's activities between Television, Radio and multiplatform, the new version goes over this distinction, stating that:

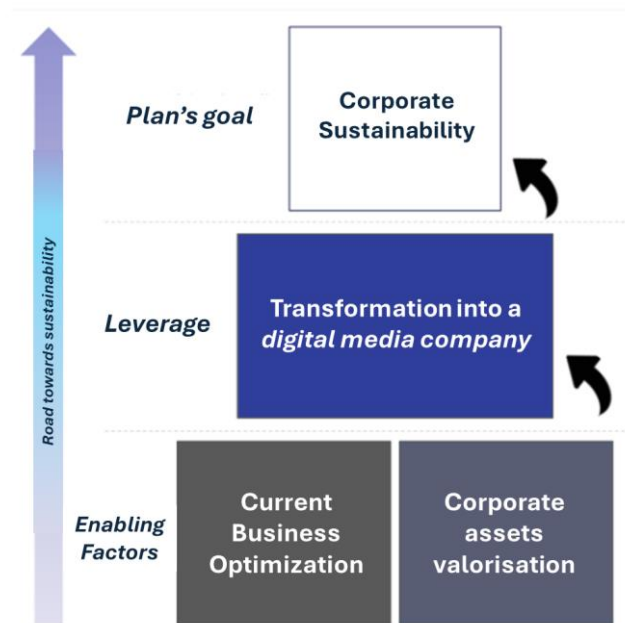
“Rai commits to completing the transformation from broadcaster to digital media company by investing [...] in technology for universal, easy, and efficient access to the public service offering across all platforms. Additionally, Rai pledges to ensure a digital offering that is relevant to every citizen user and accompanies them through different moments and modes of consumption.” (Senato della Repubblica, 2023 p.4).

The contract binds Rai to develop an overall digitalization strategy and improve productive models and professionalism to comply with the new digital competitive environment. Rai must also develop a multiplatform content strategy, improve the current and future digital platforms in terms of structure and usability and improve the news digital platform and social media channels to “make it a reference point for the Italians' consumption habits” (Senato della Repubblica, 2023, p.4). Application of AI for this shift is also mentioned in the contract, with no specific guideline of usage. Further specific digital strategies, tools or content strategies are not specified across the document, as all the recommendations and obligations are now meant for all the platforms, with no distinction between linear and digital. The only paragraph in which digitalization is explicitly mentioned as a strategic tool is the one dedicated to the youngest audience. The stated goal is to develop here is a plan to reach the widest possible number of under-35 users through online and social media offering. The paragraph mentions content production and acquisition for multiplatform purposes, improvement of the interactivity of Rai's digital platform and development of innovation-related products (which are not further explained), improvement of the news offering on social media and creation of new educative digital content, also valorizing Rai's archives. (Senato della Repubblica, 2023, p.6).

Following the new Contract of Service approval on January 2024 (Rai Ufficio Stampa, 2024, para. 1), a new Industrial plan has been approved Rai's board of directors and officially disclosed (Rai Ufficio Stampa, 2024, para. 1). Although is not yet free for online consultation, an explanatory note has been released (Rai, 2024, p. 1). The new plan has a three-year validity (2024-2026) and poses its central mission on making the shift from linear broadcaster to *digital media company*. An overall investment of 225 million euros has been considered, to face digitalization's challenges and make the organization more flexible, digital and future-oriented, strengthening the public value mission (Fortune, 2024, para. 1). Rai's transformation in a *digital media company* in this sense is intended as the main strategic leverage of the plan. The ultimate goal of it, however, is not defined in terms of public value outcome, but consists in ensuring the organization's structural stability in the future. The whole three-year strategy is well outlined in Figure 2.

**Figure 2**

*Rai's Strategic Plan for 2024-2026.*



*Note.* Elaborated From the explanatory note of the 2024-2026 Industrial Plan (Rai, 2024). Translated from Italian to English.

In terms of technological innovation, AI-based solutions and a data-driven approach are the only methods mentioned in the document.

In terms of content offering, the document mentions a strongest focus on in-house productions and an increasingly integrated linear and digital programming. An internal digital platform is to be activated, to collect and evaluate ideas and projects by Rai's employees. A data-driven approach to content offering should enable Rai to better understand market trends and reach a wider audience. In particular, podcasts, social media and digital platforms are meant to be the most strategic ways to intercept younger audiences.

In terms of social dimension of public value, the note mentions the necessity by Rai of becoming a reference for an ever wider and diverse audience, across all segments of population and guaranteeing public service's universality.

#### 4.2.3 Rai's public value obligations according to the Contract of Service

After having analysed Rai's declared innovation strategy, it is important to make a deeper analysis on the public values obligations that are included in the contract, and that Rai should accomplish, across its online and offline channels

The best way to understand which is Rai's new strategic vision and mission in terms of public value, and how it has changed from the last years, is again to compare the current version of the Contract of services with the previous one.

In terms of social dimension of public value, in the 2018 version of the contract it was specified that Rai must embrace a collective identity, and reach all of society's diverse components, considering differences on terms of gender, age, ethnical, cultural and religious identity and disability. Specific attention was given to accessibility for disabled people and to equal gender representation. Promoting social cohesion was mentioned as the first requirement to be met among the goals of Rai's offering. In the 2023 version, this mention to collective identity was cancelled, and social cohesion was downgraded among the organization's goals. The more general terms of inclusivity, meant as accessibility, and relevance for individuals' wellbeing are only mentioned among the general principles. Social inclusion is merged with cultural inclusion, just in the ninth article of the contract, mentioning support to promote minorities' integration and effort towards equality, inclusion and diversity. These value elements are not further developed, nor details are given about how to reach them. More space is dedicated to other social aspects, such as disability and gender equality, while the largest and primary sections are dedicated to new concepts of value: youth policies, promotion of sports and healthy lifestyles, promotion of Made in Italy products and Italian way of living, promotion of family's values.

In terms of cultural dimension of public value, it is stated that Rai must reach diverse audiences, through a wide range of programs and services, with the goal of always innovating and experimenting. Offering required to the organization hasn't changed particularly from the 2018 to the 2023 contract. Cultural local original content focusing on traditions, history and arts are the first to be mentioned, together with the valorization of the local cultural system and of local Italian and European projects. Cultural content can be realized also in the form of entertainment, and with a goal of multiplatform distribution. Education is stated among Rai's primary goals, together with the pursuit of encouraging the audience, especially kids, to explore different subjects of learning, particularly sciences. In the new version of the contract, however, more space is given to content related to Italian culture's promotion abroad, and content to better engage the young audience.

In terms of political dimension of public value, the two contracts don't differ particularly. In both of them it is stated that Rai must promote participation to democratic life for citizens. It must develop civic sense across the national community, spreading information about institutions and the democratic process. This has to be implemented through the above-mentioned *service programs* and *news*. When it comes to news, Rai must follow principles of equity, pluralism, completeness, objectivity, impartiality, independence and openness in relation to politics and social interests, and respect of journalistic codes of conduct. A particular focus is posed on *News about institutions*, i.e. the spreading of relevant information about and from political institutions, their functioning and participation to political life.

#### 4.2.4 Digitalization and social and cultural dimensions of public value online. New content and offering strategies.

Having understood Rai's public value goals from corporate strategy documents, it is now possible to analyze how strategic innovation is currently implemented for their achievement, and which offering, content and programming strategies Rai is following in this pursuit. According to Salini, two aspects are decisive for PSM existence online: quality of the content offered and offering strategies, dealing with users' habits of media consumption.

