



EBU

OPERATING EUROVISION AND EURORADIO

DIGITAL TRANSFORMATION INITIATIVE

DIGITAL READINESS REVIEW
TELERADIO-MOLDOVA



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Digital Readiness Review

Teleradio-Moldova

Context & Aims

The Digital Transformation Initiative supports EBU Members build more efficient, effective and modern organizations to better deliver strategic business objectives in the digital world. Our core focus is on the transition from broadcast to digital, which we understand to be inevitable and irreversible. No matter what the current state of a local market or how well a broadcaster may be doing on linear today, this alone will not be sustainable for PSM in the long-term. As such, PSM must take steps today to be ready for this future. With this foundation, we discuss many aspects of TRM in the following report, but the strategic intent is firmly on helping TRM adapt to the fast-moving digital media landscape.

The Digital Readiness Review is a new service and is still in development. The aim of the service is to help Members accelerate their corporate transformation. It is a targeted and agile approach that offers clear, quick and actionable insights. We consider the operational, organizational, technical and cultural status of the organization. Our objective is to offer a critical overview of the media organization, highlight best practices, identify opportunities for improvement, and recommend actions for growth. We endeavour to be pragmatic, sensitive and realistic in our analysis and reporting, taking into account the operational reality faced by Members whilst also working for maximum impact. However, it is important to note that these recommendations are just our views, formulated in response to the review visit and documentation.

The wide range of subjects discussed during the review visit in combination with the detail and complexity of each constitutes a huge body of work. In order to deliver this report quickly and in an easily accessible form, we are necessarily brief in our discussions. We assume a high level of understanding from the reader, and the wider review process carries the expectation of continuing discussion and support.

We thank TRM and all the staff who participated in the review process.

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EXECUTIVE SUMMARY

TRM is an organization facing many challenges, operating in a complex and problematic landscape with some serious internal barriers to change. However, we found an organization that has strong leadership with a determination to drive the changes needed to safeguard TRM in the short-term and ensure the organization has a long and positive future. Starting the process is often the hardest part, and TRM has begun the important dialogue needed to find solutions, both internally and externally.

Whilst the challenges are very real, TRM has positive areas on which to build. The corporate strategy covering 2018-2022 marked a new direction for the company and served as a statement of intent. Building on this foundation can bring positive results.

The most acute issues for TRM were repeatedly identified as financial and skills, but wider problems concerning the organization of the company, the divisions between different departments, and systems of reporting and oversight will need to be addressed if TRM is to find long-term solutions. TRM must work to become a much more aligned organization.

Recommendations

We recommend that TRM undertake a short renewal of the corporate strategy. The current strategy is strong and sets an important foundation for the company. However, we feel TRM should further develop the vision statement to communicate to all stakeholders what the company is, where it is going, and the role it wants to play in Moldovan society.

In addition, certain key milestones in the current strategy are necessary. As such, a review and renewal of targets for the 2020-2024 period would increase the likelihood of success, help motivate the workforce, and bring the leadership team into closer alignment. The emphasis should be on defining clear and achievable targets that the whole company could work towards. This renewal should involve the whole leadership team and be collectively and collaboratively defined to build a new dynamic at the top of the organization. **We propose the EBU facilitate a strategy workshop with the senior leadership team to accelerate this process.**

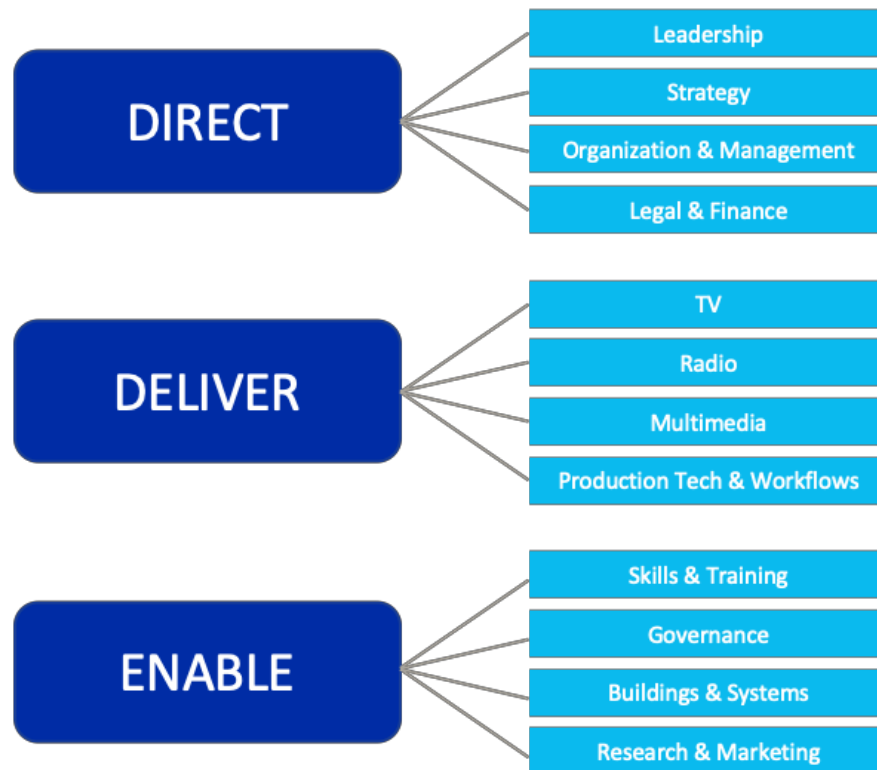
If TRM is to transform, there will need to be much closer alignment between the content divisions. TRM should work to bring the Radio, TV and Multimedia departments closer together to improve the content offer, create operational efficiency savings, and increase internal learning.

TRM's support functions also need auditing to identify savings. The current structure of the organization and distribution of resources is outdated and in need of review. There are many opportunities for restructuring that will bring financial savings, opportunities for growth in priority areas, and even chances for new activities if headcount and budget distributions are reviewed.

TRM is a very vertical company today, which creates disproportionate pressures on certain positions and departments. To alleviate this and allow a better use of skills and resources – particularly at the senior leadership level - responsibility and oversight need to be increased across the organization in terms of spending, planning and reporting. In addition, the buildings estate is inefficient in operation and function. The problem is widely recognized throughout the organization, but for many understandable reasons action to address this has stalled. However, as time passes the issues become more acute and the implications more problematic. A proposal needs to be made to centralize and streamline where possible.

