

From trailblazers to tortoises: How Europe's regional public service broadcasters approach innovation

European Journal of Communication
1–18

© The Author(s) 2025

Article reuse guidelines:

sagepub.com/journals-permissions

DOI: 10.1177/02673231251379207

journals.sagepub.com/home/ejc



José Rúas-Araújo 

University of Vigo, Spain

Talía Rodríguez-Martelo 

University of Vigo, Spain

Marius Dragomir 

University of Santiago de Compostela, Spain; Media and Journalism
Research Center, Estonia; Central European University (CEU) Vienna,
Austria

Abstract

Regional broadcast media comprises a substantial sector across Europe, encompassing thousands of players and drawing on considerable public funds. Yet, as the media landscape becomes an increasingly crowded field and the competitive heat from tech giants ratchets up, the need for media companies to sharpen their edge will only intensify. Gaining that competitive vantage requires embracing innovative practices and business models—especially as the relentless wave of innovation, often bankrolled by large tech corporations, continues to wash over the industry. Drawing on insights from interviews with representatives of member organizations under CIRCOM-Regional, Europe's largest association of regional broadcasters, this article sheds light on how regional public service media grapple with innovation. Despite widespread awareness of its significance, the findings suggest that many regional broadcasters lag behind in fully embracing the concept. Only a rare few boast dedicated teams or resources for innovation. In most cases, progress is driven through technological enhancements and organizational openness, while strategic policies and long-term investment plans often fall by the wayside.

Corresponding author:

Talía Rodríguez-Martelo, PDI Department of Audiovisual Communication & Advertising Faculty of Communication, University of Vigo, Campus A Xunqueira, s/n CP: 36005 Pontevedra, Spain.

Email: talia.rodriiguez@uvigo.es

Keywords

CIRCOM-Regional, innovation, media, public service media, regional broadcasting

Introduction

The regional and local broadcasting sector constitutes a cornerstone of the European audiovisual market, which, as of 2023, encompassed a total of 12,703 services. Around three-quarters of these offerings pertain to linear television services, while the remaining 3269 were video-on-demand (VOD) platforms.

Regional and local broadcasters claim a significant footprint within this landscape, representing 42% of Europe's 9434 television channels, according to 2023 figures. These broadcasters operate throughout every European country, with the lion's share focusing on generalist programming: an estimated 9 out of 10 of these regional channels cater to broad audience interests with generalist content (Schneeberger, 2024). Thematic or specialized programming is generally of secondary importance, as these broadcasters largely focus on appealing to the broadest audience possible, rather than zeroing in on niche demographics (Arriaza Ibarra et al., 2015).

Quantifying the precise economic clout of the regional broadcasting sector is a tall order, due to the lack of publicly available data on expenditure by regional television operators across Europe. However, broader indicators shine a light on their financial underpinnings; these broadcasters derive a considerable share of their income through revenues linked to the public audiovisual sector in Europe, given that they are integrated into public broadcaster groups. Between 2017 and 2022, the revenue generated by Europe's public audiovisual sector enjoyed robust growth of roughly 8%, amounting to €28.14 billion. By contrast, public funding exhibited a more measured increase of around 7% during the same period, climbing to €22.51 billion. Despite this slightly more reserved growth, public funding continues to act as the lifeblood of the sector, accounting for roughly 80% of overall income among broadcasters within the EU-27 framework.

While regional broadcasters hold a crucial position within Europe's media landscape, the industry is notably concentrated. Just six countries—Italy, Spain, Hungary, Ukraine, the Netherlands, and Germany—boast over half (53%) of all local and regional TV channels across Europe. Remarkably, Italy alone is responsible for 18% of these broadcasters.

A similar pattern of concentration can be observed among public television outlets at the local and regional levels. The Netherlands and Spain together make up about two-thirds of all public service channels serving regions on the continent.

The question here though is whether the sector's expansive size translates to a correspondingly high level of audience engagement. Although Europe has a substantial number of regional television outlets, to what extent do these broadcasters attract viewers and wield an influential presence within the broader media ecosystem?

Reliable figures on the specific audiences of the regional public service broadcasters are, for the most part, elusive. In many European nations, these outlets are interwoven into larger national public service media (PSM) structures, often functioning as offshoots

or regional branches of their parent organizations. As a result, the only metrics available come from the overarching audience statistics of these national entities. Through this lens, public service broadcasters' appeal varies dramatically across Europe, creating noticeable disparities between countries.

For example, insights from the European Audiovisual Observatory reveal sharp contrasts in terms of audience penetration. In Denmark, where regional broadcasters like TV2 play a key role, public service television collectively claims over 81% of the daily market share—a commanding presence. Conversely, in nations like Romania and North Macedonia, public broadcasters face an uphill battle, capturing less than 5% of the audience's attention.

PSM in Europe have generally witnessed a steady uptick in viewership since the advent of the COVID-19 pandemic. These broadcasters saw their audience share erode steadily from the early 2000s, eventually plateauing at an average of 26.5%. However, by 2022, this figure experienced a modest resurgence, rising to 27.5%—a promising shift, albeit still a far cry from the highs of the early 2000s, when audience shares hovered near 35% (Schneeberger, 2024).

Yet, the story of audience growth is far from uniform. While some PSM institutions have managed to punch above their weight in terms of viewership, most have faced mounting challenges tied to platformization. This tech-driven revolution has reshaped the media landscape, posing particular difficulties for PSM organizations directed by strict public remits and mandates. For regional PSM entities, the tides have proven even choppy; platformization, combined with the burgeoning dominance of global tech giants, has chipped away at regional viewership and disrupted well-established consumption patterns (Van Aelst et al., 2021).