Strategies focusing on users' interaction and consumption are fundamental both to increase the digital audience, but also to effectively bring social and cultural values in society. Offering new models of interaction is pivotal to increase content accessibility, being it linear or on demand (Salini). According to Salini, there's often too much focus on content quality and too less on release strategies. Strategy, in that sense, must also follow the technological development of devices. In the last couple of years, RaiPlay's access via connected TV has doubled, going from 24% to 48%, meaning that online content will be ever more accessible to the large part of Rai's audience, used to linear consumption (Imbriale). Live content offering is still, according to Salini, one of the best tools of engagement for a wide audience, and something strongly differentiating PSM from commercial streamers, on entertainment, news and sports. A combination of live offering and on demand content, if well coordinated, can create great synergies between linear and platform, in a true multimedia approach. An example of that, mentioned by Imbriale, is the audience engagement to Rai's Sanremo festival, the biggest live music event in Italy, by far the best performing prime time show on Italian television. While the audience of the linear show decreases after midnight, there's a huge increase in the on-demand content and video clips views on the platform the day after the exhibitions. This way, the show is truly accessible to everybody, those interested in some specific moments or songs, and those who cannot make it until late night following live the whole show. Building around live content is something that Rai will keep doing, benefitting from its properties in terms of events and sports rights, such as the UEFA Euro 2024 (Imbriale). Offering strategies can also be used to compete with platforms on other genres. Drama original content from RaiPlay cannot be competitive against big shows by Netflix or Disney + in terms of quality, production budget and marketing campaigns (Imbriale). However, Rai has its major strength in the drama shows produced for linear channels, which titles recording outstanding results each year. These shows can work as a strategic leverage to drag people on the platform. Offering the episodes first on RaiPlay and later on linear television is becoming a standard practice, particularly for titles at younger audience. Episodes are often released on the platform one day or one week before the linear airing, resulting in a free "premium offering" for those users who are willing and able to use it. This results in a small drop in TV audience share for those titles, repaid by a huge increase in online traffic (Imbriale).

RaiPlay can also be a huge tool of public value enhancement since it guarantees, for the first time, direct access to a huge amount of archive content by Italian public television. As Salini explains, Rai has

today, by far, the largest catalog of cultural, historical, educational and kids' content in Italy, something no commercial broadcaster could ever get. According to Salini, politics must understand that promoting Rai's archive it's of vital importance, both for attracting the older audience to the platform and for providing younger audience with cultural products of unmatched value.

Finally, another of RaiPlay's strategic roles in public value creation is the one played in the production of experimental original content. RaiPlay, and especially the Digital and Transmedia Content division led by Imbriale, is responsible for the creation of original content with the expressed mission of reaching GenZ and millennial audiences (aged 18-35). Pursuing this objective, they are required to create experimental shows, both in terms of format and language, and to give space to new and young talents. The expressed purpose is to fulfill Rai's public value duty of promoting talents, new forms of culture and experimental content. However, this approach is also required by a huge gap in budget and visibility with global platform's original content. In this sense, differentiating content through an alternative offering can be seen as an effective strategy to reach a niche and be able to offer them a different product. Currently, the results by the Digital and Transmedia Content Division have been "fairly successful" (Imbriale), with a great variety of shows with cultural or educational content, across a great variety of genres and of audiovisual languages and styles.

#### 4.2.5 Digitalization and political dimension of public value online. New challenges for Rai's journalism.

Rai is the main provider of information in Italy, with linear news bulletins recording millions of viewers per day (Rai Ufficio Stampa, 2024, para. 1). Online, most of Rai's news offering is grouped under the Rai News label, whose main activity is in the digital platform RaiNews.it and its social media channels. However, every Rai's brand (linear channels, news outlets, tv shows) conducts its own account and its own activity on social media, independently from others and without an overall management. The Editorial Division for News Offering is the department trying to coordinate all the online activity by Rai's outlets. This is a delicate work, as it requires to provide all the social media accounts with the same tools and resources, coordinating them with an overall strategy, without depriving them of their brand identity (Gerli). According to Gerli, Rai has an advantage when competing online with other news outlets, as public service media don't need to reach certain views and traffic thresholds and are not forced to surf the algorithm or adopt clickbait strategies. Therefore, Rai's goal should be to keep a variety of social media accounts, each one with its own target of users, news topics and language style, aiming to reach the broadest possible audience online thanks to such diversification. A proper strategy is however needed, as today Rai's accounts are mainly used to promote linear programming, with almost non-existent content conceived and produced for social media. In a social media landscape dominated by unmanageable algorithms, unreliable sources and superficial ways of presenting news, Rai's accounts should function as a bridge for the user toward the more complex, reliable and in-depth news offering provided by the PSM (being that on the online news portal, on RaiPlay catalog or the linear news programming).

Another crucial advantage for Rai, as agreed by both Gerli and Salini, is the existing and consolidated structure of international offices and correspondents, as well as a rooted network of regional offices around Italy. Rai should be able to take advantage of this asset, integrating its personnel and resources into its social media activity (Gerli). Salini focuses on the importance of local news. According to him, digitalization should be exploited to create local news more accessible to anyone anytime, be able to cover all minor and local subjects, employing new young local talents. The goal would be of “certify” live news at local level on social media, something that is today often up to unverified sources. News integrity and reliability would be guaranteed by a trusted label like the one of Rai. This strategic approach would guarantee anyone, and not only people already able to get reliable information, with a trustworthy digital news offering. Gerli agrees with this view, pointing out how, in Italy and around the world, local media outlets were the first to be harmed by the digital revolution, leaving local news to influencers or non-journalistic figures. One of the new digital media that can be used for this purpose is, for instance, WhatsApp or Telegram channels where to spread live news. Today, WhatsApp news channels are used by Rai with little audience returns but are an important public value activity to be maintained.

Gerli also points out another critical topic for Rai’s online news, the one of protecting images and content from external utilization and manipulation. The example of TikTok is provided, where Rai is not even present, but its news content circulate (without a logo), making millions of views. Digital watermark services (such as the one developed by the C2PA consortium) exist and should be further used, but they are often fragile. According to Gerli, Rai should not act softly in defending its content from external exploitation, also negotiating its presence on aggregators such as Google News, something that smaller media outlets cannot do.

Finally, the biggest challenge for journalistic activity by the new digital media company will be the one posed by AI (Gerli). AI potential uses in Rai’s journalistic activity are numerous, and in many cases, they have already been implemented. AI helps journalists to find sources, data, prepare interviews, organize schedules, write down short news bulletins, create subtitles, generating infographics and visuals; this will radically change the profile of Rai’s journalist soon. AI implementation will also help the screening and collection of content from Rai’s archive, still managed today by older software. However, an obstacle toward this transformation is still represented by human resources, the way they are managed, and a certain lack of skills and approach in Rai’s workforce.

#### 4.2.6 Rai’s self assessment on its public value outcome achievement: the Sustainability Statement

The Contract of Service between Italian government and Rai does not only list the principles and value obligations for Rai’s activity. It also imposes the development of specific tool of value assessment and testing. The past version of the contract required Rai to annually publish a *Bilancio Sociale* [Social Statement], an annual report where the organization had to show to the Ministry all the activities carried out

“on socio-cultural issues, with specific focus on news and political pluralism, protection of minors, rights of minorities, female representation and national culture’s promotion” (Rai, 2018, p. 20). The report also provided results of surveys about Rai’s perceived quality by the audience and corporate reputation (following parameters defined by EBU). With the new version of the contract, the name has been changed to *Sustainability Statement*. Despite the description and content of the statement don’t change from the previous version, critiques have been raised by commentators over the combination of different aspects, such as social and sustainability parameters, in one unique document, and on the lack of Rai’s transparency and communication on the statement publication (Zaccone Teodosi, 2023, para. 1-8).

From the latest Sustainability Statement available, the one referred to the year 2022 (Rai, 2023), it is possible to clearly understand the existing Rai’s social value framework. In the *Percorso di sostenibilità* [Sustainability Route] chapter the report lists 16 environmental, social and governance themes, and related actions to be carried out to comply with the organization’s social mission (Rai, 2023, p. 53). The following table reports 8 social themes and related actions that are more linked with this study’s conceptual model (mostly referring to the social dimension), assessing how much and on what extent are digital solutions and strategic innovation mentioned.

