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Teaching Note: Transforming Ireland's Public Service Media: Dawning of a Turnaround Journey for RTÉ

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Case Summary
RTÉ had to reconsider its strategic direction in response to the emergence and growth of new technologies and the change in consumer behaviour to ensure its survival in the future. Consequently, RTÉ began to look internally for new opportunities and a rigorous examination of their strengths and weaknesses allowed them to generate possible options towards a more sustainable future.

RTÉ had always made significant investments in new technologies, which led them to the strong position they once had. A slowdown in this area left RTÉ in a compromising situation. In 2018, there had been significant strategic choices made in an attempt to change the culture of RTÉ and to create a digitally focused organisation. The future of RTÉ is uncertain with the environment consistently changing and with little access to resources due to financial constraints. RTÉ face significant challenges in order to renew the organisation to progressively serve and satisfy the various generational needs of the diverse customer base.

Case Position
The three elements of the meta-level strategy framework: strategic position, strategic choices, and strategy-in-action (Johnson et al., 2017), are highlighted and made apparent by this case. The change in RTÉ's strategic position from its early days of being the dominant force in the Irish public service media industry to its currently threatened position in a digital world. The teaching note identifies some possible strategic choices (including RTÉ's present direction) that could lend themselves towards RTÉ regaining a strong position again. Consideration for

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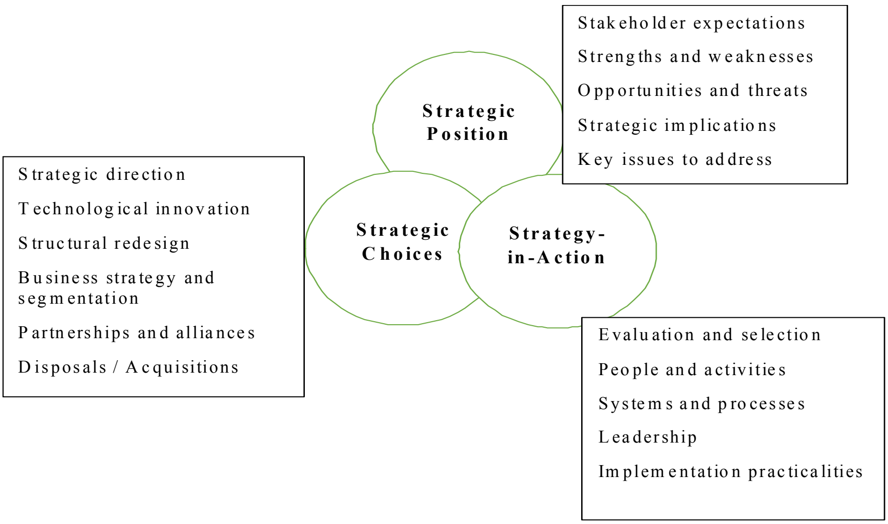
1. This case was prepared by Keith Donegan \`19, Conor Fitzgerald \`19, Conor Fortune \`19, Andrew Mackey \`19, and Tara Mockler \`19, under the supervision of Dr. Eamonn Caffrey: ecaffrey@tcd.ie. Cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

strategy-in-action is made apparent and evaluated using theory aligned with the practical developments examined.

Figure 1: Exploring Strategy Framework



Source: Adapted from Johnson et al. (2017), *Exploring Strategy: Text and Cases*, 11th edition, Chapter 1: 11-16.

Strategic Position: Analyse and build an understanding of the current situation.

Strategic Choices: Identify realistic choices aligned with direction, environmental implications and key issues.

Strategy-in-Action: Evaluate and select most suitable strategic choices; consider appropriate structures and systems to support choice(s); and elicit practicalities for leading major change.

Key Observation: A structured framework to aid strategy development and implementation might falsely indicate the work of strategy as being somewhat linear in nature. Nothing could be further from the truth; *strategy is an iterative process*, especially so in a fast-moving, complex and uncertain environment. Furthermore, the practice of strategy-making will facilitate good insight from 'learning by doing' which will aid the iterative process thereafter.

