

EBU

OPERATING EUROVISION AND EURORADIO

RAI: CHARTER RENEWAL

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2. SUSTAINABLE RAI: FUNDING/REMIT/FINDABILITY



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1. MARKET DEVELOPMENTS



EUROPE: TOTAL COMPETITION FROM GLOBAL GIANTS



- › **Global** resources
- › **Consolidation** wave (AT&T/Discovery)
- › **Vertically integrated**: acquire events, premium rights
- › Acting **locally**: local production companies, writers
- › **Controlling networks** and gateways
- › Light or no **regulation** (content, acquisitions etc)

PSM'S CROWDED COMPETITIVE ENVIRONMENT

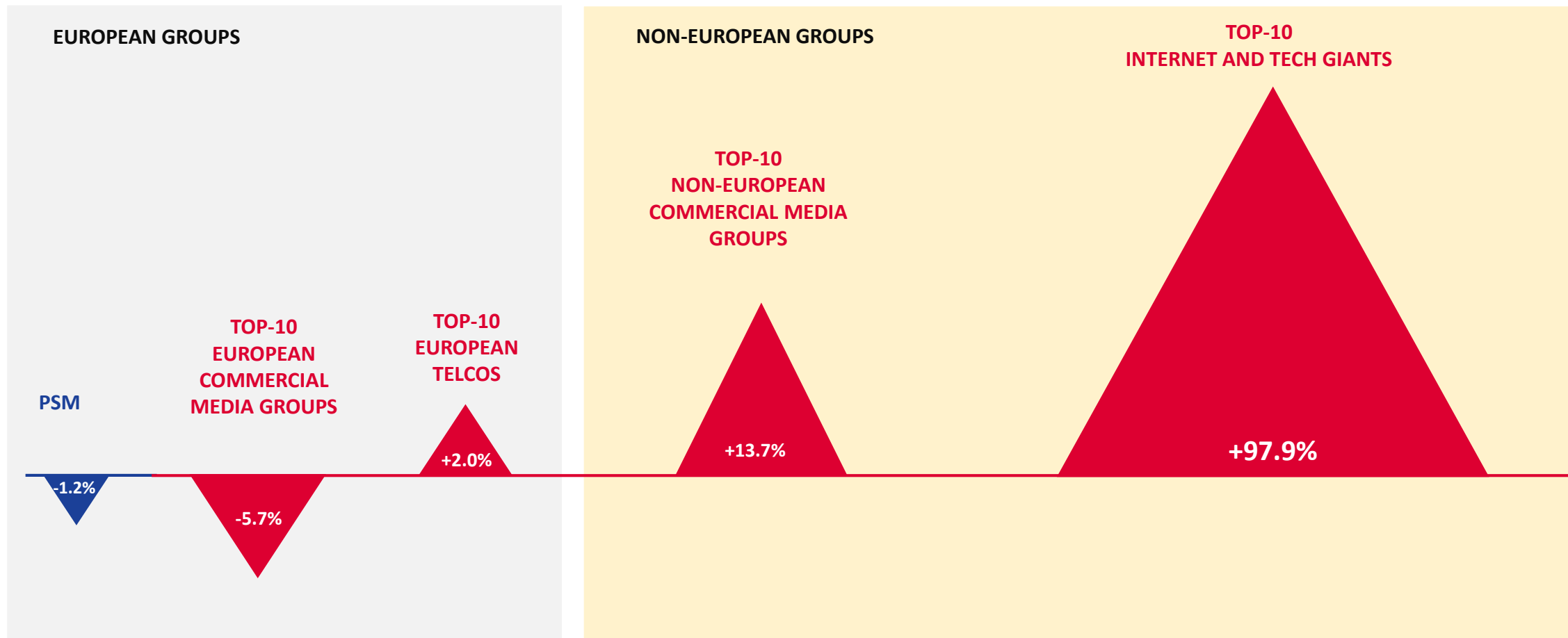
REVENUES OF SELECTED AUDIOVISUAL PLAYERS (2020)



Sources: EBU based on Members' data and companies' financial statements.