**Table 1**

*Selection of Rai's Social Themes and Actions*

<b>Social theme</b>	<b>Actions</b>	<b>Mentioning of digital solutions and strategic innovation</b>
Accessibility and inclusivity	<ul style="list-style-type: none"> <li>• Development of digital tools for making content accessible to people with disability.</li> <li>• Offering content for linguistic minorities</li> <li>• Educating the citizenship to disability-related issues.</li> </ul>	Yes
Social responsibility and cohesion	<ul style="list-style-type: none"> <li>• Fostering social cohesion, reducing inequalities and integrating minorities.</li> </ul>	No

	<ul style="list-style-type: none"> <li>Offering content promoting pluralism, cultural growth, civic sense and participation to public life.</li> </ul>	
Value creation	<ul style="list-style-type: none"> <li>Valorising territories, industries and business.</li> <li>Positively impacting on national economy.</li> <li>Sustaining audiovisual industry investing in high quality content and experimenting new formats.</li> </ul>	No
Information Quality	<ul style="list-style-type: none"> <li>Guaranteeing high quality, equal, unbiased, responsible and truthful information.</li> <li>Respecting news plurality.</li> <li>Contrasting misinformation and fake news.</li> </ul>	No
Youth Policies	<ul style="list-style-type: none"> <li>Increasing digital content offering for the young audience.</li> <li>Education's valorisation and collaborations with school through RaiPlay platform.</li> <li>Education on relevant subjects such as healthy lifestyle, cyberbullying.</li> </ul>	Yes
Relevance and Universality	<ul style="list-style-type: none"> <li>Offering content that are relevant for people's lives, across all demographics.</li> <li>Working on projects related to big social and cultural subjects.</li> <li>Strengthening users' involvement and interaction through social media and other digital tools.</li> <li>Guaranteeing prominence to Rai's content on digital platforms.</li> <li>Distributing Rai's content on all platforms, also making distribution agreements with external platforms.</li> </ul>	Yes
Innovation and digital transformation	<ul style="list-style-type: none"> <li>Digitalizing content and their channels of diffusion.</li> </ul>	Yes



	<ul style="list-style-type: none"> <li>Enhancing internal digital talents and competences with the goal of turning Rai into a <i>digital media company</i>.</li> <li>Enhancing population’s digital knowledge and skills.</li> </ul>	
Diversity and equal opportunities	<ul style="list-style-type: none"> <li>Safeguarding diversities and promoting equal opportunities for women and men, both through specific content offering and internal policies.</li> </ul>	No

Note. (Rai, 2023, pp. 54-57)

The 16 social themes were later subject to review to a list of company’s internal and external stakeholders (employees, the board of directors, users, other media companies, advertisers, etc.), with a specific focus on new generations’ users. Each of the 16 themes has been evaluated using 3 scales of rating (Rai, 2023, pp. 63-66).

- The first measurement was about the perceived relevance of Rai dealing with the subject (assessed on a 1 to 4 scale). The average result was of 2.6, resulting in a slightly positive opinion of Rai having to deal with the issue. The highest scoring themes was “Information Quality” (2.7).
- The second measurement was on the stakeholders’ awareness of Rai’s activity on the subject (assessed on a 1 to 4 scale). On average, Rai’s activities about the themes were known by 74% of the stakeholder (scores 2 to 4), and unknown to 26% of them (score 1). Among new generations, score was even higher (77% vs. 23%). “Information Quality” was the best performing theme, with 54% of stakeholders “highly” aware of Rai’s activity.
- The third and final measurement involved asking stakeholders who were aware of Rai’s activities to rate them on a scale from 1 to 10. The average result was 7.3, with “Accessibility” being the best performing category of activities, with a rate of 7.4. The assessment made by younger generations was in line with the general rating.

Combining the three categories of evaluation, a matrix was elaborated (Rai, 2023, p. 67).

“Information Quality” resulted as the dimension with one of the lowest assessed quality level but with the highest perceived priority, while “Accessibility and Inclusivity” resulted as the one with highest assessed quality and highest priority combined, followed by “Youth Policies”. Younger generations also indicated in “Diversity and equal opportunities” one of the areas of strongest required improvement.

The final strategic objectives derived by Rai in terms of social values and sustainability are, therefore: 1) To regain relevance among the under 55 audience and maximize the product quality to ensure

Rai's universality; 2) To become more efficient and flexible to adapt to an ever-changing market context and to expand the offering; 3) To build a sustainable company for the future, from the perspective of skills, environment, and digital; 4) To maintain economic balance and achieve financial sustainability. (Rai, 2023, p. 68).

Another fundamental measurement reported on Rai's Sustainability statement is the quality monitoring of the TV, radio and digital offering. Understanding if digital offering is perceived to be of highest quality by Rai's audience could be a good measure of whether the organization is improving its outcome achievement in the shift to digital. The measurement has been conducted assessing two different parameters: user's *satisfaction* and *perceived quality*. In terms of satisfaction, the whole digital offering registered an 8.0 out of 10 score, improving by 0.2 points its score from 2021. This score is slightly higher than the one registered by linear TV (7.9%), meaning that digital offering is perceived to be just moderately more satisfying than linear one, but on a positive annual trend. In terms of perceived quality, the score was lower, resulting in a 7.8%, stable on previous year and slightly lower than the one by linear TV (7.9%). Cultural content were the best performing ones, while the lowest scores were registered by RaiPlay Sound (online podcast service). Conclusions from the quality monitoring can be drawn, concluding that, despite Rai digital offering is perceived to be satisfactory and of good quality, the improvement by these parameters is still low year on year, and the difference from linear offering too little, for a company aiming to shift from a linear broadcasting to a multimedia digital company.

#### 4.2.7 Future strategies and problems of Rai digitalization and public value outcome

All the three interviewees agree on a certain extent on the fact that Rai lags in the innovation of its service but are confident for future positive developments. The main example to follow in Europe, according to all, is BBC.

The British PSM has already shifted its content primarily to the digital, relegating TV broadcast to a secondary importance and broadcasting content linearly always after the release on platform. Programs' scheduling at BBC is done focusing on digital offering, and, according to the interviewed Italian experts, this is the model to follow for Rai. A model in which "free premium" offering is available online, for those who want to watch a specific content in advance (Salini). Totally embracing this model is impossible in a one or two – year timespan, but on the long run, Rai will be able to completely adapt to this new logic (Imbriale). This transition will also be helped by innovation in devices, and in the comeback of televisions as the main tool of digital media consumption, thanks to connection technologies. Live content will still and increasingly be an element of distinction from commercial streaming platforms and of cohesion for the national community (Salini). In terms of cultural, entertainment and experimental content, departments such as the one led by Imbriale are yet not involved in the programmatic discussion about the digital media company transition. Nonetheless, content of this kind will remain one of the main ways to engage with younger

audiences, therefore fulfilling Rai's public value obligations of accessibility, universality, representativity and valorization of culture and new forms of talent.

BBC is seen as an example to be followed also for its social media accounts management. Differentiating social media offering, focusing on Rai's brands and coordinating them to reach a wider audience must be Rai's approach to social media (Gerli). Given its public value obligation, Rai must act as a reliable source of information online, providing access to journalistic content also on algorithm-driven feeds that are often dominated by misinformation, and where most of the younger audience today gets informed. The presence of Rai's certified information is necessary on every possible digital media channel, regardless of money or traffic return (Gerli; Salini).

AI can be, and already is, an important support to journalistic activity within public service organization. Internally, AI should be implemented by Rai as much as possible in assisting media production, across all genres. However, externally AI poses a threat, as new services will be increasingly able to provide updated and complete news and information. It will be crucial for big media organization to stay resolute on protecting its copyrighted content against AI exploitation (eg. the New York Times lawsuit against Microsoft and OpenAi (Grynbaum & Mac, 2023, para. 1), as mentioned by Gerli).

An important consideration must be also made on Rai's financing model. Today, Rai's major revenues come from linear TV advertisements. Revenue logics in the digital space are completely different and it is impossible to rely on the same income deriving from advertising sales. This can slow down the digital transition, as new revenue sources couldn't match the old ones. According to Salini, a complete change of paradigm should be put in place, completely forgoing advertising revenues and relying only on the license fee paid by the public. This would have the first effect of increasing public service's legitimacy, quality and distinction from commercial competitors. In the long run, it would allow Rai to complete the digital transition more smoothly and easily and truly fulfill its duties of a Public Service Media company.

Finally, the company's organization and human resources can represent a constraint to Rai's effective transition towards being a true digital media company. Human resources are today the biggest obstacle in Rai's digitalization, and a leap in quality in their management is crucial (Gerli). Rai's management is also overall old, with little turnover and a lack of new people and skills, and prevalently composed of males, which represents a limit to Rai's representativity (Il Messaggero, 2019, para. 1). Politics' involvement in Rai must also be included among these considerations. Rai has always been strongly subject to political influence (BBC, 2023, para. 1) and the situation got more critical with the latest elected government. During the last year, Rai's journalists have been protesting repetitively against censorship and control by the current government (Corriere della Sera, 2023, para. 1-6; Il Post, 2024, para. 1-11; Dalessandro, 2024, para. 1-4). Therefore, strong doubts do exist about how Rai is now able to reach journalistic integrity, objectivity and impartiality among its social values outcomes.