Structure of the report

This review covered many subjects, but for clarity we have split our findings into three sections. Each section has an overview of our observations and a short set of recommendations.



Note on findings

This report is a summary of the many conversations we had and a large number of documents we have reviewed. We have tried to keep the report as concise as possible to ensure it is accessible and clear, so much of the detail we refer to is found in the strategy and planning documents rather than being repeated here.

The recommendations propose a set of clear actions that TRM can start to act upon today. However, these are complex issues with many aspects that need considering. As such, the review team has many more suggestions in each area, explaining the details and reasoning. We fully expect to elaborate on these issues in close conversation with TRM in due course.

Finally, it is important to acknowledge that the review team is only able to comment on what we have seen and what we have heard. As such, we will only ever have a partial view of the organization. We cannot know all the details, and we cannot know all the possible implications or challenges behind our suggestions. However, our mission is to be very solutions-focused, so we make our recommendations in the true spirit of the EBU as colleagues and collaborators, with the wish to support TRM as productively as possible and with complete honesty.

TRM TODAY

Offer

TRM operates two TV channels: Moldova 1 – generalist channel, and Moldova 2, launched in 2016 and mainly broadcasting Moldova One's programs, as well as important local and international sporting and cultural events. The company broadcasts in Romanian and Russian languages. It has two bi-monthly programmes in the Gagauz language, one bi-monthly in Ukrainian, and one monthly programme in the Romani language.

TRM operates three radio stations. Radio Moldova Public Radio is the main station, carrying mostly news and cultural content. It is the only station with nationwide coverage on both AM and FM. Radio Moldova Tineret is a youth-oriented radio station launched in 2012 that broadcasts nationally but does not cover Chisinau. It is only available online to the core urban youth market. The third station is Radio Moldova Muzical, an online-only channel for cultural music offerings.

All radio and TV content are live-streamed on the trm.md portal. All programmes are also available on catch-up. TRM has a large number of Social Media accounts with varying levels of impact. The web portal was produced with the assistance of the EU-CoE Joint Project "Promoting Media Freedom and Pluralism in the Republic of Moldova".

Market

The Moldovan media market is complicated and highly politicized, and according to information submitted to the Coordinating Audio Visual Council (CCA, the Media Regulator), the most influential media assets are owned by oligarchs and politicians. Until recently, the privately-owned Prime TV has been the most dominant force in the Moldovan media sphere. However, Prime TV has of late lost its number one position in the popularity rating, being surpassed by RTR Moldova (1st place) and Moldova 1 Public Broadcaster (2nd place) according to the data of the MR MLD TV audience measurement in the Republic of Moldova (representative of the Nielson Company in Switzerland). Moldova 1 had 1.40 % in November 2019, i.e. 0.02 points more than Prime TV.

TRM serves a predominantly rural audience and is heavily slanted towards older section of society. This is a mix of reasons, but includes content scheduling that can be quite traditional, loyal legacy broadcast audiences, heaving legislations on content offer, a minimal youth offering, and distribution issues that mean the Youth Radio station cannot broadcast in Chisinau. Moldova 1 TV channel broadcasts in analogue format. Recent market gains are seen as being related to the fact that Prime TV and Canal 2 stopped broadcasting in analogue format.

According to the latest Public Opinion Barometer (POB) for December 2019, people have the highest trust in media sources from Moldova. The media from the EU ranks the second, followed at a small distance by media from Russia. The Report was published on 30 December 2019 by the Institute for Public Policy (IPP). 60% of respondents report trust in the Moldovan media and about 50% of the respondents' trust EU media. Russian media is also close to European media trust levels at 48%, and Romania has a little over 40%. The first information option is Moldova 1 (26%).

Romania, Russia and Ukraine are direct competitors due to the high-quality offer available and produced in languages that are spoken and understood in Moldova. The highly politicized nature of the media market

in Moldova is apparent in the fact that many local politicians have their own media companies as do local and Russian oligarchs. Additionally, the USA Embassy is engaged in the development of the media market in Moldova. USAID gives grants to channels seen as opposing Russian influence.

Structures & Staffing

TRM is governed by a Supervisory Council composed by 9 Members, appointed by the Broadcasting Council (the regulatory body) – (Art. 43), of which two Members are paid by TRM. Olga Bordeianu was appointed Director General in November 2019 for a seven-year mandate

TRM is organized into three main units: TV, Radio and the Director General's Office which controls all executive and support functions alongside the multimedia department. TRM currently has 730 staff. Almost half the staff work in the TV division. Radio has approximately 200 staff, but also is accountable for 120 staff who work in the national orchestra and choir, who are full-time TRM employees.

Staffing is a major issue, accounting for 54% of the total budget spending. The average age of the workforce is 59 years old, and TRM suffers major skills shortages in many critical and emerging areas. This is very limiting for TRM's ability to simply continue operating, yet alone innovate.

EBU activities

- Director General Olga Bordeianu is currently serving a Vice Chairperson on the TV Committee.
- TRM has not been involved with the News Exchange since 2016. However, TRM have just recruited a new position to work exclusively on the News Exchange, reporting directly to the Head of Communication and International Relations Department, Dr. Natalia Beregoi. This is a significant step forward for TRM and the investment should bring clear value to the organization.
- TRM makes good use of the Music Exchange.
- TRM is eligible for support from the Partnership Programme.
- English proficiency levels act as a clear barrier to participation in EBU for many TRM employees. We have put a number of systems in place to help TRM connect with T&I, News Exchange and the Young Audiences Community. However, these currently rely on Dr. Beregoi to act as both facilitator and translator, and the workload should not be underestimated.

1: DIRECT

Observations

TRM operates in a very challenging landscape, so it is encouraging to see that Olga Bordeianu was appointed on a seven-year mandate in December 2019. This brings the opportunity for long-term planning and strategy that has not always been possible at TRM. Ms. Bordeianu has a determination to make the important changes needed for the organization to survive and, with the right resources and support, transform in the future.

However, the reality is that TRM operates in a very restrictive and problematic situation today. Financial issues present significant limitations on the options available to the leadership. Political pressures have the potential to be acute. Buildings and infrastructure are outdated, inefficient and deteriorating. The supervisory board has the potential to have wider impact, and the organizational structures amplify divisions between different parts of the company. These factors all have their own momentum which carry the organization down the path already travelled. As such, it will be very difficult to turn the organization in a new direction. Yet despite these challenges, the issues faced by TRM cannot be ignored simply because they are difficult. Thankfully, TRM is taking major steps to find answers and plan for the future.

