Public Media Alliance

PSM and AI

Part 2:
Governance, Geopolitics and Procurement

November 2025

BRAID
Bridging Responsible AI Divides

UKRI Arts and Humanities Research Council

Contents

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Funding

This work was funded by BRAID, a UK-wide programme dedicated to integrating arts and humanities research more fully into the responsible AI ecosystem, as well as bridging the divides between academic, industry, policy and regulatory work on responsible AI. BRAID is funded by the Arts and Humanities Research Council (AHRC). Funding reference: Arts and Humanities Research Council grant number AH/X007146/1.

Acknowledgements

Our thanks to the authors, funders, and PSM participants who committed their valuable time to this report.

We are also grateful to the mentor on this project, Prof. Melissa Terras, for her guidance on methodology, clarification of technical matters, and constructive comments on an early draft of this report.

Cover photography: Produced using Adobe Firefly / PMA

1. Introduction

In an era marked by rapid technological transformation and intensifying geopolitical tensions, the role of public service media (PSM) has never been more vital—or more vulnerable. This report, the second in a series written by Professor Kate Wright in collaboration with the Public Media Alliance (PMA), investigates how PSM organisations around the world are navigating the complex terrain of Artificial Intelligence (AI) procurement and implementation. It is written in line with PMA's mission to support, advocate, and connect independent, accountable, and representative public service media that uphold democratic values and foster informed societies.

Public service media are uniquely positioned to champion ethical and responsible innovation in AI. PSMs are guided not by profit but by public value: editorial independence, transparency, diversity, and universal access. Yet, as this study reveals, these very principles are being tested by shifting geopolitical landscapes, opaque practices by some AI developers, and the complex relationship between geographic and commercial AI concentration. From cybersecurity threats and copyright dilemmas to the challenges of maintaining independence in the face of state interference, PSMs must make difficult decisions about which AI tools to adopt, which providers to trust, and how to safeguard their mission as the AI revolution continues.

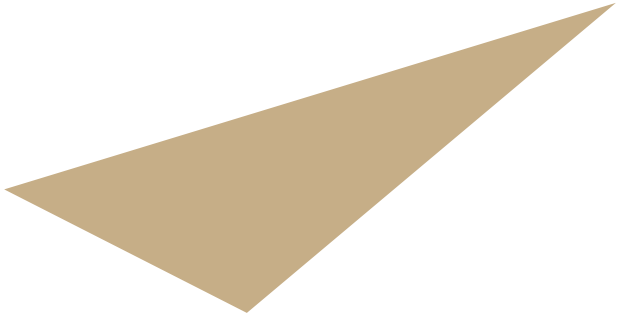
Drawing on original data collected throughout 2024 from thirteen PSM organisations across five continents, this report offers a rare insight into the governance structures, procurement practices, and ethical considerations shaping AI adoption by public service media. A key theme running throughout this analysis is how PSMs conceptualise and prioritise their various responsibilities within AI procurement, emphasising data privacy and the need to minimise national and international security risks.

The report then goes on to assess the future challenges faced by PSMs by investigating the commercial companies that supply them with AI tools and systems. This includes giving PSMs three warnings about serious emerging risks relating to state-led democratic backsliding in the USA, involving Large Language Models (LLMs), privacy policies, and data centres.

Building on the outcomes of the first report, which mapped the AI tools used by PSMs in journalism production, part two highlights the diversity of approaches to procurement—from centralised executive oversight to participatory pilots—and underscores the urgent need for collaborative, values-driven solutions. As AI becomes increasingly embedded in media production, the stakes for public trust, democratic resilience, and media freedom grow ever higher.

This report is not only a baseline study—it is a call to action. It invites PSMs, civil society, researchers, and policymakers to engage in collective reflection and strategic cooperation. Only by working together can we ensure that AI tools are effectively understood and used in the public interest, rather than undermining it. However, given the sensitive issues under discussion here, we will continue to have further, private conversations with PSMs, as and when appropriate.

The Public Media Alliance remains committed to supporting this journey, advocating for responsible innovation, and defending the values that make public media indispensable.