### 4.3 Netherlands and Italy: the two cases compared

#### 4.3.1 The national contexts

Differences between the two countries' PSB derive prevalently from two different national and societal contexts. As it has already been pointed out in the theoretical framework section of this thesis, the Netherlands and Italy are examples of two different models of media environment: the North/Central European and the Mediterranean or Polarized Pluralist (Hallin & Mancini, 2004, p. 11). In the Netherlands, public broadcasting has been built around the corner stone of pluralism and equal representation for all the country's societal, political and religious groups, leading to the creation of several public broadcasting organizations. In Italy, the public service was exclusively assigned to one single broadcaster, Rai, that had reflected for decades different political interests across its first three main TV channels.

Today, both NPO and Rai are trying to innovate themselves to keep up with the ongoing digital transformation of media. National context plays a crucial role here as well. The Netherlands ranks third in the EU 2022 DESI Index ranking and has seen governments implementing important public services' digitalization strategies in the last years. Italy places 18th in the ranking, and although great steps have been made during the last five years, large gaps still exist with more developed European countries.

#### 4.3.2 Different structures and different approaches towards strategic innovation

Given the presence of different broadcasters, each one with its own identity, target audience, and strategic goals, strategic innovation in the Dutch public broadcasting is prevalently up to the single organizations. Trajectories of innovation are determined by the umbrella body of NPO, and therefore by the Media Act that regulates its duties towards the Dutch state. A centralized coordination is present, through the NPO, its Board and the Strategy and Innovation department. However, broadcaster members choose autonomously they approach towards digitalization, which projects to focus on, which goals to pursue when going digital. The lack of coordination and the divergence of strategic goals could suggest a worse innovation outcome. However, the analysis of Rai's case shows how digitalization can be slowed down by big, centralized structures, with top management taking long-term decisions but struggling to implement them across all the company's divisions. Also, due to the accumulated delay, Rai's strategic goals for digital innovation are ambitious and widespread across all the organization, and for this reason they require substantial resources in terms of money, time and workforce. The competitiveness of the Dutch system, on the other hand, encourages the broadcasters to find new innovative solutions to engage more audiences from a specific target group. Small organizations such as the Dutch broadcasters can more flexibly set up innovation projects, joint ventures and collaborations with private companies and start ups, although risking to outsource too much of the public service technological development to the commercial sector.

The current situation of the two PSM innovation process, however, is not so different. Both are still

mainly focusing on the best possible implementation of their streaming players, considering that sooner (in the Netherlands) or later (in Italy) in the next years digital consumption of the public service will overtake the linear one in the audience's habits. The situation is also similar when it comes to social media presence and use. Despite its centralized governance, Rai has never had a coordination for the social media activity of its account. How Gerli pointed out, every Rai's brand (being it a TV show, a channel, or a news outlet) have always managed its social media presence autonomously, just as it happens (with better results, given the proportion of the two national populations) with Dutch broadcasters. Rai's goal should be to coordinate all these accounts in a unique strategy of diversification and valorization of their brands, in order to provide a service as complete and differentiated as possible.

#### 4.3.3 Public value and its outcome achievement through digitalization: social, cultural and political dimension

NPO and Rai share most of their general values and principles, both acting in the name of accessibility, pluralism, trust and relevance for all their audience, among others. Public value creation by the two organizations can be categorized using the three value dimensions (social, cultural and political) elaborated for this research's conceptual model. All the dimensions' sub-categories are included in the documents of public value assessment that the two broadcasters produce every year. Overall, the impact by the two PSM organizations is evaluated positively, just like the perceived quality of programs and services, across all the value categories. Doubts do certainly exist on the actual correctness of all these evaluations; political impartiality and independence of Rai, for instance, has always been subject of big controversy, and particularly is today.

In terms of social dimension of public value, both Rai and NPO see digital innovation as a way to make their service more accessible and findable to everyone, everywhere. NPO claims to be reached by 83% of Dutch people, thanks to its presence on all platforms, and particularly by the younger audience that is no longer using linear and offline media. Same goes for Rai, that is using online productions to target young audiences and is carrying out distribution agreements with external platforms to further spread its content online. Specific tools to guarantee accessibility to disabled users are then developed thanks to new digital technologies, just like in the Netherlands NOS is doing in its online news services. Knowledge platform NPO Kennis and news bulletins for low-literate people are also part of an innovative strategy to guarantee public service media accessibility for everybody. A form of possible social value improvement can be seen in the virtual spaces imagined by Van Turenout in the future, where people will be able to meet and sharing relevant messages, just like the publicly owned social media on whose development VPRO is actively working.

In terms of cultural dimension of public value, educational and school services are the ones mainly considered when it comes to digital innovation by the two PSM, with services like SchoolTV in the

Netherlands and RaiPlay school programming in Italy. Different approaches can be identified on cultural programming produced for online. In Italy, Rai is trying to catch younger audiences experimenting new formats and languages in its on-demand-only productions. This way, the digital platform is used as a precious tool to fulfill the public obligation of promoting new genres, formats and talents. On the other hand, some Dutch broadcasters like VPRO are offering a digital cultural content that does not differ from the linear one, claiming that also young people can be engaged by “traditional” formats.

Finally, in terms of political dimension of public value and news, the biggest achievement where the ones obtained by NOS on social media, through its different brands, active on all possible platforms with great audience response. Rai still lags behind on this aspect, but future efforts by the Editorial Division for News Offering, together with each Rai’s news outlet, will go in the direction of enhancing Rai’s news presence on social media. Another crucial element when it comes to journalism is AI and its applications, that are starting to give a great support to journalistic activity within the PSM both at Rai and the Dutch public broadcasters, but that can pose a threat in the future, in terms of content stealing and manipulation.

## 5 CONCLUSION

### 5.1 Discussion and answer to the research question

Having reported and compared the results from the two case analyses, it is possible to draw some conclusions, referring to the research question that originated the whole study. The initial research question was:

*RSQ: How do European Public Service Media exploit digitalization to strategically innovate and achieve new public value outcome?*

Divided across the three value dimensions identified in theory: social (RSQ1), cultural (RSQ2) and political (RSQ3).

The analysis of documents and interviews shows how both Rai and NPO are actively pursuing digitalization strategies to increase their public value and keep up with the ongoing digital revolution of media. These innovation strategies occur differently, given the different nature of the two broadcasters. In the Italian case, they are guided by a centralized strategic plan, while in the Netherlands they are carried out by the member broadcasters, although with some extent of overall coordination. Rai is setting the ambitious goal of completing the transition towards being a digital media company, so trying to catch up on the delay of the last years. However, its focus today is mostly oriented towards the RaiPlay platform, trying to bring most of the audience from linear to digital, and towards a better coordination of its social media presence. Dutch broadcasters, on the other hand, benefit from a more developed digital context, and can start strategically thinking about long-term projects of new digital spaces of engagement and interaction.

Referring to theoretical definitions of strategic innovation, Rai's goal today is to develop the entire company (Drejer, 2006, p. 145) and try to reconceptualize its business model (Schlegelmilch et al., 2003, p. 118), but major transformational effects on the market (Varadarajan, 2018, p. 161) are still far and unlikely to occur, given the global and fast-paced nature of the media industry transformation. The same goes for NPO and its member broadcasters, although in this case, more tangible effects can be seen in terms of value improvements for users (Schlegelmilch et al., 2003, p. 118). Referring to the existing types of media innovation identified by Storsul & Krumsvik (2013) and Dogruel (2015), as cited in Donauskaitė (2022, p. 616), NPO seems to be innovating most on its services (introduction of new digital platforms, long-term projects of new kinds of digital spaces), while Rai is more focused on innovating its organizational processes.

To answer the research question and sub-questions, it is necessary to focus on the public value dimensions improved by PSM organizations with their strategic innovation.

