European Commission

# Europe by Satellite – Study on editorial policy

Final report

TETRA TECH
International Development

# Europe by Satellite – Study on editorial policy
# - ref. COMM/04/2021/Lot1
Final report

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## EXECUTIVE SUMMARY

The **objectives of this study - Europe by Satellite – study on editorial policy -** were to provide the European Commission's Audiovisual Service with the following:

1. A better view on the use of Europe by Satellite.

2. A better understanding of who uses the service, how they use it, and to which end.

3. A solid basis to define an updated editorial line for the Europe by Satellite service by making decisions on which type of material to continue or discontinue broadcasting, based on research results and best practices in present-day media.

4. The creation of an adequate and efficient distribution strategy, which would allow to increase the use of the service by the main target audience, as well as expand the current target audience to new viewers.

The study focused on both the **current state-of-play of Europe by Satellite** and who uses it and how, as well as a **forward-looking element** that explored issues of moving Europe by Satellite beyond its traditional role towards a more fully-fledged news organisations and harnessing other (new) media in an "attention economy.

The **focus and scope of the study** concerned:

- **Europe by Satellite (EbS):** the European Union's TV/Video Information service, which provides EU related pictures and sound for professionals working in journalism, media (television, radio, online), for institutions as well as to other interested parties; and

- **EbS on Satellite,** which broadcasts a "free to air" signal via satellite and is directly available to local, regional, national and international organisations in the European Union, the Mediterranean area, and Central and Eastern Europe. Europe by Satellite is also available worldwide via the Internet on the European Commission's Audiovisual portal. EbS on Satellite transmits on two channels EbS and EbS+ (collectively EbS(+)) in accordance with a predetermined schedule to be found on the audiovisual portal.

- **EbS online / on the web:** the Commission's audiovisual portal, which provides a web-based alternative to satellite transmissions of EbS broadcasts, allowing real-time viewing of EbS and on-demand download of all previously transmitted events or video items in broadcast quality format.

All the material on the portal is available for download. The portal also carries material originating from other services, but that was outside the scope of this study, but an understanding of that is relevant to some of our Recommendations.

The methodology was designed to address the objectives listed above, and to answer 23 Research Questions organised in nine tasks as follows:

| Main tasks | Research Questions |
|---|---|
| **1. Content of the Audiovisual portal** | RQ1: Which type of content was broadcast on EbS(+) from Jan 2019-Dec 2021? |
| **2. Statistics of use of the material** | RQ2: How many times was EbS and EbS+ material viewed, live and as VoD on the portal, from Jan 2019 – Dec 2021? <br> RQ3: Who are the main users of EbS and EbS+ currently? |
| **3. Target audience analysis** | RQ4-8 Who uses EbS(+) and with what purpose? (TV stations, news agencies, online media, other users, etc.) |
| **4. What are EbS clients looking for?** | RQ9: Which type of content is the usual client looking for? <br> RQ10: Is different material used by clients accessed using the online/satellite services? |
| **5. Market research – Benchmarking** | RQ11: What are industry standards / best practices for services like those of EbS(+)? |
| **6. How can EbS provide content more efficiently?** | RQ12: Analyse/map production processes for news items to recommend improvements in speed/efficiency |

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| | RQ13: Which type of material is most useful for clients and should be continued / expanded? |
| | RQ14: Which type of material should be discontinued? |
| | RQ15: Which material is not yet offered but could be useful to add? |
| | RQ16: Should EbS(+) produce more "editorial" content on different topics? |
| **7. Updated editorial line** | RQ17: What material would differentiate us from our main counterparts, news agencies, or other institutions? |
| | RQ18: Should EbS(+) follow commercial news agencies in focusing on fast delivery of news, or a more "institutional" and historical approach? |
| | RQ19: Should EbS(+) make more "editorial" style programmes or maintain a more neutral "news-style" approach? |
| | RQ20: Could EbS(+) online and Satellite take a different editorial approach, or add a channel that broadcasts online (but not satellite) or vice versa? |
| **8. Promotion plan to the intended target audience** | RQ21: How can the Commission promote EbS and EbS+ more efficiently and effectively? |
| **9. Broadening the target audience** | RQ22: Can EbS(+) attract different audiences beyond the EU accredited press? |
| | RQ23: What type of content should the AV service provide to attract more citizens to the platform? |

## *Conclusions and recommendations*

Our **conclusions and recommendations** structured according to the **four objectives of the study** are based on findings from monitoring data, a user survey, user interviews, feedback from an expert panel, and our own assessment as evaluators of communication. Gaps in the data currently collected were a significant limitation, but we nevertheless believe that our conclusions and recommendations are robust.

| Use of Europe by Satellite | |
|---|---|
| **Conclusions** | **EbS is predominantly accessed online, with the satellite version mainly used in newsrooms in capitals and by news agencies and major TV channels with studios in Brussels.**<br><br>**Well-resourced users prefer the satellite for the quality and reliability**, but that advantage is likely to become less over time; other users are happy with the streaming quality.<br><br>Clips, animations, and short stock shots are the most frequently downloaded items; press conferences, live events and the Midday Briefing are mainly watched live.<br><br>**Data gaps are a significant limitation on the ability of the service to tailor its output** to the needs of its audience. This particularly concerns data from 2019 and earlier. The Commission has implemented steps to resolve the data issues via the introduction of a system that is currently being developed further. |
| **Recommendations** | The service should, via technology improvements and/or surveys:<br><br>• review whether the selection of the 226 channels whose usage is tracked using the Teletrax tool is still the right one;<br><br>• gain an understanding what these channels are taking from EbS;<br><br>• research / collect data on what news agencies take from EbS and the AV portal, and what and how widely this is picked up; |

| | |
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| | <ul><li>collect data on number of live views and time spent viewing different items;</li><li>collect data on whether there are differences between satellite and online usage;</li><li>collect data who is viewing and downloading material and from where geographically.</li></ul>The following improvements should be made:<ul><li>differentiate in the data between items produce by EbS/the Audiovisual Service and as part of corporate campaigns by DG COMM or by other DGs;</li><li>tag materials more consistently as a basis for better analysis;</li><li>introduce a differentiation between the use of EC material and that of all other institutions (only EP and Council material is 'tagged' separately at present);</li><li>differentiate in tagging between Midday briefings in their entirety and clips of Midday Briefing items (in line with current practice for press conferences).</li></ul> |

## Who uses Europe by Satellite and how

| | |
|---|---|
| **Conclusions** | **TV stations and news agencies are the main users of EbS(+)**. They access the service to watch live broadcasts of the events of the different institutions (EP plenaries, Council meetings and press points, press conferences and midday briefings. They download material to produce news items and features. Print media also use EbS as a source of information.<br><br>**The service is also used by academics and students in particular**, and also by EU institution staff, business/trade organisations, civil society organisations, international organisations, and public administrations, as well as citizens also appear to be using the service, mainly to watch content live. |
| **Recommendations** | **Conduct a regular user dialogue** as part of editorial decision-making (see recommendation 2 under "updated editorial line") on the relative importance of different types of content from their perspective.<br><br>**Conduct regular surveys of users,** at least annually, and always whenever a new major functionality/service is added, citing specific events rather than general topic questions – always including a "profile" section that asks respondents about their **country of residence**, **age**, and in **which role** they use Europe by Satellite. |

## Updated editorial line

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| **Conclusions** | **EbS(+) meets users' needs in terms of sound and image quality, languages available, content selection and type, speed of publication and format.** However, some technological improvements would make the material more accessible and in a wider variety of formats, and the offer could be expanded.<br><br>**The current offer of EbS(+) should be continued, albeit with some technological improvements to ease accessibility and present a wider variety of formats,** as EbS(+) is currently not state-of-the-art and risks losing users to other services and news agencies. These do not have the unique selling points of EbS(+) of being a real-time primary-source one-stop-shop offering raw material that the user can tailor specifically for their own needs and of being available free of charge and free of rights, but they offer attractive ancillary services, such as apps and video infographics |

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| | **There is scope for EbS(+) to further capitalise on its unique access to the EU institutions,** with "behind-the-scenes" stories, explainer videos, and a pool system where those admitted to limited-access events share their coverage. |
| | **There is no case for discontinuing certain products**. There is, however, a case for not providing such comprehensive coverage as now in relation to each product by focusing on news value. This assumes that the purpose of EbS is to provide a service to the media. There is a proven continuing need for such a news service for the media. |
| | **There is an argument for the service to provide comprehensive 'on demand' coverage**, i.e. the service would be a 'journal of record' for citizens for transparency and for the historic value. This is a legitimate objective explicitly set down in a **formal mission statement or defined governance structure.** The direction to take is a policy decision with potentially significant financial implications that was beyond the scope of this study. |
| **Recommendation 1** | **Implement the following technological improvements to the current offer.** |

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| **Short-term** | <ul><li>**Reintroduce the audio-only format for live broadcasts.**</li><li>Provide a system / functionality that alerts users on new / breaking items, e.g. email alerts or a **mobile app.** Introduction of an app would enable personalisation and calendar features to be added, an area where EbS(+) lags behind comparable entities.</li><li>Introduce **searchable live transcripts.**</li><li>Launch a **format suitable for social media** (9:16).</li><li>Provide q**uote clips for use on social media.**</li><li>Provide **automatically generated subtitles in all EU languages, with the option to turn them off.**</li><li>**Enable rewinding in livestreams.**</li><li>**Make better use of the newsletter by researching users' needs and making it more user-friendly**.</li></ul> |
| **Medium-term** | <ul><li>Integrate the European Commission, European Parliament, and Council on EbS better.</li><li>Modernise the visual language of EbS(+), including more clips/cutaways on stories, more details, as well as better lighting of photos, and more graphs and illustrations.</li><li>Keep up with services provided by news agencies, such as live chats with production teams and schedules updated in real time.</li></ul> |
| **Long-term** | <ul><li>Explore in the light of the impact on EbS(+) capacity of any policy decision on the role of EbS(+) **the nature and extent of demand for an additional online channel** and the types of events it should cover.</li><li>Explore no later than 2027 **the future of satellite technology use by news media** and the alternatives in the light of evolving technologies.</li></ul> |

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| **Recommendation 2** | **Define an EbS mission statement,** making clear whether it a service for the media which is accessible to all or a citizen-facing service covering all or virtually Commission activities, and the role vis-à-vis the other institutions.<br><br>**If a broad option is chosen, incorporate in the role a specific role for EbS(+) to meet the real-time needs of "media professionals"** (across the EU) based on an editorial judgement of their needs. |
| **Recommendation 3** | **Establish an Editorial Board,** operating at two levels:<br><br>• **A Board of EbS(+) senior staff headed at European Commission Director level, with attendance by their equivalent from the European Parliament and the Council, meeting quarterly.** The Board should meet quarterly to review editorial choices and decide future strategy. It should invite three different key users (at bureau chief level) to attend each time for a dialogue on their needs.<br><br>• **An Editorial Team** (an Editor-in-Chief with at least 10 years of experience in mainstream journalism + a two-person team) **solely responsible for taking day-to-day decisions on coverage for the media based on news value –** i.e. using their judgement based on knowledge of media needs, EU affairs, assessment of the extent likely pick-up of the item inside and outside the EU, and taking into account improved data on users' needs and actual usage. They would user their experience to decide on coverage based on:<br><br>    ◦ **news value,**<br>    ◦ whether the **material is not covered or available elsewhere**,<br>    ◦ whether the AV service has **unique access** to the material.<br><br>**Pending implementation of these recommendations, implement a slimmed-down version of this approach** based on (i) guidelines contained in this study in the meantime and (ii) a defined list of 'must-covers', e.g. Council and Council Press conferences, European Parliament plenaries, Midday briefings, all press conferences held in the press room of the Berlaymont, ECB Monthly press conferences etc. The AV Service should have discretion over the remainder. |
| **Recommendation 4** | **Introduce a "credit" system for additional requests for coverage going beyond the core work of EbS(+).** Each Cabinet would receive a limited number of "vouchers" for discretionary items, with a pooled contingency reserve for unforeseen circumstances. The number of vouchers should be based on the **number of past requests** but be **reduced by 10% a year for the first three years** to reach what is probably a more **realistic level of coverage of items with genuine news value.** |
| **Promotion of Europe by Satellite** | |
| **Conclusions** | • **There is confusion between the EbS brand and the AV Service brand**. It is also not clear to the users whether this is a European Commission service offering coverage from other institutions as a service to those institutions or whether it is an interinstitutional service.<br><br>• **EbS(+) lags other similar entities by not offering personalised services based on user preferences.** |

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| | <ul><li>**EbS(+) has unique selling points as a primary source of data in real time which could be better promoted.**</li><li>**There are low-cost ways in which Europe by Satellite could increase its audience of multipliers, particularly the media** and possibly the business, professional and academic community society. The service and its offering are not as well-known as they should be even inside the "Brussels bubble".</li><li>**Investment in reaching citizens direct with programming or a parliamentary channel is not justified** because of the cost not only of production but also distribution and marketing.</li></ul> |
| **Recommendations** | <ul><li>**Rebrand EbS(+) and/or the Audiovisual Service.** The name Europe by Satellite does not do justice to the service in the Internet era.</li><li>**Offer an app.** This will take time and work should start as a matter of urgency.</li><li>**Make the resources available**</li></ul> **(i)** **to promote the service better to the media in the "Brussels bubble"**, i.e. those who work intensively on EU affairs wherever they may be geographically, including resources to measure the success of different promotional activities. Those would include in a first stage a revamped newsletter, more attention to posting on EbS schedules and products on social media via a dedicated X account, social media campaigns and quarterly webinars;<br><br>**(ii)** in a second stage, based on lessons learned from the first stage, **to promote the service to media outside the "Brussels bubble" and the business and professional community in the "Brussels bubble",** treating the latter as a pilot for promotion to that community more widely. This would include more newsletters depending on user preferences, paid social media campaigns, monthly webinars, and leveraging of in-house multiplier channels (e.g. REPs and networks). |

# 1. INTRODUCTION

This document is the final report from Tetra Tech International Development Europe, Netcompany-Intrasoft and A Data Pro for **Europe by Satellite – study on editorial policy** under Multiple Framework contract with reopening of competition COMM/2020/OP/0020 – Lot 1. The study was launched with the signature of the specific agreement on 22 December 2022 and a kick-off meeting, which was held on 31 January 2023.

This report is intended to present answers to the research questions, as well as conclusions and recommendations. It also provides an overview of the background on Europe by Satellite, and details the method followed in this study.

## *1.1. Purpose of the assessment*

The European Commission's Audiovisual Service had **four main objectives** for this study, as described in the table below.

| Objectives |
| --- |
| A better view on the use of Europe by Satellite |
| A better understanding of who uses the service, how they use it, and to which end |
| A solid basis to define an updated editorial line for the EbS service by making decisions on which type of material to continue or discontinue broadcasting, based on research results and best practices in present-day media |
| The creation of an adequate and efficient distribution strategy, which would allow to increase the use of the service by our main target audience, as well as expand the current target audience to new viewers. |

The study thus focused on both – the **current state-of-play** of EbS(+) and who uses it, and how, as well as a **forward-looking element** that explored issues of moving Europe by Satellite beyond its traditional role towards a more fully-fledged news organisation and harnessing other (new) media in an "attention economy".

## *1.2. Scope of the assessment*

The focus and scope of this study concerned:

- **Europe by Satellite (EbS):** the European Union's TV/Video Information service, which provides EU related pictures and sound for professionals working in journalism, media (television, radio, online), for institutions as well as to other interested parties; and

- **EbS on Satellite** broadcasts a "free to air" signal via satellite and is directly available to local, regional, national and international organisations in the European Union, the Mediterranean area, and Central and Eastern Europe. Europe by Satellite is also available worldwide via the Internet on the European Commission's Audiovisual portal. EbS on Satellite transmits on two channels EbS and EbS+ (collectively EbS(+)) in accordance with a predetermined schedule to be found on the audiovisual portal.

- **EbS online / on the web:** the Commission's audiovisual portal, which provides a web-based alternative to satellite transmissions of EbS broadcasts, allowing real-time viewing of EbS and on-demand download of all previously transmitted events or video items in broadcast quality format.

This study covered the **production processes** for everything except corporate video clips produced for information campaigns and/or less tied to the daily news. This was related to the aim of the study, which was to focus mainly on "current affairs", news events and coverage of these, as well as stock-shots related to current affairs and EU policy. The study focused solely on the **editorial aspects** and the content offered through the Europe by Satellite service.

## 2. BACKGROUND TO THE INITIATIVE

Europe by Satellite, as the European Union's TV and video information service, constitutes one element of the portfolio of outputs provided by the European Commission's Audiovisual Service. Europe by Satellite provides pictures and sound for media professionals and interested parties and supports the communication work of other EU institutions. While these have historically been considered services specifically for the media, the material is available to anyone who wishes to consult or download it. Some of the material to be found on the Audiovisual Portal originated as material for or is also intended for use on social media, either by media users or by the European Commission itself.

Content on the Audiovisual Portal and EbS(+) consists of a mix of live EU events, semi-edited thematic stock shots, edited programmes and video clips on EU subjects produced primarily by the European Union executive branch (the European Commission), e.g. press conferences, midday briefings and weekly College read-outs, opening statements, handshakes, other press conferences and events, and corporate and non-corporate, and social media, clips. Coverage of live events is provided through EbS(+) and the Audiovisual Portal, and available for viewing or download on the portal afterwards (for seven days directly on the portal and after that via the archive.) The material is in natural sound, where it is intended as raw material, and has voiceovers in various languages where it is semi-edited or finished material. Simultaneous interpretation is provided for live coverage when available Audio files are available. Europe by Satellite also provides photos and illustration photos.

Coverage of other events is also available via Europe by Satellite, e.g. in the case of the events of the legislative branch (the European Parliament and the Council) - plenaries and other major events of the former, and press conferences, arrivals and doorsteps, edited non-doorstep arrivals and roundtables of the latter. The judiciary (the European Court of Justice) is covered via edited versions of major rulings. Major events of the European Central Bank, notably the monthly press conferences, and the European Investment Bank (EIB) are also covered. (This is a parallel service to other institutions' and the EIB's own audiovisual services.)

There are two Europe by Satellite transmission channels, EbS and EbS+, which are collectively known as EbS(+). They are transmitted free to air on Eutelsat 9b and via the internet via the Audiovisual Portal. The use of Eutelsat 9b implies that the Audiovisual Service sees its primary audience as being in Europe and the northern Mediterranean (Figure 1). The Audiovisual Service also provides an archive of previously produced content including on-demand download of footage, in broadcast quality format.[1]

**Figure 1: Footprint of Eutelsat 9b**
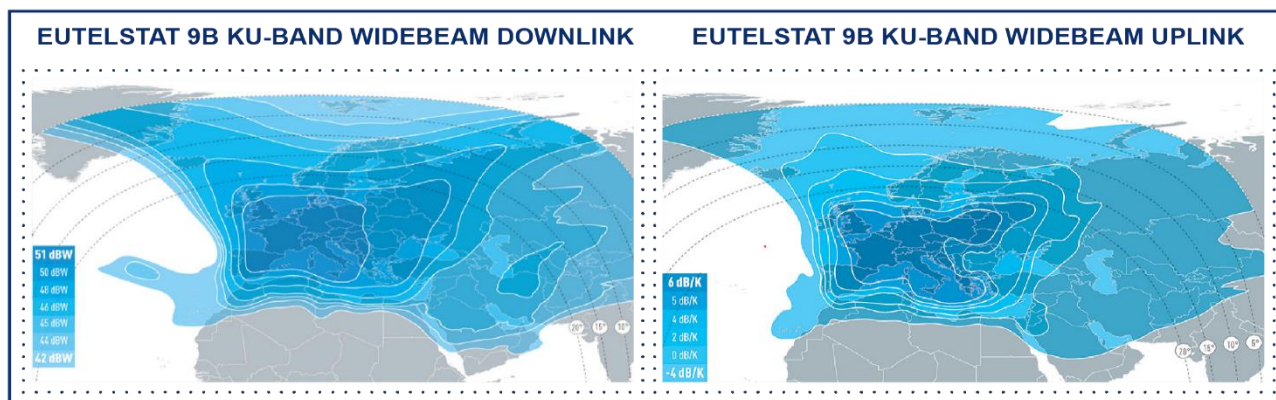


Source: eutelsat

**Core products are** the live transmission of events each day according to a pre-defined schedule for the two channels, short video clips with voiceovers in various languages (<3 minutes); news edits (3.5 minutes is standard; <4.5 minutes if necessary) and semi-edited video stock shots with natural sound (5-60 minutes), as well as news videos varying in length. A weekly newsletter keeps users abreast of the most recent key events. The live transmissions provide raw footage intended as semi-raw material for the media. There is no news

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[1] The Audiovisual service also includes two TV studios and one radio studio with editing and graphics suites. Use of these is out of scope.

reporting as such in which the Commission would provide the "talking heads" (presenters or reporters) and which could target citizens through the media or directly. It was We understand it to be an objective of this study to consider whether there is a case for that.