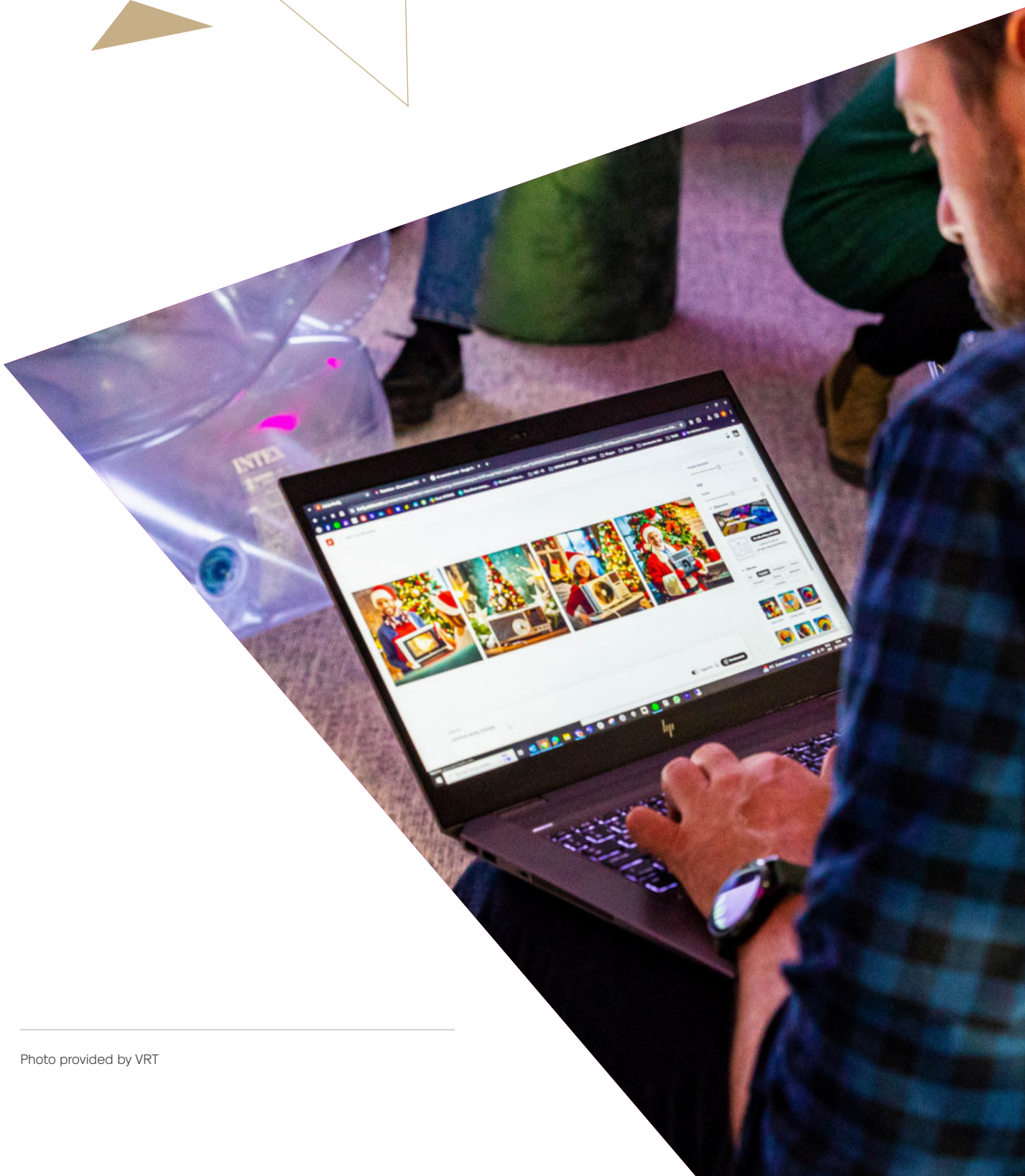


Photo provided by VRT

2. Methods

This is the second in a series of two reports, exploring how PSMs around the world approach Responsible AI. The methods used in this second report are the same as in the first (Part One), with the exception of section 2.3, which details how we investigated AI companies.

2.1 Defining 'AI' and 'Public Service Media'

In this study, Artificial Intelligence is defined broadly as **"a collection of ideas, technologies, and techniques that relate to a computer system's capacity to … perform tasks normally requiring human intelligence.**[1]" So, AI encompasses, but is not confined to, generative AI (GenAI): embracing various forms of automation, machine learning, and data analysis.

Participants were asked about their use of AI in the production of 'journalism' rather than 'news.' This was because PSMs tend to 'draw the line' differently. Some distinguish between the uses of AI permitted in hard news and other content, while others differentiate between factual and other content. By asking about 'journalism', we were also able to address a range of other genres, including current affairs and investigative documentaries, which have not previously been analysed in other studies.

PSMs tend to be defined in terms of their commitment to public service values. But it is difficult to define a sample of organisations in this way, as some organisations that self-describe as PSMs are state-controlled; while others move back and forth between degrees of government control over time and in response to political events. For this reason, we approached a diverse range of organisations able to exercise significant editorial independence, based on the latest version of the global State Media Monitor[2], as well as PMA's professional judgement. Full details are available in the academic article on which this report is based, which was undergoing peer review at the time of writing [October 2025].

2.2 Data and Sample

Thirteen organisations participated in this study, as listed in Table 1. These media organisations operate across five continents, work in a range of languages, and serve a mixture of domestic and international audiences. Unfortunately, we were unable to include any PSMs from North America as they declined to participate in the study, due to the operational demands and political sensitivities relating to general elections in the USA and Canada in 2024 and 2025 respectively.

Given the importance of resourcing, organisations are listed in order of annual income: with high-annual income being classed as €500M+p/a; medium-income as €100M+ p/a; and low-income as less than €100M p/a.

We originally intended to have five organisations per category, but two high-income organisations were unable to proceed. Our sample therefore contains more organisations with medium and low incomes, but this is more representative of the sector.

[1] reutersinstitute.politics.ox.ac.uk/our-research/industry-led-debate-how-uk-media-cover-artificial-intelligence
[2] statemediamonitor.com

Table 1: List of participating organisations

Name	Acronym	Country	Income Category	Annual Income
Nippon Hōsō Kyōkai* (trans: Japan Broadcasting)	NHK	Japan	High	€4.3 billion (2023)
Swiss Broadcasting Corporation	SRG SSR	Switzerland	High	€1.6 billion (2022–3)
Australian Broadcasting Corporation	ABC	Australia	High	Combined government/ commercial income €741 million (2022-3)
Radio-télévision belge de la Communauté française (trans: Belgian Radio-television of the French Community)	RTBF	Belgium (French)	Medium	€469 million (2023)
Vlaamse Radio- en-Televisieomroeporganisatie (trans: Flemish Radio and Broadcasting Organisation)	VRT	Belgium (Flemish)	Medium	€465.4 million
Special Broadcasting Service	SBS	Australia	Medium	€307.1 million
Sveriges Radio (trans: Swedish Radio)	SR	Sweden	Medium	€290.6 million (2022-3)
South Africa Broadcasting Corporation	SABC	South Africa	Medium	€241.4 million (2023)
Public Television Service	PTS	Taiwan	Low	€71.7 million (2022)
Suspilne (trans: Public) Prior to 2022 known as National Public Broadcasting Company of Ukraine	-	Ukraine	Low	€40.5 million (2023)
Radio New Zealand	RNZ	New Zealand	Low	€32.3 million (2022-3)
Public Broadcasting Corporation of Jamaica	PBCJ	Jamaica	Low	€8.8 million (2023-4)
TeleRadio Moldova	TRM	Moldova	Low	€8.3 million (2023)

The data on which this report is based included an online survey, which all participating organisations returned, and semi-structured interviews with designated executives provided by ten organisations.

Data collection took place between May and December 2024, so this report can be treated as a 'baseline study' conducted before the release of an open-source LLM by the Chinese firm DeepSeek, and the very rapid industry and political changes which took place in the USA at the start of the second Trump administration.

This data collection period was longer than we had originally intended because AI was almost universally regarded as highly sensitive by PSMs, which slowed down the process of obtaining organisational consent. But this longer data collection period had some advantages: enabling participants to attend various meetings between PSMs about AI[3], and to reflect on the relationship of AI to political change, as 2024 was a 'mega-election' year in which voters in more than sixty countries went to the polls[4]. We will now go on to discuss our findings, beginning with an overview of the 'state of play.'

2.3 Researching commercial AI providers

In 2025, geopolitical tensions relating to AI escalated[5], and participants seemed to become much warier of talking publicly about the challenges involved in AI procurement. We approached participants for updates twice in 2025, but only two PSMs agreed to give a follow-up interview, one in May and one in October.

To assess the procurement challenges likely to be faced by PSMs going forwards, we used desk-based research to investigate companies producing the twenty-six commercial AI tools used by respondents to produce journalism, as well as three AI products incorporated into hybrid tools (see Appendix). This analysis included companies' location, privacy policies, commercial partnerships, funding and technical dependencies.

Analysis was carried out using targeted online searches and the technology company database, Crunchbase, as well as the high-end investor database, Pitchbook.

When company details could not be found, we also consulted S&P Cap IQ Pro, LSEG Workspace and Bloomberg, emailed the companies concerned, and sent enquiries to national business registers in the countries where they were located.

Transparency regarding company information was also assessed using the same categories as Martin[6] to ensure comparability. These categories were: the name of the AI product, ownership, headquarters, founder(s); latest valuation; latest revenue; total funding acquired; number of investors; number of funding rounds; major investor(s); and primary services. Some categories were combined in tabulation (see Appendix).

We synthesised and analysed data as it was collected, and then conducted manual quantitative and qualitative content analysis, assisted by NVivo software.