These rising pressures have compelled PSM organizations to undertake sweeping transformations to keep pace with the shifts unleashed by the digital era. The road to adaptation has been anything but smooth, with clear winners and losers emerging. Some broadcasters have managed to give themselves a facelift, positioning themselves as indispensable providers of news and non-factual programming. Others, however, have seen their fortunes dwindle, either hemorrhaging audiences or damaging their credibility by appearing to parrot government narratives.

At the heart of this metamorphosis lies one critical element: innovation. The success of PSM hinges on their ability to reinvent the wheel—modernizing operations, crafting dynamic strategies for engaging audiences, and carving out a unique voice in the increasingly crowded platform ecosystem.

This article seeks to examine how public service regional broadcasters throughout Europe are tackling the mounting pressures of platformization through innovation. By analyzing how these institutions perceive, embrace, and implement innovation, it uncovers the strategies they employ to carve out an advantage in an increasingly tangled and saturated media landscape.

Drawing on insights gleaned from extensive interviews with representatives of public service broadcasters across Europe, this work represents the first pan-European comparative analysis of innovation in regional public service broadcasting. In doing so, it bridges a significant knowledge gap, offering a glimpse into the complex interplay of operational strategies and mindset shifts that shape these institutions' approaches to innovation and their views on its transformative potential.

A review of the concept, definition, and types of innovation

Historically, European public service broadcasters have been linchpins of social cohesion, education, and cultural enrichment within the societies they serve (Arnold et al., 2020). This role has endured through the evolution of PSM, institutions that trace their roots to Europe's traditional public service broadcasting frameworks. Their mandate is to deliver freely accessible, high-quality content that entertains, educates, and informs, including genres often overlooked by commercial platforms (Etura and Redondo, 2024). Moreover, they are uniquely positioned and entrusted to create media spaces that act as marketplaces of ideas—amplifying diverse voices, perspectives, and cultures—critical to nurturing a vibrant democracy and a flourishing society (Johnson, 2020).

In the age of platformization, PSM organizations find themselves walking a tightrope, striving to redefine their core mission to align with audience expectations, rapid technological advancements, and novel forms of digital engagement. They are expected to shoulder this challenge while remaining steadfast in their independence, upholding democratic values, and fostering societal empowerment (Dragomir and Túnuez-López, 2024; López-Golán et al., 2019; Rueda, 2023).

However, in the highly competitive landscape shaped by platformization, public service broadcasters must embrace innovation as a key strategy to ensure their survival, carve out a renewed position, and revitalize their offerings (Fieiras Ceide et al., 2024).

In our exploration of how regional public service broadcasters have adapted to the pressures and transformations associated with platform evolution, we grounded our analysis in Schumpeter's seminal 1950 theory of innovation (Sweezy, 1943). To frame our study, we applied the versatile definition of innovation proposed by the Organization for Economic Cooperation and Development (OECD) in its Oslo Manual (2018). According to the OECD, innovation encompasses the conception, development, and deployment of substantial changes in organizational structures, products, processes, and marketing strategies through the leveraging of new knowledge, technologies, or research. These innovations may emerge from internal efforts, external collaboration, consultancy, or by adopting cutting-edge technological tools.

The OECD's framework distinguishes innovation through a string of indicators—covering organizational dynamics, cultural shifts, intensity, and efficiency—as well as its role as a driver of organizational growth and economic development (Blasco-Blasco et al., 2017; López-Golán et al., 2024).

Fundamentally, innovation refers to the act of cultivating and applying fresh ideas, methods, products, or technologies with the goal of improvement and advancement across businesses, institutions, and societies. A crucial ingredient in this recipe is openness to change, which contributes significantly to the sustained success of individuals, organizations, and societies embracing innovation (García-Avilés et al., 2023). As an inseparable part of modernization, innovation today has become the dual cornerstone—a fusion of technological and social factors—driving the evolution and enrichment of PSM offerings (Cañedo et al., 2024).

Relevant to our discussion is the concept of ambidextrous organizations—entities that skillfully blend rigid frameworks with adaptable structures. First articulated by Robert

Duncan in 1976 and subsequently elaborated upon, this idea frames ambidexterity as ‘the ability to simultaneously achieve both incremental and discontinuous innovation across multiple contradictory structures, processes, and cultures for the long-term survival of a company’ (Tushman and O’Reilly, 1996).

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

Keeley and his team at Doblin, a consulting firm, conceptualized a framework for deciphering the multifaceted dimensions of innovation (Keeley et al., 2013). Through their research, they identified 10 distinct types of innovation that empower organizations to tackle transformation from various perspectives, as follows:

1. *Profit Model Innovation*: Pertains to the ways businesses monetize their offerings. Notable examples include subscription-based approaches, pay-as-you-go systems, or freemium models designed to entice users before scaling toward revenue.
2. *Network Innovation*: Focuses on generating value through alliances and partnerships, tapping into the power of collaborative ecosystems. Open innovation exemplifies this concept by pooling shared resources and expertise.
3. *Structure Innovation*: Concerns the strategic reorganization of internal assets, skills, and resources for value creation. Examples include streamlined talent management practices or innovative ownership frameworks.
4. *Process Innovation*: Involves refining internal methodologies to elevate organizational efficiency and efficacy. Examples encompass the integration of agile frameworks or the application of artificial intelligence to automate repetitive tasks.
5. *Product Performance Innovation*: Relates to enhancing a product’s features or capabilities. This category is traditionally the most visible to consumers and involves continual refinements or breakthroughs in design and functionality.
6. *Product System Innovation*: Arises when businesses design cohesive ecosystems of interrelated products and services that seamlessly integrate to amplify value for customers.
7. *Service Innovation*: Pins its focus on upgrading the customer experience or creating ancillary services that complement and enrich the primary product offering.
8. *Channel Innovation*: Spotlights how products or services are delivered to end-users, centering on mechanisms such as e-commerce platforms or digital distribution channels.
9. *Brand Innovation*: Concerns crafting a distinctive market identity and refining how an organization conveys its unique value proposition through branding and storytelling.
10. *Customer Engagement Innovation*: Explores novel ways of building meaningful relationships with customers and curating ongoing value experiences. Examples

range from tailor-made customer interactions like personalized services to immersive loyalty or social engagement programs.