## 3. METHOD FOLLOWED

The study was organised in **nine tasks** that grouped **23 Research Questions** as follows:

| Main tasks | Research Questions |
|---|---|
| **1. Content of the Audiovisual portal** | RQ1: Which type of content was broadcast on EbS(+) from Jan 2019-Dec 2021? |
| **2. Statistics of use of the material** | RQ2: How many times was EbS and EbS+ material viewed, live and as VoD on the portal, from Jan 2019 – Dec 2021?<br>RQ3: Who are the main users of EbS and EbS+ currently? |
| **3. Target audience analysis** | RQ4-8 Who uses EbS(+) and with what purpose? (TV stations, news agencies, online media, other users, etc.) |
| **4. What are EbS clients looking for?** | RQ9: Which type of content is the usual client looking for?<br>RQ10: Is different material used by clients accessed using the online/satellite services? |
| **5. Market research – Benchmarking** | RQ11: What are industry standards / best practices for services like those of EbS(+)? |
| **6. How can EbS provide content more efficiently?** | RQ12: Analyse/map production processes for news items to recommend improvements in speed/efficiency |
| **7. Updated editorial line** | RQ13: Which type of material is most useful for clients and should be continued / expanded? |
| | RQ14: Which type of material should be discontinued? |
| | RQ15: Which material is not yet offered but could be useful to add? |
| | RQ16: Should EbS(+) produce more "editorial" content on different topics? |
| | RQ17: What material would differentiate us from our main counterparts, news agencies, or other institutions? |
| | RQ18: Should EbS(+) follow commercial news agencies in focusing on fast delivery of news, or a more "institutional" and historical approach? |
| | RQ19: Should EbS(+) make more "editorial" style programmes or maintain a more neutral "news-style" approach? |
| | RQ20: Could EbS(+) online and Satellite take a different editorial approach, or add a channel that broadcasts online (but not satellite) or vice versa? |
| **8. Promotion plan to the intended target audience** | RQ21: How can the Commission promote EbS and EbS+ more efficiently and effectively? |
| **9. Broadening the target audience** | RQ22: Can EbS(+) attract different audiences beyond the EU accredited press? |
| | RQ23: What type of content should the AV service provide to attract more citizens to the platform? |

Our corresponding **Research Questions Matrix (RQM)** to support our approach to answering the research questions is presented in **Annex I.** It describes the judgement criteria and indicators for each question, as well as the sources of primary and secondary data that we used to produce conclusions on the current situation and our recommendations for future work. While this took the approach of an Evaluation Questions Matrix, we approached the study as a forward-looking study rather than a conventional evaluation.

The method followed combined both **qualitative and quantitative data collection and analysis tools** and centred on the analysis of available monitoring data and consultation activities with EbS users. This was complemented through an expert panel review of materials and market research into three news providers (AFP, UN WebTV, France's parliamentary channels). We describe each methodological tool in more detail below.

## 3.1. Scoping interviews

We conducted **eight scoping interviews**, with the EC Deputy Spokesperson and Director of DG COMM A: Political Communication & Services and relevant staff from the AV services at the European Commission and European Parliament, EbS users from the Commission's Spokesperson's Service, and the Cabinet of Vice-President Margaritis Schinas (see Table 1).

Our aim was to discuss their expectations towards this study and vision for EbS(+) going forward, their perceptions of the usefulness and performance of EbS(+) for the College of Commissioners, the European Parliament and media users, experiences of interinstitutional cooperation, and thoughts on the potential broadening of target audiences.

*Table 1: List of interviewees*

| Name | Role |
|---|---|
| Dana Spinant | EC Deputy Chief Spokesperson and Director COMM A |
| Simona Pilko | Deputy Head of Unit, AV Service |
| Edson Ramos | Head of EbS, AV Service |
| Fred D'Hondt | EbS Newsdesk, AV Service |
| Tim McPhie | Coordinating Spokesman, Spokesperson's Service |
| Vangelis Demiris | Communication Advisor, Cabinet of Vice-President Margaritis Schinas |
| Oscar Fontao Regueira | AV Head of News, EP AV Service |
| Frederic Tadino | Head of EbS, EP AV Service |

## 3.2. Desk research – Monitoring data analysis

We conducted a quantitative analysis of available data that was provided by the Commission in the format of PDF schedules for 2021-2020 and unstructured data in Excel and TXT files for 2020-2021 to assess:

- what type of content was broadcast on EbS(+) from January 2019 until December 2021,

- how many times EbS and EbS+ material was viewed, live and as video on demand on the portal, from January 2019 until December 2021.

**Our analysis was limited to the years 2020 and 2021** due to discrepancies between results from the analysis of the PDF schedules and the Excel and TXT files for 2020, which meant that the data in the 2019 and 2020 PDF files could not be used for comparisons.

Specifically, we assessed the following elements for the period spanning January 2020 until December 2021:

- number of items broadcast on EbS and EbS+,

- number of different types of items broadcast on EbS and EbS+,

- number of items broadcast on EbS and EbS+ by EU institution.

- number of views of items broadcast on EbS and EbS+ on the AV portal and via an embedded player,

- number of items created by television stations from EbS and EbS+ content,

- number of views for the top 100 and top 10% viewed items.

The full data is presented in **Annex II.**

## 3.3. User survey

We conducted a survey of EbS users which was advertised by the DG COMM Audiovisual Service via X (formerly Twitter) and via a pop-up on the Audiovisual Portal. It aimed to collect robust, quantitative data from a wide range of users to provide a better understanding of or gain information on:

- their profiles (location, mother tongue(s), role in which they used Europe by Satellite, etc.),

- the main ways in which and their reasons for use of Europe by Satellite,

- the frequency with which they used Europe by Satellite and what services or products they used,

- the perceived usefulness of items provided by the European Commission, European Parliament, Council of the European Union, European Central Bank and European Court of Justice,

- their suggestions for improvements of Europe by Satellite to better meet their needs,

- other types of content not featured on Europe by Satellite of which they would like to see more.

The user survey went live on the EU Survey platform on 3 April 2023 and stayed open until 31 May 2023. In addition to advertising on the Audiovisual Portal and the Audiovisual Services' X account, the study team also distributed the survey link to EU journalist unions in all EU Member States to share with their members.

Overall, 187 Europe by Satellite users responded to the survey. They represented 23 EU Member States[2] and 26 non-EU countries. The largest shares of respondents from EU Member States were based in Belgium and Italy. The high response rate from Italy comes mainly from academics and students (19 out of 31 respondents).

*Figure 2: In which country do you work?*
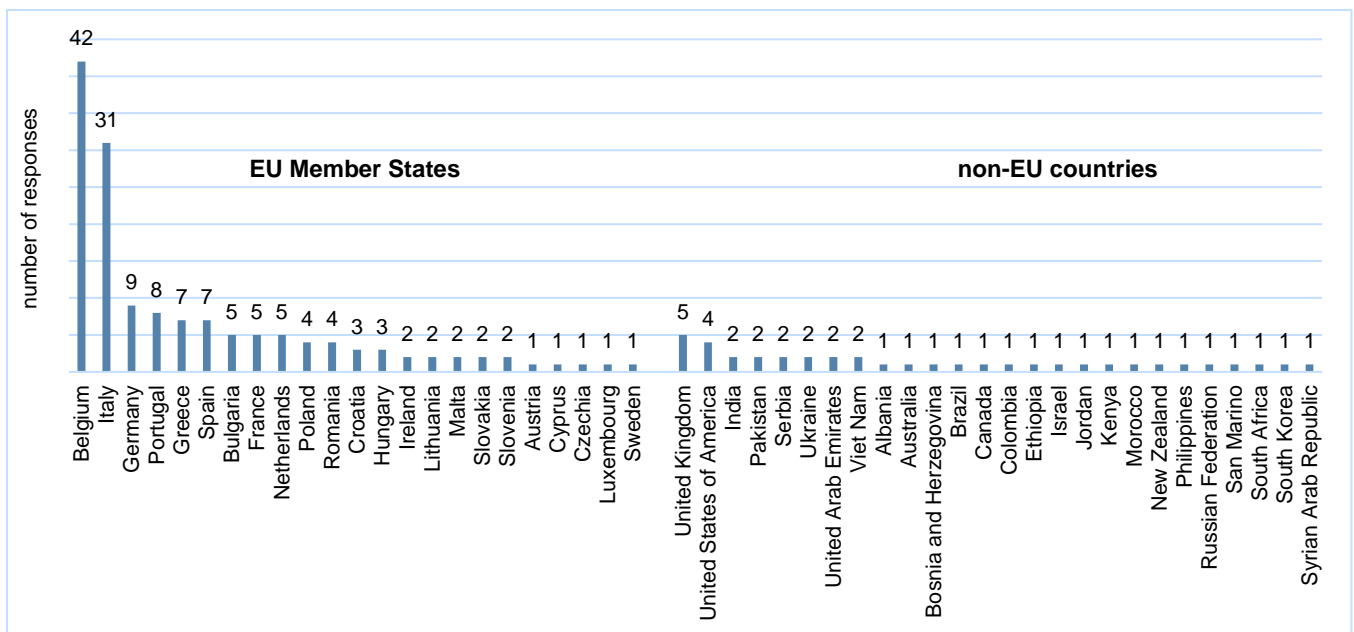


The **largest group of respondents** (33%, 61 out of 187) constituted **journalists / media / AV professionals** (we refer to these as "media users" in the report), followed by academics and students (20%, 37 out of 187), representatives of EU institutions (16%, 29 out of 187), business/trade (8%, 15 out of 187), "other" (mainly

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[2] We did not receive any responses from Estonia, Denmark, and Latvia.

"citizens", 7%, 13 out of 187), civil society organisations (6%, 12 out of 187), international organisations (5%, 10 out of 187), and public administrations (national, regional, local) (5%, 10 out of 187).

*Figure 3: In which role do you use Europe by Satellite?*
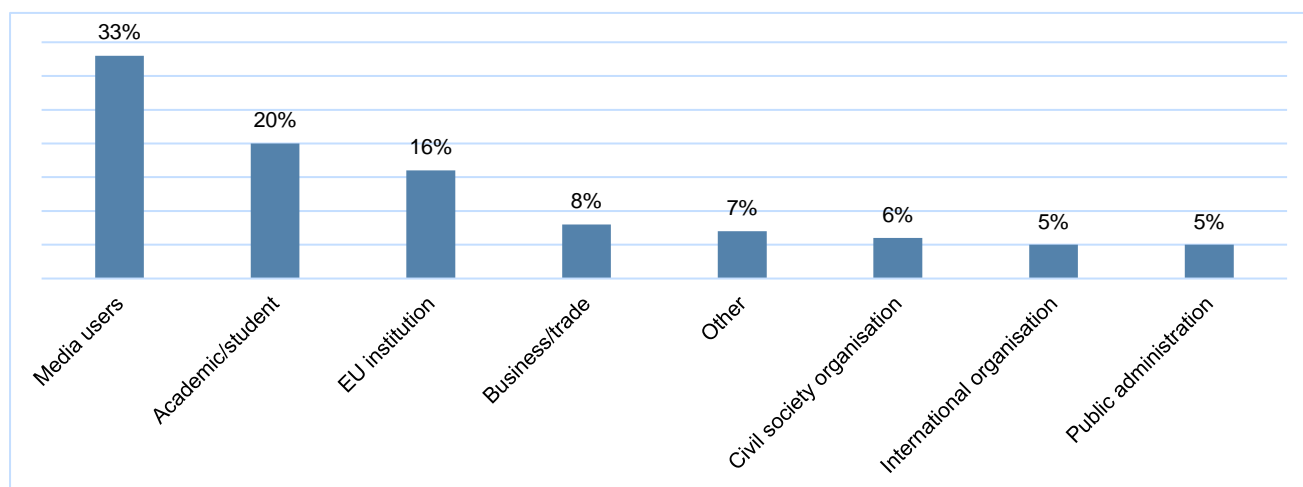


The full results are presented in **Annex III.**

## 3.4. Consultations with media users

We conducted **23 interviews with individuals who currently use Europe by Satellite in their work**, which we selected based on a stakeholder mapping and evidence from Teletrax data on current users. The interviews aimed to gather in-depth feedback from EbS users to triangulate against findings from the user survey.

Specifically, we conducted **11 interviews with TV stations identified through Teletrax as high users**, who came from the following TV stations:

| No of interviews | TV station | Country |
|---|---|---|
| 1 | ARTE | France |
| 2 | BNT1 | Bulgaria |
| 3 | CT24 | Czechia |
| 4 | Estonian Public Broadcasting Media | Estonia |
| 5 | France 24 | France / International |
| 6 | MTVA Hungarian Public Service Media | Hungary |
| 7 | Phoenix | Germany |
| 8 | SKY TG 24 | Italy |
| 9 | TV2 | Denmark |
| 10 | TVR | Romania |
| 11 | ZDF | Germany |

In addition, we interviewed **11 representatives of news agencies or news distribution hubs**, as well as EBU and ENEX, who reported using EbS in their daily work.

| No of interviews | News agency | Country |
|---|---|---|

| 1 | Agence Europe | Belgium |
|---|---|---|
| 2 | AFP | France |
| 3 | Czech News Agency | Czech Republic |
| 4 | Cyprus News Agency | Cyprus |
| 5 | European Newsroom | Poland |
| 6 | EBU | Pan-European |
| 7 | EFE | Spain |
| 8 | ENEX | Pan-European |
| 9 | Lusa | Portugal |
| 10 | Reuters BXL | Belgium |
| 11 | Slovenian News Agency | Slovenia |

Moreover, we interviewed one representative of **Reddit,** an online platform.

Our interviews focused on the following questions:

- what media users used EbS(+) materials for and when,
- whether they took the material from the AV portal and/or satellite and what governed this decision,
- whether their newsroom also used EbS(+), how and why,
- whether they took raw footage / livestreams on the EU from any other sources,
- the advantages and disadvantages of other sources as a means of obtaining raw footage / live streaming on the EU,
- whether EbS(+) met their needs and what could be improved,
- where they thought that EbS should go in the future,
- whether their newsroom was planning and/or preparing for 5G, AR/VR, and what implications this might have for EbS(+).

A summary of the results of these interviews is presented in **Annex IV.**

## *3.5. Consultations with non-media users*

In addition to media users, we also **interviewed seven non-media users of EbS** whom we considered likely to be interested in EbS content, to gather their in-depth qualitative feedback and triangulate against findings from the user survey.

While in our proposal we originally suggested consulting business leaders, EU-level civil society organisations, academia, and students, it was agreed during the kick-off meeting that we only consult EU business organisations and civil society organisations.

The list of organisations interviewed was as follows:

| Name of organisation | Type of organisation |
|---|---|
| Business Europe | Business |
| Connect International | Civil society |
| Eurochambres | Business |

| European Disability Forum | Civil society |
| --- | --- |
| European Movement International | Civil society |
| Network of European Foundations | Civil society |
| SMEunited | Business |

Our interviews focused on the following questions:

- what type of news about the EU interviewees' organisation needed, and how they used this news,

- how interested interviewees were in European Parliament plenaries, Council meetings, Summits or conferences organised by the EU, the results of Commission meetings,

- what sources they used to follow them,

- to what extent it was useful to have the news in real-time or close to real-time,

- whether they had ever watched EbS or EbS+ live or had ever downloaded material from the portal,

- which of the material currently offered they found interesting and useful,

- the main advantages of EbS(+),

- whether they were aware of a similar news service or portal hosted by other EU or national institutions, or international organisations / other sites, and comparisons with EbS,

- suggestions for improving the service (new types of raw material, language coverage and subtitling, interest in documentaries or panel discussions, promotional activities).

A summary of the results of these interviews is presented in **Annex IV.**

## *3.6. Expert panel review of EbS materials*

We were supported in this study by a panel of experts, who were current or past EbS users, and practitioners from public and commercial TV news broadcasters, as well as experts in media innovation. We asked them to reflect on what makes EbS productions useful and what could be improved. Our panel chair, Mark Rogerson, instructed them to watch a sample of EbS outputs live over the period of one month, and to review a selection of the material on the Audiovisual portal. Questions included:

- What do you use EbS for?

- Does it meet your needs? What could be improved?

- Where do you think EbS should go in the future in terms of its content, format, and distribution?

- Should EbS become a provider of programmes or remain a source of raw material?

Experts submitted their feedback in writing and met for a one-hour panel discussion on 30 May 2023.

A summary of that discussion is in **Annex V.**

## *3.7. Market research: benchmarking*

In line with our proposal and the requirements of the Terms of Reference, we looked at the practices of three news providers. Following discussions with DG COMM, it was agreed that these should be:

- Agence France Presse (AFP), an international news agency and the largest European news agency,

- UN WebTV (an international institutional service providing live coverage of its meetings),

- France's parliamentary channels (which provide live coverage of meetings and curated content).

Interviews were carried out with the French lower house channel, LCP, and UN Web TV.

The research focused on the following and comparison with products and services offered by EbS:

| Interviewee | Topics discussed |
|---|---|
| Agence France Press | Products and service, including complementary products offered (e.g. apps, podcasts, infographics, drone footage) |
| United Nations<br><br>French Parliamentary Channels (LPC & Senate° | • Budget<br><br>• Products and services<br><br>• Distribution channels to broadcasters and partnerships<br><br>• Products for citizens and extent of that market<br><br>• Complementary products offered (e.g. apps, podcasts, documentaries) |

The results of this research are in **Annex VI.**

### 3.8. Interviews on production processes

We conducted **two interviews with the contractor and the Audiovisual service** to discuss EbS production processes. Our questions focused on:

- the services that the contractor provides to EbS,

- how the workflow and distribution of responsibilities is divided between the contractor and the EbS team,

- whether current arrangements allow for adequate human and financial resources to be devoted to EbS,

- any bottlenecks in the production process,

- differences between operations for EbS in Belgium and elsewhere,

- how EbS's needs have evolved in recent years,

- any particular technical or other challenges.

### 3.9. Expert discussion on technological trends

On 24 July 2023, we hosted an online discussion with our panel of experts and DG COMM on technological trends in European newsrooms. The discussion focused on the following aspects:

- Should EbS continue to transmit by satellite there any developments in satellite technology EbS should be prepared for?

- Which emerging technologies could affect newsroom expectations of EbS or offer opportunities for EbS, and over what timeframe?

- What are the coming developments in metadata, sub-titling, voiceover, instant transcriptions, production of data graphics, etc. that EbS should prepare for?

- What equipment should EbS expect its contractors to be buying for its camera crews now to keep up with technology? How should EbS take advantage of the fact that the lines between camera crews, journalists, producers are becoming blurred?

- Is there a risk that EbS will lose users because other channels (notably, news agencies) providing newer technologies / formats and has EbS has fallen behind in the use of technologies (which?)?

## *3.10. Limitations – robustness of findings*

We faced four challenges in data collection and analysis during this study. Below, we highlight the main ones as well as activities undertaken in consultation with DG COMM to mitigate the impact of these challenges. However, despite the limitations, we consider our answers to the research questions to be **robust and reliable.** This means that they were confirmed by more than one credible source and/or are objectively verifiable.

| Limitation | Details |
|---|---|
| **Availability of monitoring data** | We faced several limitations as regards the monitoring data on the type of content broadcast and main users and trends in usage patterns, which meant that our quantitative analysis only covered the years 2020 and 2021. This was due to: |
| | • Discrepancies between PDF schedules available for 2020 and the Excel and TXT data received for 2020-2021 on content broadcast, which meant that we only used the Excel and TXT files for our analysis. |
| | • Unavailability of 2019 data on main users and trends in usage patterns on EbS and EbS+ due to limitations of the software used by the Audiovisual Service. |
| | • The AV portal software does not record EbS(+) views per specific item at the time of its live broadcast, which meant that we could not analyse live views. Instead (and to be in line with the AV portal data received), we analysed and compared online views directly from the AV portal, as well as views from external websites / embedded players. |
| | • There was no relevant data on satellite usage that could be compared with online usage (it was confirmed with the Commission as technically impossible). |
| | • There is no differentiation in the data on downloaded items between items produced by DGs and the AV service. |
| | This limitation particularly concerns data from 2019 and earlier. The Commission has implemented steps to resolve the data issues via the introduction of a system that is currently being developed further. |
| **Inability to organise focus groups with media users** | We were unable to organise focus groups with media users, despite distributing personalised e-mails to EU journalist unions and our own contacts of 427 journalists working on EU affairs across the EU Member States. However, we received six positive responses and conducted interviews with these media users instead. This meant a smaller number of media users consulted qualitatively, but, given the response rate of 187 respondents to the user survey, we consider our data sufficiently robust to present our findings and recommendations. Several interviewees reported that they had collected feedback about EbS from colleagues to present during the interview, thus sharing more than just their individual views. |

| | |
|---|---|
| **Inability to organise focus groups with non-media users** | Overall, we approached 15 business organisations and 20 civil society organisations to join an online discussion about EbS. Most of our invitations were rejected with the justification that EbS was not a priority for the organisation, as it did not constitute an opportunity to feed back on EU policy developments. We were also unable to agree a date and time for an online discussion with the seven organisations who responded positively, which is why we interviewed them each individually. This did not influence the number of non-media users consulted for this study. |
| **Analysis of costs and benefits data for cost-benefit analysis** | We had envisaged carrying out a cost-benefit analysis in line with the request in the Terms of Reference, but in practice cost estimates for EbS are not available given the many different levels of activity and the way the service. This made it impossible to attribute costs to a very specific part of the service (e.g. corporate production, news production, EbS, Social Media coverage, etc.). We thus limited ourselves to considering whether there were obvious areas for savings and orders of magnitude for any expansion of services. |
| **Market research** | We were unable to conduct an interview with AFP despite our best efforts and those of the AV Service to find an executive to discuss strategy with us. Promises of additional information from the French parliamentary channels were not kept despite several reminders. In both cases, the information we obtained was comprehensive enough for us to use the data. |

# 4. STUDY FINDINGS

In this section, we provide our answers to Research Questions 1-12, which focused on materials broadcast and used on EbS(+), EbS(+) clients' needs, market research on industry standards and best practices for services like those of EbS(+) and the question how EbS can provide content more efficiently. A summary of tasks and research questions is presented in Table 1.