[3] Such as the meetings held by the Asia-Pacific Broadcasting Union, Médias Francophones Publiques, Public Television System, and the South Africa Broadcasting Corporation.
[4] pewresearch.org/global/2024/12/11/global-elections-in-2024-what-we-learned-in-a-year-of-political-disruption
[5] Discussed in section 3 of this report.
[6] journalismresearch.org/mapping-the-finances-and-ownership-of-ai-companies-used-by-journalists

3. Who makes decisions about which AI tools to authorise?

In this section, we analyse who decides which AI tools and products to use, and how these decision-makers are embedded within different governance structures. We then go on to discuss the challenges that PSMs face in running inclusive, participatory pilots, and obtaining comparative data about various options.

3.1: Top executives and department heads

The sensitive and specialised forms of risk-assessment involved in approving and procuring AI tools and systems meant that these decisions tended to be made in a 'top down' fashion by senior managers within individual PSMs. Seven out of ten PSMs that authorised the use of AI in journalism production described these decisions being made by named senior managers, within a clear, hierarchical structure.

These decisions were either made by Tier 2 managers, who reported directly to the overall Director or by Tier 3 managers: that is to say, departmental heads, who reported to Tier 2 managers. We did not find any consistent patterns between the level of seniority at which decisions about AI tools were taken and geographic regions, income categories, or heightened sensitivity regarding data privacy, security, or other issues.

Instead, the distribution of approval between different layers of management appeared to be informed by senior managers' understandings about the best relationship between 'Responsible AI' and centralised decision-making, including their conceptualisation of the appropriate relationship between the approval of AI tools and the uses of those tools. Practical trade-offs between organisational consistency, managerial workload, and the speed of AI adoption were also significant in shaping the distribution of responsibility between different kinds of managers.

For example, top executives at ABC (Australia) approved AI tools and, at the time of interviewing, were also involved in creating a single "streamlined" list of approved AI tools. Interviewees described their approach as "responsible" because it ensured the proper assessment of a raft of complex, inter-related issues, including cybersecurity, data privacy, and copyright. As an interviewee explained, their rationale was that:

> **What we want to have is a list of tools that are approved for use, so that [editorial staff] don't need to reinvent the wheel; they can just go there [to check if what they want to use is permitted].**

However, this was a clearly challenging and time-consuming endeavour. In addition, senior managers were still discussing how much detailed guidance to give department heads, who approved the specific uses and related functions of AI tools, given that functionality was continually being updated. This was also complex, as one of the ABC interviewees explained,

> **For example, with generative fill, how do you write guidance to say to people that, if it is generic graphic you're allowed to multiply that out to a 16 by 9 ratio, but, if it is the crowd at the side of an F1 racing track, don't do that because [that could affect] the crowd, [and] who knows who was there or not there.**

A core principle guiding ABC's approach to these issues was the extent to which AI altered what they called "material facts." But as an ABC manager explained "because the technology's novel and because the applications of it are limitless, we just have slowed that down to give us time to get staff up to speed on responsible AI, and acculturated in the different uses of those tools." So, managers described ABC as having been relatively slow to benefit from "AI efficiencies".

By contrast, the interviewee at SR (Sweden) argued that it was an important normative "principle" that responsibility was not concentrated at the very top of the organisational hierarchy, for practical and legal reasons. As the manager explained,

> **We have deliberately tried to decentralise the responsibility of really seeing whether [editorial staff] should use AI-generated content or a specific tool to [Department Heads] because otherwise [the most senior managers in SR] would get flooded by questions.**
>
> **It's also a very important editorial principal for us that [other managers] should have this responsibility within the organisation…**
>
> **One reason for this is that within the Swedish publishing system … every piece of content that you publish has to have a legally responsible editor. For example, … the Head of the National News department.**

Department heads were also thought to be capable of deciding which AI tools to use within particular kinds of content, given SR's detailed editorial guidelines and the organisational strategy steered, in part, by an executive tasked with "accelerating AI safely."

3.2: Central deliberative bodies

Both forms of hierarchical decision-making were usually carried out in consultation with a central body within each PSM. This central body was comprised of senior managers from technical, legal, risk-assessment, and editorial teams; most included a separate representative from news.

These central bodies were variously described as an AI "working group", "Committee", "Council" or "Chapter", and had evolved from earlier ad hoc meetings between 2023 and 2024. Central bodies met with widely varying frequency—between once a week at SR (Sweden) and once every three months at PTS (Taiwan).

Central bodies were tasked with facilitating internal discussion about AI tools and their uses, as well as formulating organisational policies. The only exception to this was Suspilne (Ukraine), which engaged in what managers called more "fluid consultation" at the time of interviewing in 2024 because it was still in the process of establishing formal governance structures.

3.3: More complex models of governance

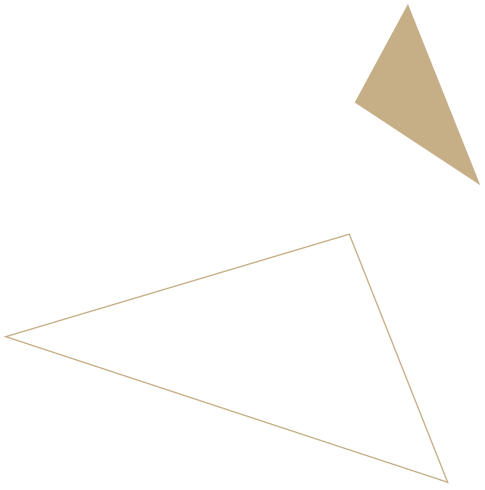
However, three PSMs indicated that new AI tools were approved via more complex governance models. SBS (Australia) was unusual in having a "bottom-up" route: allowing editorial teams to seek the permission of the Technical team to introduce a new tool. The Technical team would then conduct the necessary checks, including those relating to data privacy and cybersecurity, before issuing approval. Alternatively, an AI tool could be approved for use at SBS after being selected as a pilot for strategic reasons, and trialled by the SBS's technical Incubator team.

