

What's Changing in How You Publish

Media & Communications

You have seen this on your operations calendar

“Your sector is losing the advertising revenue that funded overhead, while the routine production layer still runs on the human hours it ran on in 2015. Either the operations engine changes, or the business compresses.”

01 Why is our cost per published unit drifting despite tighter budgets?

02 What happens to our audience franchise when our senior editors leave?

03 Why has our commission-to-air cycle not moved in a decade?



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Every Chief Operating Officer or Head of Operations at a mid-sized European media company has had the same Monday morning. Three operations reviews on the calendar. Review one: a drama franchise renewal slipped because only one senior producer knows the music-licensing terms, and she has been in edit on another series for three weeks. Review two: a documentary cycle where a mid-tier producer spent twenty-two hours last week on transcripts, metadata, rights cross-checks, and SEO cleanup that a platform you already pay for could have handled in an afternoon. Review three: a fifteen-year audience franchise. The senior commissioning editor who has carried it since 2011 scheduled thirty minutes with you for Thursday. The subject line says succession.

You have run this function for ten years. The pattern used to be simple. Hire good producers and ad-ops people. Protect the on-air quality. Hold production cost within target. Ship the calendar.

Something changed. Your cost per published unit is drifting despite tighter budgets every quarter. Your senior editors and commissioning producers are the scarcest resource in the firm, and they are spending more than half their week on coordination, metadata, and administrative handoffs that infrastructure could hold. Your commission-to-air cycle has not meaningfully shortened in a decade despite the tooling that exists now. And you can name the four or five senior editors whose departure inside three years would cost more than any cost-out programme has ever gained.

You do not have a you problem. You have an industry problem and an operations problem, happening at the same time. Most media COOs are treating them as two. The ones who see them as one are going to own the next decade of European media.

This briefing covers what is happening in your sector, what it means inside your operations engine, and the three questions your operations team should answer before the next board cycle.

Media just lost the equation that ran it for a generation

Every technology wave your sector absorbed in the last thirty years gave the business a new way to monetise the same audience. Digital video stretched the production window. Programmatic advertising multiplied the ad inventory. Streaming extended the content lifecycle. Social distribution added a new set of touchpoints. Each layer gave the business a new reason to produce more and carry more staff. The model ran on scale, and it never broke.

AI does not behave the same way. The audience still needs commissioning judgment, editorial voice, and the kind of authority a platform cannot fake. The demand for trusted content is arguably higher than it has ever been. But the routine production layer that used to absorb most of the mid-tier hours can now be done in a fraction of the time by platforms the company already pays for and by agents the company has not yet deployed. At the same time, advertising revenue is declining structurally, not cyclically. The cost line has to fall faster than the revenue line, or the business compresses.

Your sector is losing the advertising revenue that funded overhead, while the routine production layer still runs on the human hours it ran on in 2015. Either the operations engine changes, or the business compresses.

The companies pulling ahead are not waiting. A handful of Nordic and European media firms have committed serious budget to agent-led production infrastructure in the last eighteen months. The ones moving first are taking commissions from pitch to publication in half the time, on the same rate card, with margin moving back toward numbers not seen since 2016. The other half of the story is audience. Audience segments that were sub-scale because the unit cost of editorial attention was too high are suddenly the addressable segment, because the same senior judgment now reaches ten audiences instead of three. The firm that opens that segment first captures a decade of relationships incumbents never priced for.

Your operations engine is feeling it every day

Your production engine. Producers are working harder to close out commissions on the same calendar. Handoffs between commissioning, production, post-production, rights, and distribution carry friction built when the function was organised around a 2010 broadcast workflow and never redesigned. You produce a series the same way you did in 2015. The tooling has changed, the audience has changed, the distribution surface has changed. The production engine has not.

Your editorial and content quality. The quality floor holds. The quality ceiling has not risen in a decade. Both of those are now at risk. The senior editors and commissioning producers who catch the story a junior would miss, who read the audience signal before it appears in the dashboard, who know the rights terms on a fifteen-year franchise, carry that judgment as biography. It has never been written down. When one of them leaves, the firm publishes two franchises with a visible quality gap before the audience notices, and three before subscribers comment.

Your operational bench. Your mid-tier producers and ad-ops teams cost the firm fully loaded rates against routine production and administrative work that platforms now handle at a fraction of the cost. The rate card reads the same number it did two years ago. The realisation on that book of work has drifted. Utilisation targets are harder to hold every quarter. Most of your mid-tier bench has not had a conversation yet about what the next version of their role looks like in the operations engine you are building.

Your senior operators. Your senior producers, commissioning editors, and commercial directors cost the firm between €280 and €420 an hour fully loaded. On a standard week they deliver ten to fifteen hours of the editorial and audience work only they can do. The remaining twenty-five to thirty hours go into coordination, metadata review, rights cross-check, production management, and internal handoffs. Routine work the firm has not yet built infrastructure to carry. The scarcest resource in the firm spends most of its week on the work it is least suited for.