We identify four elements that constitute the capacity to direct an organization. It is critical that TRM acts to bring these elements together, reducing the gap, building trust, and aligning agendas between the key stakeholders and decision makers in TRM.

Leadership

TRM has strong leadership and the DG clearly wants to make the company into a more modern, digital organization. However, the challenges are acute. Alongside the serious financial issues facing the company, the geo-political context of the country pressured between Russia and Europa creates tension that directly affects TRM as a Public Service Media organization. Leadership of the company therefore involves serious political and advocacy maneuvering.

The priorities of the leadership are clear and convincing: to grow the presence in Chisinau, target young audiences, increase the quality drama offer, more live sports, and to try offer a big entertainment show. For Radio, upgrading the studios is a big priority. The website TRM.MD is impressive considering its size, age and the amount of resources available, and the DG is clear that the intention is to increase online offer. The fear that this may 'canalize' current TV audiences has been expressed in other areas of the company. This is a common and understandable response for a traditional broadcast organization to have, but it is wrong. TRM is one company, and audience figures are not a zero-sum game to be fought over between different departments. A central challenge is to create alignment between Radio, TV and Multimedia.

The leadership currently operates in a somewhat isolated manner. The reasons for this appear to be part structural, part legacy, and part current dynamics. For TRM to become a more open and robust organization, it will be important for the leadership to build a broader coalition at the top. The leadership has identified the skills-gap as a major barrier for the organization's growth, alongside a sense of demotivation in the workforce. Major steps have been taken, and the new skills and training centre is an impressive initiative that is having real impact, and is attributable to the DG's office. These wins show the way forward.

The DG intends to run an audit on staff, structures and processes with the intention of identifying efficiencies. TRM clearly has some dysfunctional legacy processes that need to be addressed. We fully endorse the audit approach as an important first step. The result and the road map that comes from the audit will need careful business planning, as up-front spending will be needed for longer-term financial gains. The DG will need the support of the executive team and the governance board during this potentially difficult and disruptive process.

Strategy

TRM has a corporate strategy that was developed with the support of the EBU and covers the period 2018-2022. This is a strong document that sets clear targets for the company and covers all aspects of operations. From current reporting, the strategy has clearly been important in driving progress in many areas. We refer the reader to the strategy document and Informative Note documents provided to the review team for details.

The company vision is defined accordingly: 'The company is a national public non-profit broadcaster, offering audio-visual and multimedia products of various genres for different audiences'. Whilst both accurate and relevant, we feel this current vision statement could be re-thought to create a narrative and identity that distinguishes TRM in the marketplace and the unique role it plays as a public service media organization in Moldovan society. As it stands, the current formulation does not act as a firm message for staff and stakeholders to understand the direction and purpose of the organization. When enacting changes, it is important to have a vision of the future of the company that all stakeholders can understand and invest their time, energy and belief in.

TRM has an internal strategy department with a wealth of experience. The Head of the unit, Constantin Vulpe, has 49 years of service at TRM and a vital knowledge of the company. This unit could be leveraged better, specifically in putting systems of accountability in place for delivery of the strategic goals. Currently, there is no system of measurement and accountability in place for senior managers of department heads to measure their achievements and keep them responsible if they do not deliver the strategy targets.

The strategy is not currently expected to be reviewed. We suggest a different approach. Reviewing current progress, updating the goals, and setting clear targets for managers, units and teams will create a new impetus and momentum. The time to do this is now, building on the opportunity of the new DG's mandate. TRM has a solid foundation for the strategy, and as such an update can be a quick process with a high impact. The key will be reformulating a vision collectively with the top-team and ensuring there is responsibility for delivering concrete results assigned to everyone.

Corporate communications are challenging. Internal communications are reliant on systems that are not widely used, and there is no easy answer for ensuring corporate messaging reaches all staff. Perhaps approaches such as townhall meetings and informal coffee sessions with senior leadership could be a low-tech approach to connecting with staff.

Organization & Management

The management at TRM follow very traditional structures and processes. The company is very hierarchical, and operational and divisional silos are the reality, with divisions operating as almost entirely separate business units. There is little alignment, collaboration and shared resource between the divisions. This has obvious impact on costs and staffing. There are understandable legacy reasons for the distance

between divisions, not least the fact that TV and Radio are on separate sites. However, these challenges are by no means unique to TRM.

Current structures and distribution of resources are reflective of an organization with a very dominant broadcast mindset. The content divisions of TV and Radio take the majority of resource, and multimedia is very stretched in comparison and does not hold the same power of influence. Currently, TV in particular shows clear inefficiencies and misused resources. Spending and headcount are not distributed in a way that reflects the strategic priorities of the organization. Resource distribution needs reviewing with this question the deciding factor.

TRM has very different management approaches within the company. Some managers have clear plans, know their staff and team well, and know what they need to perform and improve. In other areas, we saw a lack of oversight a worrying lack of engagement in the big issues affecting the company, a lack of accountability, financial responsibility, and a general state of malaise.

We heard from all managers that staff training and the ability to hire staff with new skills is a big issue, and we fully acknowledge the difficulties TRM face in this area. However, we also heard a lot of blame for the current problems being put on a lack of staff motivation, and in some cases, this is actually being used as an excuse for wider issues that fall under the responsibility of senior managers. A manager's job is to motivate their staff, to lead by example, to set professional standards, and to inspire the staff. Financial restrictions are an issue, but managers could use many other levers to motivate staff.

A core issue currently impacting staff motivation is the fact that TRM is very hierarchical today. Power and decision making are highly concentrated at the top. If staff do not feel empowered, they will not be motivated. Managers should challenge their staff to do things differently, empower them to make decisions and set new directions, and create opportunities for staff to grow professionally. TRM needs to reduce the hierarchy, to distribute decision-making down and across the organization, and create opportunities for staff growth.

At TRM today, structural factors (hierarchical and siloed) in combination with a lack of reporting and targets, has created a problematic situation whereby certain roles within the organization hold significant power and influence, but appear largely unaccountable when things go wrong such as a budget overspend, falling standards, or staff mismanagement. This is a critical issue for TRM to address.

Legal & finance

As discussed, TRM faces serious financial challenges, the details of which do not need repeating here. Our main observation is that despite these challenges, there appears to be very little responsibility reporting or oversight of financial matters outside the Director General's office, and this is highly problematic.