Meanwhile, RTBF (Francophone-Belgium) employed what interviewees described as a "dual axis" of AI governance, which involved two central committees: one of which was dedicated to AI-related innovation initiatives and the other conducted editorial oversight of algorithms and AI, in keeping with RTBF policy. As an RTBF manager explained:

> **The relationship between these two committees is synergistic. The Editorial Committee discusses ethical and operational guidelines, often receiving input from the newsroom but also from the Innovation Committee. For example, when prototypes developed under coordination of the Innovation Committee demonstrate substantial potential benefits for the organization, their implementation might require slight adjustments to the existing ethical guidelines.**
>
> **A recent case involved amending our policies to clarify that generating content based on RTBF's proprietary materials (e.g., articles, transcriptions) is permissible under specific conditions.**
> **This collaborative governance model ensures both the responsible use of emerging technologies and their alignment with our public service mission.**

Finally, SRG SSR (Switzerland) is a federation of four regional networks, each of which operates in one of the country's official languages. So, the approval of AI tools at SRG SSR related to each networks' priorities, but also to the organisation's overarching data strategy and governance structure. Thus, a manager explained that who was responsible for approving AI tools varied considerably, stating that:

> **It depends on what layer [of the organisation] and what topic you are talking about. If RTS [Radio Télévision Suisse] or SRF [Schweizer Radio und Fernsehen] have an idea, and decide "We need to prioritise this", then … there is a certain liberty [to pursue that].**
>
> **But we have a standard process to handle service governance. We have service review boards where this is negotiated—there are our different ones…**
>
> **It can be [complicated] but we are used to it. Sometimes, it's becoming an obstacle, and many times it's also enriching because different perspectives, different cultures usually lead to good solutions.**
>
> **We're kind of an image of the Swiss government…we have two different levels [of decision-making].**



3.4: Staff deliberation and participatory pilots

Efforts to maintain ongoing communication with rank-and-file staff about AI involved multiple approaches, including top-down "newsletters" and "bottom-up staff surveys". Other kinds of contributions tended to be limited to participatory trials and pilots. Attempting to make these pilots inclusive or representative of the staff body was challenging, as PSMs employ hundreds or even thousands of staff, working in different primary languages, countries, and time zones, including varying shift-patterns.

However, VRT (Flemish-Belgium) provided an innovative example: recruiting a gender-balanced team of "AI ambassadors" from different departments within the organisation, with varying degrees of experience with, and enthusiasm regarding, AI. These AI ambassadors piloted new AI tools that the organisation was considering adopting, as well as feeding back on the editorial guidelines that VRT is producing regarding each AI tool. But running these pilots was expensive, time-consuming, and logistically challenging. As a senior manager at VRT explained:

> **We have [had to run] six times one-hour training sessions [for our trial of Microsoft Copilot with] …really small groups because…we are a news organisation with very specific working hours in three shifts. It's really difficult to get people. They are willing to be trained, but they are not always available to be trained…**
>
> **We are testing 200 accounts for [Copilot]… So, that's the extra licence we need to pay for 200 people… Some people didn't test it a lot, so we are exchanging [those participants] for other people who are on the waiting list, and so on.**

Differing shift patterns also meant that any subsequent discussion between VRT's AI ambassadors, managers, and VRT's legal advisor was conducted asynchronously via the cloud-based software, Slack.

3.5: Lack of comparative data on AI products produced by (and for) PSMs

The cost and logistical challenges of running large participatory pilots internally were often prohibitive for PSMs on low incomes, and even wealthier PSMs reported that investigating AI tools and running pilots took considerable organisational "bandwidth". The plethora of AI tools available, and the challenges of obtaining reliable comparative data, made this even harder. This meant that which tools were investigated and selected for trials could be, as one participant put it, "a bit random."

One of the reasons why PSMs chose to participate in this study was that they were keen to hear about other PSMs' experiences of specific AI tools, given their unique needs and obligations. Two participants (ABC in Australia and SR in Sweden) also expressed interest in researchers creating an ongoing database of AI tools, including considerations relevant to PSMs, and perhaps also detailing PSMs' experiences with different tools. SR indicated that the Nordic AI Journalism network had previously hosted a similar PowerPoint, but members had struggled to update it regularly, without external support—so this had fallen into disuse.

Questions for further discussion:

1. What are the relative advantages and disadvantages of having a hierarchical governance structure versus having a more fluid or flexible structure?
2. What are the most appropriate ways of involving a variety of staff in decisions about which AI tools and systems to procure?
3. What kinds of comparative data would be useful to consult when considering which AI tools and systems to procure?
4. How could PSMs better share their experiences of tools and systems with each other, without triggering further political or security risks?

4. How did managers describe the responsibilities involved in procuring AI?

Prior to January 2025, PSM managers reflected at length on the difficulties involved in procuring AI responsibly given the need for specialist risk-assessments, the complexity and sensitivity of the issues concerned, and the speed at which the industry was changing. Much of this discussion mirrored previous research on the challenges of procuring AI for public sector organisations including for the government, education, and health[7].

However, the procurement-related responsibilities that were ranked highest by survey respondents were 'ensuring data privacy' and 'minimising risks to national and international security.' Environmental issues and concerns about data ownership were ranked much lower. For this reason, we will now explore PSMs' approach to the responsibilities involved in data privacy and security in more detail.

4.1: Data privacy and copyright

Managers portrayed PSMs as having more responsibility than private media to 'ensure data privacy' because of their special responsibility to sustain audience trust. However, the responsibilities they discussed did not seem qualitatively different from those they shared with private media. These included the need to protect vulnerable sources, their journalists, and the proprietorial nature of their own data and output.

As discussed in our previous report[8], many PSMs with high or medium-incomes described these responsibilities as informing their decision to develop in-house solutions, which allowed them to safeguard their independence. Some of these PSMs indicated that they preferred using tools from companies like Adobe and Canva, which promised to avoid training their tools using customer-created content. They were also prepared to pay higher fees for other commercial AI tools and systems, which limited the extent to which others could access and profit from their journalists' work, including AI companies seeking to train their tools. However, these kinds of costs were beyond the reach of some PSMs with lower incomes.

Either way, conversations about data privacy and copyright tended to be closely intertwined in interviews with PSM managers. Organisational documents provided to this project also indicated that some PSMs had developed detailed policies in this area. These not only specified the proprietary nature of AI-generated content (like illustrations used for promotional purposes on social media), but also the proprietary nature of pre-production data inputted into AI applications, such as journalistic enquiries submitted to Large Language Models (LLMs).

[7] See Hickock (2024) link.springer.com/content/pdf/10.1007/s00146-022-01572-2.pdf, Hillman (2022) .lse.ac.uk/social-policy/Assets/Documents/PDF/working-paper-series/02-22-Hillman.pdf, and Sloane et. al. (2021) AI and Procurement - A Primer: Faculty Digital Archive: NYU Libraries

[8] publicmediaalliance.org/wp-content/uploads/2025/08/PSM-and-AI_PMA-Industry-Report.pdf

What was not clear was whether these policies determined the tools that PSMs were willing to consider procuring from the outset, or whether some PSMs had managed to secure agreement with these conditions during pre-procurement negotiations. So, a focus of future research might be the extent to which, and the conditions within which, PSMs are able to negotiate detailed contracts with AI companies.

Debates about using tools from AI companies alleged to have trained their tools by breaking others' copyright appeared to be ongoing in PSMs. Interviews and internal documents suggested that several participants saw their responsibility to respect other creators' rights as primarily involving legal obligations. As we mentioned in our first report in this series, two PSMs also stated that they used Midjourney, which has been sued for training its tools using copyrighted content[9].