*Table 2: Main tasks 1-6 and research questions*

| Main tasks | Research Questions |
|---|---|
| **1. Content of the Audiovisual portal** | RQ1: Which type of content was broadcast on EbS(+) from Jan 2019-Dec 2021? |
| **2. Statistics of use of the material** | RQ2: How many times was EbS and EbS+ material viewed, live and as VoD on the portal, from Jan 2019 – Dec 2021? <br> RQ3: Who are the main users of EbS and EbS+ currently? |
| **3. Target audience analysis** | RQ4-8 Who uses EbS(+) and with what purpose? (TV stations, news agencies, online media, other users, etc.) |
| **4. What are EbS clients looking for?** | RQ9: Which type of content is the usual client looking for? <br> RQ10: Is different material used by clients accessed using the online/satellite services? |
| **5. Market research – Benchmarking** | RQ11: What are industry standards / best practices for services like those of EbS(+)? |
| **6. How can EbS provide content more efficiently?** | RQ12: Analyse/map production processes for news items to recommend improvements in speed/efficiency |

We drew in our answers on findings from our desk research (Annex II), the user survey (Annex III), interviews with media and non-media users (Annex IV), feedback from our expert panel (Annex V) and the workshop discussion between the panel and EbS staff, our discussions with EbS staff on workflows and production processes, and our market research (Annex VI).

## 4.1. RQ1: Which type of content was broadcast on EbS(+) from January 2019 – December 2021?

**Answer:** In the time frame for which we have reliable data, i.e. January 2020-December 2021, 10 223 items were broadcast on EbS(+). These were fairly evenly distributed between the two channels, EbS and EbS+, with a preponderance of European Parliament coverage on EbS+, which is used to broadcast European Parliament plenaries. In numerical terms, video news was the most frequently broadcast content type overall, with clips broadcast the least frequently out of all content types. Taking EbS(+) overall, 5 316 items were broadcast in 2020 and 4 909 in 2021.

The most frequently broadcast content type on EbS was press conferences, reflecting the number of Euorpean Commission press conferences, while the most frequently broadcast content type on EbS+ was video news.

Most content broadcast on EbS and EbS+ was from the European Commission and other institutions (70% and 44%, respectively); while the bulk of the content in the "European Commission and other institutions" category is likely to have been from the European Commission, the data does not distinguish between the Commission and "other institutions", such as the European Central Bank, the European Space Agency, the European Patent Office, etc.). EbS and EbS+ were used to comparable extents (24% and 23%, respectively) by the Council while EbS+ was used more extensively for European Parliament coverage (33% compared with 6% for EbS).

In our answer to this question, we drew on findings from the quantitative analysis of the following elements:

- the number of items broadcast on EbS and EbS+ for the period spanning January 2020-December 2021,

- types of items broadcast on EbS and EbS+,

- the number of items broadcast on EbS and EbS+ by European institutions.

Our analysis covers **2020 and 2021** (see section 3.2).

Overall, **10 223 items were broadcast on EbS(+)** between January 2020 and December 2021. They were fairly evenly distributed across both channels, with 56% broadcast on EbS and 44% broadcast on EbS+ (see Figure 1). Of these, **video news** was the most frequently broadcast content type overall (n=1,968); clips were broadcast the least out of all content types (n=16) (see Figure 4).

*Figure 4: Total items broadcast 2020-2021*
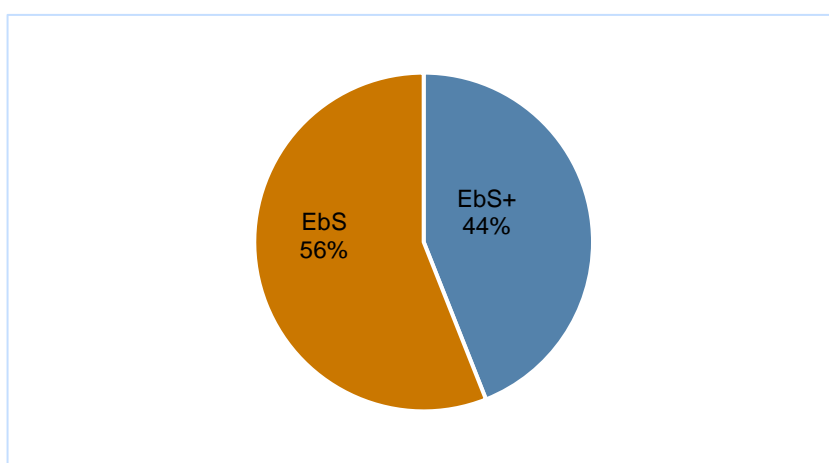


Compared with 2020, EbS content decreased in number in 2021 (2 690 versus 3 067 items, a decrease of 12.3%), while EbS+ content increased moderately during the same timeframe (2 247 versus 2 219 items, an increase of 1.3%).

Comparisons between content type broadcast on EbS and EbS+ show that the most frequently broadcast content type on **EbS** was **press conferences** (1 075 compared with 222 on EbS+), while the most frequently broadcast content type on **EbS+** was **video news** (1 141 compared with 827 on EbS) (see Figure 5).

While there is no data available on the reasons for the differences between 2020 and 2021, the higher number of European Commission press conferences in 2020 may explain at least some of the difference. The higher number of press conferences in 2020 is a reflection of higher press conference activity during COVID-19. Taking both channels together, there were 720 press conferences in 2020 and 577 in 2021.

*Figure 5: Types of items broadcast on EbS and EbS+ 2020-2021*
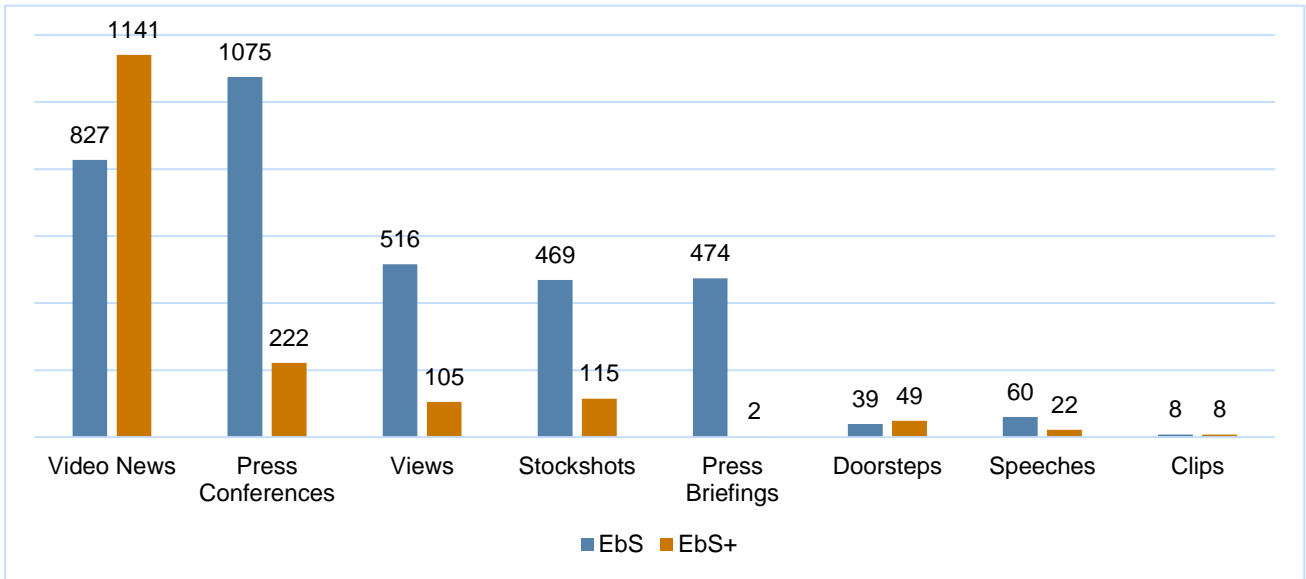


In terms of EU institutions, **most content broadcast on EbS** was from the **European Commission** and other institutions[3] (70%), compared with 24% from the Council and 6% from the European Parliament (see Figure 5).

**The largest proportion of content broadcast on EbS+** was from the **European Commission** and other institutions (44%), compared with 33% from the European Parliament and 23% from the Council (see Figure 6). The difference can be explained by the fact that EbS+ is used to broadcast European Parliament plenaries.

*Figure 6: Proportion of items broadcast by EU institution 2020-2021*



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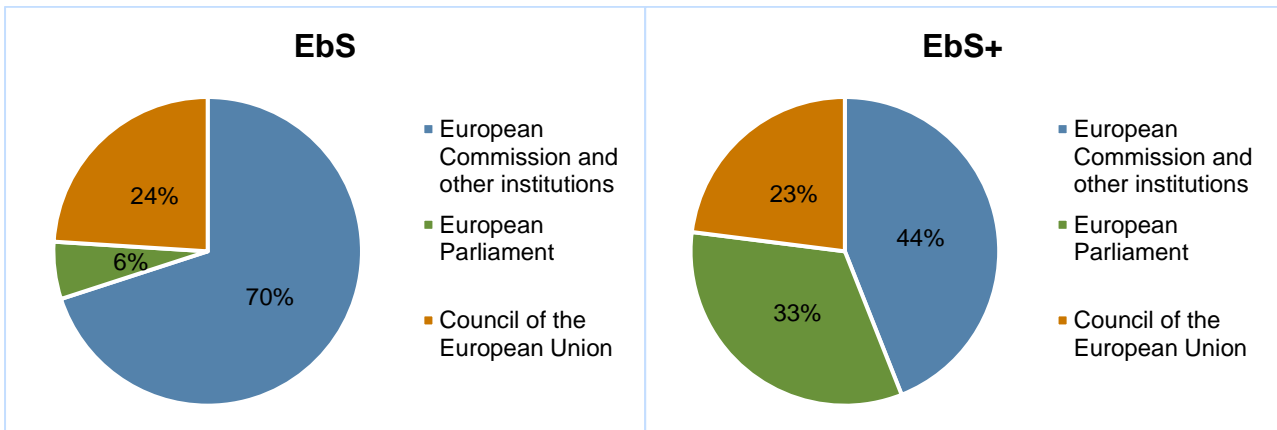
[3] Given that the data received only specified tags for the European Parliament and the Council, we created an additional category "European Commission and other institutions". "Other institutions" is meant to capture those bodies that also broadcast on EbS(+), but which we were not able to identify as there were no separate tags for them in the dataset (such as the European Economic and Social Committee, the European External Action Service, the European Central Bank, the European Investment Bank, European Space Agency, and the European Patent Office etc.). It is likely that the Commission makes up the bulk of this.

### 4.2. RQ2: How many times was EbS and EbS+ material viewed, live and as VoD on the portal, from January 2019 – December 2021?

> **Answer:** This answer is based on data on items viewed on demand on the portal during January 2020-December 2021. The data on views for 2019 is not reliable and the data on live views is not collected.
>
> EbS(+) content was viewed a total of 7 266 849 times during January 2020-December 2021. Twenty-seven percent (n=1 991 903) of these views were generated during 2020, and 73% (n= 5 274 946) – during 2021. While we believe the data to be robust, this is a surprising difference for which we have no explanation. Indeed, we would have expected a COVID bounce in 2020.
>
> EbS(+) content was viewed predominantly via embedded players, with only 4% of the content viewed directly. The top 10% viewed items generated a total of 95% of all views during the 2020-2021 period.
>
> In terms of the top 100 most viewed items, the number of views more than doubled between 2020 and 2021 (from 1,472,968 in 2020 to 3,552,789 in 2021), while the number of items only viewed once declined from 26% of the total in 2020 to 8% in 2021. We have no explanation as to why the figures are so different between years and between single views and number of views, although we can hypothesise that the COVID-19 pandemic influenced viewership of EbS(+) in 2020.
>
> In terms of materials downloaded from the AV portal in 2020 and 2021, there were 33 472 downloads of the top 100 items in total. The types of material most frequently downloaded were clips and animations, followed by stock shots (short). The least frequently downloaded materials were news, visits to the Commission, and the Midday Briefing (chapter). This includes material produced by other DGs as the data does not break this down.

In our assessment of the **statistics on the viewing and downloading of EbS(+) material**, we analysed:

- how many times EbS and EbS(+) material was viewed and downloaded (top 100 most used items),
- number of the most and least downloaded types of EbS(+) material,
- how many times the top 10% items were viewed on the AV portal and on embedded players.

Our analysis was based on data received from the European Commission for 2020 and 2021. Data for 2019 was unavailable due to limitations in the software used by the Audiovisual service. . We also did not obtain data on live views.

#### 4.2.1. Number of views and downloads of top 100 most used items

Between 2020 and 2021, the **number of views generated by the top 100 most used items more than doubled** from 1 472 968 in 2020 to 3 552 789 in 2021. In 2020, a total of 1 229 items were viewed only once, which was 26% of all items. In 2021 the number of items with only one view was 376, which was just 8% of the total items (see Figure 7).[4] We do not have an explanation as to why the figures are so different between years and between single views and number of views.

---

[4] Please note that the data exports that we received did not include items with zero views. There is a theoretical possibility that some items were not viewed at all between 2020-2021, but we were unable to verify this due to a lack of raw data.

*Figure 77: Number of views top 100 items and single view items*
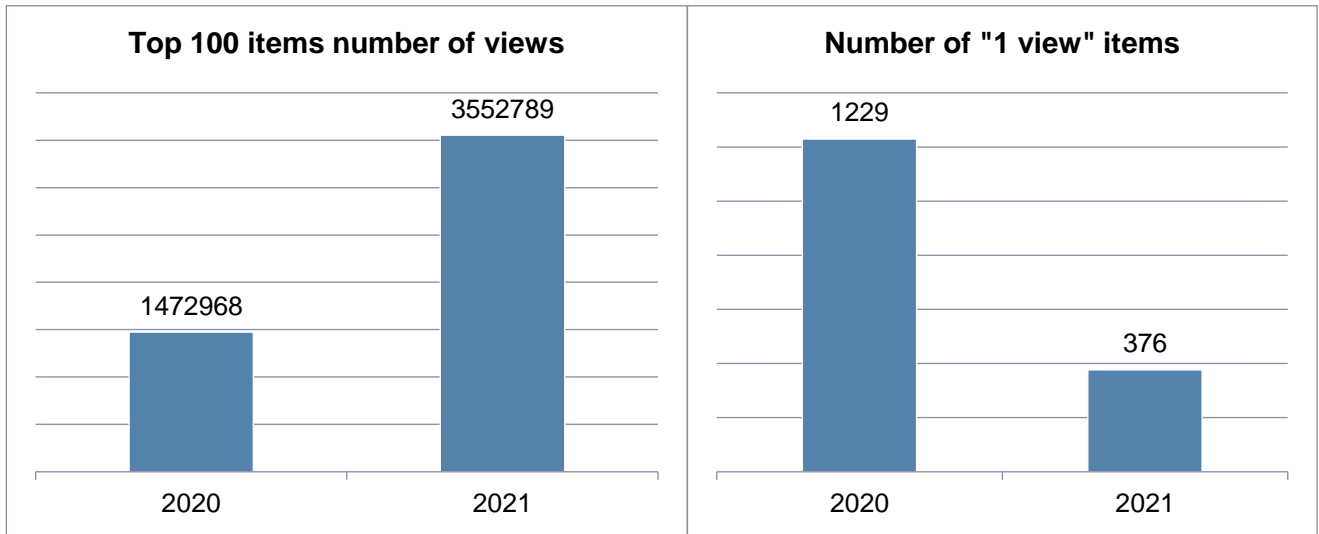
**Top 100 items number of views**

3552789

1472968

2020          2021

**Number of "1 view" items**

1229

376

2020          2021

In terms of materials downloaded from the AV portal in 2020 and 2021, there were **33,472 downloads of the top 100 items in total**.

### 4.2.1. Types of materials downloaded

The types of items most frequently downloaded were clips and animations, followed by stock shots (short) (see Figure 8). The least frequently downloaded item types were news, visits to the Commission, and Midday Briefing "chapter".. However, some of this material is produced by DGs, not the AV service, and it is not possible to differentiate based on the data we received. This is the case of the top downloads: The largest number of downloads in 2020 was 595 for a clip "Quick Europass tutorial: create your CVs" and 5939 in 2021 for an animation "The EU Digital COVID Certificate".

*Figure 88: Downloads by item types*

10464
9219
5650
1661   1229   1119   1009   669   652   410   394   246   182   140   74   70   62

Clip | Animation | Stockshot (short) | Complete speech | Report | Stockshot (long) | Press conference - chapter | Parliament - EbS contribution | Complete press conference | Council - EbS contribution | Social Media Clip | Teaser | Documentary | View | Midday briefing - chapter | Visit to the Commission | News
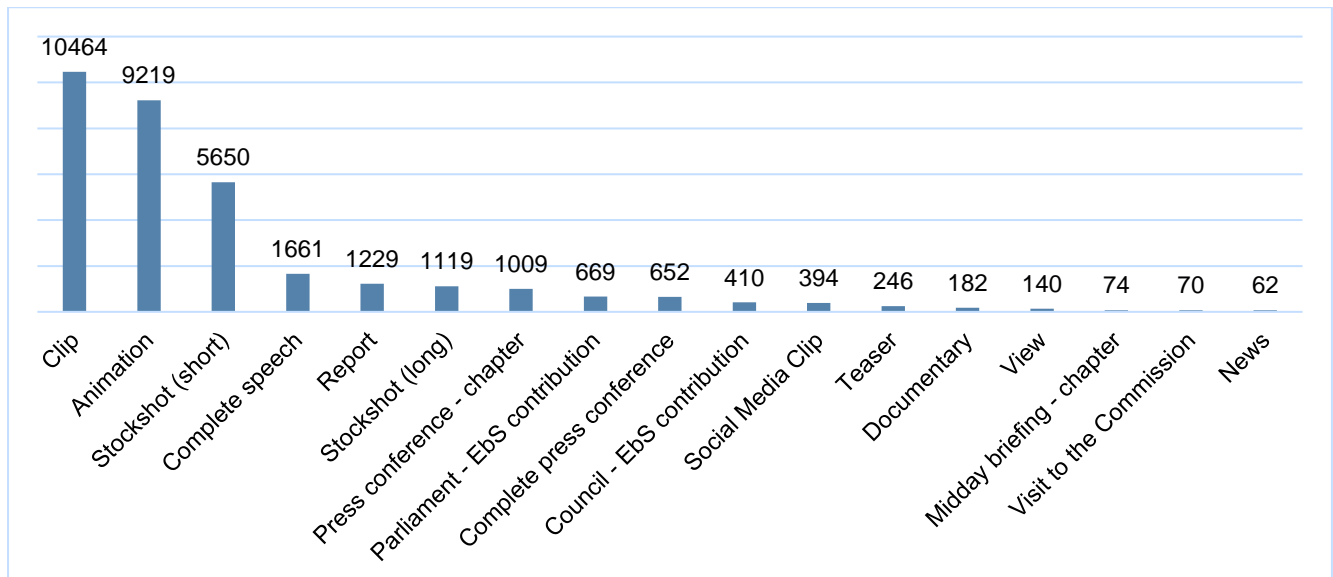
Unsurprisingly, the **topics of COVID-19 and the European Green Deal** feature most often in the Top 10 items downloaded in 2020 and 202, as well as **informative materials** such as "WiFi4EU: Free WiFi for citizens!"

(produced by DG CNECT), the "European Single Procurement Document" (produced by DG GROW), an "ERN animation clip" (produced by DG SANTE), and "ELA Rights4AllSeasons" (produced by DG EMPL).

In terms of materials produced by the Audiovisual Service, the top five most frequently downloaded items were the Green Deal Proposal (clip), Coronavirus: EU-funded research on the COVID-19 vaccine (short stock shot), EU60 in 60 seconds (clip), Coronavirus: lifting of lockdown in Brussels (short stock shot), and Coronavirus: Italy (short stock shot).

There are **only two complete speeches** that feature in the list of top 10 downloaded items, both from 2020, namely the Statement by Janez Lenarčič, Commissioner for Humanitarian Aid and Crisis Management, on the situation in Ethiopia, an extract from the plenary session of the European Parliament (downloaded 261 times) and the State of the Union Address 2020 (downloaded 184 times). We presume that this is due to speeches, press conferences, midday briefings, etc. being mainly watched live (but cannot confirm as data on live views is not available).