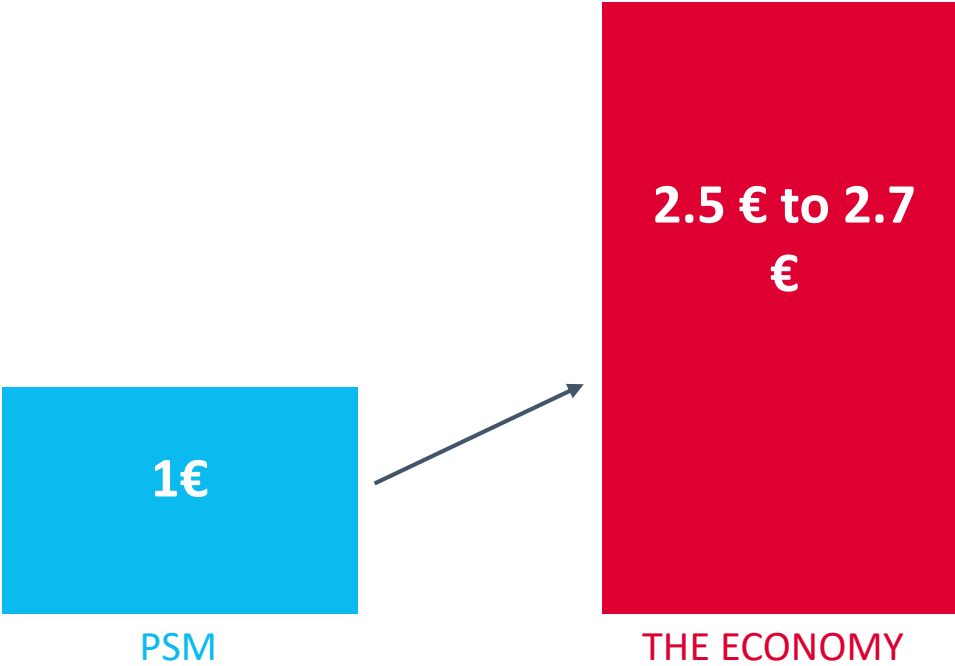
NON-EUROPEAN GROUPS GROW FASTER THAN EUROPEANS ONES

REVENUE GROWTH OF SELECTED AUDIOVISUAL PLAYERS
(%, 2016–2020)



Sources: EBU based on Members' data and companies' financial statements.

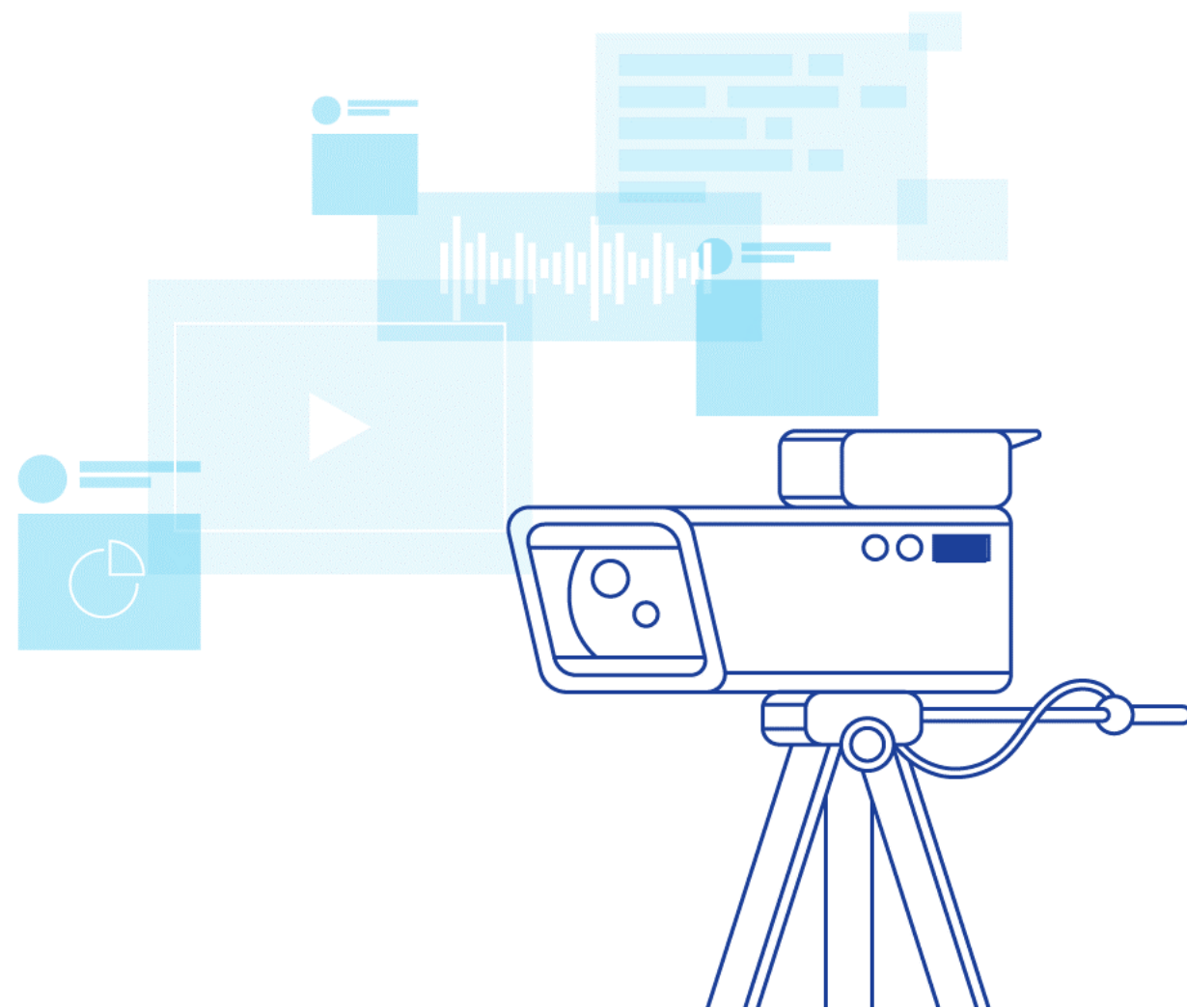
Each euro invested in funding PSM
generates
from 2.5 to 2.7 euros
in the economy



Source: EBU based on EBU based on studies from VRT (Belgium Flemish), RTBF (Belgium French), TG4 (Ireland), RAI (Italy), RSI (SRG SSR, Switzerland).
EBU Media Intelligence Service – [Funding of Public Service Media 2020](#).