Your audience continuity. Your top senior editors and commercial directors each carry audience franchises worth €500K to €1.5M a year in subscription, advertising, or licensing revenue. They built those relationships on fifteen to twenty-five years of audience-specific judgment, rights knowledge, and commercial instinct, never written down. When one of them leaves, industry experience is that the franchise loses measurable audience within two quarters. The conversations are already on your calendar. You know which ones.

The companies pulling ahead are building one piece of infrastructure

Your sector is compressing from below because AI takes hours out of the routine production layer. Your operations engine is compressing from above because your senior editors and producers are spending most of their week on coordination work the firm has not built infrastructure to hold. Same force, two altitudes. But there is a third thing happening that most media COOs have not named yet, and it is the one that matters most.

You do not have three problems. You have one. The audience judgment that makes your firm valuable has never been separated from the individual editor or producer who carries it. Every cost-per-unit drift, every subscriber-churn spike, every stuck cycle time is a symptom of that single unsolved thing. Pay a senior to do metadata work a platform can do, and cost per unit drifts. Let a senior commissioning editor leave with the audience franchise still in her head, and the subscriber base follows. Keep the production engine designed around coordination bottlenecks that cannot be unblocked, and the cycle cannot shorten.

Look at the firms pulling ahead. Production, bench, and audience continuity are not three separate programmes. They are one piece of infrastructure. Every commission makes it smarter. The senior who leaves adds to it on the way out. The mid-tier producer learns by using it. The audience franchise holds because it lives in it. The same infrastructure that protects cost per unit protects audience continuity and shortens cycle.

You can tell which camp a media company is in from a single question. Can you point to one thing in your operation that is measurably smarter this quarter than last quarter? Most cannot. The ones that can have already made the shift, and they are already closing the commissions you thought were yours.

You have eighteen to twenty-four months. The AI adoption debate is over. Your question now is whether you build the infrastructure your firm will run on for the next decade, or wait until the CFO brings in a platform vendor who builds one that belongs to someone else.

What most firms are doing. What the winners are doing instead.

Every media COO has had the AI conversation. Most are making the same four decisions. A smaller group is making different ones. The difference is architecture, not tooling.

THE DEFAULT PATH

Cut production headcount to hit cost targets

Same production engine, fewer people on it. Quality slips. Audience notices within two quarters.

Treat senior departures as an HR problem

Recruit replacements at premium rates, hope the audience stays. Franchise erodes quietly.

Deploy AI tools on top of the existing engine

Every producer gets a chatbot. Individual productivity rises. Cycle stays stuck because the engine is still 2015.

Defend the mid-tier by avoiding the conversation

Pretend roles do not change. Lose the best mid-tier producers to firms that moved first. Bench thins.

THE WINNERS' PATH

Rebuild the production engine around an agent layer

Routine work moves to infrastructure. Headcount redeploys to audience and franchise work.

Extract senior judgment as a side-effect of daily work

Capture from the artefacts they already produce. The franchise stops living in one head.

Redesign the commission-to-publish flow around the new unit

Mid-tier producer plus agent plus extracted judgment delivers senior output. Cycle halves.

Redesign the junior pathway around audience work from day one

New hires pair with agents and the firm's corpus. Five-year curve compresses to eighteen months.

Same operations engine. Same twelve months. Opposite outcomes. The difference is the architecture, not the agents.

THREE QUESTIONS

Cost per Published Unit. Editorial Continuity. Speed-to-Publish.

Three questions every media COO is tracking. None of them used to be the same question. They are now.

01 · COST PER UNIT

Why is our cost per published unit drifting despite tighter budgets?

The rate card has not moved. Utilisation is within target. But realisation on routine production work has drifted, and the platforms your company already subscribes to are delivering the tagging, transcription, metadata, and SEO work that justified mid-tier billing. The rate card is fine. The production model is the question.

02 · EDITORIAL CONTINUITY

What happens to our audience franchise when our senior editors leave?

Four to eight of your senior editors, commissioning producers, and commercial directors will leave inside three years. Each one carries audience-specific judgment that took twenty-five years to build and has never been written down. The franchise holds because they are in the room. When they leave, audience signals drift before anyone notices, and the subscription base follows.

03 · SPEED-TO-PUBLISH

Why has our commission-to-air cycle not moved in a decade?

A standard commission takes twelve to sixteen weeks on mid-complexity franchise work. Roughly half of that time is coordination, metadata, rights cross-check, and administrative handoff that compresses to hours not weeks. The firms that rebuild around this ship the same commission in five to eight weeks. Same rate card. Same quality. Not productivity. Capacity.

What the firms winning this play are actually doing

Four concrete moves any media COO can start this quarter. Each touches one part of the operations engine. Pulled together, they become one architecture the firm runs on.

1 **Production: decompose every content type to the task level, then cost around the tasks that still make money**

Most COOs are redesigning content types. The right unit is the production task. List the task bundles inside each franchise your firm commissions. Mark each: agent-owned with human audit, composite, senior-only, retired. What remains is a different production engine at a different cost base. The COO who walks into the next cost review with the task-level map owns the conversation. The ones with content-type P&Ls are running the 2019 playbook.