In 2020, the most downloaded press conferences in the top 100 (3) dealt with Brexit (2) and the President's press conference on Repair, Reform, Remodel. The speeches were overall mainly those of the President. Chapters of midday briefings that made the top 100 including chapters dealing with Brexit, economic reform and Cyprus and Malta selling citizenship. Stock shots download were predominantly about Coronavirus. Three-readouts of the weekly College meetings made the top 100.

In 2021, four complete press conferences were downloaded, one on a visit by the High Representative to the Tunisia and another on a meeting he had with the Russian Foreign Minister. The others were press conferences by the President and the Commissioner for Health on vaccines. The complete speeches were all by the President and were the State of the Union address, and statements to the European Parliament on vaccine strategy and the international political situation. Stock shots covered a wider range of topics, including the coronavirus, the Green Deal and related environmental and energy topics. Two College read-outs made the top 100.

### 4.2.2. Number of views on the AV portal and on embedded players

In terms of **number of views on the AV portal and on embedded players,** we found that EbS(+) content was viewed a total of **7 266 849 times** between January 2020 and December 2021. EbS items (n=4 566 821; 63%) were viewed significantly more than EbS+ items (n=2 700 028; 37%) (see Figure 9). This could suggest less interest in European Parliament plenaries relative to the total amount of coverage broadcast, but there is no data to substantiate this, nor is volume alone necessarily a criterion for judging whether to provide coverage of a given topic.

*Figure 99: Top 10% items viewed on AV portal and via embedded players - %  of all views*
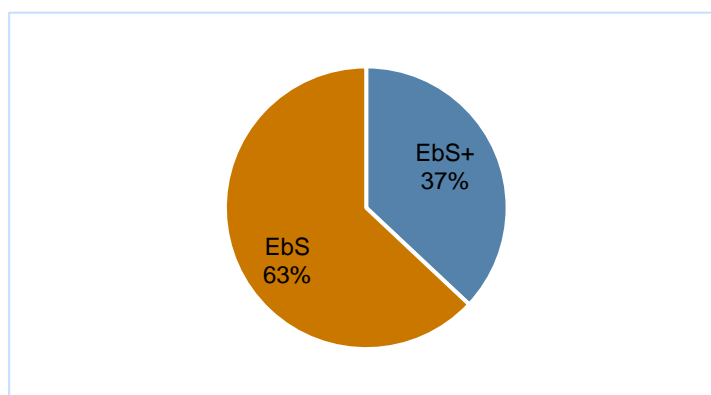


**EbS(+) content was viewed predominantly via embedded players**, which accounted for  96% (n=7 011 491) of all views. Only 4% (n=255 358) of all EbS(+) items were viewed directly on the EU Commission's AV Portal (see Figure 10). There are three possible reasons for this:

- the items are accessed via various integrated newsroom systems (such as Electronic News Production System (offered by the news agency, AP), Octopus, iNews), each having various sources embedded within them,

- the content is viewed as accompaniment to other sources browsed from news sites, and few viewers go to access the streams on the AV portal to get that specific information alone,

- a combination of both (integrated newsroom systems and other sources browsed from news sites).

*Figure 10: Views per type (AV portal and embedded) for 2020 and 2021*
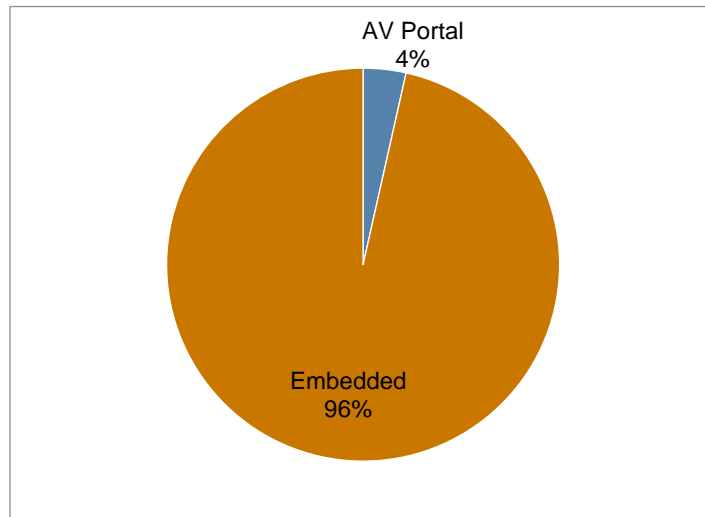


The "**Top 10%**" **items** (in terms of views) generated a total of **95% (n=6,910,073) of all views** during the 2020-2021 period (see Figure 11).

*Figure 11: Top 10% item views*
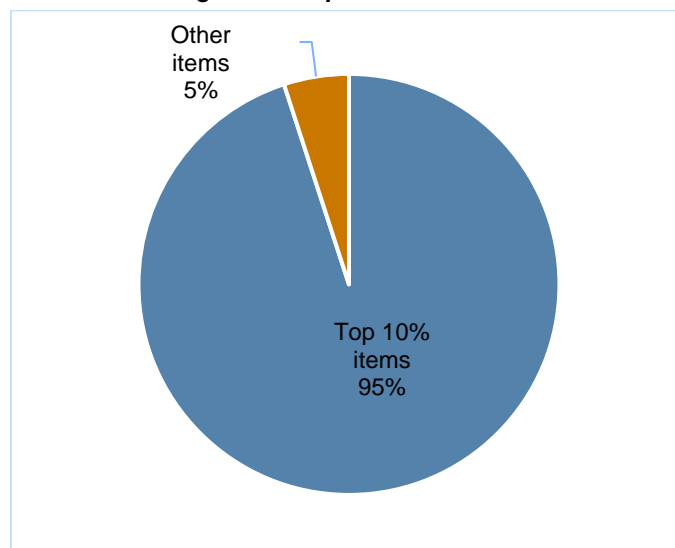
### 4.3. RQs 3&4: Who are the main users of EbS(+) currently? Are TV stations and news agencies still the main EbS(+) users?

**Answer:** The monitoring data available limits our ability to state with confidence who the main users of EbS(+) currently are, and whether TV stations and news agencies are still the main EbS(+) users. The only monitoring source is Teletrax data, which tracks the uptake of EbS(+) materials from 226 pre-defined TV stations, which are not selected on the basis of usage. Uptake from other users is currently not monitored in any way. Feedback from major news agencies interviewed did confirm that they are intensive users (for television, radio, and news story use) and value the service. Based on our survey, which was advertised on the AV portal and the Audiovisual Service's X account, we can deduce that journalists/media/AV professionals are the main users of EbS(+), particularly those working for national TV in the EU, including online versions. However, our survey results also show that EbS is used by those who do not work for the media, especially academics and students, who made up 20% of our sample of 187 respondents.

To assess who the main users of EbS(+) currently are (RQ3) and whether TV stations and news agencies are still the main EbS(+) users (RQ4), we drew on three data sources:

- Teletrax data on uptake by satellite
- interviews with journalists
- our survey of EbS users.

The only available data source from the AV Service is Teletrax data, which monitors the uptake of EbS(+) materials by **226 pre-defined TV stations**.[5] Uptake from other users is currently not monitored in any way. Recent surveys run by DG COMM on the Audiovisual Portal did not include profile questions to allow for the identification of user groups or types. In the case of our own survey, despite a good response rate of 187 respondents, we still consider the survey data to be only moderately robust, when it comes to providing a clear and complete picture of the current users of EbS(+).

From the **Teletrax data** we established that **television stations took a total of 515 067 items of EbS(+) content** between January 2019 and December 2021, 195 389 in 2019, 176 951 in 2020 and 142 727 in 2021. There has therefore been a significant decline over this three-year period. The corresponding figures for EbS are 101 787, 115 162, and 83 299. For EbS+, they are 93 602, 61 789 and 59 428. While the trend is downward in both cases (taken overall, as there was an increase in EbS uptake in 2020 compared to 2019), it is more marked for EbS+.

The same TV stations drove this decline on EbS and EbS+ between 2019 and 2021:

- Sky TG24 (Italy) reduced the uptake of materials on EbS by 3652 in this timeframe, and on EbS+ by 3518 items.
- TGCOM 24 (Italy) reduced the uptake of materials on EbS by 2177 in this timeframe, and on EbS+ by 1655 items.
- TV Evropa (Bulgaria) reduced the uptake of materials on EbS by 1523 in this timeframe, and on EbS+ by 1477 items.

Twenty-seven percent (27%) (n=138 874) of all items were taken up by **five TV stations**: Euronews English, Sky TG24, TGCom24, RAI News 24, and Canal 24 Horas (see Table 2), i.e. on pan-European, three Italian and one Spanish channel. All are 24-hour news channels. It is therefore not surprising that Italy tops the list of the countries taking the most EbS items, taking all 226 channels in all. Pan-European channels are second, followed by the channels of Germany, France and Poland. As pointed out above, the 226 channels were not chosen on the basis of usage but geographic spread. However, the results can be assumed to be a broad guide as our expert assessment is that there are no major gaps in the list.

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[5] We were unable to obtain information from the Commission how and when the Teletrax list of TV stations was adopted and what criteria were used other than geographic spread.

*Table 3: Top five TV stations and uptake of EbS items*

| TV channel | Country | EbS items | | | EbS+ items | | | Total |
|---|---|---|---|---|---|---|---|---|
| | | 2019 | 2020 | 2021 | 2019 | 2020 | 2021 | 2019-2021 |
| Euronews English | Pan-European | 9720 | 17793 | 15497 | 9557 | 8914 | 8206 | 69687 |
| Sky TG24 | Italy | 7419 | 3519 | 3767 | 5573 | 2560 | 2055 | 24893 |
| TGCom 24 | Italy | 4835 | 3785 | 2658 | 3348 | 1941 | 1693 | 18260 |
| RAI News 24 | Italy | 3039 | 3969 | 2065 | 1407 | 1524 | 1060 | 13064 |
| Canal 24 Horas | Spain | 2285 | 2745 | 1955 | 2409 | 1824 | 1752 | 12970 |

Overall, **Italian TV stations took the most items** (n=87,102) from EbS(+), followed by pan-European stations, and TV stations in Germany, France and Poland (see Table 3).

*Table 4: Countries of TV stations taking up most EbS items*

| Country | Number of items taken up |
|---|---|
| Italy | 87,102 |
| Pan-European | 69,687 |
| Germany | 37,978 |
| France | 34,040 |
| Poland | 32,901 |

We also interviewed journalists from a range of large and small news agencies, and from major TV channels. They all confirmed that they and their organisations' central newsrooms rely heavily on EbS. Major agencies and TV channels in Brussels have a satellite downlink; other journalists take material from the AV portal, either as background or to incorporate in broadcasts. The central newsrooms of the same organisations also have satellite downlinks to take coverage direct 24/7 in the case of the larger organisations.

In our EbS user survey, the **largest respondent group constituted journalists/media/AV professionals** (33%, 61 out of 187, see Figure 2 in section 2.2). While most of them worked for multiple types of media, the **most frequently indicated media type[6] was "national TV in EU, including online versions"**, followed by international and national news/press agencies (see Figure 12). This would support a hypothesis that TV broadcasters are major users of EbS, even though it is impossible to conclude so with confidence. This is the more so the case, as news agencies also download EbS material, which may used in video news items picked up by their users, who include broadcasters. Some EbS material is also picked up by ENEX (European News Exchange) and the EBU's Eurovision News Exchange. Some media users indicated that they had access to these.

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[6] Please note that this was a multiple-choice question in the survey asking respondents to "tick all that apply".

*Figure 12: For which type of media do you work? Please tick all that apply.*
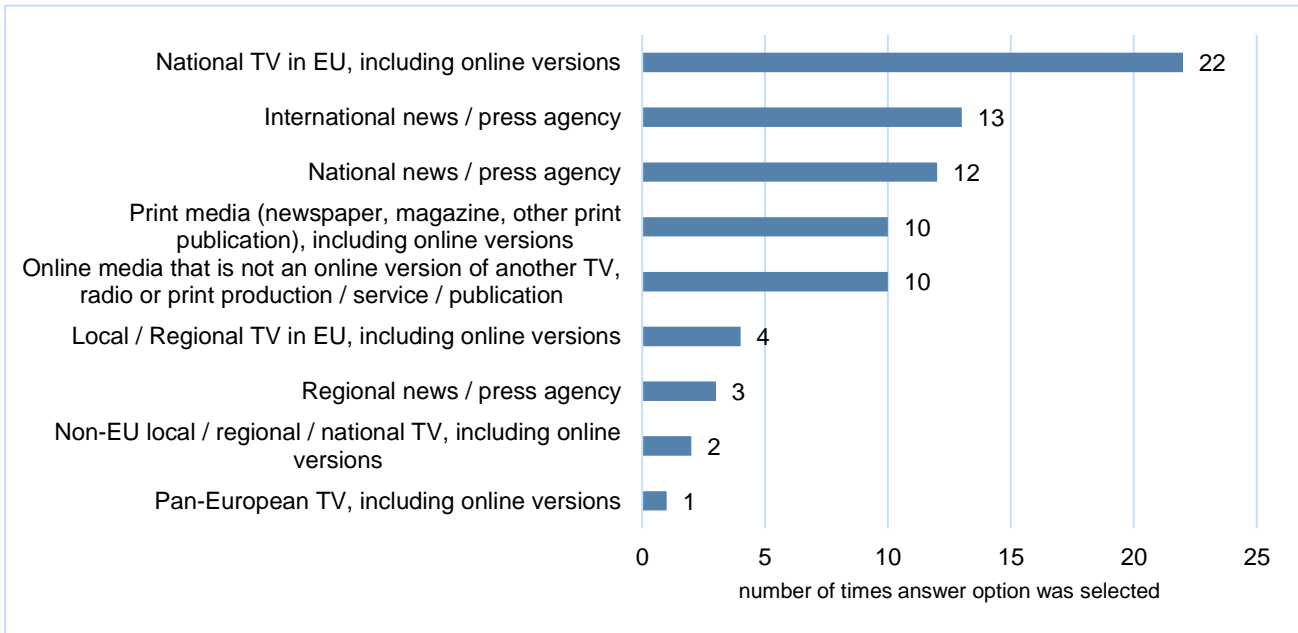


The remainder of our sample (**67%**) constituted "**non-media users**", made up of academics and students, civil society organisations, business/trade organisations, citizens, international organisations, EU institutions, and public institutions (national, regional, local) (see Figure 2 in section 2.2), which shows that **EbS is also used by those who do not work for the media** (see also our answer to RQ8). The largest proportion of non-media users constituted academics and students (20% of the overall sample, 37 out of 187 respondents).

### 4.4. RQ5: Is the satellite version of EbS(+) used more or has the online version gained in importance and numbers?

**Answer:** The evidence collected for this study points towards EbS being mainly accessed online, especially live coverage, and the satellite version being used in newsrooms in capitals and by news agencies, given that the satellite link is expensive to access. This finding is empirical as no data is available on usage of EbS by satellite.

In our answer to this question, we drew on findings from the EbS user survey and our interviews with EbS users. It was not possible for us to draw on an analysis of use statistics since the AV Service does not currently hold data on the use of the satellite version which could have been compared to data on online usage.

Based on the survey results, respondents mainly accessed EbS **online**. In fact, **watching live online on the Audiovisual Portal** was the **most frequently indicated way in which survey respondents used EbS**, followed by download for later use from the Audiovisual Portal. Watching live via satellite transmission or download from satellite was indicated significantly less frequently by comparison (see Figure 12).

*Figure 13: What are the main ways in which you use Europe by Satellite? Please tick all that apply.*
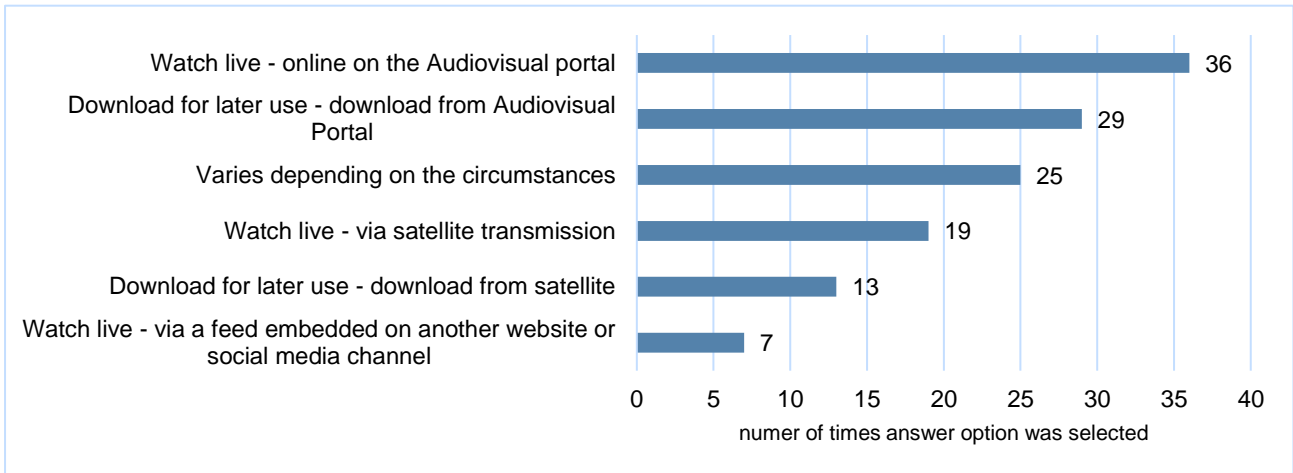


This was also confirmed in interview findings, where media users mentioned that they mainly used EbS to watch livestreams of press conferences, the midday briefing and other live events online to be informed when they are interviewed on camera or to write coverage.

Our research also suggests that it is the **TV and agency newsrooms in capitals** or international hubs rather than Brussels correspondents who are the **main users of the satellite coverage** as a satellite downlink is expensive. The exception are major international **news agencies** in Brussels who also have their own satellite feed.

### 4.5. RQ6: Based on Teletrax-data – who are the main TV stations using the service; which channels, which countries, which type of reports or which type of programmes do they produce?

**Answer:** The main TV stations using the service are Euronews English, Sky TG24, TGCom24, RAI News 24 and Canal 24 Horas, a pan-European news channel and four 24/7 news channels from Italy and Spain that report on international news. It was not possible to deduce from the data in what types of programmes or reports these materials were used. From our own evidence collected for this study, we found that EbS users most frequently used EbS content to produce news items (reporting on current affairs) and that half of them accessed the service daily.

In our answer to this question, we drew on findings from the quantitative analysis of Teletrax data, the EbS user survey and our interviews with EbS users.

Under RQ3, we identified the five main TV stations from Teletrax data[7] that take up content from EbS(+): Euronews English, Sky TG24, TGCom24, RAI News 24, and Canal 24 Horas. These constitute a pan-European news channel and four **24/7 news channels** from Italy and Spain, reporting on international news.

Based on our survey responses, we found that media users **most frequently used EbS to create a news item** (reporting on current affairs) (see Figure 14), with almost half of them using it **daily**, 25% ad-hoc, and 21% weekly (see Figure 15).

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[7] We were unable to obtain information from the Commission how and when the Teletrax list of TV stations was adopted and what criteria were used other than geographic spread.