In terms of social dimension of public value, it can be assessed that both Rai and NPO are innovating and improving their media diversity, as defined by McQuail (Deuze, 2020, pp.210-214). The concept of diversity in this sense means that public service is provided more easily, to more people and across several different channels. In particular, the two broadcasters use digital innovation mainly as a way to engage younger audiences. Being present on all possible digital platforms and channels, the two organizations are also increasing their universal accessibility, with particularly satisfying results by NPO. In terms of equal and diverse representation, digital tools seem to be less impactful; nevertheless, online catalogs can be used as a new space where to give representation to new and diverse parts of society, as in the case of RaiPlay.

In terms of cultural dimension of public value, Rai sees the online platform as a way to experiment and innovate new genres and formats, particularly focusing on entertainment for young people, while at the same valorize its archive content. NPO, on the other hand seems to be taking less advantage of digital tools to increase its cultural and high-quality offerings. Digital educational and school services, on the contrary, are implemented in both cases.

As for the political dimension, achieving new public value mainly comes from the possibility of providing news and information on the digital space, where it can be found by a broader and younger audience, without losing journalistic quality and integrity. From this point of view, Dutch system is more advanced, but Italy is following up, despite recent concerns about its independence and impartiality from politics might make void the efforts made. Less evidence was found during the research on new digital tools to enhance the civic participation of citizens.

On the overall, both the interviews' analysis and the examination of documents lead to the conclusion that public value outcome by European PSM is improving along with digital media innovations. However, what lacks to this research is a clear and structured analysis of the market context, and of the main competitors' positioning. As strategy is mainly a matter of differentiation from the offering by competitors (Porter, 1996, I section), it is crucial to understand how linear broadcasters and digital players are operating now in the European market and which kind of product they offer. This is the only way to understand on what extent does focusing on the uniqueness of public value outcome can effectively bring to a competitive advantage for PSM. It can be assessed that this competitive advantage exists for some of the PSM features that are unique or hard to imitate. This is the case of the exclusivity on cultural and historical archives, the service role in broadcasting large, relevant national events, a largely established journalistic network locally and abroad (mostly in the case of Rai) or the rooted and long running representativity of segments of the society (in the case of the Dutch broadcasters). Still, it is possible for private actors to compete with PSM on these areas, as pointed out by Olij regarding the narrative of national representation claimed by commercial broadcasters in the Netherlands at the expense of NOS. It is much harder to say if a comparative advantage can be reached on other markets on which European PSM are competing: streaming of TV series and movies, entertainment, competition to reach younger audiences, ability to stand out on social media, etc.



Furthermore, developments by PSM in incoming technologies or potential markets (metaverse, AI, VR and AR) are still slow, or limited to smaller initiatives (such is the case of the Dutch broadcasters). It is therefore almost impossible to say, today, on what extent will public value play a role in the media landscape of the future, when these technologies will be widely spread and established.

However, as of today's analysis, it is possible to say that even when at an early stage, PSM's innovation strategies are going in the right direction of giving new legitimacy and efficiency to the organizations and their services to the national audience.

## **5.2 Theoretical implications**

This research fits in the theoretical debate about PSM, their value dimensions and strategies. It can provide an important contribution to it, as the most relevant literature reviewed in chapter 2 is either prior to the digital revolution of the last years (Lowe & Bardoel, 2007; Leurdijk, 2007; Bardoel & d'Haenens, 2008; Martin & Lowe, 2014), or based on specific cases, such as the UK or the Baltic countries (Chivers & Allans, 2022; Donauskaitė, 2022). The research's findings can also relate to literature on media strategy and innovation, creating important connections between the Dutch and Italian case and the relevant theory on the subject. As mentioned in the previous paragraph, types of media innovation proposed by Storsul & Krumsvik (2013) and Dogruel (2015), as cited in Donauskaitė (2022, p. 616), were found in the two analyzed media systems, just like the areas of strategic innovation identified by Drejer (2006, p. 145), Schlegelmilch et al. (2003, p. 118) and Varadarajan (2018, pp. 158, 161, 162).

The conceptual model developed for the research was also found to be relevant, as PSM are innovating their public value outcome mainly through the three dimensions extracted by theory and included in the model. The analysis of documents of public value self assessment such as the ones by NPO and Rai presented in this study can provide further contribution to the existing literature on public value measurement for PSM.

## **5.3 Societal and practical implications**

In a period of revolutionary changes and innovations in media, it is fundamental to understand which role PSM will be able to play in the future media landscape. Studying how and on what extent are public organizations able to anticipate changes and strategically exploit the ongoing innovations is important to provide an overview of best practices to follow. Results from this research should be seen as a way for PSM managers to understand how different organizations, in different media contexts, can approach the incoming challenges of digitalization. The differences between the Dutch and the Italian contexts strongly impact the way NPO and Rai strategically innovate, as already analyzed in the first paragraph of this conclusion chapter. Choosing a strategy can impact the dimension of public value on which to primarily focus. Some of them can be seen as more strategic in the incoming market scenario, because of their uniqueness, their relevance for the community, or because they provide the firm with a competitive advantage. However, what the two

analyzed cases seem to be teaching, is that public mission must always be followed, valorizing every dimension of public value, being present on every possible media platform and communicating to everybody through all the available media channels, even without an immediate audience response or economic return. This will be crucial for PSM legitimacy and relevance in contemporary and future society.

#### **5.4 Limitations and future research suggestions**

One first limitation of this research is having analyzed only to national contexts, the Dutch and the Italian ones, aiming to draw conclusions at European level. Although representative of two different media models (Hallin & Mancini, 2004), and therefore guaranteeing external validity to the results, the cases' selection could be considered limited to draw conclusions at European level. Further research could focus on the three media models by Hallin & Mancini (2004) and thus including a country from the North Atlantic (or Liberal) system in the analysis (e.g. the UK). Otherwise, PSM could be analyzed at EU level, adding other member states to the cases' selection.

A second limitation derives from a certain extent of bias in the collected sources. Although the research has been conducted on sources both internal and external to the organizations, most of the data were collected by internally produced documents and people currently employed by the PSM. Further studies analyzing European PSM and assessing their public outcome achievement would be required, in order to rely on more independently collected data.

Finally, as already mentioned in paragraph 5.1, the lack of a deeper analysis of the market context limits the possibility of drawing conclusions on the effectivity of PSM's strategies. Further research should be carried out on PSM digital strategies in relation with the ones by commercial broadcasters or digital players.

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**APPENDIX A**  
*Units of Analysis*

<b>Netherlands</b>	
Social dimension of public value	
Universal accessibility	<p>Documents:</p> <p>EO. (n.d.). <i>AI- Richtlijnen</i>. [AI Guidelines]. <a href="https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf">https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf</a></p> <p>EO. (n.d.). <i>Over de EO</i> [About EO]. <a href="https://over.eo.nl/">https://over.eo.nl/</a></p> <p>Government of the Netherlands. (2022, June 14). <i>Media Act 2008 – Applicable from 01/07/2021</i>. <a href="https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf">https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf</a></p> <p>NPO. (n.d.). <i>Over NPO</i>. <a href="https://npo.nl/overnpo">https://npo.nl/overnpo</a></p> <p>NPO. (2023). <i>Terugblik 2022</i> [2022 Review]. <a href="file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html">file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html</a></p> <p>NPO. (2023). <i>Jaarverslag 2022</i> [2022 Annual Report]. <a href="file:///C:/Users/39340/Downloads/Jaarverslag-2022.html">file:///C:/Users/39340/Downloads/Jaarverslag-2022.html</a></p> <p>Omroep.nl. (2013, April 5). <i>Welke rol speelt de NPO als organisatie binnen het Nederlandse omroepbestel?</i> [What role does the NPO play as an organization within the Dutch broadcasting system?] - <i>help.publiekeomroep.nl</i>. Web.archive.org. <a href="https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel">https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel</a></p> <p>Interviews' transcripts: Olij, Bogaerts, Van Turennot</p>
Equal and diverse representation	<p>Documents:</p> <p>EO. (n.d.). <i>AI- Richtlijnen</i>. [AI Guidelines]. <a href="https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf">https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf</a></p> <p>EO. (n.d.). <i>Over de EO</i> [About EO]. <a href="https://over.eo.nl/">https://over.eo.nl/</a></p> <p>Government of the Netherlands. (2022, June 14). <i>Media Act 2008 – Applicable from 01/07/2021</i>. <a href="https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf">https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf</a></p> <p>NPO. (n.d.). <i>Over NPO</i>. <a href="https://npo.nl/overnpo">https://npo.nl/overnpo</a></p> <p>NPO. (2023). <i>Terugblik 2022</i> [2022 Review]. <a href="file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html">file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html</a></p> <p>NPO. (2023). <i>Jaarverslag 2022</i> [2022 Annual Report]. <a href="file:///C:/Users/39340/Downloads/Jaarverslag-2022.html">file:///C:/Users/39340/Downloads/Jaarverslag-2022.html</a></p> <p>Omroep.nl. (2013, April 5). <i>Welke rol speelt de NPO als organisatie binnen het Nederlandse omroepbestel?</i> [What role does the NPO play as an organization within the Dutch broadcasting system?] - <i>help.publiekeomroep.nl</i>.</p>