Case Audience and Reading

This case is intended for Undergraduate business students possessing prior knowledge of frameworks including PESTEL, Porter's Five Forces Framework, VRIO analysis, TOWs analysis and Grundy's strategic option matrix.

Students are expected to have read the following chapters of the '*Exploring Strategy*' text by: Johnson, G., Whittington, R., Scholes, K., Angwin, D. and Regnér, P. (2017), *Exploring Strategy: Text and Cases*, Eleventh Edition, Harlow: Pearson.

- Chapter 2: Macro-Environment Analysis;
- Chapter 3: Industry and Sector Analysis;
- Chapter 4: Resources and Capabilities;
- Chapter 6: History and Culture;
- Chapter 7: Business Strategy and Models;
- Chapter 12: Evaluating and Selecting Strategies; and
- Chapter 15: Leadership and Strategic Change.

In addition to the text, students are expected to have read the following five article readings:

- Chesbrough, H. (2007), "Business Model Innovation: It's Not Just About Technology Anymore", *Strategy & Leadership*, 35(6): 12-17.
- Enright, D. (2018), "Digital Transformation: Creating a Digital-First Culture through Transpersonal Leadership", Routledge, Taylor & Francis Group, *Transpersonal Leadership Series*, White Paper Eight: 1-14.
- Grundy, T. (2004), "Rejuvenating strategic management: the Strategic Option Grid", Strategic Change, 13(3): 111-123.
- Knights, J. (2016), "How to Develop Ethical Leaders", Routledge, Taylor & Francis Group, *Transpersonal Leadership Series*, White Paper One: 1-11.
- Weill, P. and Woerner, S. L. (2015), "Thriving in an increasingly digital ecosystem", *MIT Sloan Management Review*, 56(4): 27-34.

Teaching Scheme

The case is to be examined in a 60-minute seminar. To facilitate discussion, students should be familiar with the case study and the discussion questions prior to attending the seminar. Students will be divided up into smaller groups of 4 or 5 to ensure each student is actively engaged in class discussion. The tutor will engage with each group briefly to answer any queries. Students will be given 20 minutes in their groups to discuss the case in further detail before providing their analysis to the rest of the class. To conclude, the tutor will revisit the key issues to further entrench the main learning points from the case. This collective style of seminar group work should help students to develop their skills in critical analysis within a supportive environment.

Learning Objectives

Upon completion of the seminar, students should be able to:

1. Analyse and evaluate the macro-environment and how it impacts an organisation.

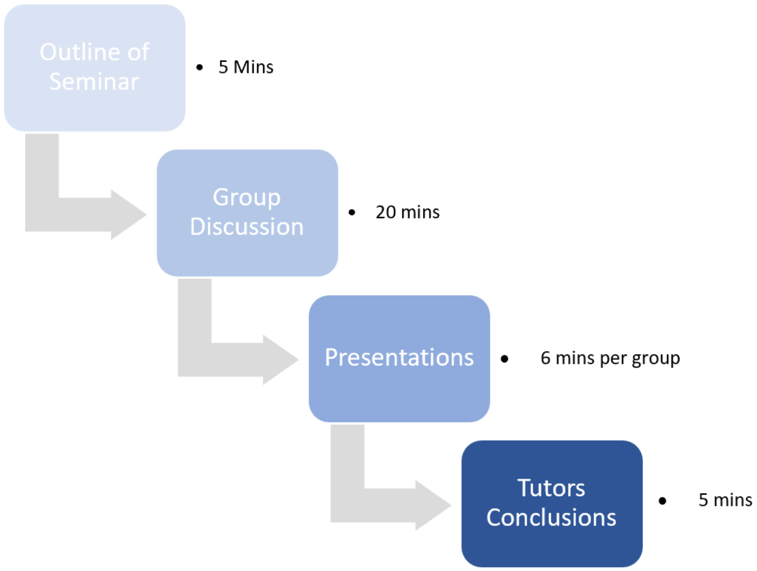
2. Evaluate the resources and capabilities of an organisation and how they can be utilised in a competitive market.