TRM is an organization with not enough money, and every department, unit head or team leader can quickly identify their key spending priorities that are often critical for the short-term viability of their operations. The company is also acknowledged to be highly inefficient in certain areas. Yet paradoxically the same managers do not appear to be taking action to make savings. Financial responsibility is a key aspect of management but seems to be lacking in many areas of TRM.

Directors submit yearly budgets, but spending is not tracked or reported by them. We would expect directors to have a very detailed picture of exactly where the money is being spent in their departments, and equally to have a clear idea of how to spend it better. The financial situation is unlikely to improve significantly

anytime soon. If TRM is to grow, it needs to set systems in place in which directors have responsibility for making efficiency savings in their areas of responsibility.

Recommendations

1. Define the vision and objective of TRM

We suggest a review of the core vision: a concise, convincing narrative that defines the identity of TRM, and the role it wants to play in Moldovan society. This vision should communicate the direction the company is travelling, and signal ambition and belief. We believe this could be achieved quickly and would be a strong signal to mark the Director General's new mandate. We also believe it should be developed collaboratively with the senior leadership. The vision statement will also need certain key targets for real impact. See recommendation two:

2. Renew the strategy; update key priorities; create accountability

The current strategy would benefit from a short and quick renewal so that it works as a better tool for the leadership. The purpose is not to re-write the strategy, but to remove the elements that are no longer relevant, clarify those that are, identify the resources and tools needed to achieve them, and update the timelines so that they are realistic and achievable. A strategy with big missed targets can be demotivating or easily dismissed. It is a common management practice to review strategic targets at the halfway point of a strategy cycle.

We recommend that the renewal identify a small number of key priorities that are specific, achievable, measurable and relevant. The current timeline has some elements that have been neglected or dismissed, such as the integrated newsroom. We sincerely hope that TRM moves towards this goal, but if it is not a reality, it should be removed, and other targets defined. If it is only possible to achieve in 3 years' time, that is still significant to define a pragmatic roadmap so that actions can begin today. It is important to define small, incremental steps that will build toward significant change.

To be effective, responsibility would best be assigned to Directors and key stakeholders for delivery of these targets, with a system of accountability if they are missed. With these small changes, the current strategy can be renewed as a powerful tool to instigate and track changes, to motivate staff, and to have accountability for improvements amongst management.

3. Align the senior leadership team

A Director General cannot change a company on her own. The leadership needs to identify a 'coalition of the willing' that share the future vision of TRM. The team needs to align across common and shared goals that will drive the whole organization forward. Responsibility for success needs to be shared by all sectors.

At the senior leadership level the DG, Division Directors, and other key positions should find ways to work much more closely together. The ways for doing so can be simple, such as regular and often face-to-face meetings where content, editorial, technology, staffing and financial issues are discussed, aligned and improved. In this way, solutions and strategies will naturally become collective and collaborative.

4. Build a trusted, accountable management layer

Second, we suggest a strategic 'taskforce' made up of staff from across the organization and at different levels of seniority. The criteria for inclusion should be a desire and drive to shape the organization. This team should have a mandate for identifying improvement and should report directly to the Director General and Leadership Board.

These changes can have a big effect. Working closer together should bring alignment, efficiency and new ideas to the table. It should also build trust between areas and positions that currently operate in isolation from one another, and it should drive up standards across the company. It will also motivate staff at other levels in the organization.

5. Audit the organization in terms of resource and headcount

The DG's office has begun important work in auditing current spread of staff and resources. If resources are found to complete this project, the results would be very useful for identifying new solutions. The potential for savings is highly significant and bring major opportunities for refocus resources in a way that better align with current and future corporate priorities.

6. Communications workplan

After the completion of the vision statement and renewed strategic goals, TRM would benefit from communications plan working on two fronts:

- Public diplomacy messaging to promote the new vision and direction.
- Internal communications to ensure staff are informed at all stages with opportunity to feedback to senior managers.

In order to accelerate TRM's transformation and build on the work of this review, we propose that the EBU facilitate an executive workshop in Chisinau as soon as practically possible.

This workshop would run over one-or two days and would focus on the three areas above: defining the vision and objectives of TRM, setting a framework for leadership teams (people, agenda, meetings and reporting framework); and defining top-level strategy targets for the coming period.

The workshop would require the participation of all directors and senior managers, and well as members of the supervisory board for appropriate sessions.

2: DELIVER

Observations

There is a very strong division between the Radio, TV, and the Multimedia departments, and because of this TRM has serious inconsistencies in its current content and audiences offer. The leadership should concentrate efforts to ensure the three main departments work together more closely, and learn to trust and support one another.

There are issues in reaching many audiences, with rural and older demographics over-served, and urban and younger age groups under-served. The TV content schedule has serious and restrictive conditions in terms of language, local productions and original broadcasts. Whilst the audience is much greater in the countryside than the city, the news schedule particularly is very heavily focused on Chisinau and political issues.

Radio also operates with restrictions, but these seem much less problematic for the radio division and whilst audience figures are hard to report, it appears they have a significant successful and loyal partnership. The radio brands appear to have a higher status than the TV stations. TRM also has distribution issues, which are particularly problematic for the Youth radio station, which is only available online in Chisinau. This is another example of current resources being used in the wrong places, as the young and urban markets must be a higher priority for TRM.

Both TV and Radio have secondary channels, but the identify and purpose of both is not clear. Both have a very 'laissez faire' approach when TRM does not have the luxury to operate in this way. It is recommended to set a clear agenda for these channels: where do they fit in the wider TRM content and audience strategy, what is the long-term plan, what is the target audience, how is it being addressed and how are targets for these channels set, measured and achieved?

There is a problem around audience data throughout TRM. In the TV division, high-quality reporting from Nielsen is not being used properly. There is a lack of understanding of the potential to leverage this data for trends and forecasts that can and should inform the TV offer. Financial and strategic value is being lost.

In the radio division, audience data is lacking in general apart from some limited media diary reporting. However, it is worthy of noting that Radio reporting is a problem for the entire Moldova market, so it puts TRM at less of a disadvantage than with TV.

The online channels for both TV and radio have the potential to collect and analyze audience data, but this is not currently happening. This is problematic, those responsible for these channels need to be collecting, analyzing and reporting-up audience data. This should inform both their day-to-day decision making and their long-term strategies. Only this way can TRM's content activities be viable propositions.