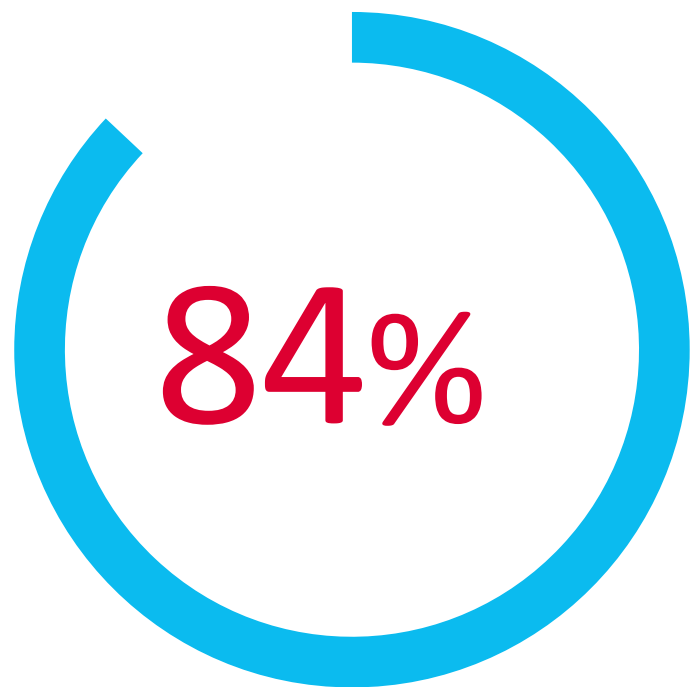
PSM support the content industry, investing more than

EUR 18
billion a year
in content

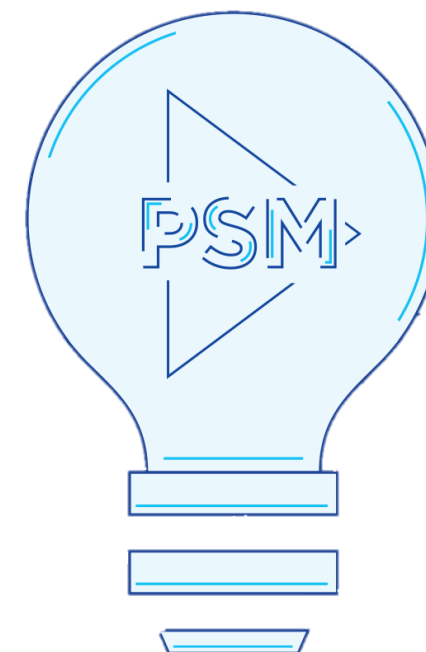


Note: based on 55 PSM organizations in 41 markets.
Source: EBU based on EBU PSM Member's 2020 data. EBU Media Intelligence Service – [Datasets 2021](#).

PSM are committed to creators,
investing more than



of total content
spend
in **original** content



Note: based on 55 PSM organizations in 41 markets.
Source: EBU based on EBU PSM Member's 2020 data. EBU Media Intelligence Service – [Datasets 2021](#).

PSM showcase
European content, with

90%

of their
TV output
of domestic or
European origin



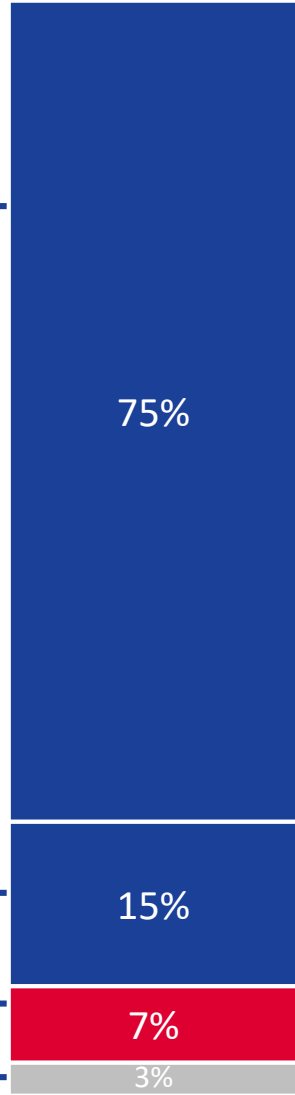
% of output hours

Domestic

Europe
(not including own
market)

USA

Other



Note: based on 38 PSM organizations in 36 markets.

Source: EBU based on EBU PSM Member's 2020 data. EBU Media Intelligence Service – [Datasets 2021](#).