Keeley's framework offers organizations a fresh lens through which to approach innovation, enabling transformative strategies through creative yet methodical improvements across a wide array of opportunity areas. Among the various forms of innovation, those tied to pioneering new business models and the creation of networks wielded the most weight in driving value creation, even though such innovations are relatively rare (Keeley et al., 2013).

When it comes to size, although certain studies suggest that bigger organizations are more inclined towards innovation, the overarching consensus across the literature is that the organization's size holds minimal sway over its ability to implement innovative measures.

When examining innovation in European public service broadcasters, the Hexagon for Public Innovation Model (HPIM), as outlined by Oliván (2020), holds significant relevance and served as the framework for the survey conducted to gather material for this article (see Methodology section). This model is underpinned by six key pillars that drive an innovation-centric culture, detailed as follows:

- OPEN. Opening organizations and establishing collaboration networks with suppliers, competitors, users, and audiences
- TRANS. Mainstreaming and creating project teams and 'circles' that work as a network, combining ideas and skills
- FAST. Making more flexible and accelerating processes, breaking down bureaucratic barriers, tearing down departmental walls, and improving internal and external communication
- PROTO. Aligning visions, inspiring change, turning prototypes into projects
- CO. Promoting collaboration, cooperation, co-creation, collective intelligence, creating learning and innovation communities
- TEC. Boosting digitization and personalization

To stave off obsolescence, traditional media must bid farewell to antiquated development models, fully embrace the integration with new media, and make the most of complementary strengths to craft innovative forms that cater more effectively to the diverse demands of the public (Wang, 2024).

Building on this notion, media organizations face major decisions in selecting the most suitable path for innovation—be it internal, external, or a hybrid model. Such choices hinge on several variables, including the organization's scale and overarching strategic vision.

In this context, innovation embedded within open community collaboration, where greater emphasis is placed on contributing to societal good, improves an organization's public value. However, innovation alone does not hold all the answers for European PSM organizations as they navigate the hyper-competitive media landscape fueled by platformization (Rodríguez-Martelo et al., 2023). Beyond innovation lie equally crucial dimensions that encapsulate the essence of their public value—factors such as diversity,

social engagement, independence, excellence, universality, and accountability, among others (Cañedo et al., 2022).

Within European public service audiovisual organizations, three predominant models of innovation coordination have been identified (Cai and Lattu, 2022):

1. Large-scale departments that autonomously undertake innovation initiatives using in-house resources.
2. Mid-sized departments, tasked with synchronizing both internal and external innovation efforts by assembling specialized teams for projects commissioned by various segments of the organization.
3. Innovation coordinators with minimal structure and limited funding, often operating with just personnel and functional resources. These coordinators depend on ‘ambassadors’, ‘links’, or ‘nodes’ embedded within each department, chosen in coordination with project managers to facilitate the adoption and implementation of innovation.

PSM organizations are expected to play a vital social role by design, incorporating technological experimentation and a strong commitment to innovation. Their mandate is to ensure the highest quality in their audiovisual products (García-Avilés et al., 2023). This social function extends beyond content production; it also entails improving media and digital literacy, bridging the audience-tech divide, and empowering audiences to better navigate and engage with emergent tools (Pérez-Tornero et al., 2021).

Moreover, in the media sector, innovation flourishes through collaborative efforts. Partnerships among public institutions, academia, cultural hubs, and private enterprises are essential in driving innovation (Cai and Lattu, 2022; Leydesdorff and Ahrweiler, 2014).

In summary, innovation serves as the lifeblood for the survival and expansion of media organizations navigating a fast-evolving landscape, particularly as they strive to adapt in the fiercely competitive digital arena (García-Avilés et al., 2023). Key areas for innovation include devising sustainable monetization models, capturing the attention of new audiences—especially younger demographics, addressing disinformation through fact-checking, breaking new ground in the creation of fiction and non-fiction content, crafting innovative journalistic narratives, experimenting with cutting-edge technologies for production and distribution, streamlining workflows by automating repetitive tasks that do not add human-added value, personalizing content, and encouraging user collaboration.

Methodology

To undertake the research for this study, we selected regional public service broadcasters affiliated with the CIRCOM-Regional network (International Cooperative for Research and Action on the Field of Communication) as our focus of analysis. CIRCOM-Regional is a network comprising 44 media organizations from 29 countries.

A mixed-methods research design was adopted, incorporating an online survey targeting CIRCOM-Regional members alongside in-depth interviews conducted with senior executives from these broadcasters. The final dataset for the study captures insights from 28 regional broadcasters operating across 21 European countries.

The survey, carried out between March and June 2024, was primarily administered online. Additionally, in-person interviews were conducted during CIRCOM-Regional's 40th Annual Conference, which took place on May 23–24 in Poznań, Poland, allowing for more direct engagement with participants.

Looking at the geographical breadth of responses, the survey gathered input from broadcasters representing 10 countries in Eastern Europe, eight from Northern and Western Europe, and three from Southern Europe (namely Spain, Portugal, and Italy). Notably, the response from eight Spanish broadcasters substantially bolstered the representation of this southern region.