The multimedia department is achieving great things for a new and very small team and are now starting to understand the potential of user data from the TRM.MD site. They could achieve much more if they had more staff, training, and most critically, the support and collaboration of the Radio and TV departments. TRM currently has no central social media strategy, which means all units and teams act in isolation. There is no shared overview of how pages/social accounts perform or how they are reported back. This way no-one can assess effort or impact. Moreover, since everyone can do what they want there is no-one monitoring tone of voice of the TRM brand or ethical principles.

When it comes to content and audiences TRM needs to stop acting in competition with itself for audiences and understand that success in one domain represents success for everybody. In short, TRM needs to learn to think like one organization.

The establishment of an integrated newsroom was a central pillar of the 2018-2022 corporate strategy when it was published. The review team fully endorses this approach and believe this would be of great benefit to TRM. Integrated newsrooms - where TV, Radio and online media work side by side, producing multi-platform content - are a well-established approach that drives up the standards across all the domains whilst also bringing significant efficiencies.

Unfortunately, this target has not just been missed, it never got started. Our impression was that key stakeholders within both radio and TV news are lacking a clear understanding of what an integrated newsroom entails and the significant advantages it brings. This would explain why the target has not been met.

Many EBU Members have adopted this approach. Integrated newsrooms do not have to be high-cost investments, and there are Members who have found low cost but high-impact solutions that would be very valuable to TRM. The DTI would be happy to facilitate expert exchanges and research delegations to relevant Members. We believe this could be a major lever for wider change organizational changes.

An integrated newsroom would have significant impact for TRM if executed well. It would drive up journalism standards across all media, enable the production of more and a wider range of content, increase editorial consistency and values, and bring significant financial savings.

Television Division

TV operates within a complex set of obligations, such as airing locally-made content at least 10 hours, and at least 80% of all locally made content should be in the Romanian language, with 75% of it going on air in prime time (06.00-09.00, 17.00-23.00); 90% of all content must be European, 5 hours per day must be original broadcasts. These laws came in from January 2019 and are challenging from an operations and editorial perspective. However, every challenge contains an opportunity, and in this case the content laws define the identity of TRM as a public broadcaster with very distinct social obligations. TRM should leverage this to assert its identity and differentiate itself from the competition.

There is very little for young audiences in the schedule from Moldova 1. In fact, TRM doesn't have a specific strategy for young audiences on TV.

Audience First

There is a problem within TRM's TV division concerning audience data, how it is understood, and how it is and should be used on a daily basis. TRM currently pays for Nielsen TV audience reporting. This is a high-quality service of international standing. Whilst it may not offer all the detail one may wish for, Nielsen reports are absolutely of the quality needed for informed decision making.

The data from Nielsen is not being leveraged to its full potential. Currently, internal reporting is simply delivered as daily snapshots. There is no attempt to plot this data over time and explore it for trends over time, or equally to make informed forecasts for future audience needs.

This is a problem on two levels. First, this paid-for service is not being used properly and therefore both

financial and strategic value is being lost. This cannot be allowed to continue considering the financial situation at TRM. Second, we observed that 'a lack of audience data' being used as a reason for not evolving. This means the TV offer is not growing or responding to audience needs. The TV offer at TRM needs refreshing and updating, and there is plenty of opportunity to do so. The reporting from Nielson can be leveraged to do so.

The TV management need to be proactive in leveraging current audience insights and come up with new ways to get simple and effect insights through activities like focus groups or open studio days where the public can come and speak to the managers directly. In short, the TV division needs to have a plan to improve. It needs to define its target audience on a programme level and have a plan to deliver, improve and grow.

TV News

News and current affairs take around 40 % of the overall content of Moldova 1. There are nine newscasts per day. Being such a dominant aspect of TRM's offer, the News must show the best of the company and today standards and not always met. Measures are needed to improve the news offer. The review team have analyzed a random example of main newscast. At times, the ranking of the news items, relevance, and the quality of editing and images pictures were problematic. The news is centred heavily around the capital and political events/press conferences/etc., with little reference to other parts of the country. This is problematic because TRM is mainly watched in rural areas. Therefore, the core audience is being under-served.

The current use of facilities is challenging for the News department. TV journalists and editors sit several floors away from the TV studios, and the newsroom is poorly equipped. The News department does not appear to be working as one unit, and instead as small teams based on function rather than process.

There are many ways of organizing news departments and all have pros and cons. The TV news department should reach out to other PSM in the region to understand the possibilities for improvement. The EBU would be happy to facilitate these exchanges, and we have several proposals that we think would be very useful for TRM to learn from. Considering how central the News department is to Moldova 1's content offer, it is not operating with the level of professionalism expected. Raising standards in the TV news division should be a priority. The principle of producing less overall content in order to increase the quality is a starting place.

Moldova 2

The secondary channel is somewhat hard to assess. The target group is 18+, which is far very broad and impossible to target in any meaningful way. As a result, the content offer is not totally clear, as is the identity of the channel. The channel broadcasts DW programmes, concerts, European content, and documentaries. There are only three staff assigned to the channel, which sits in very high contrast to Moldova 1. There are some good intentions to broadcast live sport, to have more live broadcasts, to show culture, concerts and use the archives. The new channel head has only recently joined TRM, and as such must be given time to have impact, but the priority is to define the purpose and target audience for the channel, and build the rest from there.

Radio Division

The radio operations at TRM appear to be professional, impactful, and aligned with one another. Quality audience data is hard to get, but it is understood that Radio Moldova has a good audience share. The same demographic splits appear with Radio, inasmuch as the audience is primarily rural and older. Full penetration of Radio is a challenge especially in the capital. Radio is in need of a technical upgrade, the last of which was done in 2008. In 2018 one studio was updated and is being used now for visual radio broadcasts, and is streamed online.

Radio Moldova makes use of a lot of music from the EBU exchange. It is also worth noting that 90% of the radio archive is digitized, enabled by a grant from an Electric Company in 2008. Radio, like the rest of the organization, lacks sufficient resources. Key staff members have left and remain un-replaced.

Radio News

News makes up a large proportion of the radio offer, and is a serious and professional operation within TRM. The Head of Radio News is impressive, with a clear understanding of his role and his vision for the department. In his words: 'radio should make more news, better news, and shorter news'. This clarity is sorely lacking in other areas of the company, and has enabled some important changes in the News scheduling and content since his arrival. Leadership should identify ways to transfer this knowledge and professionalism to other areas.