3. Apply relevant frameworks in order to compare and contrast the strategic options of a company.

4. Analyse leadership style and evaluate different business models.

Seminar Structure

Figure 2: Seminar Structure

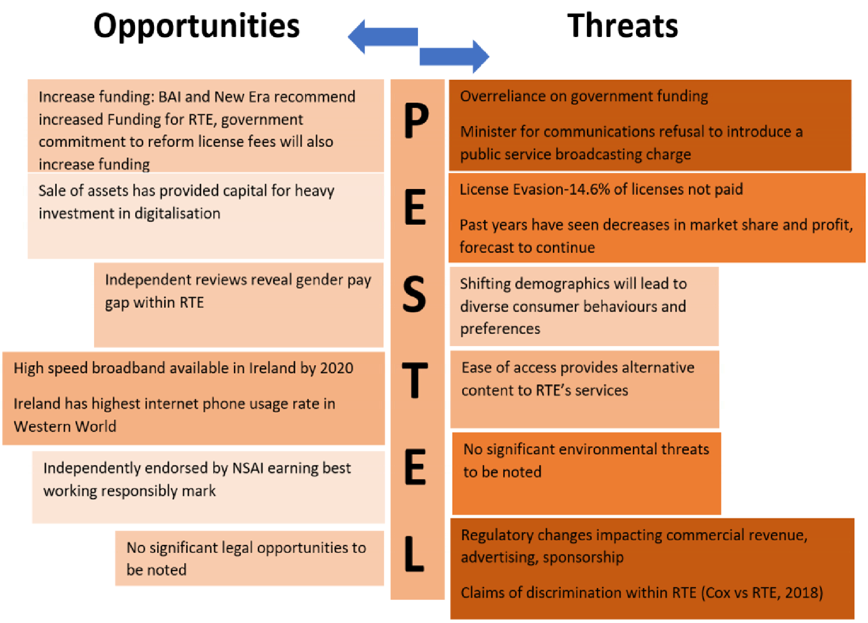


Discussion Questions
The discussion questions are incremental in nature. Some of the points provided below can be helpful when considering student responses to the following question.

Question 1 - Using relevant frameworks, critically analyse RTÉ's external environment to determine the current strategic position.

Prompt: Students could avail of the PESTEL framework and Porter's Five Forces to analyse the strategic position.

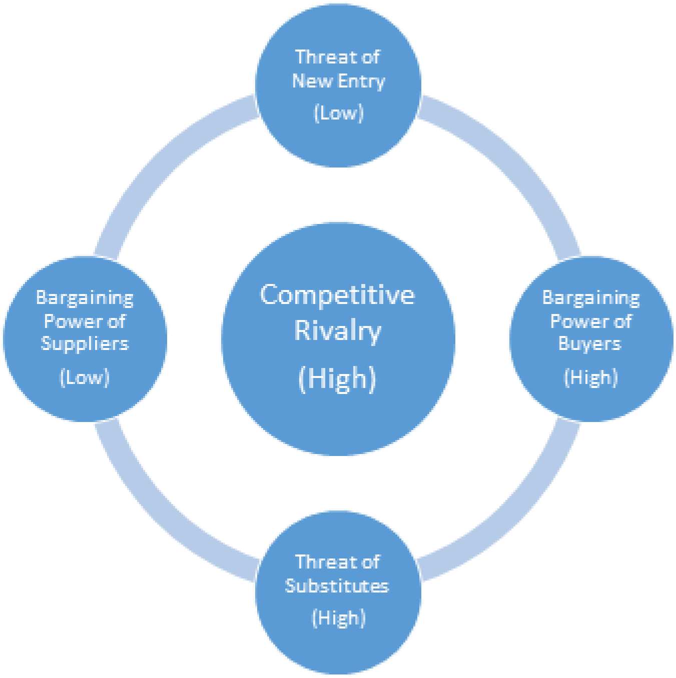
Figure 3: PESTEL Framework



Source: Adapted from Johnson et al. (2017), *Exploring Strategy: Text and Cases*, 11th Edition, Chapter 2: 34-48.