While the research faced certain constraints, including the absence of notable players like the BBC and a lighter representation from Northern Europe, the sampled cohort remains well-rounded and comprehensive, covering more than two-thirds of CIRCOM members and the nations they represent. Such limitations were factored into the analysis that follows, ensuring a balanced and nuanced discussion of findings (Table 1).

Table 1. List of broadcast companies that participated in the research.

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

Source: Own elaboration.

Note: Representatives of these organizations participated in either the survey or the interview. ^a In some classifications (such as the UN Geoscheme), Ireland is listed in Northern Europe. However, given the characteristics of the Irish PSM model, we have included it in our classification as part of Western Europe (Hallin and Mancini, 2004; Newman et al., 2024).

Abbreviations: SVT (Sveriges Television), Yle (Yleisradio Oy), NRK (Norsk rikskringkasting), ORF (Österreichischer Rundfunk), RPO (Regionale Publieke Omroep), RAI (Radiotelevisione italiana), CRTVG (Corporación Radio e Televisión de Galicia), EITB (Euskal Irrati Telebista), CEXMA (Canal Extremadura Televisión), CyLTV (Castilla y León Televisión), RTPA (Radiotelevisión del Principado de Asturias), CMM (Castilla-La Mancha Media), RTP (Rádio e Televisão de Portugal), MTVA (Médiaszolgáltatás-támogató és Vagyonkezelő Alap), STVR (Slovenská televízia a rozhlas), TVR (Televiziunea Română), BNT (Bulgarian National Television), TVP (Telewizja Polska), RTS (Radio Television of Serbia), RTSH (Radio Televizioni Shqiptar), RTV SLO (Radiotelevizija Slovenija), MRT (Makedonska radio-televizija), and RTCG (Radio i Televizija Crne Gore).

The survey involves dichotomous and Likert scale questions, along with a couple of open-ended ones to develop qualitative responses about how PSM corporations understand innovation (Table 2).

Table 2. Questions of survey conducted among regional public service broadcasters.

-
- Q1. How does the corporation you work for understand and define innovation?
- Q2. Is there a specific department and/or a person responsible for innovation? What is it called? (identification and denomination)
- Q3. If so, how many people are part of it, what is the name/job position of the person/people in charge, and which is their profile? What department or senior management do they report to, what other departments do they coordinate with (structure, organigram)?
- Q4. Has the organization you work for developed new formats in the last 3 years? Describe which ones.
- Q5. Has the organization developed new content in the last 3 years? What kind of content? What type of audience was it aimed at?
- Q6. Point out in which of the following areas the organization you work for has innovated in the last 3 years: Organization and structure: workplace or the company's external relations / Incorporating new professional profiles / Personnel training / Business models, products, and services / Marketing, promotion, and distribution / Other
- Q7. Which of the following three innovation models do you think the public corporation you work for corresponds to? One or two coordinators / managers with hardly any structure or Budget / Medium-sized department: between 3 and 4 members / Large department: more than four members (indicate how many)
- Q8. Rate, from 0 to 10 (Likert scale), how the organization's contribution is (based on the Hexagon for Public Innovation Model): OPEN: opening organizations and establishing collaboration networks with suppliers, competitors, users, and audiences.
- Q9. Rate, from 0 to 10 (Likert scale), how the organization's contribution is (based on the Hexagon for Public Innovation Model): TRANS: mainstreaming and creating project teams and 'circles' that work as a network, combining ideas and skills.
- Q10. Rate, from 0 to 10 (Likert scale), how the organization's contribution is (based on the Hexagon for Public Innovation Model): FAST: making more flexible and accelerating processes, breaking down bureaucratic barriers, tearing down departmental walls, improving internal and external communication.
- Q11. Rate, from 0 to 10 (Likert scale), how the organization's contribution is (based on the Hexagon for Public Innovation Model): PROTO: aligning visions, inspiring changes, turning prototypes into projects.
- Q12. Rate, from 0 to 10 (Likert scale), how the organization's contribution is (based on the Hexagon for Public Innovation Model): CO: promoting collaboration, cooperation, co-creation, collective intelligence, creating learning and innovation communities.
- Q13. Rate, from 0 to 10 (Likert scale), how the organization's contribution is (based on the Hexagon for Public Innovation Model): TEC: boosting digitization and personalization.
- Q14. How does the organization generate innovation? Closed: from inside to inside, with labs, departments, and internal structures / Internal: in a closed way, from inside to outside, from the corporation / External: through alliances, agreements / Hybrid: a mixture of the two above / Social: from outside to inside, incorporating citizens into the process / Circular: in all directions, by establishing nodes involving all agents—including the audience—and shared co-creation processes
-

Source: Own elaboration.

Results and discussion

A key takeaway from the study is that the narrative around innovation among regional public service broadcasters is largely steered by technological determinism. Notably, 44% of respondents equate innovation with maintaining competitiveness and staying relevant in the field. At the same time, a significant share (24%) underscores embedding innovation into the fabric of corporate culture, signaling a more holistic strategy geared toward long-term sustainability (Table 3).

Table 3. How PSM corporations understand and define innovation.

Perception of innovation	Areas and activities	Share of all respondents (%)
Technological and technical development	Technologies seen as essential for maintaining competitiveness	39.3
New formats and content development	Creation of novel program formats and content	17.9
Cross-cutting corporate culture	Considering innovation as embedded across organizational processes	21.4
Adaptation to market changes	Responsiveness to evolving viewer demands and market conditions	14.3
Public service objectives	Links innovation to achieving public service mission	14.3
Other	Responses that do not align with the above categories	10.7

Source: Survey and interviews conducted with CIRCOM-Regional members.