*Figure 14: To what end do you use Europe by Satellite content? Please tick all that apply.*
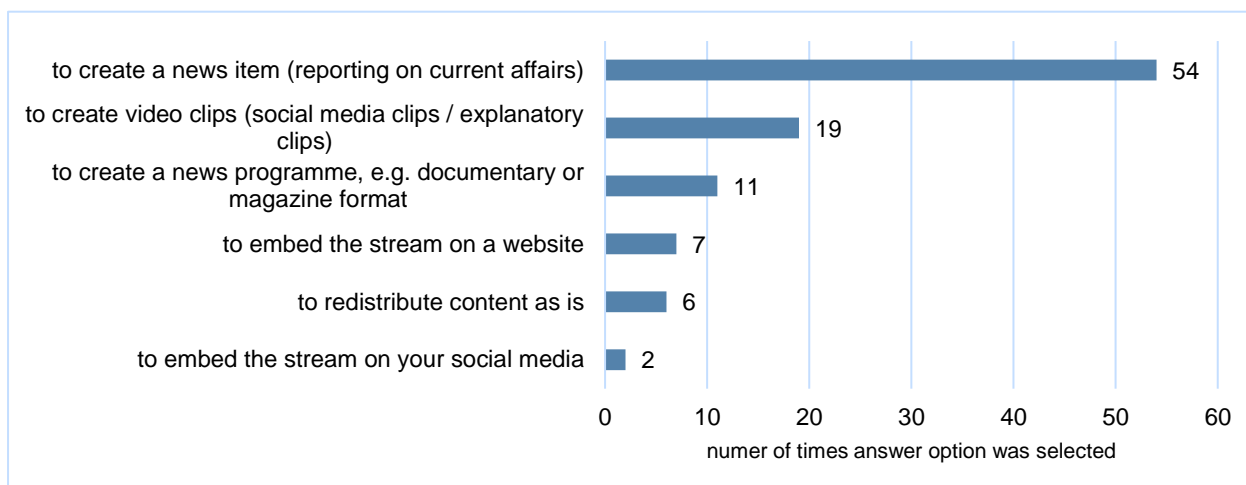


*Figure 15: How often do you use Europe by Satellite?*
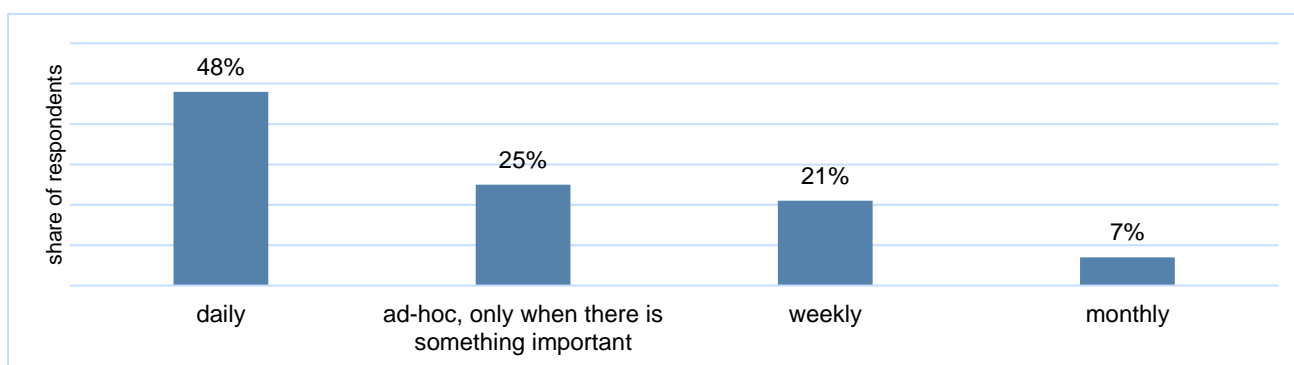


This was confirmed in interviews, where most reported using it daily and to create news items. However, most also noted **using other sources for material on EU topics**, including Reuters, Associated Press, and EbS material accessed via ENEX and EBU.

## 4.6. RQ7: Which online media use the service?

**Answer:** Our survey of EbS users showed that respondents worked across multiple types of media, with online media being one of them. However, for anonymity reasons we did not obtain any information on the specific media outlets. The fact of journalists working in various channels is consistent with the understanding of our experts of patterns in modern media, i.e. while a news outlet may have a channel through which it is predominantly accessed, content is available through several channels. News channels where the online channel is the predominant channel are the exception. The survey and input from our experts were the sources of data for answering this question, as the Commission does not collect data on EbS users or track uptake of EbS materials by online media.

We drew in our answer to this question on findings from our survey of EbS users and the view of our expert panel. There is no Commission monitoring data in this area. However, it was not possible for us to discern from the survey who the online media are that use the service. This was because media users who responded to the survey worked across **multiple types of media**, with online media being one of them in the case of 10 out of 61 media users. Moreover, for anonymity reasons, we did not ask about the name of their media outlet. Online media is also a broad concept embracing the online versions of conventional radio, TV and print press, all of

which use video material, as well as media that only provide news online. Our experts confirmed that online pure players are an exception among news media. We are not aware of any tool available at present to track when material is being used online though an expert we consulted confirmed that blockchain has that potential, but with some limitations. In addition, our market research also provided evidence that a major international news agency is looking at blockchain to do this.

## 4.7. RQ8: Who are the other EbS(+) users (citizens, academics, written media, business, civil servants, etc.)?

**Answer:** This answer is based on our survey, which was advertised on the AV portal and via the Audiovisual Service's X account. Our results showed that EbS is also used especially by academics and students, who constituted 20% of our survey sample, to download historic/archive materials. Representatives of EU institutions, business/trade organisations, civil society organisations, print media, international organisations, and public administrations, as well as citizens also appear to be using the service, mainly to watch content live.

Given the absence of user monitoring data, we drew in our answer on the profiles of our survey respondents. Here, we found that **academics and students were the second-largest group of respondents** after media users **(20%, 37 out of 187)**, followed by representatives of EU institutions (16%, 29 out of 187), business/trade (8%, 15 out of 187), "other" (mainly "citizens", 7%, 13 out of 187), civil society organisations (6%, 12 out of 187), international organisations (5%, 10 out of 187), and public administrations (national, regional, local) (5%, 10 out of 187) (see Figure 2 in section 2.2).

In the survey, **academics and students** indicated that they mainly used EbS to **download historic/archive materials** and valued the access to content free of rights. Civil society organisations, business/trade organisations, and public administrations indicated that they mainly watched EbS live and used it to redistribute content as is. They particularly valued EbS for content being free of rights, simultaneous interpretation, and for providing content not covered elsewhere. Citizens who responded to the survey, indicated that they watched EbS mainly live, and used the material to create news items in the context of social media, and also valued the access to free content.

Among media respondents, **print media** (newspaper, magazine, other print publication), including online versions, were the **most frequently indicated type of media[8] that respondents worked for after "national TV in EU, including online versions", and international and national news/press agencies** (see Figure 12 in section 4.3).

## 4.8. RQ9: Which type of content is our usual client looking for?

**Answer:** Taking the "usual client" to mean media users, we found that the usual client looks for live coverage of events, press conferences, and the midday briefings. While monitoring data on live views was not available, data on downloads showed that users most frequently downloaded clips and animations, followed by short stock shots. Overall, the current offer of EbS meets users' needs in terms of sound and image quality, languages available, content selection and style, speed of publication and format. However, media users also suggested some technological improvements to make the content better accessible and in a wider variety of formats, and to potentially expand the offer with more data visualisations and infographics. There were also strong opinions among media users that EbS should continue providing raw material for journalists, and that being a "one-stop-shop" of unedited content on EU matters should be the main objective of EbS.

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[8] Please note that this was a multiple-choice question in the survey asking respondents to "tick all that apply".

In our answer to this question, we drew on findings from the quantitative analysis of data on downloads, the EbS user survey and our interviews with EbS users.

According to the monitoring data on downloads, the most frequently downloaded items were clips and animations, followed by stock shots (short) (see Figure 8 in section 4.2.1). The least frequently downloaded item types were news, visits to the Commission, and Midday briefing-chapter, which we understand to be extracts from the midday briefing.

While data on live views was not available for analysis, our survey findings show that media users most frequently indicated that they used **live coverage of events and video news edits (recorded)**. Stock shots and historic/archive materials were indicated less frequently and clips / explanatory videos the least (see Figure 15).

*Figure 16: Which of the following Europe by Satellite products have you used? Please tick all that apply.*
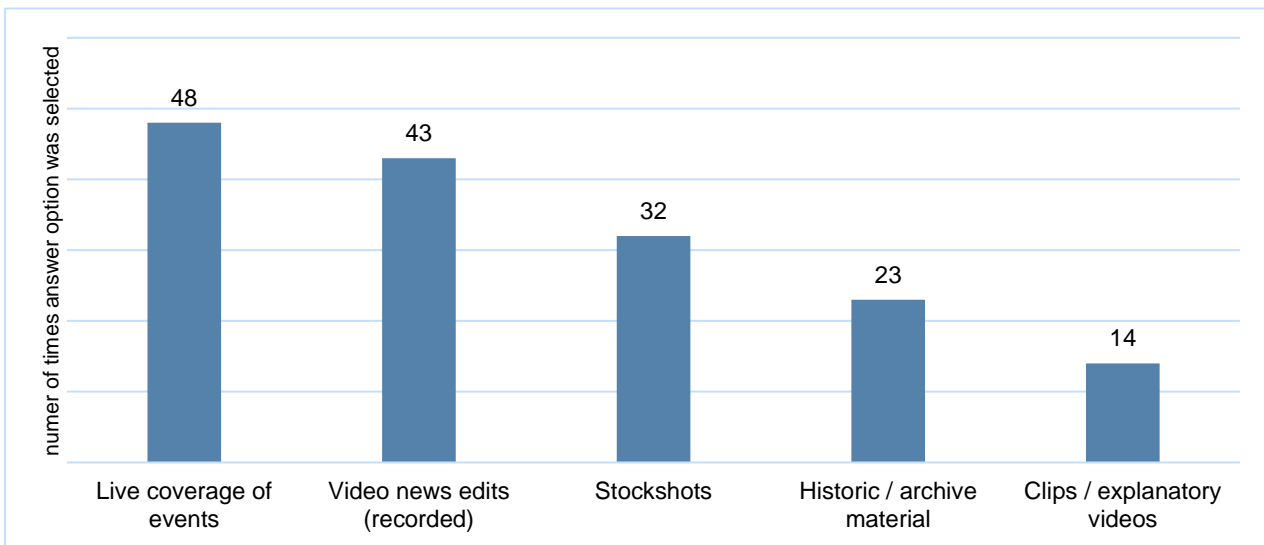


This was also confirmed in interview findings, where media users mentioned that they mainly used EbS **to watch livestreams of press conferences, the midday briefing and other live events** – especially those attended by national representatives of EU Member States. There was a strong interest among interviewees in Council meetings and European Parliament plenary sessions. EbS was preferred as a source of the coverage because it is a **one-stop shop**, but sometimes the Council is faster or covers events not on EbS. Occasionally, these users download live events for later use, especially written press, to facilitate the writing of articles. Some interviewees also mentioned using archived materials and stock shots.

In the user survey, most media users **"agreed" or "strongly agreed"** that the **content met their requirements** in terms of sound quality (74%), image quality (73%), languages available (67%), content selection and style (64%), speed of publication (61%), and format (58%) (see Figure 16).

*Figure 17: To what extent do you agree or disagree that EbS content meets your requirements in terms of…*

| | strongly agree | agree | neutral | disagree | strongly disagree | don't know |
|---|---|---|---|---|---|---|
| sound quality | 36% | 38% | 18% | 7% | | 2% |
| image quality | 34% | 39% | 18% | 5% | | 3% |
| languages available | 39% | 28% | 16% | 8% | 5% | 3% |
| content selection and style | 25% | 39% | 25% | 3% 3% | 5% | |
| speed of publication | 25% | 36% | 20% | 12% | 5% | 3% |
| format | 25% | 33% | 23% | 5% | 5% | 10% |
| metadata description | 16% | 30% | 25% | 7% 2% | | 21% |
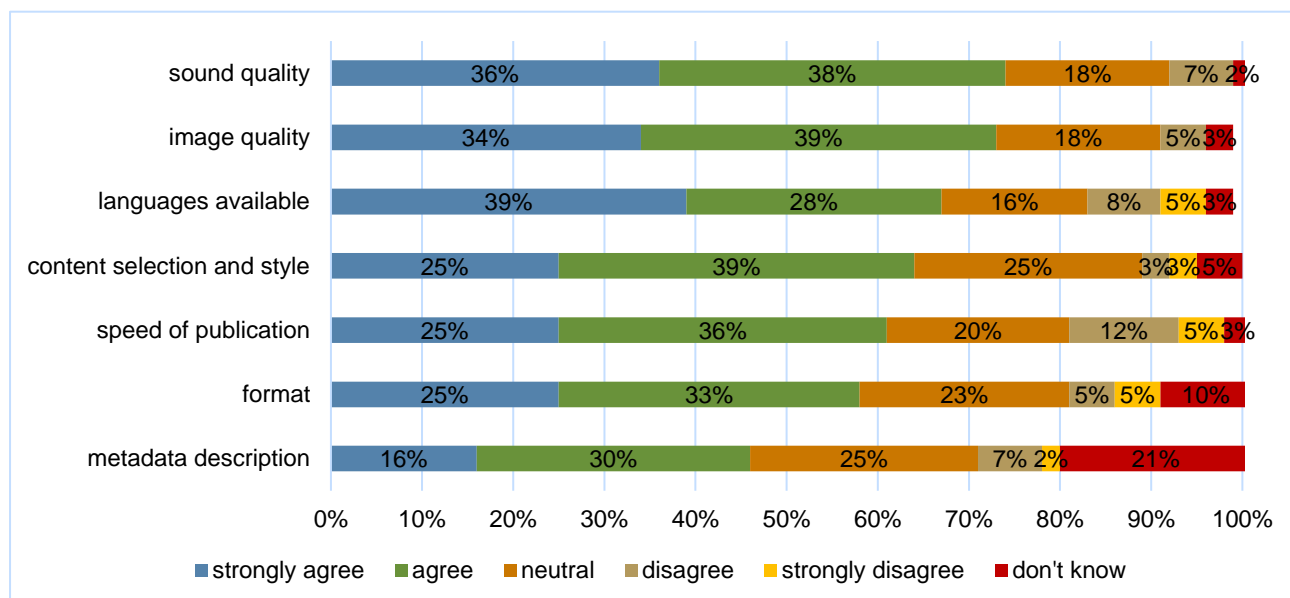
Among interviewees, there was **consensus that EbS met their needs** and was a useful tool in their daily work. They appreciated the wide range of materials offered on EbS, the quality of the items, the planning and schedule of events (which updates with changes more rapidly than, for example, the Council website), the reliability of the service and its accessibility. They also mentioned positively that materials are available in different languages, and that there was the option to download videos quickly after a live event. Some reported on occasion taking streamed material from the Council or a news item from Reuters in preference to EbS, because it was available more quickly or because it could substitute for the broadcaster producing their own item as it had been produced as a news item that was ready-to-use. These were a minority.

In terms of suggestions for improvements of EbS in the future, survey respondents and interviewees were more concerned with **technical improvements** that would enable them to make better use of the content than different or new types of content, namely:

- to have an **app (or email alerts)** that shows the schedule for the next day, which would facilitate planning; the advantage of an app would also be that it could send alerts on schedule changes about when an event is actually starting if the start time is "not before" (e.g. College read-outs), and would make it easier to search the portal on a phone, to download streamed EbS from a phone, and to generate 'screen grabs' for social media,

- to provide short and snappy clips in a **format suitable for social media** (vertical, not horizontal),

- to have a **schedule that runs out further than at present**, e.g., a month, and to be able to search backwards in the schedule (as opposed to scrolling) to find exactly when a press conference had happened,

- to **reintroduce the audio only format** that was available live before and would inter alia make it easier to follow live events while on the move and/or to stream audio on an additional channel when there is no space available on EbS,

- to utilise Artificial Intelligence to produce **searchable live transcripts** of speeches, doorsteps, conferences, etc.,

- to have **automatically generated subtitles in all EU languages**, but with the option to remove them to allow for the inclusion of TV stations' own subtitling formats,

- to have **quotes extracted for social media** also available on EbS,

- to **edit the titles** of events, meetings etc. in a way that is **free of EU jargon and acronyms**, and **more precise definition of the topics** of press conferences,

- to add the **location information** to videos and live streams of events,

- to have an option to "go back" **(rewind) in livestreams** if they started to follow the stream late, rather than having to wait for the recorded version,

- to being able to **search backwards in videos** – a facility that we were told the Council offers,

- to have gender-specific interpretation and voice-overs.

In terms of new or different types of content that users would like to see on EbS in the future, survey respondents most frequently indicated "**interviews**", followed by "conferences/events" and "live news coverage" (i.e., with reporters, presenters) (see Figure 17).

***Figure 18: Are there any other types of content not featured on Europe by Satellite that you would like to see more of? Please pick your top three suggestions.***
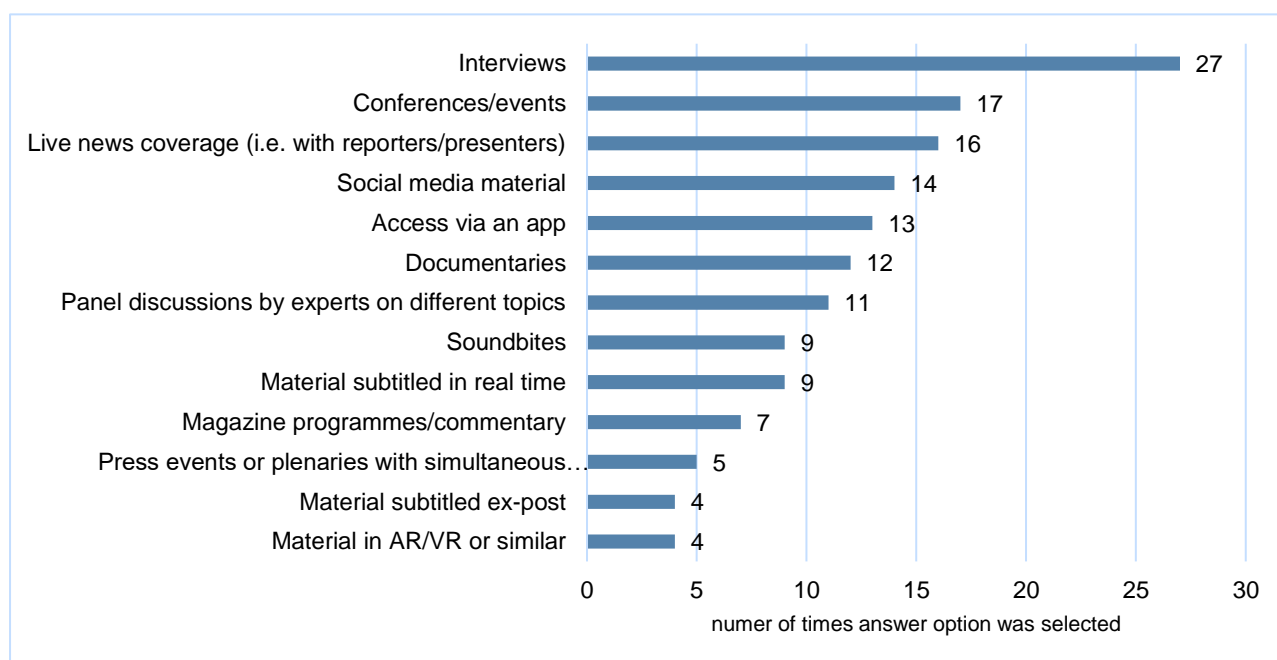


In interviews with media users, there was **consensus** that EbS should continue to provide **raw material for journalists**, and not venture into making programmes. Interviewees were concerned that this would just come across as "propaganda" or "spin", though the possibility of interviews was not ruled out. Other editorial changes that were suggested included:

- to have a **third (or even fourth) streamed channel**, which would not necessarily stream all the time, but would allow for more events to be covered; users believe that there are worthwhile events that are being crowded out at present, and some believed that the phenomenon is particularly acute in European Parliament plenary week – coverage of which is nevertheless valued.,

- to **better integrate the European Commission, European Parliament and Council on EbS** - some interviewees noted that if they went to the different web pages, they could find a lot of information that was not available on EbS, and they felt that at least having links on EbS to relevant videos featured elsewhere could be an asset; others, who implicitly see this as an inter-institutional service, wanted more coverage of Council events in particular; it was also argued that adding the **logos of the three EU institutions** on EbS might alleviate confusion about whether this is an "EU service" or a "European Commission service" or, if that is not the objective, then the branding as a European Commission service should be reinforced.

- to ensure that material is published **as fast as possible**; while most media users were satisfied with the speed of EbS, they also noted that while they found the delay of a few minutes in uploading recorded content, they would never use material on a meeting or event that had happened the day before.

However, some would search the back footage on events they had missed which were important for information purposes. The seven-day replay window appears to be adequate for this.

- to provide **data graphics** that could be included in news programmes produced by broadcasters.

While the portal as such is out of scope and while we believe that DG COMM is aware that there are improvements to be made in terms of **navigation and the search functionalities**, we note that this was a recurring topic in interviews that interviewees raised unprompted.

## 4.9. RQ10: Is different material used by clients accessed using the online/satellite services?

**Answer:** We found no evidence of a difference in the types of material being accessed via satellite or downloaded. This comes with the caveat that we were unable to obtain data on satellite usage from the Commission, which could have been compared to online use of the material.

Given the absence of Commission monitoring data on satellite usage which could have been compared to online use of the material, we drew in our answer to this question on findings from our survey and interviews with EbS users.

We found that there is **no evidence of a differences in the material being accessed via satellite or downloaded**. Three categories stand out in both cases: Commission midday briefings, Commission and Council press conferences and EP plenaries. Broadcasters mainly download from the satellite, but there are examples of streamed coverage (include via phone) being used. The EbS satellite feed appears to be used more by those in newsrooms in capitals (as most Brussels-based journalists do not have access to a satellite downlink).

## 4.10. RQ11: What are industry standards / best practices for services like those of EbS(+)?

**Answer:** Based on market research carried out specifically with a view to answering this question and on the tools and content types identified in our interviews with the media and our survey (see RQ 10), the media have a wider range of tools and content types available to them from services like those of EbS(+) or other sources of news material on the EU. EbS(+) has some comparative advantages, particularly for those users for whom using a primary sources of raw material and live coverage of wide range of EU events is a selling points. This gives EbS+ a loyal following, but there is a risk that it will lose users to secondary sources offering a wider range of ancillary services.