Outcome: There are numerous macro-environmental factors that should concern RTÉ, in particular economic, social and political factors. However, the opportunities in technology could catapult RTÉ to a new level. While capitalizing on opportunities in technology, RTÉ should seek to simultaneously solve economic, social and political factors. Furthermore, some of the threats to RTÉ can serve to act as an opportunity if they successfully implement strategic change.

Figure 4: The Five Forces Framework



Source: Adapted from Johnson et al. (2017), *Exploring Strategy: Text and Cases*, 11th Edition, Chapter 3: 64-74.

<u>Threat of Substitutes – High</u>

- Existence and popularity of internet distribution channels that offer on-demand and tailored programming to consumer for both video and audio (YouTube, Spotify, Netflix, Amazon Prime, Apple Music, Apple TV, Facebook, etc.);

- The use of such services does not necessarily require a TV set or a TV license. In addition, these services can rely on minimal advertising and although they are paid services, some provide free or premium offerings; and

- Problem surrounding piracy today, as technology develops, fraudulent activity does too.

Threat of New Entrants – Low

- Due to the competitive nature of substitutes, new entrants are a rare occurrence. RTÉ has benefitted greatly from first mover advantage;
- Rebranding of TV3 to 3e to Virgin Media could be seen as a new entrant, but they are owned by the same parent company, Liberty Global Communications; and
- High cost of capital to gain a footing in the complex value chain, especially regarding distribution. RTÉ benefits from public funding.

Supplier Power – Low

- Increasing number of content providers;
- Extremely low switching costs; and
- Industry has an increasing amount of forward integration, original content provided by Netflix is a key example.

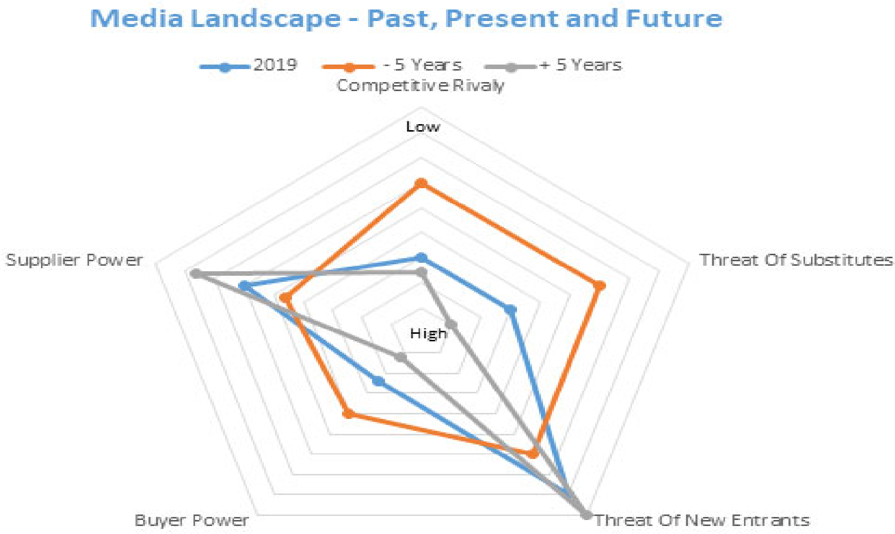
Buyer Power – High

- High level of variety has caused decreasing station loyalty, consumers are content driven; and
- Landscape of industry allows consumers to jump from content provider to content provider with no consequences.

Competitive Rivalry

- The first four forces provide a clear indication that the industry is a highly competitive one, perhaps the most intense it has ever been;
- Variety of choice, lack of customer loyalty and low switching costs provide for a highly competitive environment; and
- Intensity will only be seen to increase as competitors try to joust for market share.

Figure 5: Comparative Industry Structure Analysis - Media Landscape: Past, Present and Future



Source: Adapted from Johnson et al. (2017), *Exploring Strategy: Text and Cases*, 11th Edition, Chapter 3: 80.

Outcome: Highly competitive industry, to compete requires significant investment and consistent innovation to attract wavering customers. In terms of attractiveness, the forces indicate caution due to the threat of substitutes and high buyer power.

Question 2 – Assess RTÉ's internal environment using frameworks that will be used to generate strategic options.