Note: The response shares do not add up to 100%, as interviewees could choose more answers.

Regional variations in innovation strategies among European broadcasters are evident, with Northern outlets prioritizing business model innovation, whereas their Southern counterparts focus their innovation efforts on marketing strategies. A key trend is the increasing focus on digital content, with 37.5% of new formats designed for both broadcasting and digital platforms and 31.3% targeting social media. This underscores the efforts among these broadcasters to expand reach and optimize distribution channels.

Additionally, 25% of organizations have developed over-the-top (OTT) platforms to enhance control over content delivery, while 18.8% concentrate on producing exclusive content for social media, which reflects a strategic response to shifting consumption patterns and the need to engage younger audiences. Moreover, innovation in leadership and talent development is seen as crucial, with human resource strategies centered on staff training, the introduction of new professional roles, and fostering a culture of innovation.

The integration of AI-based tools and solutions is emerging as a transformative factor in content production and audience engagement. However, several challenges hinder innovation, including financial constraints, particularly in Eastern Europe and underfunded regions, as well as restrictive legal frameworks that limit creative flexibility in

countries such as Austria and Romania. Cultural resistance, characterized by reluctance among staff to adopt new practices and union opposition, presents additional obstacles in Austria and France, while political pressures in Eastern European nations, notably Slovenia and Slovakia, seem to further constrain innovation initiatives. These barriers underscore the complex interplay of economic, regulatory, and sociopolitical factors shaping the landscape of broadcasting innovation in Europe.

When it comes to the nuts and bolts of innovation from an administrative perspective and the distribution of resources, approximately 70% of surveyed broadcasters lack a dedicated innovation department. Furthermore, there are notable geographical discrepancies in the presence of innovation managers and specialized departments (Q2) within broadcasting organizations. Broadcasters in Western Europe often dedicate human resources specifically to innovation management in contrast with their counterparts in Eastern Europe, where such roles are few and far between. This disparity likely reflects the earlier stages of innovation maturity in the Eastern European region (Figure 1).

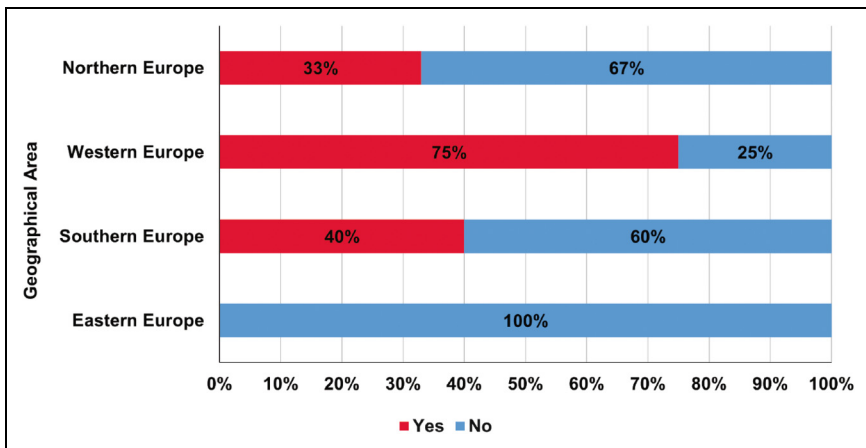


Figure 1. Presence of innovation departments in regional public service media across Europe. Source: Rúas-Araújo et al. (2025).

In some organizations, innovation is treated as a decentralized function, distributed across departments to foster a company-wide innovation culture. However, the lack of a designated leader or department can hinder coordination, leading to fragmented efforts and diminished strategic effectiveness. A structured innovation department or leadership role could improve alignment, resource allocation, and long-term innovation impact.

Both centralized and decentralized models have advantages, but organizations without dedicated innovation leadership may benefit from establishing one, particularly in dynamic environments requiring agile responses to fast changes. Further research could examine whether the absence of formal innovation structures is unique to this field or extends to other strategic areas.

Where innovation departments exist, they are often small—two-thirds have four or fewer members. Additionally, they typically report directly to the CEO, emphasizing the strategic importance of innovation in those organizations.

Based on the responses to the questions tied to the six pillars of the HPIM, digitization and a strong inclination toward openness emerge as the foremost contributions to innovation among regional PSM organizations. A notable 47% and 46% of respondents identified TEC and OPEN (see HPIM pillars in this paper) as their key contributions, respectively, placing them front and center on their strategic agendas (Figure 2).

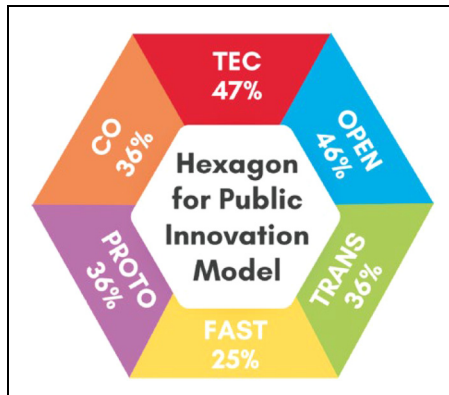


Figure 2. Where regional public service broadcasters make a contribution to innovation, in % of all responses, based on the Hexagon for Public Innovation Model. *Source:* Rúas-Araújo et al. (2025).

Nearly half of the broadcasters surveyed (46%) view opening their organization (OPEN in the HPIM framework) as a powerful catalyst for innovation, rating their contribution to this opening as ‘high’ or ‘very high’. In contrast, just over a fifth (21%) deem their impact to be moderate, while 22% regard it as ‘low’ or ‘very low’—a clear indication that opinions on its significance vary widely across the board.