In our answer to the question about industry standards / best practices for services like those of EbS(+) (**RQ11**), we found evidence from the research that editorial and technical features on the **'wish-list' of those surveyed and interviewed are available from the services we benchmarked**. Of the three organisations which were the subject of market research, two were particularly relevant for answering this question: the United Nations and AFP, as they are B2B, while the French parliamentary channels are B2C and more akin to potential users of any expanded EbS editorial content. (The answers to RQs 21-23 explain why we do not believe expanding to this level of content is appropriate.)

**All the benchmarked organisations offer a wider range of features than EbS** via platforms that we assess to be more user-friendly than the AV Portal, a factor which is likely to give organisations such as these a competitive advantage.

These products include:

- **Apps**, either for the general public or solely for subscribers, with features such as choosing whether to be notified of breaking news, which news to show based on users' preferences, a range of languages (either with officially supplied translation and/or automated translation), the ability to read offline,

podcast episodes, calendars updated in real time, and curated insights into the news (AFP, UN). Similar features are also offered by Reuters and AP.

- **Drone footage** (AFP, as do the other two leading international news agencies, AP and Reuters)

- **More active and different use of social media**, including X (formerly Twitter) accounts, a key means of reaching journalists. Practical information on EbS is crowded out of the current account. The UN has separate X accounts for UNWebTV, the Secretary-General, the Spokesperson, and the news. The UN and AFP also use Facebook, Instagram and TikTok. They also provide news items in 9:16, i.e. social media format.

- **Calendars** updated in real time, which can be calibrated on personal preferences, and in go out further ahead than the EbS schedule.

Other notable characteristics are **automated sub-titling, on/off sub-titling, interviews and features, infographics (including video infographics), non-jargon/'newsy' titles of items** as well as having a more modern look and feel. We were told by a media user that the White House in the U.S. offers **live transcripts**, which are appreciated by the media.

There is thus a clear overlap between the add-ons that users are asking for and what is available from other providers. Major users, e.g. news agencies and major TV channels, value EbS(+) as a one-stop-shop and as a primary source. They are likely to remain loyal to EbS(+) as one of many sources of information they use. Our research suggests that for those for whom the main EbS(+) selling points at present of being a primary source of raw material and live coverage, and one that is free of charge and free of rights, may not be enough to prevent them turning more to secondary sources in future as EbS is not in line with industry standards and best practice. While EbS(+) coverage only competes for certain events with the White House or the UN, its image is likely to suffer by comparison if it cannot offer more of the add-ons its users want and others offer.

### 4.11. RQ12: How can EbS provide content more efficiently?

**Answer:** EbS currently has an efficient production process, which could be improved if the contractor was further integrated into planning to ensure a better understanding of film crews as regards the schedule and location of an event.

Based on our two interviews with the contractor and the DG COMM Audiovisual Service, we found that there are **no efficiency issues as regards the technical aspects of the production process**. However, our interviewees voiced some **organisational considerations** that could improve the efficiency of the production process, which mainly concerned the **closer integration of the contractor into the planning process**, to ensure that film crews have a detailed understanding of the schedule and location.

# 5. UPDATED EDITORIAL LINE

In this section, we present our answers to Research Questions 13-20 on the revised editorial strategy, which are as follows:

| Main task | Research Questions |
|---|---|
| **7. Updated editorial line** | RQ13: Which type of material is most useful for clients and should be continued / expanded? |
| | RQ14: Which type of material should be discontinued? |
| | RQ15: Which material is not yet offered but could be useful to add? |
| | RQ16: Should EbS(+) produce more "editorial" content on different topics? |
| | RQ17: What material would differentiate us from our main counterparts, news agencies, or other institutions? |
| | RQ18: Should EbS(+) follow commercial news agencies in focusing on fast delivery of news, or a more "institutional" and historical approach? |
| | RQ19: Should EbS(+) make more "editorial" style programmes or maintain a more neutral "news-style" approach? |
| | RQ20: Could EbS(+) online and Satellite take a different editorial approach, or add a channel that broadcasts online (but not satellite) or vice versa? |

In this section, we merged our answers to

- RQ16 "Should EbS(+) produce more "editorial" content on different topics?" and

- RQ19 "Should EbS(+) make more "editorial" style programmes or maintain a more neutral "news-style" approach?",

as we consider these questions to address the same issue.

In drafting our answers, we drew on findings presented in our answers to RQs 1-12, as well as feedback from our expert panel, findings from the market research, and our own judgements as evaluators of communication.

## 5.1. RQ13: Which type of material is most useful for clients and should be continued/expanded?

**Answer:** In this answer we relied on data on downloads, as well as survey and interview findings, while recognising that this has limitations in the absence of more comprehensive monitoring data. The sources we used show that different types of materials are accessed live and via download, making live coverage of events, press conferences and Midday briefings "useful" for watching live, and clips, animations and stock shots "useful" for download. Based on these insights, the current offer of EbS should be continued, albeit with some technological improvements to foster accessibility and a greater variation of formats in line with our answers to RQ 12 and RQ 13. We also identified some demand for expanded coverage via a third streaming-only channel, particularly at peak times such as European Parliament plenary week as this crowds out some items in the view of some users. The visual language of EbS could also be modernised, and a revamped newsletter could draw in more clients, as well as facilitate monitoring of client preferences. Finally, a better integration of the European Commission, European Parliament and Council could alleviate confusion about this being an inter-institutional service, and ensure that clients access materials of these institutions which are not featured on EbS.

In our answer to this question, we drew on findings from the quantitative analysis of monitoring data, our survey and interviews with EbS users, feedback from our expert panel and the market research.

As noted above, the quantitative analysis of monitoring data was limited due to **no data available on live views** of EbS content on the website. We could therefore only draw on **data on downloads** to assess what materials users downloaded most often and could thus be considered "most useful". Here, the data shows that in 2020

and 2021, these materials were **clips and animations**, followed by **short stock shots** (see our answer to RQ9). By contrast, news, visits to the Commission, and Midday briefings (chapter) were downloaded least frequently. As noted above, we presume that this is due to speeches, press conferences, midday briefings etc. being mainly watched live - but we cannot confirm via quantitative analysis as data on live views is not available.

**However, our survey and interview results show a different picture**. Here EbS users surveyed reported that they **mainly used live coverage of events and video news edits (recorded)**, while stock shots and historic/archive material was indicated less frequently, and clips / explanatory videos the least. EbS users interviewed also confirmed that they mainly used EbS to watch **livestreams of press conferences, the Midday briefings, and other live events**, with strong interest in Council meetings and European Parliament plenary sessions (see our answer to RQ9). It thus appears that **different EbS materials are useful live and for downloading**, and those that may be most useful live are being less downloaded, and vice versa.

We also identified some demand for more coverage. Conferences crowded out during European Parliament plenary weeks were a specific example cited. As discussed further in answer to RQ 20. However, several journalists interviewed said they would welcome a third, streamed channel as they feel they are missing out on some events at present without being able to pinpoint specifics.

Overall, our evidence points to all content current offered on EbS being useful to clients, although survey respondents and EbS users interviewed highlighted some **technological improvements** that would make the offer even more useful to them (see our answer to RQ9). Based on this feedback and insights from our expert panel, changes to the current offer could include the following:

- **Devise a system / functionality that alerts users on new items.** This could take the form of email alerts, or ideally a **mobile app**, which could feature an **agenda that is updated in real time** and could be **tailored to users' preferences**, whether media users or non-media users. We know from our benchmarking exercise that this approach is currently taken by the AFP. In addition to a schedule updated in real time, this **schedule should run out further than at present**.

  However, providing a calendar that is updated in real time and that runs out further than at present should also be implemented for the EbS website.

- A mobile app could also include **other functionalities that would improve the existing offer**, such as:

  - **Searchable live transcripts.**
  - **A format suitable for social media**: For example, the AFP introduced "Social Stories", video stories in 9:16 for use on social media, also in "raw format" which excludes the integrated text, allowing clients to incorporate their own narrative and brand identity.
  - **Quotes usable on social media.**

  However, these functionalities could also be offered independently from the development of a mobile app.

- **Reintroduce the audio-only format for live broadcasts.** There was consensus in feedback received from media users that this functionality was highly desired, as it allowed users to "listen into" live broadcasts on the move, without having to download video data at the same time.

- **Provide automatically generated subtitles in all EU languages, with the option to turn them off.** This was considered highly desirable by media users in this study, as they found that interpretation did not always cover all speakers and/or questions from the audience (e.g. Commissioners speeches and Q&A sessions that take place outside of Brussels). However, media users emphasised the importance of being able to turn subtitles off and provide subtitles in their TV stations' own subtitling formats.

- **Enable rewinding in livestreams** for those who start to follow the stream late, rather than have them wait for the recorded version.

**The visual language** of EbS(+) could be modernised, including more clips/cutaways on stories, more details, as well as better lighting of photos, and more graphs and illustrations.

Introducing services currently provided by news agencies could also be explored, such as **live chats with production teams** and **schedules updated in real time**.

The **newsletter could be revamped.** In the first instance, the mailing lists could be cleaned by sending out a mailing on whether people want to continue to receive it and telling them (after two reminders) that they will be taken off the list if they do not reply. Other specific improvements that may be considered include:

- The AV service could introduce **two types of newsletters** – one covering the **President**, and one covering **other items,** as our research has shown that the topics in which the media are interested are wide.

- **Links** could be provided that go to the **actual item** rather than just the schedule. More news items should be included (currently the tendency seems to be four upcoming items and one headline news item).

- **Images** could be included to draw the user in.

- **Non-video, non-news items could be highlighted**, e.g. new clips.

- **Metrics could be collected** on which items are viewed, to be able to know whether any promotional measures have led to a spike in subscriptions.

- Measures could be taken for the newsletter(s) **not to be treated as spam**.

- A **survey** could be considered to ask subscribers about their preferences on information provided in the newsletter(s).

While the service's freedom of action on this is constrained by the Commission's rules, there are some changes that could be made now and some that could be kept in mind for the future should the rules change.

Finally, the European Commission, European Parliament, and Council could be **better integrated** on EbS. This is based on our finding (see our answer to RQ9) that users accessed the different web pages of the EU institutions to find information that was not available on EbS. Having **links on EbS to relevant videos featured elsewhere** could thus be an asset. Adding the **logos of the three EU institutions** on EbS might also help alleviate confusion about this being an inter-institutional service. However, if this is not the objective, then the branding as a European Commission service could be reinforced.

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While out of scope for this study as per its Terms of Reference**, improving the functionality of the AV portal** has been the most recurring finding in interviews and surveys of users, which is why we suggest that the AV service improves the **search function of the AV portal:**

- Currently, when users access the schedule webpage of one of the channels, they can see a quick search bar to the left which offers limited options (search by channel, keywords, institutions, and type). However, the full search menu is available at the bottom of the schedule, which offers multiple additional search options and filters based on dates.

- We do not see the benefit of having two different search menus. Instead, we suggest that only the full search menu be provided and feature more prominently on the website (e.g. right under the EbS tab on the website's front page).

We also note an anomaly on the **video home page**, namely the banner offers "press conferences" and "midday briefings" as options. If one chooses these, full-length videos become available. However, if one then removes the filter, topic-by-topic short snippets become available. We identified these as products which are not well enough known (though they can be found via the Categories filter). The fact that it needs a "trick of the trade" to find them could well be the reason. We consider these **snippets to have considerable potential**, not just among the media but also among the business and academic community.

Finally, based on interview feedback from EbS users, we suggest **editing titles of events**, meetings etc. in a way that is **free of EU jargon and acronyms**, and more precise definition of the topics of press conferences and **adding the location information** to videos and live streams of events.

## 5.2. RQ14: Which type of material should be discontinued?

**Answer:** We could not find any evidence that any of the current types of material offered on EbS should be discontinued.

In our answer to this question, we drew on findings from the quantitative analysis of monitoring data, our survey of EbS users and interviews with EbS users, as well as feedback from our expert panel. Based on these, and our answers to RQ9 and RQ13, **we did not find any evidence that any type of material should be discontinued.**

Whether not to provide this material for as many events as are covered now within a given material type is a separate issue. Our expert panel argued strongly that the issue is not one of one type of product, or another not being needed but of discontinuing items that are of low news value. These are decisions which in media organisations are taken by the Editor and their staff based on knowledge of their target audience and of the subject matter, and data from monitoring which shows which items have proven to be of interest (see RQ 18.)

## 5.3. RQ15: Which material is not yet offered but could be useful to add?

**Answer:** Material which is not yet offered but could be useful to add includes "behind-the-scenes" interviews led by selected journalists. This would capitalise on the unique access of EbS, and was desired by both media and non-media users consulted for this study. Similarly, adding data graphics, static infographics and video infographics would be useful for media and non-media users alike. For non-media users, adding social media materials ("short and snappy videos"), as well as panel discussions by experts on different topics might be considered. A pool system for journalists to accompany the President when travelling or when media access is limited (and who would make their material available for use by other journalists free of charge and free of rights) would have good news and image value for the Commission.

In our answer to this question, we drew on findings from our survey of EbS users and interviews with EbS users, as well as feedback from our expert panel.

Based on survey results of EbS users, **"behind-the-scenes" interviews** or **features** led by selected journalists was the most frequently indicated answer option as regards additional material that is not currently offered on EbS but which media and non-media users would like to see.

Other types of materials that are not yet offered but which non-media survey respondents and interviewees highlighted as desirable included **social media materials**. Civil society organisations and business and trade organisations, in particular, mentioned that **"short and snappy" videos** on social media would be something that they would like to be able to share with their members. Similarly, **data graphics, static infographics and video infographics** (e.g. https://www.youtube.com/watch?v=R_BNMbq3_Hg) were also mentioned as useful additional offers that media users and non-media users alike could use in their reporting.

Civil society organisations and public administrations also emphasised that **panel discussions by experts on different topics** would be materials that they would be interested to see featured on EbS.

Finally, based on feedback from our expert panel, a **pool system** for journalists to accompany the President when travelling or when media access is limited (and is currently granted to the contractor but could conceivably be widened to a pool) would have **good news and image value** for the Commission. Typically pool systems operate when space to allow journalists into a major event is limited, or it makes sense to limit it in order to keep

the access brief, or when a major personality is travelling, e.g. on a train or plain. By a pool system, we mean journalists whose material is available for use by other journalists free of charge and free of rights.

### 5.4. RQs16&19: Should EbS(+) produce more "editorial" content on different topics? Should EbS(+) make more "editorial" style programmes or maintain a more neutral "news-style" approach?

**Answer:** If media users are the main clients, EbS(+) should continue providing raw materials and continue being an "institutional first-hand source" for journalists, and not venture into editorial programme making. However, if the client base was to be expanded to non-media users, and the objectives of EbS(+) were to change to address the needs of this clientel, documentaries could be included in the offer to provide more "editorial" content – with the caveat that it might be difficult for EbS(+) to find a meaninful market for such programmes.

In our answer to this question, we drew on findings from our survey of EbS users and interviews with EbS users, as well as feedback from our expert panel.

There was **consensus among media users interviewed and surveyed, as well as our expert panel**, that EbS(+) should **continue providing raw material for journalists and not venture into editorial programme making**. While it was considered that some "upgrades" would improve the current offer (see our answer to RQ13), it was felt that the **"institutional, first-hand source" of raw material for journalists** should be the main objective of EbS(+). Feedback from our expert panel also noted that EbS would be hard-pressed to find a meaningful market for editorial programmes produced speculatively and that finding distribution channels or markets would require significant human resources and budgets.

**Non-media users** consulted for this study also did not have a strong preference for EbS(+) providing more editorial content, and emphasised in their feedback a **preference for "behind-the-scenes" interviews, social media materials, and infographics as an additional offer** (see our answer to RQ15). However, **documentaries** were a frequently selected answer option in the survey of non-media users, indicated by academics and student, business/trade organisations, as well as civil society organisations, as materials that they would like to see featured on EbS.

### 5.5. RQ17: What material would differentiate us from our main counterparts, news agencies, or other institutions?

**Answer:** EbS is a unique "one-stop-shop" for EU-related audiovisual materials that are published immediately and in raw form, and could capitalise on this unique access further by providing "behind-the-scenes" type materials and a pool system. Video infographics and explainer videos on EU matters would also differentiate EbS's offer from those of its main counterparts.

In our answer to this question, we drew on findings from our survey of EbS users and interviews with EbS users, feedback from our expert panel, and the market research.

Based on our survey and interview findings from EbS users (see our answer to RQ9), what currently differentiates EbS for media users is that it is a **"one-stop-shop"** for EU-related audiovisual materials that are published **live** and in **raw** form, with good **metadata**, but also for **replaying** that material.

EbS could explore how to **capitalise o**n **access** further, such as handshakes during events abroad. In this context, **new products showcasing access** could be explored, such as "behind-the-scenes" type materials (brief videos of the main presenters getting ready / talking to each other before going on stage), interviews with the President, and a pool system (see our answer to RQ15).

Based on the market research, we found that other material that would not necessarily differentiate EbS from its main counterparts but be a unique selling points would be **explainer videos** on EU matters. Many broadcasters produce these now, but EbS would be providing explanations "straight from the "horse's mouth". This would be attractive to users and to EbS as it could avoid inaccurate explanations by others. These could also be a way to test the waters of the demand from non-media users for documentaries discussed in RQ 16.

### 5.6. RQ18: Should EbS(+) follow commercial news agencies in focusing on fast delivery of news, or take a more "institutional" and historical approach?

**Answer:** The AV service was set up as a service to provide fast delivery of news to the media. The ability for almost anyone to access that news thanks to the internet and broadband has blurred the original clear view of the primary purpose of the AV service. This has led to demands for coverage of a very high proportion of Commission and, in particular, Commissioner activities irrespective of whether the uptake by the media seems likely to justify the investment. There is a case for the AV service to be a 'journal of record' since today's low news value item may one day turn out to be of high news value for historical reasons. At the moment, however, the dividing line on what to cover or not to cover is not clear as there is no written policy on the objectives and target groups of the service. Any such policy decision in future would need to take into account the significant financial implications of a fully institutional route in addition to the current service for the news media, for which this evaluation has shown a strong justification.

In our answer to this question, we drew on feedback from our expert panel and our own judgement as evaluators of communication.

The AV service was set up as a **service for media professionals**. That implies **fast delivery of the news**. The ability to access news that was originally delivered fast is also important to professionals for programme-making, i.e. the **library function of the AV service is equally important**.

Some content was originally accessible only to the media, underling the fact that this was originally seen as a specialist service with a dedicated target group. As the Internet has become more widely used, it has made sense to open the service up to anyone able to access it in the interests of transparency. Over time, this has led to demands for coverage of a very high proportion of Commission and, in particular, Commissioner activities irrespective of whether the uptake by the media seems likely to justify the investment. That has blurred the understanding of what the service should be offering and to whom, and as to the level at which decisions should be taken on what has news value.

At the moment, the dividing line between news and institutional coverage is not clear. Over time the AV Service has in fact become a hybrid, trying to stick to its original mandate but under pressure to broaden it without a policy framework. The service has no **mission statement, or similar document,** such as a decision tree**,** to guide it.

For the service to be a journal of record (the "institutional" and historical approach) covering every news event against the time when an item with low news value now may have news value as a historical record would be a major shift by comparison.

However, we do not see the answer to this question, however, as an either/or decision between the news service and the institutional approach. They have different objectives even if they overlap. Going the institutional, 'journal of record' would however have significant financial ramifications. Taking the decision on how far down that route to go is beyond the scope of this study. It is a matter for policymakers.

This study has shown strong justification for the fast delivery of news which is valued by news organisations. That assessment is true despite the areas for improvement identified in this study. Providing such a service is also in line with other international bodies and governments do. Consequently, **the news agency function would still have to be funded with the cost of a fully institutional approach coming on top of that.**

### 5.7. RQ20: Could EbS(+) online and Satellite take a different editorial approach, or add a channel that broadcasts online (but not satellite) or vice versa?

> **Answer:** There is some demand for an online channel, particularly in European Parliament plenary week, when some intensive users felt that worthwhile events are crowded out. However, there is currently no data that would indicate the exact nature and extent of this demand, and issues of cost-effectiveness of providing such a service would need to be agreed by the Commission. If there is a clear decision that the service should focus on areas it judges to have high news value (RQ 14 and RQ 18) that could free up some space on the existing channels. In the medium-term, it may be possible to do without one of both satellite channels as streaming quality improves and 5G and 6G become more widely used.

In our answer to this question, we drew on findings from our survey of EbS users and interviews with EbS users, and feedback from our expert panel.

In our survey and interview findings, we could not find any evidence of a difference in material being accessed or downloaded online and from satellite services (see our answer to RQ10). Broadcasters mainly download from the satellite, but there were examples of streamed coverage (including via phone) being used. The EbS satellite feed appears to be used more by those in newsrooms in capitals for high definition (as most Brussels-based journalists do not have access to a satellite downlink).

In interviews, we established that there is **some demand for an online channel**, but it came from **intensive users** (see our answer to RQ9), who believed that currently some worthwhile events are being crowded out, particularly in European Parliament plenary week.

However, **the nature and extent of the demand would need to be measured more accurately** (e.g. via user surveys) and the Commission would need to agree on the cost-effectiveness of providing such a service. Considerations would also need to be made whether covering only "must-haves" on EbS and a smaller number of requested events might free up the existing channels enough to cover the events that are leading to the demand for an additional channel now, thus making an additional online channel superfluous.