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2. SUSTAINABLE RAI



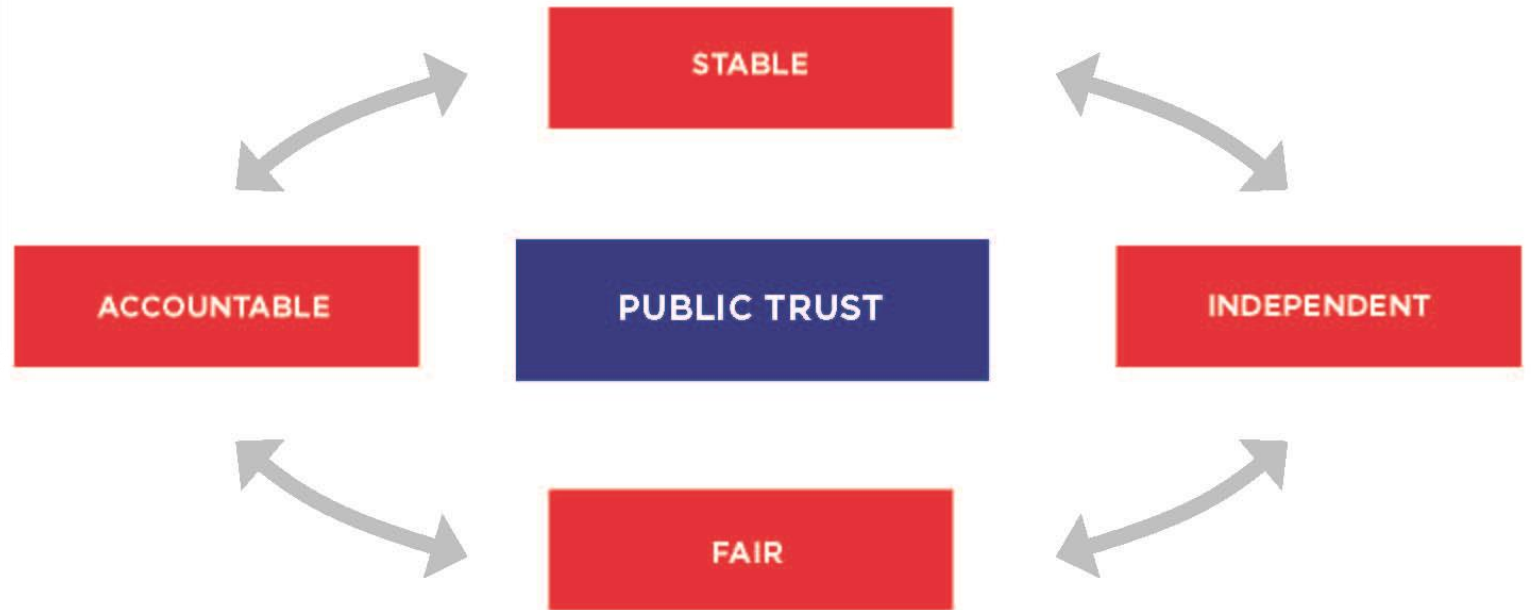
RAI FUNDING

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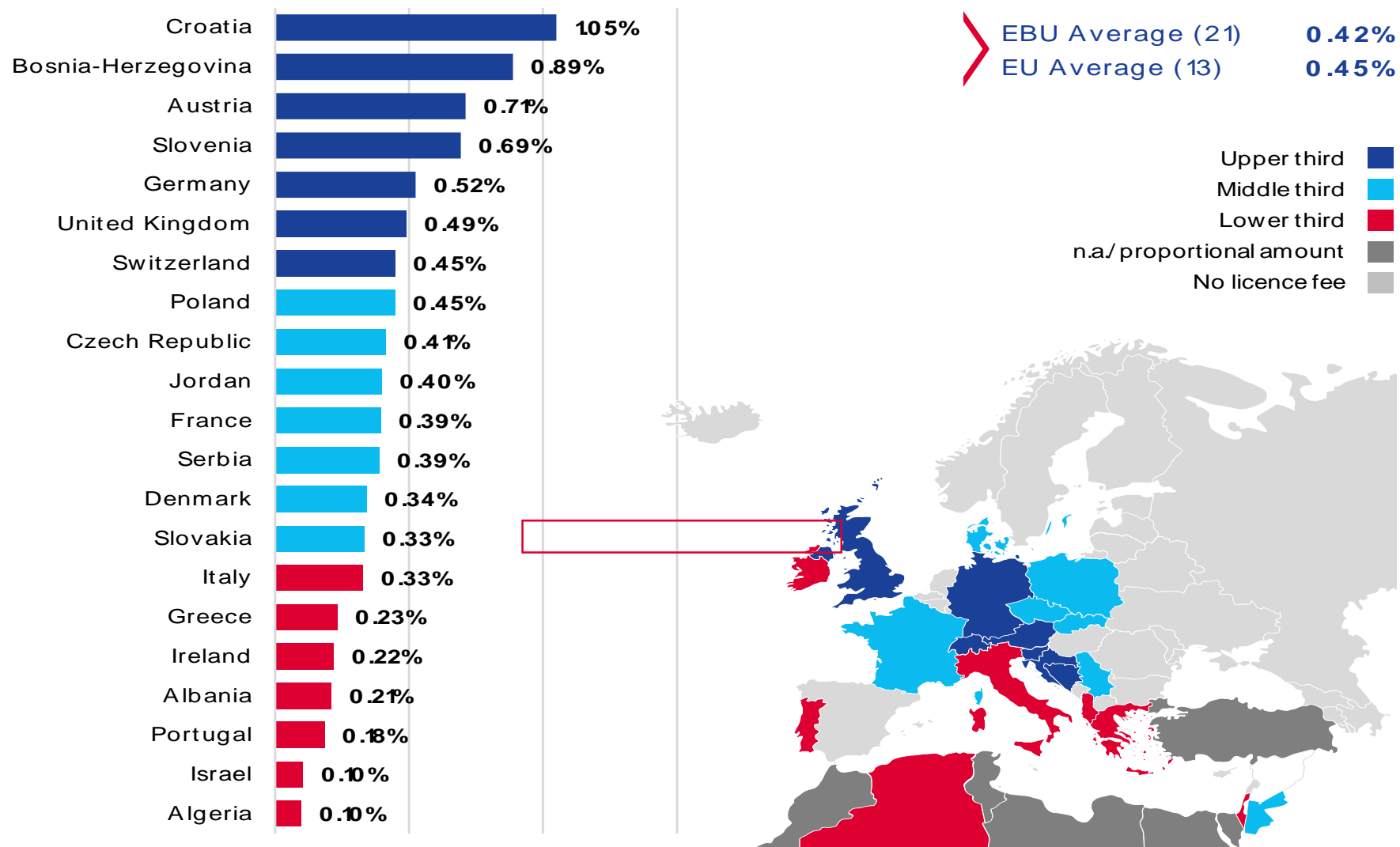
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LEGAL FOCUS PUBLIC FUNDING PRINCIPLES FOR PUBLIC SERVICE MEDIA