Significant geographical disparities are evident in how broadcasters see their contribution to innovation-related aspects. Broadcasters from Northern Europe unanimously place opening the organization at the forefront. This sentiment was echoed, albeit to a slightly lesser extent, in Western Europe, where over half of the broadcasters reported a ‘very high’ or ‘high’ contribution to openness. In contrast, Southern Europe lags behind in these metrics, while Eastern European broadcasters exhibited a mixed outlook—half demonstrating a lukewarm, if not outright low, inclination toward openness as a pillar of innovation.

A more even distribution emerged among respondents regarding their contribution to networking as a cornerstone of innovation (TRANS in the HPIM framework). The majority (36%) described their contribution in this area as moderate, while those who rated it as ‘high’ or ‘very high’ were sitting in the same ballpark percentage-wise (Figure 3).

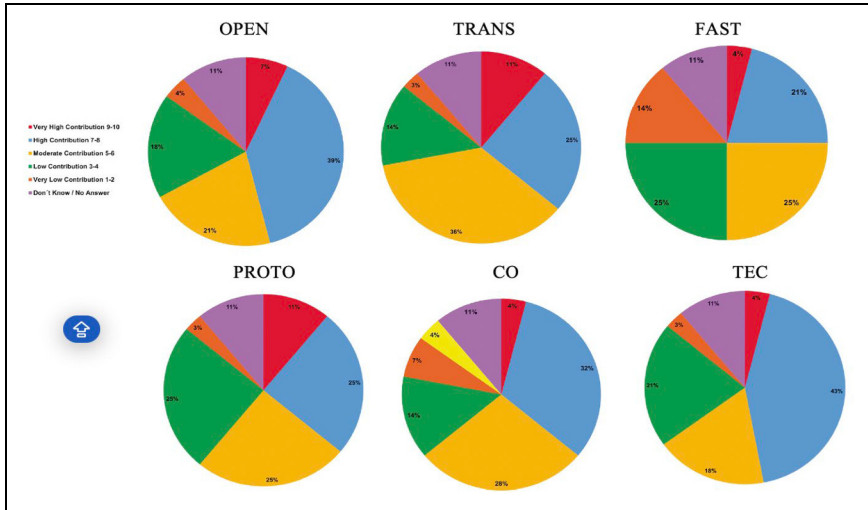


Figure 3. How regional public service broadcasters rate their organizational contribution to various areas of innovation. *Source:* Rúas-Araújo et al. (2025). *Note:* This is based on the areas forming the Hexagon for Public Innovation Model (for details, see Methodology section).

In terms of geographical breakdown, the Northern broadcasters stand out, reporting a ‘high’ or ‘very high’ contribution to networking (66%), followed by respondents from Western corporations (40%).

Among the innovation pillars, the area where respondents feel their contributions fall shortest is linked to enhancing internal operational processes (making more flexible and accelerating processes, breaking down bureaucratic barriers, tearing down departmental walls, improving internal and external communication: see FAST in the HPIM framework). A significant share of broadcasters rated their impact in this area as ‘low’ or ‘very low’ (39%), while 25% chose ‘moderate’. The latter matches the proportion of respondents who categorized their contribution as ‘high’ or ‘very high’. These findings highlight the significant disparity among broadcasters, pointing to gaps in their ability to form tightly knit teams and robust networks. Such divisions can likely be attributed to major variations in organizational structures, sluggishness in adopting agile and dynamic workflows, and an entrenched tendency to remain tied to red tape.

The inflexibility of these structures is particularly pronounced within Eastern European corporations, with 60% indicating either a ‘moderate’ or ‘very low’ level of impact. In contrast, Northern broadcasters lead the pack, displaying a ‘high’ or ‘very high’ level of contribution, accounting for 66%.

A parallel issue arises when examining the broadcasters’ role in sparking change (referenced as PROTO in the HPIM framework), which is substantially hampered by their constrained ability to execute projects. This challenge underscores notable discrepancies, with respondents evenly divided among those selecting ‘moderate’, ‘high’, and ‘low’ contributions, each at a rate of 25%.

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

In the realm of collaboration and cooperation (as outlined by the CO component of the HPIM framework), broadcasters seem to regard themselves as weighing in with notable impact—around 36% of organizations self-assess as performing above average, whereas a mere 21% classify their efforts as 'low' or 'very low'. This suggests a clear leaning and a favorable mindset among PSM organizations when it comes to joining forces to cultivate learning, as well as nurturing innovation groups and communities.

Northern broadcasters demonstrate a robust level of contribution, exhibiting a pronounced inclination toward cooperation and collaboration, with 67% falling into this category. By contrast, Western and Southern broadcasters show more modest figures, each with 40% reporting similar behavior. Meanwhile, those in Eastern nations trail significantly, with fewer than 20% describing their contribution as either 'very high' or 'high'.

When examining the technological impetus (TEC within the HPIM framework), this metric registers as the standout performer. A striking 47% of broadcasters rate their contribution in this domain as 'high' or 'very high', while a significantly smaller proportion—just 24%—consider their impact as 'low' or 'very low'.

Northern broadcasters, once more, take center stage with their solid technological advancements, achieving a full 100% contribution rate in their perception. Hot on their heels are the Southern corporations, where half of the broadcasters confidently report a significant impact. Meanwhile, approximately 40% of Western organizations and 30% of their Eastern counterparts rank their contributions as 'very high' or 'high'.

In summary, regional public service broadcasters pinpoint their most significant contributions to innovation in harnessing digital technologies and supporting organizational openness. Nonetheless, they acknowledge considerable scope for progress in areas such as collaborative innovation, partnership, and professional networking.