While it is not directly relevant to the question, there was consensus among experts and other interviewees who felt qualified to comment that satellite technology will itself not be as widely used no later than the end of this decade, so that it is not inconceivable that one satellite channel at least could become redundant with one remaining for the additional reliability and quality it offers, at least for the present. It is clear from our survey and interview findings that many journalists are satisfied with the current streaming quality and that can be expected to improve.

## 6. PROMOTION PLAN TO THE INTENDED TARGET AUDIENCE AND BROADENING THE TARGET AUDIENCE

In this section, we present our answers to Research Questions 21-23 on the promotion plan for the intended target audience (Task 8) and for broadening the target audience (Task 9). We provide a **composite answer** to three research questions (RQ21-23):

| Main task | Research Questions |
|---|---|
| **8. Promotion plan to the intended target audience** | RQ21: How can the Commission promote EbS and EbS+ more efficiently and effectively? |
| **9. Broadening the target audience** | RQ22: Can EbS(+) attract different audiences beyond the EU accredited press? |
| | RQ23: What type of content should the AV service provide to attract more citizens to the platform? |

> **Answer:** EbS(+) and some of its services could be better known not only among the core audience of journalists accredited in Brussels and journalists specialising in EU affairs in newsrooms across the EU, but also journalists across the EU occasionally called on to cover EU-related topics. The same applies to the business and academic community. Those following EU affairs on a day-to-day basis can be reached more effectively and efficiently with a relatively low resource effort. A low-to-moderate effort could reach those who follow EU affairs less systematically or do not need real-time or close-to-real time news. However, there is less certainty about the potential in the business and academic market than among journalists, and this needs to be tested and measured within the Brussels bubble as a first step. It would require a significant investment not only in production but also in distribution and marketing to go beyond that. The evidence from the market research is moreover that only a limited segment of the population would be reached. This would be likely to be much less cost-effective than putting more effort into reaching multipliers. That can be done cost-effectively by product and service promotion combined with using social media at different levels of intensity and cost depending how broad the reach desired, by leveraging in-house channels and by understanding which messages with resonate most with the different audiences. Measurement of the results should be built into the promotion plans suggested here for reaching journalists and the business and academic community following the EU on a day-to-day basis, and for reaching journalists who follow the EU from time-to-time.

In our answer to this question, we drew on research and findings in answer to the previous RQs, i.e. interviews, the survey, interviews with users, and discussions with our expert panel of journalists and communicators. As described below we have also assessed in discussion with our experts the costs, in broad terms, of various levels of expansion. Our findings from this evidence are that that it is important that the core role of EbS(+) as a service for news media not be diluted, and this service could be better known, and that there is a case for exploring some products and content that have appeal for the business and academic community with a view to testing that market before embarking on any large-scale expansion. The evidence does not support investing in content for a wider range of citizens.

Our answer to these RQs therefore consists of:

- a **draft promotion plan** for promoting Ebs and EbS+ more efficiently and effectively to its existing audience (RQ21), i.e. primarily the **accredited EU press (**but including already some members of the business and academic community) and **journalists following the EU occasionally** from outside the "Brussels bubble";

- a **draft promotion plan for the business and academic community** (RQ22). This is the **only segment of citizens** where we have found evidence for a **cost-effective case** to be made for attracting a new target audience of "citizens". We propose that this be piloted first in the "Brussels bubble" as the potential for reaching this audience is less clear than for journalists.

While we are asked for a **hypothetical promotion plan with no budget attached**, our proposal is based on what we know from our research for this study of the **resource constraints faced by the Audiovisual Service**, both in terms of the availability of human resources and budgets now and what is likely in the future, i.e. an assumption of little likelihood of expansion of either. We have focused therefore on putting forward what we believe could be realistic in terms of what the Audiovisual Service might be able to implement in the short- to medium-term (three to five years) with few extra resources. If the new editorial line results in covering fewer events, this should free resources for a higher level of ambition.

We consider that it is **a prerequisite** of these promotional proposals that:

- **EbS be re-branded**. The current "brand" of EbS does not do justice to the wealth of audiovisual material on offer; when the acronym is used, it does not convey an understanding that this is an EU service; it could be confusing by implying that live coverage is only available to those with a satellite downlink; guidelines are also needed on when to use Audiovisual Service and when to use EbS. Having a single brand would be more powerful. That brand and the associated messaging should also convey clearly whether this is a European Commission service also offering access to information from the other institutions or whether it is an interinstitutional brand.

- An 'App', offering functionalities such as alerts and content tailored to users preferences, real-time updates to calendars, ease of use in content in social media format (16x9), which should be one of the new products of the service. This is an area where EbS lags behind industry standards and is a matter of urgency if EbS is not to lose market share.

- the Audiovisual Service should have a **dedicated X account** targeting the media specifically with its scheduling and service as opposed to content**,** i.e. to use the X channel to promote its schedule (as opposed to individual upcoming items) and or "did you know" messages twice a week about the content available on the platform. This would be a separate account from @EC_AVServices. While we do not regard an App (see our answer to RQ15) as a prerequisite to more promotion, we regard it as highly desirable and a priority for launch within the next two years at the latest.

### 6.1. The underlying hypotheses

To answer these RQs, we considered **two hypotheses**:

(i)  that there is an untapped audience for EbS(+) services as they exist now, i.e. essentially primary source material available in real time and on demand;

(ii)  that there is a potential audience for more tailored editorial products for citizens, with citizens broken down into various potential target groups.

We believe that **hypothesis (i) has been substantiated and justifies a promotion plan for promoting EbS(+) more effectively and efficiently**. The plan builds on our conclusion in answer to the previous RQs, as indicated above, that the Audiovisual Service should essentially play to its existing strengths going forward. The priority should be to offer news services to its existing audience, who can act as multipliers to citizens. The broader that audience, i.e. beyond the accredited press and beyond traditional channels, the greater the reach to citizens. EbS(+) can realise a fuller potential for growth of that core audience through the promotional steps described later in this section.

Our finding on hypothesis (ii) is that **there is no case for large-scale targeting of citizens** as this would not be cost-effective. We have not found any evidence to justify turning EbS(+) into an EU online TV news channel for citizens, or even for producing programmes targeting citizens on a large scale. Any such channel would be likely to achieve only a very small market share at a cost likely to be prohibitive in the current budgetary environment. To compete head on with broadcasters would not only require significant resources to produce programmes tailored to citizens but resources to further tailor the material for national markets and interests, and a major, and probably ongoing, marketing effort both to raise awareness of this offering and overcome the likely perception that it is propaganda.

The French Senate and National Assembly channels offer a possible model but have a number of inherent advantages that an EU channel could not replicate: they are in one language, they are required by statute to balance coverage across all political parties which provides an image of neutrality, and they are free-to-air, and therefore part of all standard TV packages in France. Even so, their market share only tops 2% for the most-watched programmes at the best of times, e.g. the most popular documentaries or during the debate on pension reform in France in 2022. Moreover, it costs EUR 35 million annually to provide this service.

Euronews is an illustration of the challenges of multilingualism and reaching a large audience of citizens. Euronews has never been able to make this model viable with only eight EU languages, even with a subsidy meeting, in the past, as much as more than 40% of its costs, and innovative distribution approaches, including monetising the franchise in countries speaking languages it does not offer. It is currently in the midst of the latest in a series of major restructurings and recapitalisation by a new owner.

Stopping short of this and producing programmes which it might be possible to market to broadcasters, e.g. hard-hitting interviews, behind-the-scenes programmes on policymaking, panel discussions, news round-ups would be conceivable but still require a major quantum leap in resources – human, financial and infrastructure, including establishing a marketing department.

The evidence does justify **targeting the academic and professional community**, e.g. businesses and NGOs with a need for first-hand, real-time (or close to real-time) news that needs no contextualisation and/or that they need to disseminate to their members in the case of business groups and NGO umbrella organisations. Our research showed that there are users and potential users in this group, but that EbS and products, such as topic-specific clips from midday briefings or podcasts, are little or not known. We suggest this should be **piloted within the Brussels bubble** before any more extensive roll-out. This responds to the questions we were asked (RQs 22 and 23) but does not change our conclusion that there is no case for expanding this market through new programmes until the core offering has been aligned more closely with news agencies that offer live or close-to-live coverage of EU affairs. That alignment should of itself bring in more users.

Table 4 summarises our findings of the resources needed for **four scenarios** and demonstrates why we are **only advocating the two which require a low level of resources or a low-to-moderate level**, with the proviso that the second level should be piloted in the Brussels bubble first. We only describe the promotion proposals for the low and low-to-medium scenarios in more detail below as we do not assess medium-to-high scenarios as offering benefits that would outweigh the considerable investment cost, or as being in line with our assumption on the future availability of funds for expansion.

*Table 5: Scenarios for expanded promotion*

| Resources needed | Target group | Broad description | New products | Promotional channels |
|---|---|---|---|---|
| Low | Sub-group (i) - Brussels press corps; academics/professionals in Brussels bubble<br><br>Sub-group (ii) - journalists in Member States specialising in EU | Improve existing products, including the newsletter; publicise lesser known products (snippets from press conferences, midday briefings, podcasts) | Add an app, real-time translation, optional voice-overs and sub-titles, infographics, data, pool coverage | Social media X (Twitter) (preferably paid around the launch of major new developments), newsletter/s, introduction-to-EbS webinars |
| Low-to-medium | Sub-group (i) – journalists in MS covering topics covered by EU policies on an ad hoc basis driven by topical news<br><br>Sub-group (ii) – As above + Brussels bubble (associations, lobbyists) + academics specialising in EU | Broaden the product range | Explainer videos, additional newsletters | Social media (paid): X (Twitter), LinkedIn, additional newsletters, newsletters of DGs with video and podcast material on the portal, Representations, EUROPE DIRECTs, introduction-to-EbS webinars |

| | | | | |
|---|---|---|---|---|
| Medium-to-high | Academics and associations in Member States covering topics covered by EU policies; interested citizens | Add more tailored products | Incisive interviews, panel discussions, weekly digests produced by professional journalists with voiceovers/real-time translation, behind-the-scenes reporting – primarily in English but with some programming where the original language is another EU language | Paid social media campaigns on X (Twitter), , Facebook, Instagram, TikTok, and possibly WhatsApp and Telegram (at regular intervals)<br><br>Marketing<br><br>Partnerships with additional distribution channels (e.g. broadcasters, Vimeo) |
| High | All interested citizens | Parliamentary-type channel | Schedule of programmes produced by professional editors & journalists in main or al EU languages + additional studios and streaming infrastructure | Paid social media campaigns across all major platforms (ongoing)<br><br>Supporting online infrastructure |

We assume in this promotion plan that the main proposals for add-on/improved products under Task 7 are implemented. Promotion should then be calibrated on introduction of the new elements of the editorial line; it should start at the time of the first major changes. These changes offer 'pegs' for promotion. Prior to that, there is a risk of promotion of the existing service being counter-productive: once a potential audience has decided a service does not meet its needs, it requires extra effort to win them back as they have already formed a view.

### 6.2. Target audience segmentation

The scenarios are based on a **simple, but we believe, appropriate target audience segmentation**. Target audience segmentation involves dividing the primary target audience into distinct groups based on shared characteristics and preferences. This segmentation helps in tailoring the promotional strategy and messages to better meet the needs of each group. The target groups for this promotion plan in the two chosen scenarios broadly speaking fall into the following categories:

- news organisations in and outside the Brussels bubble, and

- academics and specialists in and outside the Brussels bubble.

Being in or outside the Brussels bubble is not a question of geography. A journalist or a specialist in a business association working in a location far removed geographically from Brussels may be inside the bubble for the purposes of their work. There is a crossover between the groups, and we propose that for the purposes of promotion in the first two scenarios they be sub-divided for promotional purposes into:

- News organisations, and academics and professionals in the Brussels bubble (time-sensitive) (RQ 21)

- News organisations outside the Brussels bubble – specialists in EU coverage (time-sensitive, topic -sensitive) (RQ 21)

- News organisations outside the Brussels bubble covering the EU on an ad hoc basis, e.g. when a topic is of particular interest in their region or Member State and who have a less advanced understanding of EU issues (time-sensitive, topic-sensitive)

- Academics and professionals outside the Brussels bubble specialising in specific EU policies (less time-sensitive, topic-sensitive) (RQs 21 and 22).

The additional breakdown of those outside the Brussels bubble is because we have concluded that there is a case for addressing their needs differently based on time- and topic-sensitivity.

We do not make any distinction in the media audience between broadcasters (radio and TV), news agencies, print media or online media. They have been converging into a single group in recent years. They may focus on particular types of material, but there is considerable overlap. A radio journalist will watch a press conference in order to know what quote to capture; a TV journalist will listen to the press conference while "on the road" covering something else in order to stay informed. In large news organisations, journalists hey may specialise in certain topics. However, most journalists will be interested in what is topical at a given time, though that will often be influenced by geography – fisheries issues will interest even mainstream media in Spain but are clearly of little interest in Slovakia.

## 6.3. Promotional channels

We suggest only **online promotional activities** for the two scenarios that we advocate pursuing. Online activities would leverage digital channels, including newsletters and social media platforms to reach a wider audience and generate increased visibility for EbS(+). In more developed scenarios, there would be a case for partnerships with broadcasters with few resources to cover the EU to provide regular coverage and presence at industry events and conferences. While events offer online opportunities for learning, physical presence is preferable to maximise networking, which in this case will have a marketing function. We have not developed these further for the reasons explained above.

**In the low resource scenario, the two key channels are** social media and newsletters. In this case, social media would be X (formerly Twitter) as this has become a major one-stop shop for journalists everywhere to follow the news and should include promotion of EbS products, e.g. full schedules as well as specific events, newsletters, new products or content on the portal that are news-relevant but not necessarily time-sensitive. Paid campaigns should accompany the launch of any major new development of the service with a call to action to follow the EbS posts systematically. As discussed above, a dedicated EbS account (under a new brand) would target journalists more specifically than the current Audiovisual Service account does, since that content is driven by the Commission's current news agenda interspersed with posts on press conferences. That does not do justice to the offering.

In the first part of this study, we suggest that the service have two **newsletters**, one for the activities of the President, and one for other hot topics, as these are being crowded out of the current newsletter. That proposal is based on the low-resource scenario. The newsletter should be available prominently on the portal and the title line of the accompanying email should highlight an item rather than being generic. The content should emphasis content rather than scheduled events. Subscribers should have the choice of receiving it daily, twice a week or once a week, i.e. this should be a daily rather than a weekly newsletter. The expansion could be in stages, first a twice-weekly newsletter and second a daily newsletter. Promotion should not start until improvements have been made to the existing weekly newsletter.

Messaging via both channels should bear both sub-groups in mind, focusing on what will interest the accredited press, but also highlighting strategically items of interest to the business and professional audience.

**In the low-to-moderate scenario, the online promotion is expanded** to include LinkedIn in order to capture more of the business and professional audience in the Brussels bubble. The metrics from this promotion should be considered a pilot to indicate whether there is potential to promote to this audience more widely.

This scenario also leverages in-house channels by **publicising EbS through in-house low-cost channels**, i.e. newsletters of DGs, particularly those with videos and podcasts on the portal, reminding press officers in the Representations of the existence of EbS and asking them to promote it to their audiences through their newsletters and personal contact, and reminding EUROPE DIRECT network correspondents of the existence of EbS and asking them to remind the EUROPE DIRECTs to publicise EbS as part of their local media outreach.

A functionality should be added to existing newsletters In this scenario for subscribers to express preferences as to the subject matter which they want to receive. The possibility of additional newsletters on coverage of clusters of policies (e.g. agriculture + fisheries + cohesion) could be considered.

**Explainer videos** should be added at this stage.

Messaging via all channels in this scenario should bear both sub-groups in mind, focusing on what will interest the accredited press, but also highlighting strategically items of interest to the business and professional audience.

**In both scenarios we advocate regular 'introduction-to-EbS' webinars** to promote the services and offset the current issue of the user-unfriendliness of the portal. This is a model for which there are precedents on other EU platforms (e.g. the Health Policy Platform and Capacity4dev). These could be quarterly in the low-resource scenario and monthly in the low-to-moderate scenario. We believe these will be useful to the accredited press in Brussels as they are known to have difficulty navigating the portal or not to be aware of certain products. These webinars should also be promoted to journalists or business/professional groups visiting the Commission or which DG COMM is holding online.

At the same time, appropriate **monitoring and feedback mechanisms** would be needed to measure the effectiveness of all promotional efforts, and to adapt and optimise them in the light of that feedback. These would include measuring the results from the tools advocated in the first part of this study (e.g. metrics, surveys, feedback from the Editorial Board) and metrics from social media and targeted newsletters (including measuring which items are read). As a minimum, these should use the metrics advocated by the Commission Communication Network Indicators.

**The result should be** more use of EbS(+) material, and greater accuracy and better tailoring by users (old and new) of EbS(+) material as a result of integrating a primary source into their material more frequently rather than using news agency material or other secondary sources. Integrating EbS(+) material in this context does not just mean integration in what is seen on screen. Our research shows that journalists use EbS(+) to integrate what they learn from watching EbS(+) into written material (e.g. news agency reports, newscasts or interviews on-camera).

## *6.4. Messaging*

Over and above highlighting key news events or the launch of new services, **messaging should highlight the unique features and advantages** of EbS(+) to differentiate it from other platforms, e.g. news agencies, which offer highly valued services virtually in real-time but remove some of the user's discretion that having access to raw material gives. It should emphasise the value of accessing accurate and up-to-date information, the speed of delivery, the diverse range of content available, and products which we believe are currently not well known now, reflect learning from user surveys, or promote new services.

Demonstrating the relevance and reliability of EbS(+) will encourage users to integrate EbS(+) into their existing workflows and leverage its offerings to enhance their own services. The objective is to raise awareness, encourage engagement, and increase the usage of EbS(+) among the core market of the media, both the Brussels press corps (who according to our research do not necessarily all know about EbS(+) or all the products) and users of news in video format across the Union.

The key messages, whether on social media or in newsletters, should be tailored to each target audience, addressing different needs and reflecting their relationship with Europe by Satellite, i.e. the use that most suits a given audience. The messages should be developed with support from communication experts, either from within the Commission or under an appropriate DG COMM Framework Contract. Message drafting should consider what would motivate target audiences to use EbS(+), the benefits and unique selling points for a given audience and should provide tips on finding content on EbS.

Messaging should also reflect the following principles:

- Help create awareness of the EbS(+).

- Emphasise the unique value proposition of EbS(+), including the live elements, the fact that the content is free of charge and free of rights and the technical quality of the streamed content.

- Highlight the official EU affiliation of EbS(+) and its reputation as a reliable information service.

- Communicate the reliable, up-to-date, exclusive EU-related content EbS(+) offers.

**Key messages** to reflect the answer to these questions and these principles **should be tag lines that are secondary** to the main messages, which should be about the news of the day from the service or new services.

# 7. CONCLUSIONS AND RECOMMENDATIONS

We based our conclusions and recommendations on our findings and answers to all Research Questions, feedback from our expert panel, and our own assessment as evaluators of communication.

## 7.1. Conclusions

We structured our conclusions by the four objectives of this study:

| Objectives |
|---|
| A better view on the use of Europe by Satellite |
| A better understanding of who uses the service, how they use it, and to which end |
| A solid basis to define an updated editorial line for the EbS service by making decisions on which type of material to continue or discontinue broadcasting, based on research results and best practices in present-day media |
| The creation of an adequate and efficient distribution strategy, which would allow to increase the use of the service by the main target audience, as well as expand the current target audience to new viewers. |

### 7.1.1. Use of Europe by Satellite

Europe by Satellite can be used in a variety of ways as the concept of Europe by Satellite covers:

- live satellite transmission;

- the availability of the satellite-transmitted coverage streamed via the Internet through the Audiovisual portal;

- the availability of this same coverage for replay on demand on the portal; and

- other material available to view on the portal - that material includes edited items or extracts from the material that has been live streamed and original material.

All the material on the portal is available for download. (The portal also carries material originating from other services, but that was outside the scope of this evaluation.) We conclude from the evidence available that **EbS is predominantly accessed online, with the satellite version mainly used in newsrooms in capitals and by news agencies and major TV channels with studios in Brussels**,

**Precise analysis on the different types of use would require more monitoring data than is available.** The use of materials by TV broadcasters is tracked via Teletrax, but it is limited to 226 pre-defined TV stations, with no clear rationale that we could identify as to how and why these TV stations were selected. There is no data on what these stations are using or on whether they obtained it from the satellite or the portal, or via third parties, notably ENEX (the pooled system for commercial broadcasters or the EBU (public sector broadcasters). The data that would be needed for more precision would be data on live views of material broadcast by satellite (and available at the same time online); comparative data on the uptake and types of materials accessed via satellite and online, as only data on online viewing (and downloads) is available at present; data on use via embedded players which account for 96% of online views at present.