The internal editorial guidance provided by Schweizer Radio und Fernsehen (SRF)—part of SRG SSR (Switzerland)—also names Midjourney as one of several AI tools that are potentially problematic for copyright reasons. However, SRF's guidelines go on to outline their dilemma about tools, which may be problematic but which "help us fulfil our public service mandate as efficiently and effectively as possible." SRF then concludes that managers will continue to consider the issue, including "monitoring developments" in legal cases[10]. In so arguing, SRF highlights a core issue for PSMs: that is, the extent to which their public mandate gives them moral-political responsibilities to respect other creators' rights, as well as legal responsibilities, and how to square both with their obligations to audiences.

[9] reuters.com/legal/litigation/ai-companies-lose-bid-dismiss-parts-visual-artists-copyright-case-2024-08-13

[10] SRF (2024), AI Guidelines. Document in author's possession.

4.2: Security

Senior managers described data privacy and security as being closely inter-related issues within pre-procurement checks. However, PSM managers' discussion of security seemed to involve qualitatively different concerns to private media.

Many interviewees described PSMs as being increasingly targeted by cyber-attacks because of their unique relationship to respective countries, as well as public trust in them. Some PSMs also linked their heightened caution about security to their status as part of their country's critical infrastructure in event of war, and to their legal obligations to carry public messages in event of emergencies, including war, terror attacks, and other major incidents.

Specifically, participants voiced concern about Distributed Denial of Service attacks; cybercrime, including the doxing of critical journalists; data corruption and data theft; and prompt injection attacks, including those aimed at PSMs' own chatbots.

Yet despite the shared nature of PSMs' concerns about AI and security, managers were often wary of discussing such issues openly. Indeed, several said they were reluctant to name the specific tools their organisation used, in case this created further political and security risks to their organisations and respective countries. The anonymisation afforded by this study reduced those risks, differing from other collective fora.

For example, some members of the European Broadcasting Union (EBU) said they did not wish to name the AI tools they used in the EBU's collective meetings because of their inability to "systematically vet" the independence of other self-described PSMs from their respective governments. The possibility that captured PSMs might have hidden political affiliations was another concern.

As a manager from a different European PSMs explained,

> **I remember very well in my EBU meeting at least 15 years ago… one of the representatives from Russian TV was there, was proud to explain…that he was a Putin loyalist and he saw no problem with that…**
>
> **So yes, indeed, just the label 'public service' doesn't automatically mean that we are in the same league.**

Meanwhile, PSMs based in other regions either lacked a sufficient critical mass of PSMs, or state-controlled media from China self-defined as PSMs and attended collective sessions about PSM and responsible AI. Understandably, PSM managers were uncomfortable sharing sensitive details in that context.

4.2.1 Security threats posed by authoritarian states

Russia and China were the most frequently cited sources of security threats. Such concerns were, understandably, strongest amongst low-income PSMs in countries seriously threatened by these authoritarian states: namely, Suspilne (Ukraine), PTS (Taiwan), and TRM (Moldova).

Suspilne (Ukraine)

Suspilne, whose country is at war with Russia, had banned journalists from using Russian AI tools and systems, with some rare exceptions[11]. However, determining which AI providers were influenced by Russia was much more challenging. As a senior manager at Suspilne explained,

> **We understand that [AI tools] can be registered somewhere in Europe, but the developers are from Russia, and the money can be from the Kremlin. It's a tricky thing how to check these systems [of influence]…**
>
> **We have to check …where this app came from on the official website, but [we] also ask other journalists, for example who is from Russia but now lives outside… We also [ask] the [Ukrainian] Ministry of Digital Transformation—they also help us with this… [But] if we have some doubts about [whether] it's from Russia or not… we will not use this [tool].**

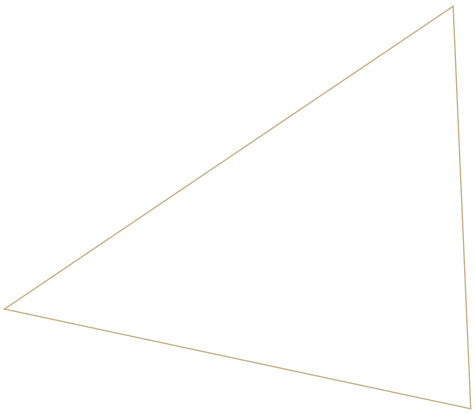
PTS (Taiwan)

Interesting comparisons can be drawn with PTS (Taiwan) whose country is experiencing pronounced tensions with China, including intense waves of AI-generated and distributed misinformation during the run-up to the Taiwanese election in 2024[12].

A PTS manager explained, PTS had banned journalists from using all Chinese software, hardware and cloud infrastructure[13]. In addition, the PTS manager explained that their journalists did not use OpenAI's ChatGPT, claiming that it had been trained using Chinese data so gave "incorrect views" about Taiwanese leaders.

Although the manager seemed to support the Taiwanese government's efforts to create a Taiwanese LLM, they were concerned about the potential for government interference in its operation, given that PTS Taiwan is listed as part of the country's critical infrastructure during times of conflict.

Therefore, the interviewee used the opportunity afforded by their research interview to call on other PSMs to share information and other resources relating to AI to help them fight "this [information] war" with China.



[11] As discussed in our previous report, Suspilne's investigative journalists were allowed to use facial recognition technology to help identify alleged war criminals, including the Russian tools, Findclone and Search4Faces, as well as PimEyes, which is owned by a firm in the United Arab Emirates (UAE). publicmediaalliance.org/wp-content/uploads/2025/08/PSM-and-AI_PMA-Industry-Report.pdf

[12] lowyinstitute.org/the-interpreter/how-taiwan-fights-disinformation-war

[13] However, as mentioned in our first report, PTS had a transcription contract with a Hong-Kong based AI firm, cSubtitle, which had trained its speech-to-text tools to differentiate between Taiwanese Mandarin, Chinese Mandarin and Hong Kong Cantonese.

TRM (Moldova)

The main concern that managers at TRM (Moldova) had about their government was the low funding they received from them, which not only left them struggling to afford high-end AI tools, but also to employ the AI specialists needed to identify and assess those tools. Even after a salary raise, the average monthly income at TRM was only €600. TRM's lack of resources had security implications because, as the interviewee explained, Moldova was "one of the most sensitive countries in Europe", following widespread allegations of Russian interference in the country's 2024 elections[14].

The TRM manager said they were deeply worried about the possibility that Russia could use AI to interfere in the organisation, and regarded their journalists' unofficial use of free AI tools as particularly risky since, "Nobody is really offering anything for free." However, the only affordable AI solutions that managers had been able to find were from China and, although TRM has a deal with the Chinese wire agency, Xinhua, this was viewed as unacceptable. As our interviewee explained, "We have other concerns about how China might use the data we are providing to them."

4.2.2: Malicious state and non-state actors

Other European PSMs combined their discussion about Russian threats with those posed by malicious non-state actors, linking their responsibility to minimise these threats to their distinctive status as PSM.

SR (Sweden)

A senior manager at SR (Sweden) explained that security was a central theme within cross-parliamentary talks about its new Charter period (2026-2033), following a terror attack in Stockholm in 2017, ostensibly on behalf of ISIS, as well as Russia's invasion of Ukraine in 2022, which prompted Sweden's accession to NATO. The interviewee explained that these security concerns were relevant to SR's Charter because the organisation has a statutory responsibility to carry public messages in event of war, terror attacks, or other emergencies.