At the same time, a major imbalance persists among broadcasters in the realm of digital adoption and openness, underscoring a broader challenge covered here—organizational agility and flexibility. Overcoming entrenched bureaucratic inertia remains a daunting hurdle for many regional PSM organizations. Indeed, several broadcasters exhibit limited effectiveness in driving substantial change or transforming innovative concepts into fully realized initiatives (see PROTO in the HPIM framework).

Geographical comparisons sharply illustrate a widening chasm between broadcasters in Northern and Western Europe and their Eastern counterparts. Northern broadcasters top the leaderboard, earning commendable scores ranging from 66% to 100% across all six pillars. Western organizations trail slightly but still hold their ground, delivering reasonable outcomes with scores spanning 40–60% in every HPIM model domain. By contrast, Eastern players falter significantly, posting the lowest marks—between 10% and 30%—particularly in collaboration, internal bureaucracy, and organizational openness. The broadcasters located in Southern Europe paint a more varied picture; while excelling in technology adoption, openness, and teamwork, they grapple with bureaucracy and inefficiencies akin to the challenges facing their Eastern peers.

Conclusions

At its heart, innovation represents a corporate ethos embodied through distinct organizational behaviors. It transcends merely brainstorming fresh ideas, emphasizing, instead, the effective execution of those ideas to generate tangible value. In our research, we have examined these behaviors and attitudes to gauge how well the regional broadcasters participating in the study promote an innovation-driven culture.

Our findings underscore the absence of a one-size-fits-all approach to defining innovation among European broadcasting entities. These organizations perceive innovation through diverse lenses and deploy a range of strategies and tools to bolster audience engagement, enhance their standing, and streamline operations. As illustrated in this article, the integration of digital technologies and efforts to embrace greater organizational openness have been particularly impactful for many broadcasters. On the flip side, progress in networking and instigating change through innovation appears to be slow.

When it comes to encouraging openness, our research reveals an inclination toward internal emphasis—61% of respondents confirm that innovation takes a deliberate place on their thematic agenda. Yet, external collaboration—spanning research partnerships, joint ventures with universities, or efforts to secure external funding—remains relatively rare across the sector.

Together, these findings illustrate a sector highly attuned to embracing technology and furthering greater openness with both its audience and industry peers. Nevertheless, what remains conspicuously absent is a coherent vision and the foundational groundwork required to catalyze transformational change—which is precisely the engine that has fueled the most groundbreaking tech revolutions in recent history.

The results also stress pronounced disparities and asymmetries across various regions of Europe. Broadcasters in Northern Europe stand out for their notable progress in implementing cutting-edge tools and strategic innovations across the board. By contrast, those in Eastern Europe tend to fall behind—often impeded by a lack of foresight, drive, and resources to pursue innovation. Although this article refrains from identifying the root causes of these gaps, bureaucratic bottlenecks—commonly flagged as an obstacle among Eastern European broadcasters (and their Southern European counterparts)—are likely a significant contributing factor to this sluggishness.

Innovation's ramifications for regional public service broadcasters vary widely, shaped by local conditions and individual organizational readiness. However, there's a growing sense of alarm for those missing the mark in integrating innovation into their modus operandi, especially as the media landscape becomes fiercely competitive in capturing fragmented audience attention. Although this discussion stops short of speculating on what innovation may hold for these organizations' future, precedent indicates that an absence of trailblazing approaches—be it in content creation, distribution, or technology—can erode a media organization's competitive advantage, leaving them unable to keep pace.

Finally, the analysis presented in this article offers only a snapshot of the state of innovation among regional public service broadcasters. It describes the levels of innovation through the lens of the professionals interviewed and surveyed for this study, rather

than providing an objective assessment of innovation levels (by seeking, e.g. the opinion of independent experts or audience studies). Delving deeper into how innovation is genuinely embraced by these broadcasters and the ripple effects it generates for the audiences they serve thus represents a critical avenue for future research.


Declaration of conflicting interests

The authors declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.


Funding

The authors disclosed receipt of the following financial support for the research, authorship, and/or publication of this article: This work is funded by the grants for Growth Potential Groups (GPC) from the Xunta de Galicia, awarded to the research group ‘Persuasive Communication’ (CP2) at the University of Vigo, under Code: ED431B 2024/40 and is part of the activities of the CIRCOM-Regional UVigo Chair, a chair led by José Rúas-Araújo from the University of Vigo in collaboration with CIRCOM-Regional (23-24). This research has been funded by the project “Value bots: Creation of a generative platform for chatbots through AI for communicating the public value of PSM” (Ref. PDC2023-145885-I00), supported by MCIN/AEI/10.13039/501100011033 and by the European Union NextGeneration EU/PRTR; and by the project “Open Public Service Media in the Age of Artificial Intelligence: Public Value, Inclusive Society and Ecosystemic Innovation (OpenPSM)” (PID2024-160337OB-I00).