Prompt: Students should identify RTÉ's resources and capabilities in order to identify their core capabilities. These core capabilities should subsequently be used to conduct a VRIO analysis.
Resources and Capabilities

Table 1: Resources and Capabilities

Resources (What we have)		**Capabilities** (What we do well)
Products and Programmes (Apps, website, television, radio and related content) *Facilities* (Broadcasting studios, administration facilities, regional offices, etc.) *Real Estate* (Land) *Broadcasting Infrastructure* (Interconnected digital technology) *Intellectual Property* (patents, trademarks, copyright) *Computing* (databases, equipment, etc.)	**Physical**	Utilisation of facilities and infrastructure Programme and content development Network planning Technology deployment Marketing Brand Reputation Credibility Flexibility Variety of product offering
Dual source of *funding* *Balance sheet* *Cashflow*	**Financial**	Ability to source and raise funding Cashflow management Financial management (debtors, creditors)
Employees, Managers, Executives and Board members *Executive Team* Broad *stakeholder* community (developers, technicians, publishers, content providers, unions, suppliers, customers, media partners) *Legal.*	**Human**	*Knowledge* *Skills* *Creativity* *Culture* *Reputation* *Mobility* *Integration and coordination* *Relationships* *Leadership* (inspiration, motivation, direction and alignment) *Networks* Political *alliances*

Source: Adapted from Johnson et al. (2017) *Exploring Strategy: Text and Cases*, Chapter 4: 98.

Outcome: From using this framework, students should be able to identify RTÉ'S core competencies. These are:

- Strong brand and reputation;
- Financial resources (assets, cashflow, real estate);
- History of loyalty (viewing, listening and interactive customers);
- Structure;
- The business of media and broadcasting;

- Network of technologies and infrastructure;
- Strong leadership and executive team;
- Innovation, creativity, mobility and flexibility;
- Political and industry affiliations, partnerships and relationships;
- Multi-funding sources; and
- Direct access to every Irish home and many established communities.

Table 2: VRIO Analysis

Core Competency	**Value**	**Rarity**	**Difficult to Imitate**	**Organisational Support**	**Competitive Implications**
Brand and Reputation	Y	Y	Y	Y	**Sustainable competitive advantage**
Financial Resources	Y	N	Y	Y	Competitive parity
Loyal Customer Base	Y	Y	Y	Y	**Sustainable competitive advantage**
Organisation Structure	Y	Y	N	Y	Temporary competitive advantage
Leadership and Executive Team	Y	N	N	Y	Competitive parity
Innovation	Y	N	N	Y	Competitive parity
Partnerships and alliances	Y	Y	N	Y	Temporary competitive advantage
Multi-funding sources	Y	Y	N	Y	Temporary competitive advantage
Cultural penetration in Irish marketplace	Y	Y	Y	Y	**Sustainable competitive advantage**

Source: Adapted from Johnson et al. (2017), *Exploring Strategy: Text and Cases*, Chapter 4: 101-102.

Brand reputation and cultural penetration in the Irish marketplace provide RTÉ with a sustainable competitive advantage. The organisation's position as the public service media broadcaster is a unique differentiator and can be leveraged in a way to gain competitive advantage. RTÉ is recognised as one of the most credible brands in the media industry. This is due to the length of time they have been consistently delivering value to Irish people and have subsequently become well established in the Irish culture.

RTÉ's introduction of Dee Forbes as Director-General in 2016 was a significant strategic change to leadership. Digitalisation and innovation capabilities will become central to RTÉ's strategy in the coming years with the strategic aim to bring RTÉ in line with its peers and ultimately extend a competitive advantage within the arena.

RTÉ's vast Real Estate resources with the potential to convert to cash and thus, increasing available capital to invest, can be used over the next few years to develop digital content and viewing systems such as RTÉ player. This will then provide RTÉ with a temporary competitive advantage and will help to reposition RTÉ as a digitally focused and innovative media broadcaster.