Dr Richard Burnley
EBU Legal Director



ITALIAN FEE ONLY 0.33% OF GDP PER CAPITA, BELOW EUROPEAN STANDARDS, 2020

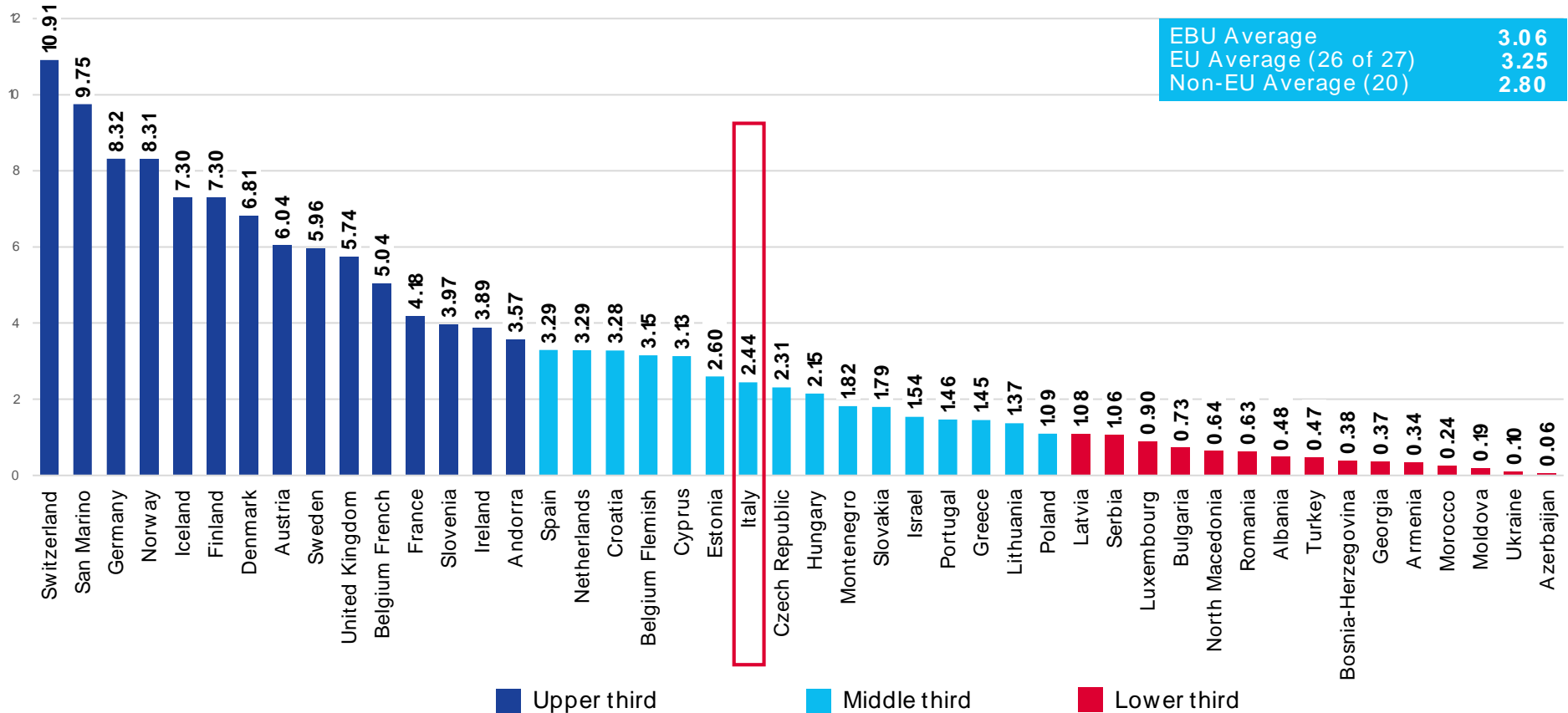


Note: does not include countries where fee is a proportional amount - Turkey, Egypt, Morocco and Tunisia.

Sources: EBU based on Members' data, official websites and collection agencies. GDP per capita from IMF economic outlook database.