There are 27 news casts per day in Russian and Romanian on Radio Moldova, as well as a weekly digest programme. There is also a Saturday morning programme in which the Prime Minister answers questions directly from citizens. This is an impressive feature for the Radio Moldova portfolio, and shows the types of programming TRM could pursue to build and enhance its identity (providing, of course, TRM remains a critical voice and does not allow itself to become mouthpiece for politicians).

The schedule is not built on audience figures, but on journalists' judgment. Radio has regional correspondents who cover the whole country, but only five. After a reorganization in 2011 from 30 correspondents, only five were left.

Moldova Music

This is an online-only music channel, providing a cultural offer (i.e. no pop music). The review team were left somewhat confused by the value proposition of this channel, and how it relates to the wider TRM portfolio and strategy. There is almost no engagement with defining the channel's audience, and any questions around who is the target audience were met with confusion. The need to build an understanding of the audience and reach of the channel is very important. There are a variety of options for gathering website and streaming data that can be leveraged, often at little or no cost.

Youth Radio

The youth radio station was doing very interesting work in difficult circumstances. The team are positive, engaged and clearly connected to their audiences. They have interactive elements to their programming and use social media to connect with audiences in real-time during broadcasts and at other points throughout the day. Despite also working in outdated facilities, the team clearly have a passion for their jobs. The management of the youth radio should be congratulated for empowering the team to make their own decisions and serve their audiences as they see fit.

Orchestra & Choirs

The Radio division is also responsible for the National Orchestra and Choirs. This is a huge financial burden, considering they constitute 120 staff out of less than 800 in total. This arrangement was recently reviewed and the decision to keep TRM responsible for these national cultural bodies was a political one. This is quite a common situation for PSM, but that does not make it easy. The choir and orchestra facilities are in need of renovation, yet they still function as needed.

TRM puts on a series of public concerts throughout the year, when members of the public attend concerts in the TRM building. This is a really great activity, and a rare occurrence of the audience really connecting in person with TRM. We suggest exploring ways to scale and leverage these events. The 90th anniversary celebrations provide a good opportunity for trying new things in this area.

There are examples of EBU Members innovating to leverage their orchestras and choirs to reach both old

and new audiences that could help TRM build on their strengths in this area.

Multimedia

The website TRM.MD has been relaunched one year ago and is now mobile friendly. This was enabled by the support of the council of Europe. All channels are streamed live, and there is a catch-up for all programs. However, there is no curation as such: all are available as 'click-and-play' in listformat.

The online team are working hard but their ability to really deliver is compromised by TV and Radio. Collaboration is generally not good, with some people thinking that success for the digital offer will be a loss of the broadcast offer. This is a faulty and dangerous attitude, and management need to ensure that the multimedia unit are central to broadcast workflows.

Whilst digital and streaming are still quite low in Moldova, market trends and explicit: the future success of TRM needs a strong online presence. The Director General understands this, and the rest of the organization will need to come to this understanding too. It is imperative to grow the multimedia unit, bit in resources and in terms of its position within TRM.

Production Technology & Workflows

The whole of production technology is underfunded, and the teams working in this area are doing great work in very difficult circumstances. TV and radio studios are in disrepair and need consolidating and renovating. Current facilities are inefficient and degrading. The technical department are also heavily restricted in procurement with all spending being done through a public tender process that appears to be highly problematic for the review team. We would suggest this as an important area for the Supervisory Board to look into and lobby for respective changes in the Law. If the production teams were able to source their own equipment savings could be made.

Moldova is behind the digital switchover, which had to be done 2015. All neighbours have already switched off. This results in bad quality of the picture. TRM will apply officially for the inclusion of the Moldova 2 in the Multiplex.

There is a need to invest in studio technology as much equipment is outdated and in disrepair, as identified in the corporate strategy. There are some options that, whilst requiring some up-front spending, have the potential for quick immediate impact on the production quality of TV programming. We recommend discussions with experts in EBU Technology and Innovation department for specific recommendations for investments in this area.

The Production Technology department was created in 2018 and is placed under Moldova 1. Five sections are dealing with production. There are 130 people - 30 sound engineers, 12 décor, 28 design, style, main manager, two editors and technical. There is a serious issue around staff who do not have the up-to-date skills needed to work with the relevant machines.

The Head of TV production has very clear ideas about how to make savings and improve the efficiency of operations, but is currently frustrated by the structures he operates in. This should be addressed in order to make savings and free up resources. Furthermore, his attitude and approach could be applied to other departments. A presentation of his work to other units could provide a template for them to work with when tasked with doing the same exercise. Collectively, this could have a serious impact.

Production technology has an acute staffing issue, with many older staff and a problem hiring young staff on very low wages. There are a number of current vacancies that are proving very difficult to fill.

Recommendations

1. Bring departments into closer alignment

TV radio and multimedia need to be much more closely aligned, and regular face-to-face meetings should be put in place. TRM is a relatively small organization, so a few changes can really impact the culture. Directors could easily meet at least once a week. News Heads could meet even more regularly to discuss editorial planning. Editorial planning should be shared across teams. This can be done with simple online documents. It is recommended to design a roadmap for promoting content across the different platforms.

2. Focus on the audience

Defining a content strategy for the whole organization could be an important tool for TRM. Start mapping the current offer across all channels and platforms to understand what audience segments are being over and underserved. The priority should be to improve the quality of the current content offer, increase the youth offer, and drive up standards. The new content strategy should focus on bringing the TV, Radio and Multimedia departments into closer alignment.

We also suggest that the 'Vision Statement' exercise is extended to all channels, whereby all Channel Heads would propose a short statement that captures the identify and purpose of the channel for review and discussion of the executive team.

Focusing on the audience requires fully exploiting all possibilities to better understand the audience TRM is currently addressing and who the organization will target going forward. The Nielson audience reports need to be fully leveraged. We suggest inviting TRM's Nielson account manager in for up-to date explanations and training. If it is possible to train managers to understand and use data analytics, they will be able to make data- driven decisions to that will improve the content offer.

For some teams, particularly the secondary channels, starting with simple data from Google analytics is should be the first step. For other teams (programme-level), another low-cost option is to have outreach activities to build up qualitative insights. Organizing meetings with Members of the public, where all staff can speak openly about TRM, how the audience connect with the organizational and when and why they don't, will bring rich insights. This could be an exercise for all levels of staff, from Directors to junior assistants. We have some very powerful examples from EBU Members that can serve as a template for TRM.