Clips, animations, and short stock shots are the most frequently downloaded items, while our evidence suggests that press conferences, live events and the midday briefing are mainly watched live. Data on views on demand shows that the number of views of the 100 most viewed items between 2020 and 2021 more than doubled, which is likely due to the COVID-19 pandemic having an adverse effect on the viewership of EbS(+). However, there is no reliable data for 2019 that would make it possible to make a comparison. There is scope to fill some of these gaps fairly straightforwardly while waiting for more advanced technology to be introduced by including a profile section and relevant questions on the intended use of the material in surveys that are regularly run on

the AV Portal, and by monitoring the nature and interests of subscribers to the service's newsletter and/or items most clicked.

Access to a satellite link is expensive, which explains why only large users take the satellite coverage (though there is no data on exactly who they are). This does not, however, obviate the need for the satellite. In the absence of an evidence-base, there are still considerations to be made around the future of satellite technology, which is likely not to be used as widely no later than the end of this decade. At the same time, EbS users are satisfied with the current streaming quality, which can be expected to improve in the future. The satellite channels themselves are at present being used to capacity at some peak periods, creating some demand for a third online channel among intensive users. A decision on that would need to be weighed against any capacity savings and/or decisions on covering fewer events in general by restricting access to EbS as discussed in the section on the updated editorial line.

### 7.1.2. Who uses Europe by Satellite and how

**TV stations and news agencies appear to be the main users of EbS(+)** based on evidence collected from a user survey, user interviews and the monitoring data which is available. They **access the service to watch live broadcasts and download material to produce news items and features. The service is also used by those who do not work for the media.** The largest group of respondents who participated in our survey constituted journalists/media/AV professionals, most of whom worked for national TV in the EU (including online versions) and news agencies. They were mainly looking for live coverage of events, press conferences, and the midday briefings, and used EbS materials to produce news items. This was confirmed by interviews with users, including users on our expert panel. Most media survey respondents accessed EbS daily. Teletrax data shows that the main TV stations using the service are Euronews English, Sky TG24, TGCom24, RAI News 24 and Canal 24 Horas, which represent a pan-European news channel and four 24/7 news channels from Italy and Spain, which report on international news. However, our survey also attracted EbS users who did not work for the media. Here, academics and students stood out as the largest group of respondents (20% of the total sample), who used EbS to download historic/archive materials. Representatives of EU institutions, business/trade organisations, civil society organisations, print media, international organisations, and public administrations, as well as citizens also appear to be using the service, mainly to watch content live.

### 7.1.3. Updated editorial line

**The current offer of EbS(+) should be continued, albeit with some technological improvements to ease accessibility and present a wider variety of formats, as EbS(+) is currently not state-of-the-art and risks losing users to other services and news agencies.** These do not have the unique selling points of EbS of being a real-time primary-source one-stop-shop offering raw material that the user can tailor specifically for their own needs alongside more tailored items available free of charge and free of rights, but they offer attractive ancillary services, such as apps and video infographics Our study found that EbS(+) met users' needs in terms of sound and image quality, languages available, content selection and type, speed of publication and format. However, some technological improvements would make the material more accessible and in a wider variety of formats, and the offer could be expanded - we provide recommendations on how the current offer could be improved in the next section. We found no evidence that any materials currently offered should be discontinued.

**There is also scope for EbS(+) to further capitalise on its unique access to the EU institutions,** with "behind-the-scenes" coverage of handshakes, presenters' preparing themselves before a speech, etc., explainer videos, quickfire reactions from Commissioners emerging from important meetings, and introducing the type of pool system that other major international players have when access is restricted, in which the pool shares its coverage with those not on the list of those able to access the meeting or travel with the VIP.

**There is no case for discontinuing certain products**. There is, however, a case for not providing such comprehensive coverage as now in relation to each product by focusing on news value. This assumes that the purpose of EbS is to provide a service to the media, the original intention when the service was set up. However, that intention appears to have been lost sight of to some extent with a widespread perception within the Commission that this is an on-demand service that should provide coverage on broader political grounds of

transparency and availability of coverage to all citizens, however small the number and however low the current news value, i.e. the service would be a 'journal of record'. This is a legitimate objective but has never been explicitly set down in a **formal mission statement or clearly defined governance structure.** The direction to take is a policy decision with potentially significant financial implications that is beyond the scope of this study. We conclude, however, come what may, that this study **has proven the need for a news service for the media.** That need will be there for the foreseeable future irrespective of any broader role for the service. That service requires a governance structure to support decision-making on what constitutes news value.

### 7.1.4. Promotion of Europe by Satellite

**There are low-cost ways in which Europe by Satellite could increase its audience of multipliers, particularly the media and possibly the business, professional and academic community society.** Investment in reaching citizens direct with programming is not justified given the cost of production and distribution and marketing. Nor would be the even greater investment that would be needed to set up a parliamentary-type channel.

The research for this study showed that **even among the core audience of journalists accredited in Brussels, some were not aware of EbS** (though this was an exception) and some were not aware of some products. (This is not helped by the widely spontaneously remarked-upon user-unfriendliness of the AV portal.)

Four scenarios were considered for promotion: a low-cost scenario targeting the "Brussels bubble", including accredited journalists and interest groups who follow the EU on a day-to-day basis while not necessarily being physically located in Brussels; a low-to-moderate cost scenario reaching out beyond the bubble to those with an occasional interest in the EU or interested in a specific area of policy; a medium-to-high cost scenario of offering broadcasters programming targeting a broad audience, and a high-cost scenario of a parliamentary-type channel. These last two scenarios assumed that programmes would have to be in a large number, if not all, official languages. An important additional cost factor in these two cases would be marketing and distribution. Supply the product would not be enough. These two scenarios were rejected as prohibitively expensive in the Commission budgetary context.

The **potential benefits of the low, and low-to-moderate cost scenarios, outweigh the costs**, with the proviso that the case for reaching out to the non-bubble business, academic and civil society is uncertain on the basis of the evidence we collected. There is evidence only to justify a pilot scheme within the bubble.

Promotion would be based in both cases on an improved newsletter / additional newsletters, more attention to posting on EbS schedules and products on social media, with a dedicated X account for this, social media campaigns – paid in order to improve targeting, webinars and in the case of a wider campaign the leveraging of in-house multiplier channels (e.g. REPs and networks) with appropriate messaging.

Three other steps should go hand-in-hand with the promotion: **rebranding EbS** to remove the blurring with the Audiovisual service brand and the confusion as to whether it is a European Commission brand or an inter-institutional brand, **an app** in order to keep up with industry standards, and **measurement** of the results of the promotion.

## *7.2. Recommendations*

### 7.2.1. Improve monitoring on the use and clients of EbS(+).

As noted in our conclusions in section 7.1.1. and in section 2.9 on data limitations in this study, the AV service currently does not have access to data that would allow it to identify:

- Relevant data on satellite usage: "Satellite broadcasts" refers in the monitoring data to material taken up by TV stations only as regards the duration of videos taken up (the actual number of views are out of reach since these are only collected by the respective TV stations). This does not allow for comparisons between satellite data with online data, for example.

- What is taken up by TV stations: Teletrax data shows the amount of material taken up by TV stations, but not what materials.

- What items are viewed live, and how many items are viewed live: Currently, the system only monitors visits to the website, but not number of live views (how many visitors pressed "play", how long they viewed the item for, whether they viewed the whole item, and what type of item).

- Who downloads materials: Data on downloads shows what is downloaded, but not by whom or from where geographically.

- Reach of materials taken up by news agencies and who takes up these materials from them.

We therefore recommend that the AV service takes steps to **improve the monitoring process** as follows:

- **Consistent tagging** of materials on the AV portal: While we note that relevant fields exist already, they are not filled in systematically for all materials, such as item type and location. People in images should also be tagged more extensively than is currently the case. Moreover, institutions other than the European Commission, European Parliament and the Council should also be tagged individually and consistently.

- Explore the use of **blockchain** to trace the use of EbS(+) material via news agencies and understand what use clients are making of the material. This approach is taken by the AFP.

- Conducting a **research exercise on news agency material take-up** (including a survey / interviews with news agencies, and data analysis on EbS(+) material available.

- Including a **"profile section" in all user surveys of the AV portal** that asks respondents about their **country of residence**, **age**, and in **which role** they use Europe by Satellite, e.g.:
  - Journalist / Media / AV professional
  - Business / Trade
  - Civil society / non-governmental organisation
  - Public administration (national / regional / local)
  - International organisation
  - Working for an EU institution / body / agency
  - Academic / student
  - Other (please specify)

- **Regular user dialogue**, as suggested in Box 1 on the Editorial Board proposal.

- **Regular surveys of users,** at least annually, and always whenever a new major functionality/service is added, citing specific events rather than general questions – always including a "profile" section.

As part of this process, the **list of TV stations monitored through Teletrax data** should be reviewed by the Editorial Board to determine if it is still up to date and monitors TV stations of most relevance and interest to the Commission, e.g. withdrawal of the UK from the EU may justify some changes They should also review the monitoring packages available in the light of the monitoring needs identified in this study.

### 7.2.2. Implement technological improvements to the current offer.

While we concluded that all materials currently offered on EbS are useful to clients, some **technological improvements** could be implemented to enhance it further. We structured these by short, medium and long-term changes that the Audiovisual Service may consider:

| Short-term | **Reintroduce the audio-only format for live broadcasts.** There was consensus in feedback received from media users that this functionality was highly desired, as it allowed users to "listen into" live broadcasts on the move, without having to download video data at the same time. |
|---|---|
| | Devise a system / functionality that alerts users on new items. This could take the form of email alerts, or ideally a **mobile app**, which should feature an agenda that is updated in real time and could be tailored to users' preferences, whether media users or non-media users. We know from our benchmarking exercise that this approach is currently taken by others. In addition to a schedule updated in real time, this schedule should run out further than at present. |
| | Users should be able to receive alerts of news or events in real time. |
| | However, providing a calendar that is updated in real time and that runs out further than at present should also be implemented for the EbS website. |
| | A mobile app could also include other functionalities that would improve the existing offer, such as: |
| | • Searchable live transcripts. |
| | • A format suitable for social media: For example, the AFP introduced "Social Stories", video stories in 9:16 for use on social media, also in "raw format" which excludes the integrated text, allowing clients to incorporate their own narrative and brand identity. |
| | • Quotes usable on social media. |
| | However, these functionalities should also be offered independently from the development of a mobile app. |
| | **Provide automatically generated subtitles in all EU languages, with the option to turn them off.** This was considered highly desirable by media users in this study, as they found that interpretation did not always cover all speakers and/or questions from the audience (e.g. Commissioners' speeches and Q&A sessions that take place outside of Brussels). However, media users emphasised the importance of being able to turn subtitles off and provide subtitles in their TV stations' own subtitling formats. |
| | **Enable rewinding in livestreams for those who start to follow the stream late**, rather than have them wait for the recorded version. |
| | **Revamp the newsletter**. In the first instance, the mailing lists could be cleaned by sending out a mailing on whether people want to continue to receive it and telling them (after two reminders) that they will be taken off the list if they do not reply. Other specific improvements that may be considered include: |

| | |
|---|---|
| | • The AV service should consider introducing two types of newsletters – one covering the President, and one covering other items, as our research has shown that the topics in which the media are interested are wide. |
| | • Links should be provided that go to the actual item rather than just the schedule. More news items should be included (currently the tendency seems to be four upcoming items and one headline news item). |
| | • Images should be included to draw the user in. |
| | • Non-video, non-news items should be highlighted, e.g. new clips. |
| | • Metrics should be collected on which items are clicked on / viewed, to be able to measure interest in different items and know whether any promotional measures have led to a spike in subscriptions. |
| | • Measures should be taken for the newsletter(s) not to be treated as spam. |
| | • A survey should be considered to ask subscribers about their preferences on information provided in the newsletter(s). |
| | While the service's freedom of action on this is constrained by the Commission's rules, there are some changes that could be made now and some that could be kept in mind for the future should the rules change. |
| **Medium-term** | **Modernise the visual language of EbS(+)**, including more clips/cutaways on stories, more details, as well as better lighting of photos, and more graphs and illustrations. |
| | Explore introducing services currently provided by news agencies, such as **live chats with production teams and schedules updated in real time.** |
| | **Integrate the European Commission, European Parliament, and Council on EbS better**. We found that users accessed the different web pages of the EU institutions to find information that was not available on EbS. Having links on EbS to relevant videos featured elsewhere could thus be an asset. Adding the logos of the three EU institutions on EbS might also help alleviate confusion about this being an inter-institutional service. However, if this is not the objective, then the branding as a European Commission service could be reinforced. |
| **Long-term** | Once decisions have been taken on the mission of EbS, and in the light of decisions that might have on satellite capacity, explore in detail **the nature and extent of demand for an online channel** and the types of events it should cover. |
| | Explore in detail, potentially in any future evaluation, but no later than 2027, **the future of satellite technology use by news media** and the alternatives in the light of evolving technologies. |

### 7.2.3. Define an EbS mission statement.

We recommend that DG COMM **define a clear mission for EbS**, which would clearly outline the **scope of its work**. The first part of the current mission of EbS on the website reads:

*"EbS, the European Union's inter-institutional TV information service, was launched in 1995 and provides EU related audiovisual material via satellite to media professionals. The programming consists of a mix of live events, news items, stock shots on EU policies and issues."*

A **formal mission statement** should be drawn up and endorsed by the Director-General of DG COMM and the President of the Commission. The mission should then be regarded then as a **permanent decision** as it would

not be possible to move between one and the other option between mandates, particularly if the institutional option of comprehensive coverage is chosen, where the service becomes a 'journal of record' irrespective of the likelihood that there will be a large uptake of a given item, but because citizens have a right to be fully informed. That would then need to be irreversible. If that option is chosen, the mission should incorporate a specific role for EbS. In both cases, there should be a service targeting "media professionals" (across the EU) dedicated to meeting their needs for live coverage of news about the EU, supplemented with contextualised news items, and a focus on news of general interest, and based on an editorial judgement of their needs.

### 7.2.4. Establish an Editorial Board to make editorial decisions.

It is our recommendation that emphasis in decisions on continuing, expanding or discontinuing material be placed on:

- **news value** (not by item type)**,**
- whether the **material is not covered or available elsewhere**,
- whether the AV service has **unique access** to the material.

All these decisions should be taken by an experienced **news editor.**

Our **proposal for an editorial board** is presented in Box 1 and has been **approved by our expert panel** as being **transparent** and a **media industry standard** to organise editorial decisions.

*Box 1: Proposal for EbS(+) editorial board*

We propose the following structure:

- Editorial Board
- Editorial Team (Editor-in-Chief + a two-person team)

*Editorial Board:*

The **Editorial Board** should meet **quarterly** at the level of Director (European Commission) and equivalent at the European Parliament and the Council. The **Editor-in-Chief** - Europe by Satellite should sit on that Board as of right. Their counterparts from *all* the other institutions should be invited to participate as relevant.

They should review the decisions taken over the previous quarter, in particular any that were controversial, and draw on data to **measure the nature and extent of the demand**:

- What the latest monitoring data shows and what can be learned from it.
- What the editorial team wished they could/though they should have covered that quarter.
- Whether the right choices were made.
- Any decisions where the news editor found it particularly difficult to decide or conceded to political pressure despite their judgement, what to cover and/or that were controversial.
- Updates to the list of core items which EbS must cover (see below).

**Three key users** should be invited to attend relevant parts of each meeting (a different trio each time, representing a range of new organisation types) and consulted on the relative importance on different types of content from their perspective.

*Editorial team:*

The **editorial team** should meet weekly and have a good knowledge of what of all the activities has news value for users. It should be headed by an Editor-in-Chief assisted by two journalists, who bring **specialisms** in video and/or data journalism. The editorial team should be nationality- and gender-diverse.

There is currently a role of Editor-in-Chief of EbS, however, it is combined with the role of Head of Sector. **These roles should be separated out.**

Ideally, the Editor-in-Chief should have been a journalist in Brussels (minimum 10 years' experience) and be at the level of Adviser to the Director-General, and at a minimum Head of Sector. The Editor-in-Chief must be **embedded** in DG COMM with clearly defined powers of decision.

The editorial team **decide what has news value** – looked at from the perspective of **all the institutions** – and makes it onto the schedule. To aid this process, the Editor-in-Chief should have an **open channel of communication to EBU and ENEX news editors** about stories considered important by their members each morning.

The editorial team should have a **set of criteria** to guide them to provide a **hierarchy of potential importance** and that they can use in justifying decisions, e.g.:

- Is the event/topic of interest in only one non-EU country?
- Is the event/topic of interest in only one EU country?
- Is the event of interest/topic in the wider region (e.g. a region such as the Maghreb or southern Africa)?
- Is the event/topic of interest across a wider EU region (e.g. the Baltics)?
- Is the event/topic of interest across the EU
- Is the event/topic of global interest?

This should be coupled with an assessment of whether the material can be **captured for archive purposes some other way** and whether the advantages in terms of cost savings outweigh the disadvantages, e.g.

- A local film crew will be present (but will focus on the local personalities not the Commissioner).
- The coverage of a local TV station can be obtained from them (but there will be a loss of immediacy / they may charge / it may contain a local 'spin' / they may not charge but their may be rights restrictions on use).
- The event was streamed, and the recording can be obtained (but the quality may be poor / the focus on the areas of interest to the Commission may not get the coverage that would be desirable).
- The material can be recovered from the EBU or some other source, e.g. the UN, (but there will be a loss of immediacy).

As editors, the editorial team will have to exercise judgements. When the non-EU country is the United States, that is obviously different from San Marino. A loss of immediacy is more important in some cases than others. However, all editorial decisions should be based on robust monitoring data about demand and users (see below).

The Editor-in-Chief's word is final, though obviously that final word may only come after discussion with those who feel that bad news judgment is being exercised and that the news item they would like to see covered has been undervalued).

Pending the appointment of an Editor-in-Chief with the powers described above and in the absence of an Editorial Board, the AV service should continue to base their decision-making about the **news value of materials** on the above **set of criteria** to provide a hierarchy of potential importance and archiving decisions, and a framework for resisting pressure to cover items not regarded as having news value.

### 7.2.5. Define EbS(+) core work and introduce a "credit" system for additional requests.

The scope of the AV service's **EbS(+) core work should be defined for internal purposes**. The Editorial Board should agree in consultation with the other institutions what EbS(+) will always cover, e.g. Council and Council Press conferences, European Parliament plenaries, Midday briefings, all press conferences held in the press room of the Berlaymont, ECB Monthly press conferences etc. The list should be drawn up by the Editorial Board and reviewed regularly. The AV Service should have discretion over the remainder.

In order to ensure that its assessment of the news value of other items is respected, we recommend that if and when the Commission's internal cost recovery systems allow, coverage of other items be at the expense of the policy area involved (i.e. the DG would pay even if the request came from the Cabinet). In the meantime, we recommend that introducing a **"credit" system** be explored, where each Cabinet receives a limited amount of "vouchers" to request coverage of discretionary items, with a pooled contingency reserve for unforeseen circumstances. The number of vouchers should be based on the **number of past requests** but be **reduced by 10% a year for the first three years** to reach what is probably a more **realistic level of coverage of items with genuine news value.**

### 7.2.6. Recommendations on promotion

**We recommend that EbS and/or the Audiovisual Service be rebranded.** The name Europe by Satellite does not do justice to the service in the Internet era. It is not clear when the EbS brand is to be used and when the AV service brand is to be used, or what the distinction is intended to be between the two. It is also not clear to the users we met whether this is a European Commission service offering coverage from other institutions as a service to those institutions or whether it is an interinstitutional service. Clarity on that will drive what the new brand will be.

**We recommend making the resources available to promote the service better to those in the "Brussels bubble"**, both media and interest groups, as we have established that there are interest groups wanting real-time, primary information. However, the media should be the priority as it is clear that the service and its products are not as well known in the Brussels press corps as it could be. The resources made available should include resources for measuring the success of different promotional activities.

Greater visibility and therefore more usage of EbS material could be achieved at relatively low cost through a change of approach to the way EbS is promoted on social media, paid promotion on social media, promotion of the app or other new services, an improved newsletter, and webinars for users. While paid promotion on social media is the optimum, it is not a sine qua non if setting it up, e.g. through a new contract with a contractor, would delay instituting the new approach to promotion.

**Based on the results of this low-cost promotional activity, promotion should be extended to those with a more occasional interest in EU affairs**, primarily non-specialist journalists in the Member States. The interest groups should be included if there is conclusive evidence from the first stage that business and professionals, including civil society, academics and students are potentially significant users. The second stage would use similar tools, but add LinkedIn as a social media channel for the professional community rather than just using X, increase the frequency of the webinars for new users, and leverage in-house multiplier channels who are in contact with the media and professional groups in the Member States, e.g. the REPs and a wide range of Commission networks.

# 8. ANNEXES

Six annexes are provided separately and structured as follows:

***8.1. Annex I: Research Questions Matrix***
***8.2. Annex II: Quantitative analysis of monitoring data***
***8.3. Annex III: EbS user survey – results***
***8.4. Annex IV: Key findings from interviews***
***8.5. Annex V: Expert panel review of EbS materials***
***8.6. Annex VI: Market research***

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