TAKING ONLY PUBLIC INCOME INTO ACCOUNT: ITALIAN CITIZENS CONTRIBUTE EUR 2.44 PER MONTH TO FUND RAI - UNDER EU AVERAGE

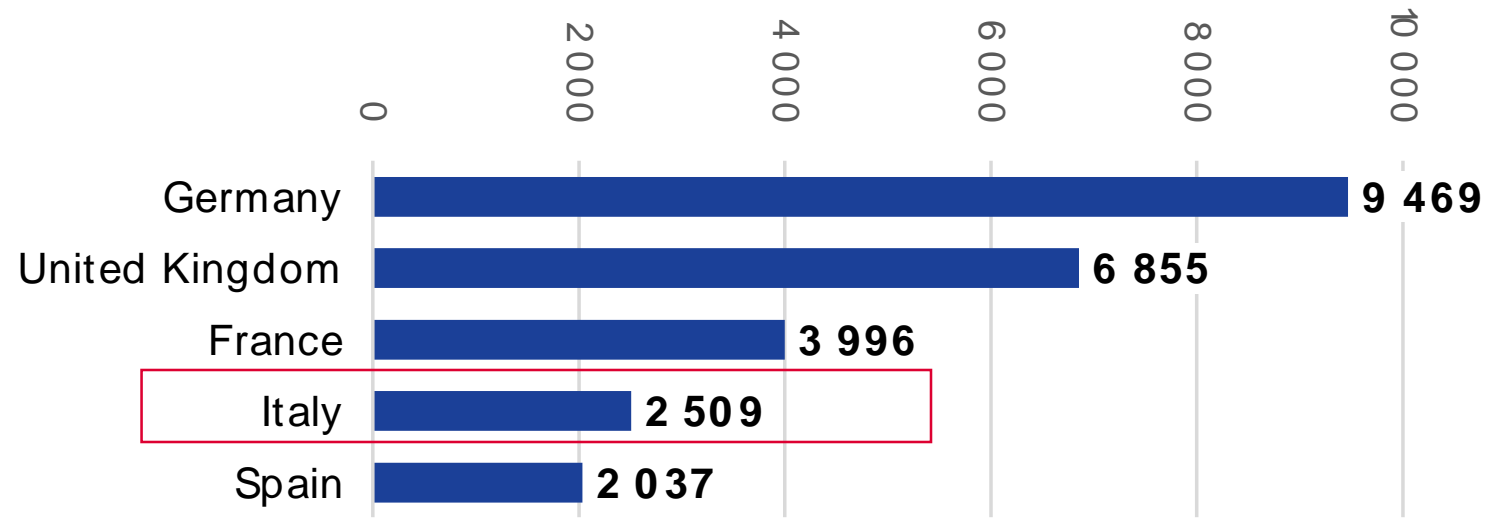
PSM MONTHLY CONTRIBUTION PER CITIZEN – COUNTRY LEVEL
(EUR, 2020)



Note: PSM contribution per citizen calculated by dividing PSM public income by population. based on 63 organizations in 46 markets.
The Vatican has not been included owing to its small population and the consequent distortion in the calculation.
Source: EBU based on Members' data.

PSM FUNDING IN ITALY IS FAR BELOW GERMANY, UK AND FRANCE

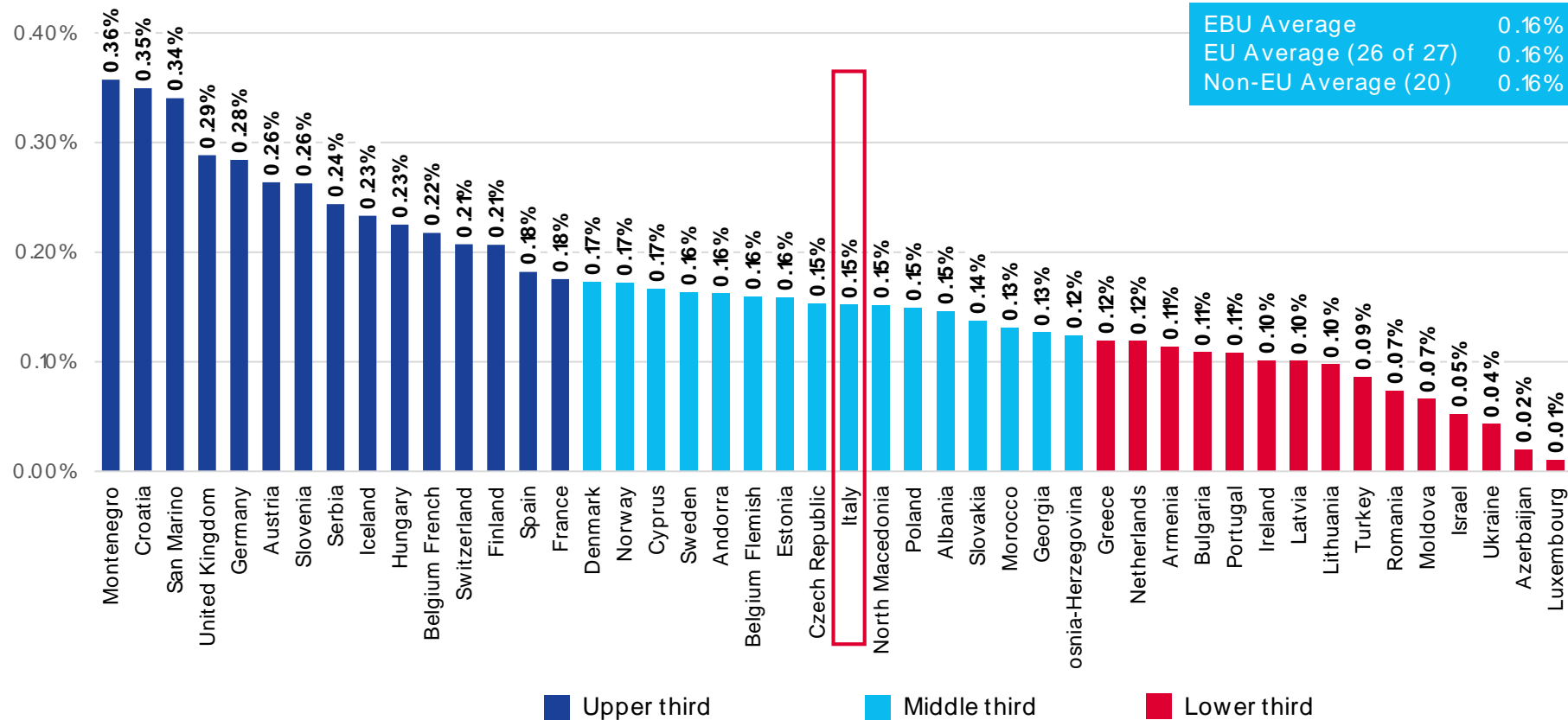
PSM OPERATING REVENUES – COUNTRY LEVEL
(EUR MILLION, 2020)