2 **Quality: extract senior editorial and commissioning judgment as a side-effect of daily work**

Documentation sprints and mentoring programmes have failed in every media firm for thirty years. The judgment is not articulable in prose. Extract from the artefacts the senior already produces: commissioning briefs, rights notes, audience memos, post-mortem notes. The firm captures the reasoning patterns as a side-effect of paid work. Senior consent is straightforward because the editor is not asked to explain themselves. Their role elevates from production to escalation. The franchise stops being biographical.

3 **Bench: redesign the junior pathway around audience and commissioning work from day one**

The routine production work that trained juniors into mid-tiers is now running on agents. No routine work, no training ground, no senior bench in 2031. New hires do not start on metadata and post-production cleanup. They start on commissioning research, audience analysis, and paired work with seniors. The five-year curve compresses to eighteen months. The junior who in 2022 built competence through three years of repetition now builds it through three years of judgment at volume.

4 **Continuity: institutionalise the audience relationship, so it transfers on architecture, not biography**

Every media CEO has lost a franchise once, the quarter after the senior editor who carried it announced her departure. The move is to treat every major audience franchise as a small intelligence asset under active construction. Ten years of commissioning history. Accumulated judgment from every senior who served it. The franchise's audience data, rights architecture, commercial deal structure, unwritten editorial rules. When the senior leaves, the next inherits the asset. The franchise holds on the firm's architecture.

Senior advisory fused with working infrastructure

The media COO has four places to go for help. None of them can do what we do, each for a specific reason.

The big consulting firms' media practices sell expensive diagnostics delivered by partner-led teams billing analyst hours. They produce decks. They cannot put working infrastructure into a senior producer's workflow in three months. Their revenue model is what your problem is about.

The large implementation arms sell eighteen-month programmes designed around the broadcast architecture built in 2010. They staff hundreds of consultants on the ground. They cannot run the senior-judgment conversation about which flows the firm should leave alone.

The media-tech platform vendors sell tools and call them transformation. Every media firm has bought a platform that did not translate to cost per unit or cycle time once already. The tool runs. The operations engine stays the same.

The hyperscaler media consulting arms sell technical implementation tuned to their own platform. The infrastructure they build optimises for their stack, not your operating model. Lock-in is the business model. Your infrastructure becomes a platform asset, not a company asset.

The market offers four things you have already said no to. GRAIL is the fifth option.

WHAT YOU GET

Senior advisory that speaks operations-floor, not diagnostic-deck

Working infrastructure your producers use the same week

Custom agents built on your franchises, your audience, your rights

The start of an intelligence infrastructure your best editors feed

No vendor lock-in at any phase of the engagement

WHY IT MATTERS

Founded by operators who have run media and technology operations

Business first, technology second

Three weeks from first meeting to working infrastructure

Your producers keep the infrastructure, you own the IP

Every next step earned by what just shipped, never assumed

Three sessions with your operations leadership. Working infrastructure from week one.

We start with your operations leadership team because the change cannot outrun the team's personal understanding of what is possible. Three workshops. Each delivers standalone value. Each earns the right to the next.

WORKSHOP 01

How to think

Walk through what is happening in your sector and inside your operations engine. Build the first piece of infrastructure in the room: a franchise-specific agent for one of your real audience relationships, extracted from the commissioning archive you already have. Your operations team leaves with a shared view of what to do next and the first piece of working infrastructure already in their hands.

WORKSHOP 02

Your operations infrastructure

A half-day build. Your Head of Production, Head of Commissioning, Head of Ad Operations, and Head of Subscriber Operations each leave with five to ten pieces of working infrastructure tuned to their function. Commissioning prep. Rights cross-check. Ad-ops proposal drafting. Subscriber-cohort analysis. Metadata pipelines. Infrastructure your teams are using the same week, not decks about infrastructure.

WORKSHOP 03

Ready to run

Refined infrastructure based on real use. The rollout plan to your wider operations organisation. The knowledge-extraction plan for your senior editors and producers. The pathway plan for your mid-tier producers and ad-ops teams. And the CEO, Editor-in-Chief, and CFO conversation with numbers they can check: revenue per senior operator, cost per published unit by franchise, audience retention by relationship.

Three weeks. No IT project. No board approval needed to start. The infrastructure your operations engine is already running on when we finish.

For your next operations review

The questions where your operations team cannot agree on an answer are the ones worth an hour on the agenda. Ask these honestly.

Of the last ten franchise commissions where cost per published unit came in over plan, how many drifted because routine production work ran on human hours instead of infrastructure? If you do not know, how would you find out?

What percentage of your senior editors' and producers' weeks is spent on coordination, metadata, rights cross-check, and administrative handoff, and what would it take to cut that in half?

If your top three senior editors left next year, what would happen to the audience franchises they carry? What have you actually transferred to the rest of the bench in the last twelve months?

Can you point to one thing in your operation that is measurably smarter this quarter than last quarter? If not, what are the next four quarters going to add up to?

Which of your mid-tier producers is already working the way the rest of the bench will need to work by 2027? What would it take for that to be the default across your operations organisation?

If any of these produces a disagreement in your operations team, that is the conversation worth having before the board asks.

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The biggest talent transition of a career. Compete on capacity, not headcount.

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