TRM may consider centralizing audience research personnel from across the content divisions into a single unit, working closely with corporate strategy and the marketing department, and reporting to the DG's office. This would enable a much richer view of the audiences across all media and create an interdisciplinary team with the mixed skills needed to fully leverage current data sources and explore new ones. This would also bring closer alignment across the content divisions of the organization, and supporting the development of a data-driven multi-media content strategy.

3. Drive up standards in TV news

The TV news department is responsible for the most visible aspect of TRM: this is what the public see, and this is what TRM are judged on. There are many opportunities for improvements, including:

- Establishing a correspondent's network to deliver news outside Chisinau that is relevant for the

core audience demographics could have a big impact.

- Defining and implementing editorial guidelines so that TRM has a clearer editorial line could improve the offer and counter pressure to cover certain events by politicians.
- Re-arrange workspaces to improve efficiencies and workflows.
- Open the editorial decision-making process to encourage pitching sessions and proposals for original stories.
- Increase human storytelling elements.
- Create opportunities for investigative journalism in areas such as consumer rights.
- Work with the online team to create and test new content and formats for trm.md.

4. Build the multimedia team

If success and growth is to continue at the same rate, the multimedia team will need be supported with staff and resources. Identifying support staff who could be reassigned from other departments is a start, but also rotating journalists and others from Radio and TV could then increase the impact of the team, helping to bring better alignment.

As mentioned above, the website can be used for testing and exploring content and formats that would not be possible to broadcast. The government does not place limits on online content, so TRM should find ways to leverage this opportunity to its full potential.

The Multimedia department could be positioned with higher priority and responsibility in the organization. As TRM grows its digital offer in response to audience needs, the rest of the organization will increasingly depend on their expertise and resources.

5. Use TRM.md to publish and experiment with new formats.

The website is currently underused, and has the potential to carry lots of innovative, creative and targeted content. Young and creative staff could be given the opportunity to make short-form content and use the website as a test case. Journalists could do commentary and background pieces to supplement their

bulletins. Interviews with members of the public could increase the human element of the news. These are just some simple, quick and cheap ideas for using the potential of the online space, and those that are successful can be developed into TV or Radio pieces when appropriate.

6. Develop social media guidelines

A social media strategy is needed that aligns with the overall strategy. Clear guidelines should be in place to ensure a consistent, professional approach, to enhance the TRM brand, and to protect the company and the staff from potential risk online. The strategy needs to include firm rules on personal social media use by TRM employees. It must also therefore have a process in place for if and when these are broken. We have already identified the Swedish Radio example as a very strong basis for TRM to develop their own guidelines. Responsibility for this would most naturally sit with the Multimedia team, and administrator access to all TRM social media accounts would also be centralized to ensure professional standards are maintained. We recommend a review of all accounts with the expectation that these will be reduced and optimized. The EBU can help TRM with having single dashboards for multiple accounts on one platform.

Building an audience-first mindset is extremely important. We know that audience and viewing data is very difficult to come by for TRM, but there are many other ways to connect with the audience and understand how they experience TRM content, what they think of the organization, and how TRM can better address their needs.

Where relevant, starting with simple data from Google analytics can have huge impact. But if this approach is to have a real effect, managers should be driving the change, and not expecting it to come from the bottom-up.

From there, we suggest audience-mapping exercise, to really define who the people the channels are targeting are. The Heads of Channels should then define a plan for targeting these profiles. This will require oversight and management of the senior leadership team.

There are many opportunities within the EBU community for training and expertise exchange around data and audience analytics. The review team recommends identifying a liaison officer within TRM to connect of this critical subject, with the view of facilitating training and knowledge exchange.

3: ENABLE

Observations

Skills & Training

TRM faces serious difficulties in the area of people and skills. The most pressing issue is an apparent inability to hire new staff. The consistent message is that TRM cannot offer competitive salaries, which are set and allow no flexibility for the management to set pay rates themselves. TRM also suffers from an aging staff and has a very high average age rate. Many of these staff are trained in skills and professions that are increasingly outdated.

TRM also suffers from a heavy staff turnover. The organization is seen as a stepping-stone into the media industry. Many staff come and work for just enough time to make themselves employable elsewhere and leave. This is disruptive and negates the chance for legacy planning. All departments report the same issue.

The Human Resources department works largely as a processing unit and does not have a remit or resources to work pro-actively to address these issues. With just four staff, the administration of salaries and contracts is just about all they can manage.

However, there are also some very positive gains to report. The training centre is an impressive addition to TRM that has already served many staff. Working with limited budget the training centre is a rare example of clarity, forgetting and results orientated work. It is already providing a number of courses including practical media skills and soft management skills. The combination of internal trainers and external experts allows the training centre to leverage resources very effectively. With skills being identified as a critical issue by all departments, it is encouraging to see the priority given to the training centre, and the clear successes it has made. TRM has an assessment system and training needs questionnaire which has informed the portfolio of developed for the centre. The professional manner in which the Training Centre has been set up and managed could be used as a template for other areas of the company to improve planning, setting targets, and managing budgets.

With all the issues around staff, training and pay rates, TRM needs to identify new ways to motivate and skill the workforce. Establishing a system of staff rotations would be an effective and easy place to start, particularly between the newsrooms of the three sectors. This would build skills, build relationships between teams and departments, increase the level of internal learning, and sustain the various teams. It also shows young staff new opportunities for growth, and should help in recruiting.

The youth radio team are an example of how staff can be motivated in ways that are not just financial. If other areas can create opportunities for staff to create new content, follow their own stories, and have genuine impact on the identity of the units they work in, TRM will become a much more attractive place to work, which will mean more young talent, better staff retention, and most importantly perhaps, better content.

Governance

TRM is governed by a Supervisory Board composed by 9 Members, appointed by the Broadcasting Council (the regulatory body) – (Art. 43). Two Members are paid by TRM (Chair and Deputy), whilst the rest of the board are paid per meeting. The current remuneration system for the members of the Supervisory Council

could be revised in order to ensure better engagement of the Council.

The Supervisory Board lacks a clear agenda, and this is seriously undermining their ability to fully perform the legally mandated role of governorship. The day-to-day activities of the Board are not clearly defined. We did not hear of specific initiatives, priorities or issues. The Board report their role as one of 'enabling' the organization to do its job, but this appeared to involve a lot of oversight and auditing, rather than proactive actions. As such, it is unclear how the board operates in distinction from regular internal staff and management, except to add an extra layer of complexity. And TRM already has an internal audit unit. This is sub-optimum use of resources and represents a serious missed opportunity. The board is inactive in pushing for proper legal, financial and administrative frameworks necessary for the functioning of and successful PSM.