SRG SSR (Switzerland)

Meanwhile, managers at SRG SSR (Switzerland) said that "sensitivity" about cybersecurity had increased during a diplomatic conference at Bürgenstock in 2024, aimed at securing peace in Ukraine. As one explained, "We were the focus of the Russians' [attention] and had to make sure that nobody could hack our systems."

However, SRG SSR had already enhanced its security assessment framework, following earlier legislative and regulatory changes, prompted by a major ransomware attack on the Swiss government in 2023 (Federal Department of Defence, 2024). For example, the organisation is obliged to apply for governmental permits when data is stored in unapproved countries, and these permits are subject to regular review. Speaking shortly after the US election in 2024, SRG SSR confirmed that the USA was not on the Swiss government's list of approved countries.

As an interviewee explained,

> **Whatever service we build up or whatever service we buy, there are regulations and procurement processes and then integration processes, and they all need to be considered.**
>
> **Looking back five years it was easier, to be frank. I mean, it's way more complex now – but it has to be done.**

[14] apnews.com/article/moldova-democracy-election-russia-disinformation-corruption-0a23e330da7121dbc34b085fc5d0d8ad

ABC (Australia), RNZ (New Zealand) and SBS (Australia)

PSMs in Australia and New Zealand prioritised their responsibility to minimise risks to national and international security, without identifying any particular threat. However, the Pacific is often cited as the site of the new "Great Game" between China and the USA[15].

Managers at ABC (Australia) stated that their organisation has a "very, very active cybersecurity team", tasked with guarding against "the corruption of ABC data and the ABC network": a strategic approach that was partly influenced by "an increased interest and investment in cybersecurity across government agencies…in the last couple of years." RNZ (New Zealand) also described security as a rapidly growing concern and SBS (Australia) listed "security first" as its top AI principle within its 2024 Annual Report[16].

PBCJ (Jamaica)

Finally, it is worth noting that one of the reasons why PBCJ avoided authorising any AI tools involved concerns that authorising any AI tools could expose it to hostile state and non-state actors. This included the threat of cybercrime, which is common in Jamaica. A PBCJ manager also explained that authorising AI tools involved seeking the approval of their board and the Jamaican government, which, they feared, the latter could threaten the organisation's independence and non-partisanship.

The need for direct, government approval of AI tools prior to procurement was not discussed by any other PSMs in this study. But, as we noted earlier, PTS (Taiwan) raised concerns that government interventions regarding AI security could undermine their independence. Since the government capture of PSMs often involves over-reach by government officials on the boards and regulatory bodies overseeing PSMs[17], we would urge PSM managers to consider the risk of politicisation by their respective governments, as well as threats posed by other kinds of external actors.

Questions for further discussion:

1. What are the most serious data privacy risks that PSMs are dealing with? How can these be addressed?
2. Do PSMs have a responsibility to protect others' copyright, above and beyond their legal responsibilities?
3. How can PSMs balance the need to take security risks seriously with the need to remain independent of their respective governments?
4. In what ways can PSMs collaborate to better understand their unique challenges and needs, as well as the AI tools and systems best suited to them?

[15] bloomberg.com/opinion/articles/2024-08-27/us-can-t-afford-to-let-china-win-the-great-game-in-the-pacific
[16] sbs.com.au/aboutus/wp-content/uploads/2024/10/SBS_2024_Annual_Report_DIGITAL.pdf
[17] https://academic.oup.com/book/57598

5. 2025 onwards: changing geopolitical contexts

Since we finished our main data collection period in December 2024, the geopolitical contexts of the AI industry have changed dramatically. Most of the commercial AI industry is based in the USA[18] and as early as February 2025, leading political scientists were warning that state-led democratic backsliding under the second Trump administration was so serious that the country was on the cusp of becoming a competitive authoritarian state[19]. That is, a state that combines autocratic and democratic elements: retaining the vestiges of democratic structures and processes while ensuring that elections are neither free or fair.

Global comparative research has demonstrated that executive aggrandisement is the main characteristic feature of state-led democratic backsliding around the world[20]: that is, the erosion of judicial and federal checks and balances designed to curb executive power. Unfortunately, some AI elites and companies seem to have been central to executive aggrandisement within the USA.

Most notably, the co-founder of OpenAI and founder of X.AI Elon Musk, led the decimation of federal agencies via a pseudo-government department, the so-called Department of Government Efficiency (DOGE), allegedly allowing unauthorised coders to gain access to citizens' personal data[21]. DOGE staff were reported to have been recruited by the prominent AI investor, Marc Andreessen, although he described himself more modestly as an "unpaid intern" at DOGE[22]. Meanwhile Palantir, the AI company founded by Peter Thiel, is reported to be working with the US administration to create a "super-database" of combined data from all agencies, as well as providing the AI-enabled surveillance technology used by the US Immigrations and Customs Enforcement (ICE) to track immigrants[23].

In addition, in July 2025 the White House issued a new AI Action Plan, geared towards "winning the race" for global AI dominance[24]. This plan involves investing heavily in US data centres, seeking to export US data stacks overseas, and removing existing safety and risk-based regulation, as well as tackling "woke AI"[25]. The USA's expansionist approach to AI also greatly increases tensions with other countries, the most obvious of which is China, the other dominant provider of AI tools and systems[26].

On 20th January 2025, a Chinese start-up, DeepSeek, released a more energy-efficient open-source LLM than previously thought possible. Their announcement occurred on the day of Trump's second inauguration, and the day before his announcement of a $500 billion investment in AI infrastructure[27]. Days after the White House announcement about the US AI Action plan, China issued its own AI Action Plan, calling for international cooperation on technical development and regulation[28]. However, China also has an expansionist approach to AI, referred to as the Digital Silk Road strategy[29].

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[18] policycommons.net/artifacts/12089781/hai_ai-index-report-2024/12983534
[19] foreignaffairs.com/united-states/path-american-authoritarianism-trump
[20] muse.jhu.edu/article/954440
[21] tandfonline.com/doi/pdf/10.1080/01442872.2025.2521170
[22] techcrunch.com/2025/03/26/19-founders-and-vcs-working-with-elon-musks-doge
[23] theconversation.com/tech-giant-palantir-helps-the-us-government-monitor-its-citizens-its-ceo-wants-silicon-valley-to-find-its-moral-compass-260824. Concerns have also been raised about the anti-democratic ideologies circulating in Silicon Valley, including those that reject liberal egalitarianism in favour of leadership by exceptional individuals, and those aspiring to exit the nation state altogether, thereby evading regulation and taxation. See Merrin and Hoskins (2025) link.springer.com/book/10.1007/978-3-031-84786-8 and 'Captured: how Silicon Valley's AI emperors are reshaping reality', panel at the International Journalism Festival, Perugia (2025) youtube.com/watch?v=wXo6isGKRNQ
[24] whitehouse.gov/wp-content/uploads/2025/07/Americas-AI-Action-Plan.pdf
[25] whitehouse.gov/presidential-actions/2025/07/preventing-woke-ai-in-the-federal-government
[26] policycommons.net/artifacts/12089781/hai_ai-index-report-2024/12983534

The intense competition for global AI dominance between the US and China poses a serious challenge to nations seeking 'digital sovereignty', the prevention of which has been a condition of trade agreements with both superpowers for several years[30]. However, the meaning of 'digital sovereignty' is somewhat hazy: the term is commonly used to refer to judicial authority, but it can also refer to data storage within national borders, and a preference for homegrown companies and digital infrastructure[31].