	<p>Web.archive.org.  <a href="https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel">https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel</a></p> <p>Interviews' transcripts:  Olij, Bogaerts, Van Turennot</p>
Cultural dimension of public value	
High quality content production	<p>Documents:</p> <p>EO. (n.d.). <i>AI- Richtlijnen</i>. [AI Guidelines]. <a href="https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf">https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf</a></p> <p>EO. (n.d.). <i>Over de EO</i> [About EO]. <a href="https://over.eo.nl/">https://over.eo.nl/</a></p> <p>Government of the Netherlands. (2022, June 14). <i>Media Act 2008 – Applicable from 01/07/2021</i>.  <a href="https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf">https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf</a></p> <p>NPO. (n.d.). <i>Over NPO</i>. <a href="https://npo.nl/overnpo">https://npo.nl/overnpo</a></p> <p>NPO. (2023). <i>Terugblik 2022</i> [2022 Review].  <a href="file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html">file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html</a></p> <p>NPO. (2023). <i>Jaarverslag 2022</i> [2022 Annual Report].  <a href="file:///C:/Users/39340/Downloads/Jaarverslag-2022.html">file:///C:/Users/39340/Downloads/Jaarverslag-2022.html</a></p> <p>Omroep.nl. (2013, April 5). <i>Welke rol speelt de NPO als organisatie binnen het Nederlandse omroepbestel?</i> [What role does the NPO play as an organization within the Dutch broadcasting system?] - <a href="http://help.publiekeomroep.nl">help.publiekeomroep.nl</a>.  Web.archive.org.  <a href="https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel">https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel</a></p> <p>Interviews' transcripts:  Olij, Bogaerts, Van Turennot</p>
Educational offering	<p>Documents:</p> <p>EO. (n.d.). <i>AI- Richtlijnen</i>. [AI Guidelines]. <a href="https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf">https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf</a></p> <p>EO. (n.d.). <i>Over de EO</i> [About EO]. <a href="https://over.eo.nl/">https://over.eo.nl/</a></p> <p>Government of the Netherlands. (2022, June 14). <i>Media Act 2008 – Applicable from 01/07/2021</i>.  <a href="https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf">https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a-act-2008/Media+Act+2008.pdf</a></p> <p>NPO. (n.d.). <i>Over NPO</i>. <a href="https://npo.nl/overnpo">https://npo.nl/overnpo</a></p> <p>NPO. (2023). <i>Terugblik 2022</i> [2022 Review].  <a href="file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html">file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html</a></p> <p>NPO. (2023). <i>Jaarverslag 2022</i> [2022 Annual Report].  <a href="file:///C:/Users/39340/Downloads/Jaarverslag-2022.html">file:///C:/Users/39340/Downloads/Jaarverslag-2022.html</a></p>

	<p>Omroep.nl. (2013, April 5). <i>Welke rol speelt de NPO als organisatie binnen het Nederlandse omroepbestel?</i> [What role does the NPO play as an organization within the Dutch broadcasting system?] - <a href="http://help.publiekeomroep.nl">help.publiekeomroep.nl</a>. Web.archive.org. <a href="https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel">https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel</a></p> <p>Interviews' transcripts: Olij, Bogaerts, Van Turennot</p>
<p>Political dimension of public value</p>	
<p>Information quality and journalistic integrity</p>	<p>Documents:</p> <p>EO. (n.d.). <i>AI- Richtlijnen</i>. [AI Guidelines]. <a href="https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf">https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf</a></p> <p>EO. (n.d.). <i>Over de EO</i> [About EO]. <a href="https://over.eo.nl/">https://over.eo.nl/</a></p> <p>Government of the Netherlands. (2022, June 14). <i>Media Act 2008 – Applicable from 01/07/2021</i>. <a href="https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a_act-2008/Media+Act+2008.pdf">https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a_act-2008/Media+Act+2008.pdf</a></p> <p>NPO. (n.d.). <i>Over NPO</i>. <a href="https://npo.nl/overnpo">https://npo.nl/overnpo</a></p> <p>NPO. (2023). <i>Terugblik 2022</i> [2022 Review]. <a href="file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html">file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html</a></p> <p>NPO. (2023). <i>Jaarverslag 2022</i> [2022 Annual Report]. <a href="file:///C:/Users/39340/Downloads/Jaarverslag-2022.html">file:///C:/Users/39340/Downloads/Jaarverslag-2022.html</a></p> <p>Omroep.nl. (2013, April 5). <i>Welke rol speelt de NPO als organisatie binnen het Nederlandse omroepbestel?</i> [What role does the NPO play as an organization within the Dutch broadcasting system?] - <a href="http://help.publiekeomroep.nl">help.publiekeomroep.nl</a>. Web.archive.org. <a href="https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel">https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel</a></p> <p>Interviews' transcripts: Olij, Bogaerts, Van Turennot</p>
<p>Citizenship involvement in the democratic process</p>	<p>Documents:</p> <p>EO. (n.d.). <i>AI- Richtlijnen</i>. [AI Guidelines]. <a href="https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf">https://3gybgdzmb2xr.b-cdn.net/37tdb2q0sab9-eo-en-ai-richtlijnen.pdf</a></p> <p>EO. (n.d.). <i>Over de EO</i> [About EO]. <a href="https://over.eo.nl/">https://over.eo.nl/</a></p> <p>Government of the Netherlands. (2022, June 14). <i>Media Act 2008 – Applicable from 01/07/2021</i>. <a href="https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a_act-2008/Media+Act+2008.pdf">https://www.government.nl/binaries/government/documenten/publications/2022/06/14/medi_a_act-2008/Media+Act+2008.pdf</a></p> <p>NPO. (n.d.). <i>Over NPO</i>. <a href="https://npo.nl/overnpo">https://npo.nl/overnpo</a></p> <p>NPO. (2023). <i>Terugblik 2022</i> [2022 Review]. <a href="file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html">file:///C:/Users/39340/Downloads/terugblik-2022-npo%20(1).html</a></p>

	<p>NPO. (2023). <i>Jaarverslag 2022 [2022 Annual Report]</i>.  <a href="file:///C:/Users/39340/Downloads/Jaarverslag-2022.html">file:///C:/Users/39340/Downloads/Jaarverslag-2022.html</a></p> <p>Omroep.nl. (2013, April 5). <i>Welke rol speelt de NPO als organisatie binnen het Nederlandse omroepbestel? [What role does the NPO play as an organization within the Dutch broadcasting system?]</i> - <i>help.publiekeomroep.nl</i>.  Web.archive.org.  <a href="https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel">https://web.archive.org/web/20130405125104/http://help.publiekeomroep.nl/faqs/welke-rol-speelt-de-npo-als-organisatie-binnen-het-nederlandse-omroepbestel</a></p> <p>Interviews' transcripts:  Olij, Bogaerts, Van Turennot</p>
<b>Italy</b>	
Social dimension of public value	
Universal accessibility	<p>Documents:</p> <p>Rai. (2018). <i>Contratto di Servizio 2018-2022 [Contract of Service 2018-2022]</i>.  <a href="https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf">https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf</a></p> <p>Rai. (2023). <i>Bilancio di Sostenibilità Gruppo Rai 2022 [Rai Group Sustainability Statement]</i>.  <a href="https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf">https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf</a></p> <p>Rai (2024). <i>Piano Industriale 2024-2026 – Nota illustrative [Industrial Plan 2024-2026 – explanatory note]</i>. <a href="https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf">https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf</a></p> <p>Rai Ufficio Stampa. (2024, January 18). <i>Approvato il Contratto di Servizio e il Piano industriale Rai 2024-2026 [Rai's Contract of Service and Industrial Plan 2024-2026 approved]</i> [Press release].  <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html</a></p> <p>Rai Ufficio Stampa. (2024, February 14). <i>Rai, presentato piano industriale 2024 [Rai presents the 2024 industrial plan]</i>. [Press Release].  <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html</a></p> <p>Ruggiero, P. (2024, January 20). <i>Rai, piano da 225 mln per la trasformazione digitale e risorse interne [Rai, 225-million plan for digital transformation and internal resources]</i>. Fortune Italia. <a href="https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/">https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/</a></p> <p>Senato della Repubblica. (2023, July 11). <i>Schema di contratto di servizio tra il Ministero delle imprese e del made in Italy e la RAI-Radiotelevisione Italiana Spa, per il periodo 2023-2028</i> <i>Contratto di Servizio 2023-2024 [Contract of Service 2023-2024]</i>.</p>