ORCID iDs

José Rúas-Araújo  <https://orcid.org/0000-0002-1922-9644>

Talía Rodríguez-Martelo  <https://orcid.org/0000-0002-7633-0394>

Marius Dragomir  <https://orcid.org/0000-0003-2078-348X>

References

- Arnold K, Preston P and Kinnebrock S (2020) *The Handbook of European Communication History*. Hoboken, NJ: John Wiley & Sons, 1–18.
- Arriaza Ibarra K, Nowak E and Kuhn R (2015) *Public Service Media in Europe: A Comparative Approach*. New York, NY: Routledge.
- Blasco-Blasco O, Campos-Freire F and Juanatey-Boga Ó (2017) Una propuesta de indicador para medir la eficiencia de la financiación mixta de las radiotelevisiónes públicas europeas [A proposal for an indicator to measure the efficiency of mixed financing of European public broadcasters]. *Recta* 18(1): 17–36.
- Cai Y and Lattu A (2022) Triple helix or quadruple helix: Which model of innovation to choose for empirical studies? *Minerva* 60: 257–280.
- Cañedo A, Pérez-Seijo S and Rodríguez-Castro M (2024) Innovating public service media: A diagnosis of the innovation applied as an element of public value in Spain. In: Barredo-Ibañez D, Castro LM, Espinosa A, Puentes-Rivera I and López-López PC (eds) *Communication and Applied Technologies. Proceedings of ICOMTA 2023*. Gateway East, Singapore: Springer, 377–387.
- Cañedo A, Rodríguez-Castro M and López-Cepeda AM (2022) Distilling the value of public service media: Towards a tenable conceptualization in the European framework. *European Journal of Communication* 37(6): 586–605.

- Dragomir M and Túñez-López M (2024) How public service media are changing in the platform era: A comparative study across four European countries. *European Journal of Communication*: 1–17.
- Etura D and Redondo M (2024) Innovación y adaptación de las televisiones públicas europeas: De la emisión lineal a las plataformas OTT. *Estudios Sobre el Mensaje Periodístico* 30(4): 687–702.
- Fieiras Ceide C, Vaz Álvarez M and Túñez López M (2024) Building the future of European Public Service Media: Innovation priorities, key points and optimization areas in PSM. *Communication & Society* 37(3): 107–123.
- García-Avilés JA, Arias F, De Lara A, et al. (2023) *Analysis of Trends and Innovations in the Media Ecosystem in Spain and Portugal (2025-2030)*. Spain: IBERIFIER. Servicio de Publicaciones Universidad de Navarra.
- Hallin DC and Mancini P (2004) *Comparing Media Systems: Three Models of Media and Politics*. Cambridge: Cambridge University Press.
- Johnson C (2020) Video-on-Demand as public service television. In: Freedman D and Goblot V (eds) *A Future for Public Service Television*. Goldsmiths, University of London, 223–228.
- Keeley L, Walters H, Pikkell R, et al. (2013) *Ten Types of Innovation*. 1st ed. Wiley. Available at: <https://www.perlego.com/book/1001297/ten-types-of-innovation-the-discipline-of-building-breakthroughs-pdf> (Original work published 2013).
- Leydesdorff L and Ahrweiler P (2014) In search of a network theory of innovations: Relations, positions, and perspectives. *Journal of the Association for Information Science and Technology* 65(11): 2359–2374.
- López-Golán M, Cañedo A and Blasco-Blasco O (2024) Are public service media innovative? Developing a tool for assessing innovation in production processes. *International Journal of Communication* 18: 5382–5404.
- López-Golán M, Rodríguez-Castro M and Campos Freire F (2019) The innovation of European public service media in digital communication and user communities. *Cuadernos.Info* 45: 241–255.
- Newman N, Fletcher RT, Robertson C, et al. (2024) *Digital News Report 2024*. Reuters. Available at: <https://reutersinstitute.politics.ox.ac.uk/es/digital-news-report/2024/dnr-resumen-ejecutivo>.
- Oliván R (2020) Instituciones que aprenden HIP: Un modelo de Innovación Pública para la Era post-COVID [HIP learning institutions: A public innovation model for the post-COVID era]. Available at: https://www.segib.org/wp-content/uploads/SEGIB-Instituciones-que-aprenden_ES.pdf.
- Organization for Economic Cooperation and Development (OECD). (2018) *Oslo Manual 2018: Guidelines for Collecting, Reporting and Using Data on Innovation*. Paris, France: OECD Publishing.
- Pérez-Tornero JM, Grizzle A, Pulido CM, et al (2021) The challenge of media and information literacy for public service media. In: Túñez-López M, Campos-Freire F and Rodríguez-Castro M (eds) *The Values of Public Service Media in the Internet Society*. Switzerland: Palgrave Macmillan, 247–273.
- Rodríguez-Martelo T, Rúas-Araújo J and Maroto-González I (2023) Innovation, digitization, and disinformation management in European regional television stations in the Circom network. *El Profesional de la información* 32(1): e320112. DOI: 10.3145/EPI.
- Rueda MC (2023) Explaining expectations–evaluation discrepancies: The role of consumption and populist attitudes in shaping citizens’ perceptions of PSM performance. *Journalism Practice* 19(4): 803–821.
- Rúas-Araújo J, Medved Z, Rodríguez-Martelo T, et al. (2025) *Trends in Innovation and Adaptation to Digital Transformation in Regional Public European Broadcasters Research—November 2024*. CIRCOM-Regional UVigo Chair. Available at: <https://circom-uvigo-chair.com/no-access/download-id/5174/>.

- Schneeberger A (2024) Audiovisual media services in Europe—2024 edition. European Audiovisual Observatory. Available at: <https://rm.coe.int/audiovisual-media-services-in-europe-2024-edition-a-schneeberger/1680b0dc9a>.
- Sweezy PM (1943) Professor Schumpeter's theory of innovation. *The Review of Economics and Statistics* 25(1): 93–96.
- Tushman ML and O'Reilly CA (1996) Ambidextrous organizations: Managing evolutionary and revolutionary change. *California Management Review* 38(4): 8–30.
- Van Aelst P, Toth F, Castro L, et al. (2021) Does a crisis change news habits? A comparative study of the effects of COVID-19 on news media use in 17 European countries. *Digital Journalism* 9(9): 1208–1238.
- Wang J (2024) Research on the communication innovative integration of traditional media and new media. *Media and Communication Research* 5(4): 1–35.