A key power bloc in discussions about 'digital sovereignty' is the European Union (EU), which emphasises the competitiveness of European companies and has passed a raft of risk-based laws and regulations to safeguard citizens from harms caused by digital technology[32]. A key source of tension with the US is the Digital Services Act (2022), which regulates online platforms, including social media, as well as search engines. According to the Act, technology companies providing these services must assess and mitigate risks, such as the spread of misinformation and harm to minors, as well as acting promptly to report and remove illegal hate speech.

At a keynote speech in Munich in February 2025, the US Vice President, J.D. Vance, accused European leaders of censoring free speech[33]. By August 2025, President Trump was threatening to impose additional tariffs and stop selling technology and chips to countries that enforced rules that he regards as discriminating against US companies[34]. The EU's AI Act (2024) and a related code of practice[35] have also been the subject of intense opposition from US technology companies, leading to delays in implementation.

Challenges to the EU's ability to regulate the operation of AI and other technology within its own territories have also resulted in calls for Europe to invest more in scaling up AI companies to reduce European countries' dependence on externally-provided AI products, foundational models, and digital systems, which could "be weaponised in times of geopolitical tension… posing risks to Europe's stability and security"[36]. In October 2025, the European Commission responded by announcing €1 billion in funding and the introduction of new AI-powered initiatives. Speaking at a press conference on 8th October, the European Commissioner for Technological Sovereignty, Security and Democracy, Henna Virkkunen, said that companies "should favour EU solutions where they can[37]."

This approach seems consonant with the EU's 'Democracy Shield' initiative, which seeks to guard European democracies against external threats: focusing on strengthening information integrity and preventing foreign interference online, including cyberattacks, disinformation, and other forms of manipulation. It also includes ambitions to effectively implement the European Media Freedom Act (EMFA) (2024) to "further support and protect independent media and journalists". At the time of writing, in October 2025, tangible proposals were being reviewed about how exactly the shield will work[38], amid concerns that this would increase tensions with the US.

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[27] forbes.com/sites/markweatherford/2025/02/04/big-bets-bigger-rivalries-the-race-for-ai-leadership
[28] cnbc.com/2025/07/26/china-ai-action-plan.html
[29] journals.sagepub.com/doi/pdf/10.1177/20578911231174731?casa_token=6W-G-tRtMxUAAAAA:9i87MHlHrlxGDd4ipHCfCGyR-U9s2zzFWGO47hqnxWHxlpH03mV7UXF4AUr-Hn8Kysn2M6lWybvcRg
[30] ojs.weizenbaum-institut.de/index.php/wjds/article/view/141
[31] tandfonline.com/doi/pdf/10.1080/13501763.2024.2318475
[32] tandfonline.com/doi/pdf/10.1080/13501763.2024.2318475
[33] politico.eu/article/us-europe-free-speech-trade-talk
[34] politico.eu/article/us-question-report-sanction-eu-officials-dsa-donald-trump
[35] corporateeurope.org/en/2025/07/eus-ai-rules-set-be-handed-silver-plate-corporate-lobbyists
[36] Bria *et al* 2025, p. 14 https://www.euro-stack.info/
[37] euronews.com/next/2025/10/08/european-commission-eyes-ramping-up-ai-to-keep-up-with-us-and-china#:~:text=The%20European%20Commission%20has%20identified,across%20healthcare%2C%20manufacturing%20and%20defence.
[38] europarl.europa.eu/legislative-train/theme-protecting-our-democracy-upholding-our-values/file-european-democracy-shield

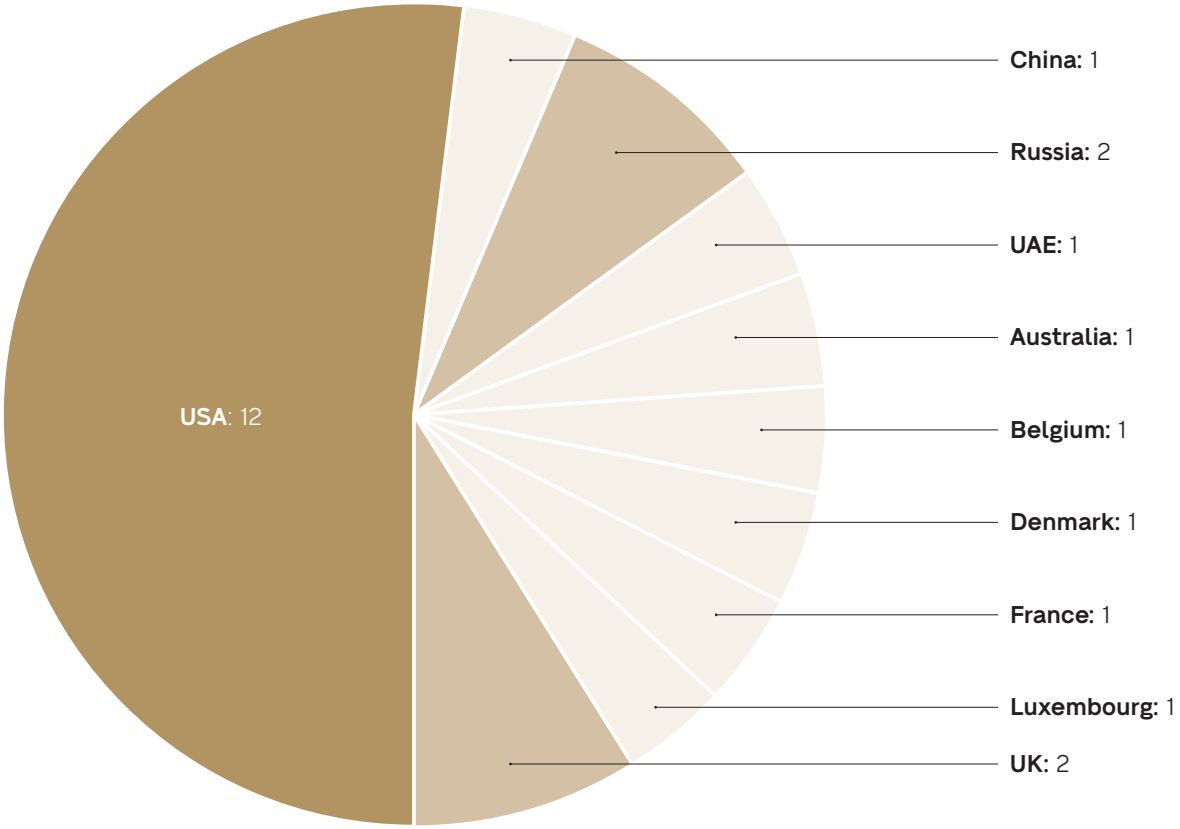
5.1 Future challenges: depending on the USA during state-led democratic backsliding

To explore the procurement challenges that PSMs are likely to face, we analysed the twenty-three companies that provided participating PSMs with AI tools and the products they used in hybrid tools (see Appendix). As Figure 1 shows, nearly three-quarters of these companies were not based in full democracies[39], although only two PSMs used tools provided by companies based in full authoritarian states[40].