	<p><a href="https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/">https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/</a></p> <p>Zaccone Teodosi, A. (2023, July 21). <i>Esclusiva. Bilancio sociale della Rai 2022: confermata l'evanescenza del servizio pubblico?</i> [Rai' Social Statement 2022. <i>Is public service's evanescence confirmed?</i>]. <a href="https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/">https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/</a></p> <p>Interviews' transcripts: Salini, Imbriale, Gerli</p>
Equal and diverse representation	<p>Documents:</p> <p>Rai. (2018). <i>Contratto di Servizio 2018-2022 [Contract of Service 2018-2022]</i>. <a href="https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf">https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf</a></p> <p>Rai. (2023). <i>Bilancio di Sostenibilità Gruppo Rai 2022 [Rai Group Sustainability Statement]</i>. <a href="https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf">https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf</a></p> <p>Rai (2024). <i>Piano Industriale 2024-2026 – Nota illustrative [Industrial Plan 2024-2026 explanatory note]</i>. <a href="https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf">https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf</a></p> <p>Rai Ufficio Stampa. (2024, January 18). <i>Approvato il Contratto di Servizio e il Piano industriale Rai 2024-2026 [Rai's Contract of Service and Industrial Plan 2024-2026 approved]</i> [Press release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html</a></p> <p>Rai Ufficio Stampa. (2024, February 14). <i>Rai, presentato piano industriale 2024 [Rai presents the 2024 industrial plan]</i>. [Press Release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html</a></p> <p>Ruggiero, P. (2024, January 20). <i>Rai, piano da 225 mln per la trasformazione digitale e risorse interne [Rai, 225-million plan for digital transformation and internal resources]</i>. Fortune Italia. <a href="https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/">https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/</a></p> <p>Senato della Repubblica. (2023, July 11). <i>Schema di contratto di servizio tra il Ministero delle imprese e del made in Italy e la RAI-Radiotelevisione Italiana Spa, per il periodo 2023-2028</i> [Contract of Service 2023-2024]. <a href="https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/">https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/</a></p> <p>Zaccone Teodosi, A. (2023, July 21). <i>Esclusiva. Bilancio sociale della Rai 2022: confermata l'evanescenza del servizio pubblico?</i> [Rai' Social Statement 2022. <i>Is</i></p>

	<p><i>public service's evanescence confirmed?</i>]. <a href="https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/">https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/</a></p> <p>Interviews' transcripts: Salini, Imbriale, Gerli</p>
Cultural dimension of public value	
High quality content production	<p>Documents:</p> <p>Rai. (2018). <i>Contratto di Servizio 2018-2022 [Contract of Service 2018-2022]</i>. <a href="https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf">https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf</a></p> <p>Rai. (2023). <i>Bilancio di Sostenibilità Gruppo Rai 2022 [Rai Group Sustainability Statement]</i>. <a href="https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf">https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf</a></p> <p>Rai (2024). <i>Piano Industriale 2024-2026 – Nota illustrative [Industrial Plan 2024-2026 – explanatory note]</i>. <a href="https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf">https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf</a></p> <p>Rai Ufficio Stampa. (2024, January 18). <i>Approvato il Contratto di Servizio e il Piano industriale Rai 2024-2026 [Rai's Contract of Service and Industrial Plan 2024-2026 approved]</i> [Press release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html</a></p> <p>Rai Ufficio Stampa. (2024, February 14). <i>Rai, presentato piano industriale 2024 [Rai presents the 2024 industrial plan]</i>. [Press Release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html</a></p> <p>Ruggiero, P. (2024, January 20). <i>Rai, piano da 225 mln per la trasformazione digitale e risorse interne [Rai, 225-million plan for digital transformation and internal resources]</i>. Fortune Italia. <a href="https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/">https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/</a></p> <p>Senato della Repubblica. (2023, July 11). <i>Schema di contratto di servizio tra il Ministero delle imprese e del made in Italy e la RAI-Radiotelevisione Italiana Spa, per il periodo 2023-2028</i> <i>Contratto di Servizio 2023-2024 [Contract of Service 2023-2024]</i>. <a href="https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/">https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/</a></p> <p>Zaccone Teodosi, A. (2023, July 21). <i>Esclusiva. Bilancio sociale della Rai 2022: confermata l'evanescenza del servizio pubblico? [Rai' Social Statement 2022. Is public service's evanescence confirmed?]</i>. <a href="https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/">https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/</a></p> <p>Interviews' transcripts:</p>

	Salini, Imbriale, Gerli
Educational offering	<p>Documents:</p> <p>Rai. (2018). <i>Contratto di Servizio 2018-2022 [Contract of Service 2018-2022]</i>. <a href="https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf">https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf</a></p> <p>Rai. (2023). <i>Bilancio di Sostenibilità Gruppo Rai 2022 [Rai Group Sustainability Statement]</i>. <a href="https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf">https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf</a></p> <p>Rai (2024). <i>Piano Industriale 2024-2026 – Nota illustrative [Industrial Plan 2024-2026 – explanatory note]</i>. <a href="https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf">https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf</a></p> <p>Rai Ufficio Stampa. (2024, January 18). <i>Approvato il Contratto di Servizio e il Piano industriale Rai 2024-2026 [Rai's Contract of Service and Industrial Plan 2024-2026 approved]</i> [Press release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html</a></p> <p>Rai Ufficio Stampa. (2024, February 14). <i>Rai, presentato piano industriale 2024 [Rai presents the 2024 industrial plan]</i>. [Press Release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html</a></p> <p>Ruggiero, P. (2024, January 20). <i>Rai, piano da 225 mln per la trasformazione digitale e risorse interne [Rai, 225-million plan for digital transformation and internal resources]</i>. Fortune Italia <a href="https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/">https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/</a></p> <p>Senato della Repubblica. (2023, July 11). <i>Schema di contratto di servizio tra il Ministero delle imprese e del made in Italy e la RAI-Radiotelevisione Italiana Spa, per il periodo 2023-2028</i> <i>Contratto di Servizio 2023-2024 [Contract of Service 2023-2024]</i>. <a href="https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/">https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/</a></p> <p>Zaccone Teodosi, A. (2023, July 21). <i>Esclusiva. Bilancio sociale della Rai 2022: confermata l'evanescenza del servizio pubblico? [Rai' Social Statement 2022. Is public service's evanescence confirmed?]</i>. <a href="https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/">https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/</a></p> <p>Interviews' transcripts: Salini, Imbriale, Gerli</p>
Political dimension of public value	
Information quality and	Documents:



journalistic integrity	<p>Rai. (2018). <i>Contratto di Servizio 2018-2022 [Contract of Service 2018-2022]</i>. <a href="https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf">https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf</a></p> <p>Rai. (2023). <i>Bilancio di Sostenibilità Gruppo Rai 2022 [Rai Group Sustainability Statement]</i>. <a href="https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf">https://www.rai.it/dl/doc/1686578785141_Rai_Bilancio%20Sostenibilit_DNF_2022_Pubblicato.pdf</a></p> <p>Rai (2024). <i>Piano Industriale 2024-2026 – Nota illustrative [Industrial Plan 2024-2026 – explanatory note]</i>. <a href="https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf">https://www.key4biz.it/wp-content/uploads/2024/01/RAI_nota_Piano_industriale_18.1.2024.pdf</a></p> <p>Rai Ufficio Stampa. (2024, January 18). <i>Approvato il Contratto di Servizio e il Piano industriale Rai 2024-2026 [Rai’s Contract of Service and Industrial Plan 2024-2026 approved]</i> [Press release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/01/Approvato-il-Contratto-di-Servizio-e-il-Piano-industriale-Rai-2024-2026-al-via-la-trasformazione-in-Digital-Media-Company-80d6364f-9363-49a6-8116-e1a1433f003b-ssi.html</a></p> <p>Rai Ufficio Stampa. (2024, February 14). <i>Rai, presentato piano industriale 2024 [Rai presents the 2024 industrial plan]</i>. [Press Release]. <a href="https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html">https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html</a></p> <p>Ruggiero, P. (2024, January 20). <i>Rai, piano da 225 mln per la trasformazione digitale e risorse interne [Rai, 225-million plan for digital transformation and internal resources]</i>. Fortune Italia. <a href="https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/">https://www.fortuneita.com/2024/01/20/rai-piano-da-225mln-per-trasformazione-digitale-e-risorse-interne/</a></p> <p>Senato della Repubblica. (2023, July 11). <i>Schema di contratto di servizio tra il Ministero delle imprese e del made in Italy e la RAI-Radiotelevisione Italiana Spa, per il periodo 2023-2028</i> <i>Contratto di Servizio 2023-2024 [Contract of Service 2023-2024]</i>. <a href="https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/">https://www.monitor-radiotv.it/w/documenti-il-contratto-di-servizio-tra-rai-e-ministero/</a></p> <p>Zaccone Teodosi, A. (2023, July 21). <i>Esclusiva. Bilancio sociale della Rai 2022: confermata l’evanescenza del servizio pubblico? [Rai’ Social Statement 2022. Is public service’s evanescence confirmed?]</i>. <a href="https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/">https://www.key4biz.it/bilancio-sociale-della-rai-2022-confermata-levanescenza-del-servizio-pubblico/454674/</a></p> <p>Interviews’ transcripts: Salini, Imbriale, Gerli</p>
Citizenship involvement in the democratic process	<p>Documents:</p> <p>Rai. (2018). <i>Contratto di Servizio 2018-2022 [Contract of Service 2018-2022]</i>. <a href="https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf">https://www.rai.it/dl/doc/1607970429668_Contratto%20di%20servizio%202018-2022.pdf</a></p>

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<https://www.rai.it/ufficiostampa/assets/template/us-articolo.html?ssiPath=/articoli/2024/02/RAI-PRESENTATO-PIANO-INDUSTRIALE-2024-e8db6a13-df93-4b1c-b719-845c0504d91e-ssi.html>

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Interviews’ transcripts:  
 Salini, Imbriale, Gerli

## APPENDIX B

### *Operationalization of Concepts in Interviews*

<b>Concept</b>	<b>Operationalization</b>
Social dimension of Public Value	
Universal accessibility	<p>Measured by asking interviewees questions such as:</p> <ul style="list-style-type: none"> <li>• <i>What is the organization’s strategic vision in terms of universal accessibility for all individuals?</i></li> <li>• <i>How is digitalization affecting this strategic vision?</i></li> <li>• <i>Which digital strategies and tools is the organization developing to enhance universal accessibility?</i></li> <li>• <i>Which target groups are the hardest to reach for the organization?</i></li> <li>• <i>How can digitalization overcome barriers between the organization and its target audience?</i></li> </ul>
Equal and diverse representation	<p>Measured by asking interviewees questions such as:</p> <ul style="list-style-type: none"> <li>• <i>What is the organization’s strategic vision in terms of equal and diverse representation of the society’s composition?</i></li> <li>• <i>How is digitalization affecting this strategic vision?</i></li> <li>• <i>How are digital channels allowing more and more equal media access to individuals and organizations, both as senders and recipients of messages?</i></li> </ul>

Cultural dimension of Public Value	
High-quality content production	<p>Measured by asking interviewees questions such as:</p> <ul style="list-style-type: none"> <li>• <i>What is the organization's current strategic vision in terms of digital content offering?</i></li> <li>• <i>How has digitalization impacted the quality of the organization's production and offering?</i></li> </ul>
Educational offering	<p>Measured by asking interviewees questions such as:</p> <ul style="list-style-type: none"> <li>• <i>What is the organization's strategic vision in terms of its role as an education provider and as an actor in the national education system?</i></li> <li>• <i>Which school-related projects were developed through the organization's digital channels and platforms?</i></li> </ul>
Political dimension of Public Value	
Information quality and journalistic integrity	<p>Measured by asking interviewees questions such as:</p> <ul style="list-style-type: none"> <li>• <i>What is the organization's strategic vision for information and news offering?</i></li> <li>• <i>How has this strategy changed since the advent of digitalization?</i></li> <li>• <i>What impact has digitalization had on information quality and impartiality?</i></li> <li>• <i>How is the organization competing with social media native news outlets?</i></li> </ul>
Citizenship involvement in the democratic process	<p>Measured by asking interviewees questions such as:</p>

	<ul style="list-style-type: none"><li>• <i>What is the organization's strategic vision about its role of a platform to bring citizens closer to democratic institutions and facilitate democratic processes?</i></li><li>• <i>Which digital solutions can be implemented for that?</i></li></ul>
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## APPENDIX C

### *Operationalization of Concepts in Documents' Analysis*

Concept	Operationalization
Social dimension of Public Value	
Universal accessibility	<p>Measured by assessing in the company's reports:</p> <ul style="list-style-type: none"> <li>• How often and with which terms is the reach of a universal accessibility to the service mentioned.</li> <li>• Which tested has been carried out to assess the organization's accessibility and universality, with which results, and which digital solutions were developed to increase these parameters.</li> <li>• How often is digital divide mentioned and how it is addressed in the context of the organization's strategic innovation.</li> </ul>
Equal and diverse representation	<p>Measured by assessing in the company's reports:</p> <ul style="list-style-type: none"> <li>• How much and in what terms is the possibility of increasing individuals' and organizations' access and representation in media mentioned.</li> <li>• Which tests have been conducted to assess the level of equal representation of minorities by the organization's programmes and services, which were the results and how has the situation changed with digital innovation.</li> <li>• On what extent are digital channels and platforms considered to be strategically</li> </ul>

	<p>used to increase equal representation of society.</p> <ul style="list-style-type: none"> <li>• Which strategies emerge to make minorities more represented.</li> </ul>
<p>Cultural dimension of Public Value</p>	
<p>High quality content production</p>	<p>Measured by assessing in the company's reports:</p> <ul style="list-style-type: none"> <li>• How has the organization's content offering changed since the advent of digital channels and platforms. Which tests have been conducted to assess content quality and which were the measured changes.</li> <li>• Which strategic vision emerges by the organization in terms of digital content offering.</li> <li>• What is the organization's strategic vision in terms of local and original content production and distribution, and how is related to digital innovation.</li> </ul>
<p>Educational offering</p>	<p>Measured by assessing in the company's reports:</p> <ul style="list-style-type: none"> <li>• How often and on which terms is the organization's educational purpose mentioned.</li> <li>• Which strategic vision emerges by the organization in terms of its role in the educational system of the future.</li> <li>• Which digital tools were developed or are under development to enhance the organization's educational offering.</li> </ul>

Political dimension of Public Value

<p>Information quality and journalistic integrity</p>	<p>Measured by assessing in the company's reports:</p> <ul style="list-style-type: none"> <li>• Which tests have been conducted and which parameters are considered by the organization to assess quality, impartiality and reputation of its information services. How did these parameters change with the advent of digital channels and platforms.</li> <li>• Which are the organization's current and future strategies regarding information offering on digital channels and on social media. On what extend do these strategies focus on the above-mentioned parameters to gain competitive advantage over news media competitors.</li> <li>• How is the competition by social media native players addressed to and considered.</li> </ul>
<p>Citizenship involvement in the democratic process</p>	<p>Measured by assessing in the company's reports:</p> <ul style="list-style-type: none"> <li>• How often and on which terms is the organization's civic purpose mentioned.</li> <li>• Which digital tools of civic and democratic participation have been developed or are under development by the organization.</li> </ul>