Source: EBU based on Members' data.

WEIGHTED WITH GDP, ITALIAN PSM FUNDING RANKS ONLY 24th IN EUROPE

PSM OPERATING REVENUES AS A % OF GDP
(%, 2020)



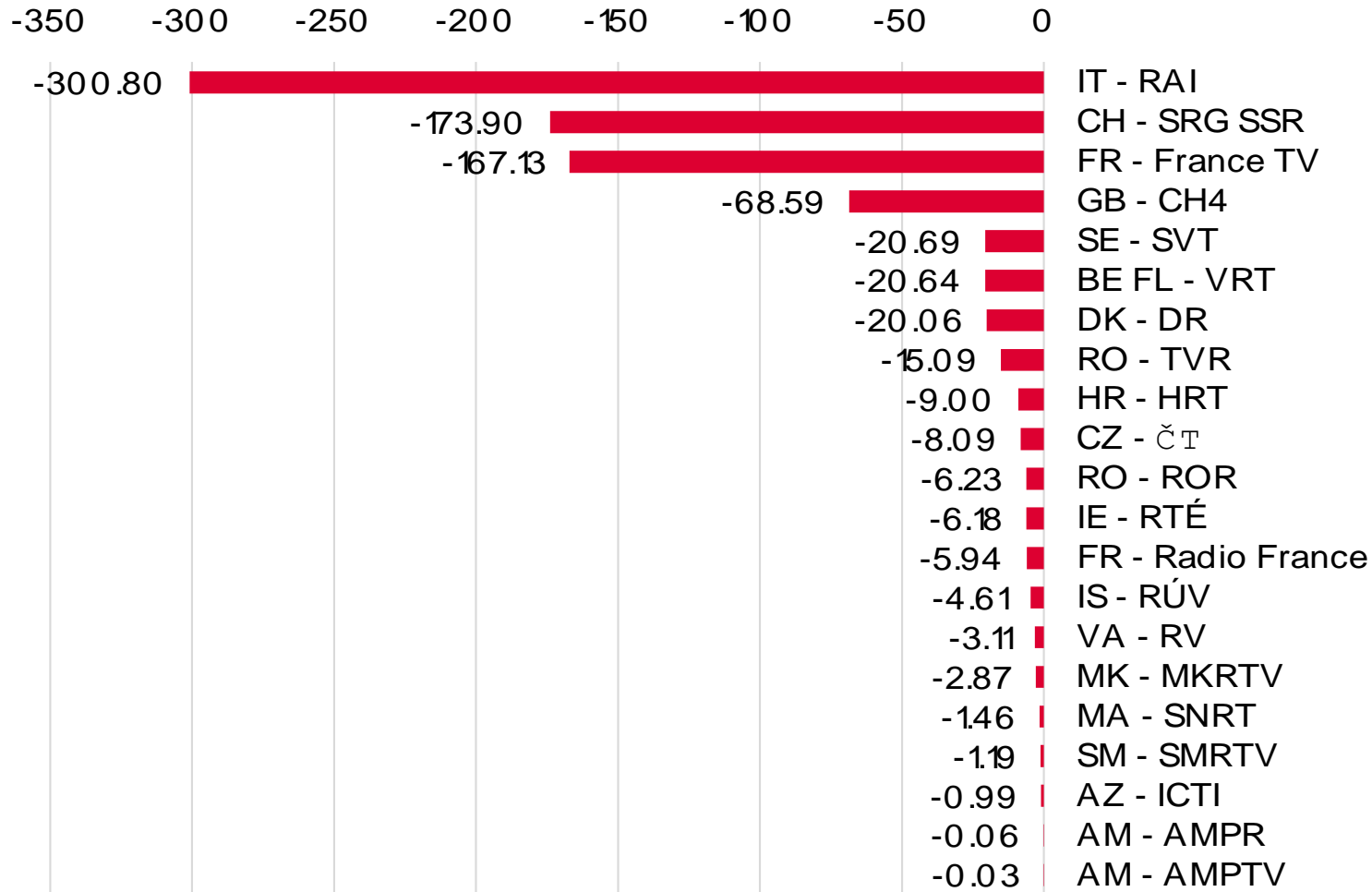
EBU Average 0.16%
EU Average (26 of 27) 0.16%
Non-EU Average (20) 0.16%

With 0.15% of Italian GDP, RAI funding is below EU average

Note: based on 63 organizations in 46 markets.
The Vatican has not been included owing to the lack of GDP data.
Source: EBU based on Members' data and IMF.