Outcome: Students should recognise that the VRIO analysis can provide a valuable basis for examining an organisation's core competencies stemming from the integration of resources and capabilities. It is clear to see what resources and capabilities provide a sustained or temporary advantage in terms of competitiveness. From this, consideration for the leverage and connection of resources and capabilities to feature as part of any future strategy can be evaluated. In this case, the opportunity to build innovation and alliance / partnering capabilities appear as prime opportunities to leverage towards strengthening competitive position.

Question 3 – Identify RTÉ's strategic options and assess each of them critically using relevant frameworks.

Prompt: Questions 1 & 2 have provided the necessary information to identify the strengths, weaknesses, opportunities and threats facing RTÉ; students should now generate strategic options using the TOWS Matrix and assess the options using Grundy's 'Strategic Option Grid'.

Table 3: TOWS Matrix

<table>
<tr><th colspan="4">Internal</th></tr>
<tr><td rowspan="3">External</td><td>Factors</td><td>Strengths</td><td>Weaknesses</td></tr>
<tr><td>Opportunities</td><td>SO – Strategic Option
New executive leadership team develop and execute on a digital strategy to regain customers lost to more digitally focused competitors (Option 1)</td><td>WO – Strategic Option
Identification of new and additional revenue streams by way of digital development to complement existing revenue sources (Option 3)</td></tr>
<tr><td>Threats</td><td>ST – Strategic Option
Capital realised from sale of real estate invested in new original content and systems to enhance user experience (Option 2)</td><td>WT – Strategic Option
Demonstrate value-for-money by introducing loyalty programme for licence fee payers (e.g. access to privileged digital content) whereby the rewards programme also becomes available to newly signed up fee payers – contingent on allying with An Post; (Option 4)
Identify cost-cutting mechanisms leading to a reduction in cost of licence fee towards increasing take-up and penetration levels (Option 5).</td></tr>
</table>

Source: Adapted from Johnson et al. (2017), *Exploring Strategy: Text and Cases*, Chapter 4: 115-119.

Outcome: By analysing RTÉ using the TOWS matrix, we can logically formulate strategic options based on internal and external factors identified in Questions 1 & 2 above. This tool helps to identify options that are likely to be a good fit with the organisation's internal strengths and weaknesses and external opportunities and threats.

Table 4: The Strategic Option Grid

Option Evaluation Criteria	**Option 1:** Digitalisation	**Option 2:** New Original Content	**Option 3:** New and Additional Revenue Streams	**Option 4:** Loyalty Programme (An Post Alliance)	**Option 5:** Reduced Licence Fee
Strategic attractiveness	3	3	2	3	2
Financial attractiveness	2	2	3	3	1
Implementation difficulty	2	2	2	2	2
Uncertainty and risk	2	1	1	2	2
Acceptability to stakeholders	3	2	2	3	2
Total Scores	12	10	10	13	9

Score rating: 3 = Very Attractive; 2 = Medium Attractiveness; 1 = Least Attractive
Source: Adapted from Grundy (2004) "Rejuvenating strategic management: the Strategic Option Grid", *Strategic Change*, 13(3): 113.

Option 1 (score # 12): Digitalisation is an attractive strategic option for RTÉ to take. It will be difficult to implement and carries a slight risk, however it will be highly acceptable to stakeholders. It is strategically attractive and ties in nicely with RTÉ's current strategic direction and plan.

Option 2 (score # 10): It is apparent that cost-cutting measures are not the most widely acceptable approach to take. Therefore, capital realised from the sale of real estate could be invested in new original content and systems to enhance user experience. This is financially attractive but also carries a degree of risk in terms of the return on capital employed.

Option 3 (score # 10): Business model innovation can be attractive to businesses that are struggling in the modern technology-driven era. This is a moderately attractive option for RTÉ towards increasing revenue streams. It would not be widely accepted by stakeholders as many would feel a loss of identity could be experienced. Furthermore, it comes with a lot of risk, uncertainty, implementation difficulty and it can prove to be expensive.