Governance boards have a vital role to play in defending PSM from political and market pressures on one side, and ensuring the organization is fulfilling its public service remit to the best of its potential, and to maximum economic efficiency. The governance board should have an unquestionable knowledge of the operational legislative and financial challenges the organization is facing, so that they can work to alleviate these. We would therefore expect a governance board be in constant dialogue with key political, social and commercial stakeholders, and be ready to leverage those relationships. If the Board were to have more proactive dealings with the regulator, parliament and other national authorities, the DG would have more time to focus on the critical leadership duties in-house.

Buildings & Systems

Everyone at TRM understands that the building and infrastructure are very problematic. The property estate is big, but dysfunctional for TRM. Radio and TV are in different buildings that amplify the divisions between them. There appears almost no daily cross-over between the two.

Much of the estate is in serious disrepair and continues to degrade. This is inefficient and will only increase unless steps are taken now. TRM are restricted in how they can use or re-purpose the buildings because of the legal status. We suggest the Supervisory Board take ownership of this issues and lobby the relevant politicians to allow more flexibility. The business case is simple: changing the rules will save TRM money in the short-term, and creative solutions have the potential to provide new benefits.

The more serious issues appear to be in the TV campus, where very large areas of the estate are unused and those that are spread out over a very wide area. The main tower of TRM is in generally good repair, and the logical step would be to bring other units into this central building. Whilst studios and production facilities are difficult to move, offices are easy. Centralizing executive functions could bring significant running and staffing savings and would also help bring the executive teams into alignment.

Research & Marketing

The research and marketing department finds itself in a strange position since the loss of advertising possibilities makes the unit largely obsolete. The staff in this unit should really be assigned to a new unit, with the multimedia team being the most obvious destination. The marketing and sales team skills would be highly transferable, and they could be responsible for promoting digital services designing marketing campaigns for TRM products and services, and potentially leading the social media strategy. In short, flip the remit and use the marketing skills for the promotion of TRM itself.

Recommendations

1. Focus on people

Senior managers need to identify new opportunities for growth for their staff. When money is not available, creative solutions must be sought to drive up skills, standards and motivation levels. The levers are in place for TRM, but they need leadership. New opportunities for programme making can be created by using the multimedia team; professional growth can be supported by staff rotations and cross-departmental training; rising talent should be identified and provided with tailored support to fast-track their career. This should all be based on talent, and not seniority or length of service. Managers will need to ensure their staff take full advantage of the Training Centre. A template for managers could be provided, and managers tasked with defining and submitting a training plan for their department and teams.

2. Define priority items for Supervisory Board

Supervisory Board and senior leadership would benefit from defining a set of priority areas and actions, focusing on ensuring institutional independence for TRM and adequate legal and financial frameworks. A work plan could then be agreed for the supervisory board to engage with all authorities and stakeholders on these issues.

3. Audit the buildings estate

A proper assessment and evaluation study on the TRM properties would enable the leadership to make informed decisions about relocating and centralizing current activities and make longer-term proposals. For example, the properties could be rented out or provided free of charge to creative people with the condition they collaborate with TRM. This could give rise to new initiatives and events could attract the public. Some parts of the premises could become a 'creative factory' for digital media, music, painting, and performing arts, which would promote and nurture young talents. This would align with TRM's public service remit and illustrate a new and inclusive direction for the company. A tender for ideas for the use of the premises could be announced.

4. Build a culture of improvement through closer financial monitoring and accountability

We recommend setting up a system of budget reporting for senior managers. Financial reporting needs to be as transparent as possible, and should be an agenda item for the senior leadership meetings. Each department would benefit from providing detailed budgets that identify opportunities for new spending by making efficiency savings. Achieving financial targets should be incentivized where possible, as is establishing a system where responsibility for missing targets has repercussions.

5. Review Marketing and Sales unit

This is a quick and easy way to bolster the resources of the multimedia team, since TRM no longer has need of a sales and marketing unit. The expertise of the team could perhaps be used for social media marketing, cross-platform marketing of the TRM portfolio, and special events such as the orchestra and choir and 90th anniversary. These changes could be a template for other resources to be used to increase the multimedia department.

PRIORITIES ROADMAP

SHORT-TERM GOALS		Timeline	Resources/ppl
Vision	Formulate corporate vision	0-3 months	Senior Management & EBU facilitation
Align leadership	Set up system of meetings & reporting for Directors	0-3 months	DG's office Senior management
Build trusted management layer	Empowering coalition of willing	0-3 months	DG's office Tier 1 & 2 Managers
Marketing and sales team	Re-assign	0-3 months	DG's office
Communications plan	Internal External	3-6 months	DG's office
Strategy renewal	Identify key levers	3-6 months	DG's office
Newsroom renewal	Establish correspondents' network Improve quality of news	0-6 months	TV Director TV News
Image quality issue	Buy new studio technology (digital interface)	0-6 months	TV Director
Data analytics	Train key managers	0-6 months	Heads of Channels Head of Multimedia Marketing & Sales

MID-TERM GOALS		Timeline	Resources/ppl
Content strategy	Analyse & Review current offer Define vision for channels and brands Increase standards in TV production Define approach for new formats online	6-12 months	All content divisions
Buildings audit	Map current use and issues Centralize current spaces	6-12 months	Head of Production, Logistics
Social Media Guidelines	Strategy and guide for staff	6-12 months	DG's office +
Grow Multimedia unit	Marketing and Sales Collaborate with Youth Channel Increase staffing Increase technical support Begin job rotations Locate journalists directly in team	2-24 months	Multimedia
Organization	Audit staff structures Decentralize accountability and responsibility Improve workflows & processes	6-24 months	DG's office All departments
People and Skills	Scale training centre activities	6-24 months	DG's office

LONG-TERM GOALS		Timeline	Resources/ppl
Financial and Legal Framework	Raise standards Engage national authorities (regulator, Parliament etc.) Raise awareness of Council of Europe standards Ensure better funding mechanism	Ongoing	Supervisory Board with input from Senior Management
Ensure Independence	Engage national authorities (regulator, Parliament etc.) Undertake public diplomacy campaigning Organize public debates	Ongoing	Supervisory Board with input from Senior Management
Buildings solutions strategy	Plan for commercialization and/or alternative uses Lobby political and public stakeholders	Ongoing	Supervisory Board with input from Senior Management

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