RAI SUFFERED FROM THE BIGGEST FUNDING CUT IN EUROPE IN ABSOLUTE TERMS BETWEEN 2016 AND 2020

PSM FUNDING CUTS – ORGANIZATIONAL LEVEL
(EUR MILLION, 2016-2020)



Note: based on 64 organizations in 47 markets.
Source: EBU based on Members' data.

PSM ADVERTISING REVENUE



- › Approx **80%** EBU Members have advertising revenue
- › Most EBU Members in EU have **more than 6mins/hr** (majority 12mins/hr)
- › As of 1st of Jan 2023: **6%** in each slot 6 a.m. – 6 p.m. and 6 p.m. – 00.00 a.m. = **one of lowest in Europe**
- › Evidence is that reducing/banning PSM advertising **passes revenues to online globals** (no benefit to national market in France/Spain)

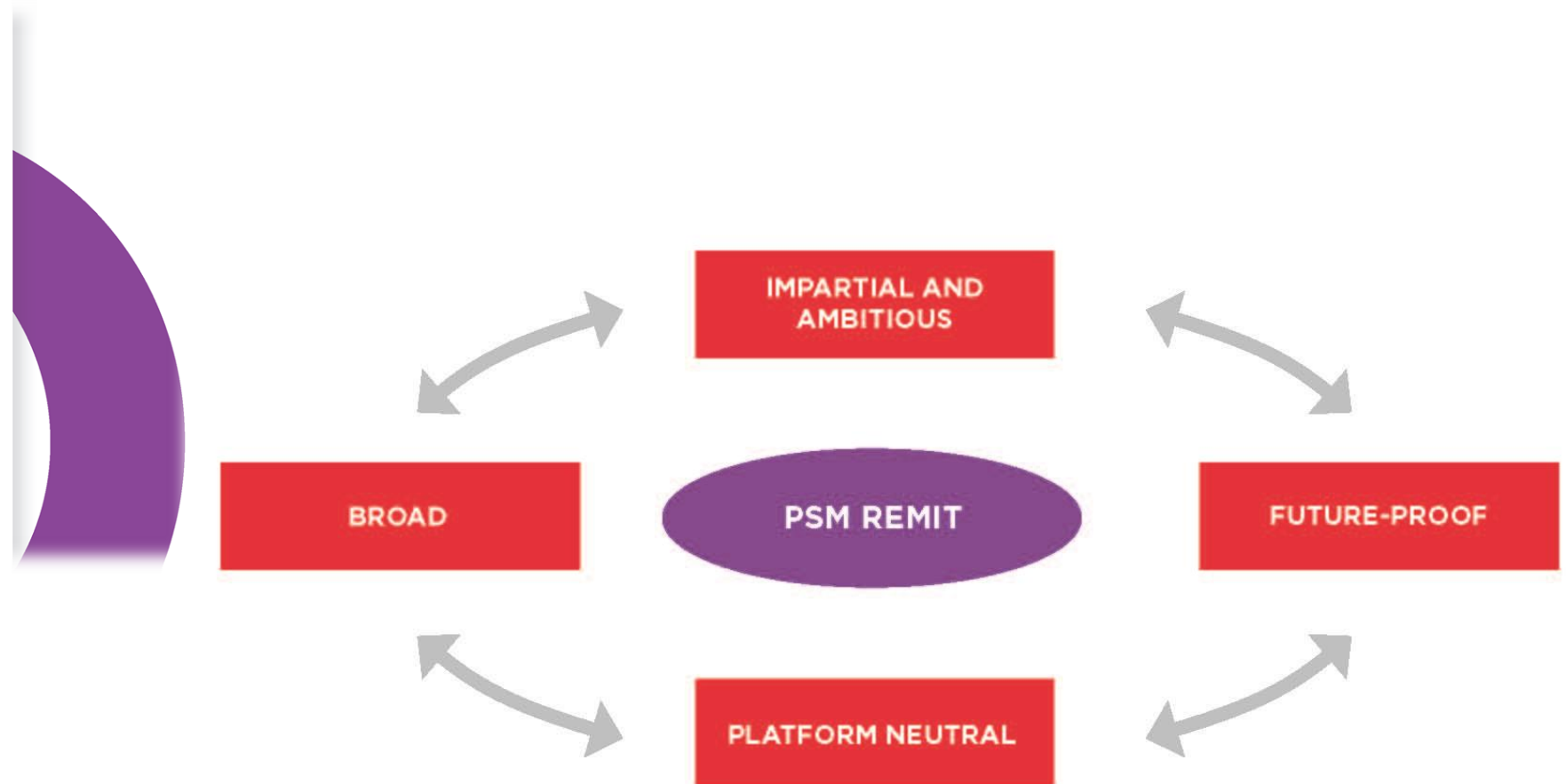
RAI REMIT

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LEGAL FOCUS PSM REMIT PRINCIPLES FOR THE DIGITAL MEDIA AGE

Dr Richard Burnley
Legal Director



RAI PROMINENCE



- › Rai must be found on all platforms
- › **AVMS**: Member States may ensure general interest content is findable online
- › Only **Germany and France** implemented rules for devices/smart TV