Option 4 (score # 13): A very attractive option to select and pursue. The sense of value-for-money for customers who pay the licence fee will ensure ongoing customer loyalty. It will provide an incentive for non-fee-paying viewers to take-up the licence. For both categories, the incentive could comprise of highly privileged access to specialised and sought-after digital content. Financially attractive but carries moderate implementation difficulty and potentially require a lengthy period of time to set-up. It would surely be saluted by the stakeholder community. Furthermore, it would contribute towards sustainability well. Nevertheless, given that An Post are legally obliged to collect licence fee revenues and neither An Post nor RTÉ determine the annual licence fee cost, this would require a high degree of partnering between An Post and RTÉ to lobby and influence key government decision makers.

Option 5 (score # 9): A reduction in the licence fee would be warmly welcomed by many stakeholder constituents but certainly not all. This option carries a good level of risk and is somewhat unattractive in financial terms. However, it is attractive by way of enhancing affordability and therefore, lead to an increase in licence fee paying customers. The financial and risk-related concerns make it somewhat precarious.

Outcome: It should be apparent to students that option 4 is the optimum strategic option to pursue. Arguably however, option 4 is more short term in nature, closely aligned to Horizon 1, whereas option 1 holds a longer-term orientation and more closely aligned to Horizon 3. In terms of setting long-term direction, option 1 would appear to be the preferred option overall.

Key Observation: These evaluations are subjective to the individual, however, and they can be enhanced by research by way of deep dives to gain greater insights. Good clinical justification must form the basis for scoring and evaluation. Furthermore, ranking of options towards identification of the singular most attractive option to pursue can lose sight of a multi-pillared approach to strategy whereby a number of options might combine to form a comprehensive approach to strategy development and execution over time.

Question 4 – Describe the leadership style of Director-General Dee Forbes and the business model chosen by RTÉ under her direction.

Prompt: Students should be familiar with the traits of Transpersonal leadership (Enright, 2018; Knights, 2016), as well as being aware of the 'Four Business Models for the Digital Era' discussed by Weill & Woerner (2015). Students should also be familiar with the types of business models that exist as illustrated by Chesbrough (2007).

Transpersonal Leadership

A Transpersonal leader is defined in Knights article as a leader who will "operate beyond the ego while continuing personal development and learning. They are radical, ethical, and authentic while emotionally intelligent and caring" (2016: 1). Direction-General Dee Forbes has managed to do this by leading RTÉ to execute on a strategy that prioritises the public and the consumer. By putting the consumers first, she is acting beyond the ego, redefining the mission and values of RTÉ. A strong customer-oriented focus contributes towards acting beyond the limits of personality.

Students could refer to Enright (2018) and draw on the six Action Points to demonstrate how Forbes exhibits the traits of transpersonal leadership to create a digital-first culture within RTÉ.

1. Establishing the Core Purpose of the organisation, to act as a pivot during digital transformation:

- Redefining the mission and values of RTÉ to become more consumer focused.

2. Create a vision - and visionary leadership - to inspire and maintain optimism:

- Development of a detailed strategic vision and executable plan;
- Identification, selection and appointment of new executive team members;
- Implementation of digital platform, channels and content;
- Placing customer needs at the centre of RTÉ's strategy to create a reciprocal relationship with the public; and
- Will enable RTÉ to deliver on their agenda as a Public Service Media organisation.

3. Recognise the power of democratic and affiliative leadership styles:

- Appointment of new members to executive board; and
- Creation and integration of departments to share ideas and introduce a creative and forward-looking cultural perspective within the organisation.

4. Use empathy, and a deep and detailed customer focus, by letting clients be involved:

- Collective ideation present in all strategy development initiatives for RTÉ going forward; and
- Realisation that consumer is King (or Queen).

5. Change the culture, and make digital transformation as a continuous process:

- Capital raising and cost-cutting initiatives to free up capital for digital investments;
- Not neglecting traditional media, but constantly looking at trends in younger audiences viewing habits; and
- Recognising the need to establish and build-up digital content channels and capabilities within the newly designed structure.

6. Pursue transpersonal leadership; leaders must change themselves:

- Recognition that government play a critical role in RTÉ's future demonstrating concern for a broader stakeholder community;
- Adapting to performing within the public sector; and
- Making the tough decisions, that have to be made, for the company to survive and provide a public service.

Business Strategy

Table 5: Four Business Models for the Digital Era

Omnichannel Enterprise	**Ecosystem and Community Shaper**
- Manages and safeguards customer relationship	- Branded Platform
- Many products and channels to satisfy an array of customer need and experience	- Strong interface with third parties
- Unified value chain	Generative insights from all customer data
	- A portfolio of provider services to meet a customer needs
	- Dividend returns from all customer-related activity
Supplier	**Modular Provider**
- Products and services on offer via alternative channels and providers	- Interface capabilities
- Efficient producer	Ecosystem versatility
- Continuous Innovator	- Constant Innovator

Source: Adapted from Weill, P. and Woerner, S. L. (2015), "Thriving in An Increasingly Digital Ecosystem", *MIT Sloan Management Review:* 56(4): 29.

From the above Four Business Models for the Digital Era Matrix, students should recognise that RTÉ is aiming towards an '*Omnichannel*' business model where they prioritise the consumer through an integrated value chain business design. The services are available on a number of channels however the key to the success of this model is that consumers must have the same brand experience across each of the platforms. But in somewhat equal measure, it should also be evident that characteristics of the '*Ecosystem driver*' model feature as RTÉ's digital developmental aspirations and ambition evolve towards having a robust branded presence that will ensure great customer experience. Furthermore, RTÉ's reinvigorated sense of purpose requires the organisation to constantly innovate, a feature of the '*Modular producer*' model. Moreover, should RTÉ's ambition become stymied because of, for example, lack of funding, the threat of loss of power will be high, an attribute of the '*Supplier*' model.

<u>Key Observation:</u> Very often frameworks and models fail to illuminate the porous nature of real-world business. Complex business does not fit neatly within the boundaries of a single frame. In RTÉ's case, this is evident by way of the business model in effect which displays multiple attributes spanning all four business model designs. It is evident nonetheless that there is scope for RTÉ to strengthen its knowledge of the end consumer and potentially leverage benefits from an expanded ecosystem domain of service provision. This in effect could potentially open up new possibilities in terms of quality, design and revenue generation.

Chesbrough (2007) provides insightful advice on business model innovation and the different types of business models. RTÉ's business model aligns somewhat closely with the attributes set out by Chesbrough (2007) in describing the type 3 business model. The organisation has developed a segmented business model enabling it to compete in different segments simultaneously (e.g. TV, radio, online platform) allowing RTÉ to serve more of the market. On the one hand, RTÉ's suite of offerings have become more distinctive, but on the other hand, this has not translated into higher profitability. Arguably then, the associated higher costs related to public service absorbs the added benefit gained from serving multiple segments effectively well. A key distinction between private and public entities lies in the cost of doing business. For RTÉ to transition fully to a type 4 or 5 business model will be challenging. This will require the unlocking of a greater set of resources to support the development of products and services stimulated by external ideas and new technologies. This type of business model values collaboration with an ecosystem of partners (e.g. suppliers) towards continuous innovation to unlock potential. As external ideas and technological development become more mainstream, RTÉ's challenge will be one whereby anchoring innovation practice into the organisational fabric that play a key integrative role within the business is not stymied by structural and financial obstacles. This is contingent on a high degree of awareness, openness, collaboration, learning and systematic practice. Director-General Dee Forbes is attempting to innovate RTÉ's business model towards type 5 whereby the company integrates its innovation process with the business model towards a highly responsive and adaptive platform made possible by leveraging new technologies to support a new approach.

Key Observation: It might be argued that business model design does not necessarily take into account the important organisation behavioural dimensions that must also be considered when attempting a major transformation (e.g. culture, learning, leadership practice).

References:

Chesbrough, H. (2007), "Business Model Innovation: It's Not Just About Technology Anymore", *Strategy & Leadership*, 35(6): 12-17.

Enright, D. (2018), "Digital Transformation: Creating a Digital-First Culture through Transpersonal Leadership", Routledge, Taylor & Francis Group, *Transpersonal Leadership Series*, White Paper Eight: 1-14. Available via https://www.leadershapeglobal.com/white-papers#digital. [Accessed on 30 January 2020].

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