AI providers in the US comprised more than half of the companies in our database. US-based providers were used by eight out of ten organisations that authorised AI for use in journalism production.

PSMs' dependence on US-based companies is not surprising given the concentration of the AI industry in the USA[41]. However, it is problematic for pro-democratic PSMs to rely so heavily on companies based in a country that is on the cusp of becoming a competitive authoritarian regime[42], particularly given Trump's removal of risk-based AI regulation[43]. However, we can better understand the challenges facing PSMs by analysing the complex relationship between geographic and commercial AI concentration.

Figure 1: Location of AI Companies



[39] Determined by the latest democracy indices provided by the Economist Intelligence Unit and V-Dem at the time of writing in 2025.
[40] See footnotes 3 and 4.
[41] policycommons.net/artifacts/12089781/hai_ai-index-report-2024/12983534
[42] foreignaffairs.com/united-states/path-american-authoritarianism-trump
[43] Discussed in O'Donnell (2025) technologyreview.com/2025/07/29/1120760/what-you-may-have-missed-about-trumps-ai-action-plan

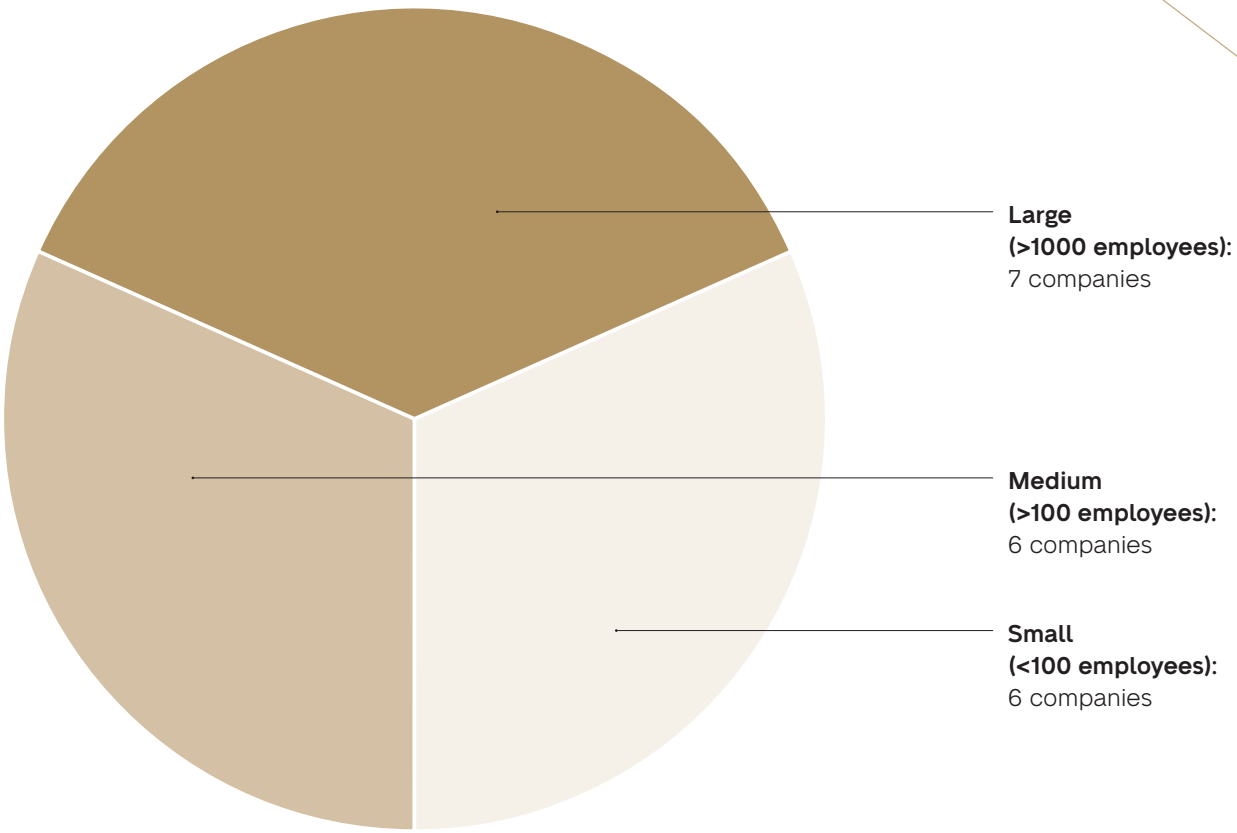
5.2 Geographic and commercial AI concentration

We could not confirm the size of the four companies based in authoritarian countries, leaving a remaining sample of nineteen companies. As Figure 2 shows, seven were large, having more than 1,000 employees, six were medium-sized, with over 100 employees, and six were small, with fewer than 100 employees. The smallest employed only seven people.

This seems to be relatively good news in terms of PSMs' avoidance of commercial AI concentration. However, eight out of the ten PSMs that authorised the use of journalistic AI stated that they used at least one tool or product provided by a large company—all but one of which were based in the US. The most frequently cited large companies were Adobe and OpenAI, which are not amongst the "Big Five" technology companies (Amazon, Apple, Facebook/Meta, Google, and Microsoft) flagged within previous research about PSMs and AI[44], but they have close ties to them.

For example, Adobe has a partnership with Microsoft, which involves connecting Adobe Experience Cloud with Microsoft Copilot[45]. OpenAI also has a long-standing partnership with Microsoft, including significant strategic investment and the provision of Azure cloud services for OpenAI's models[46]. However, this partnership became more fractious during 2024-2025[47], and Google has now joined Amazon in investing in Anthropic, another large US technology firm in our sample[48].

Figure 2: Size of AI companies



[44] Discussed in our previous report publicmediaalliance.org/wp-content/uploads/2025/08/PSM-and-AI_PMA-Industry-Report.pdf
[45] business.adobe.com/blog/the-latest/microsoft-and-adobe-partnership
[46] technologymagazine.com/news/behind-microsoft-openais-redefined-partnership-in-ai
[47] computerworld.com/article/4061120/the-microsoft-openai-divorce-is-coming-whos-getting-the-best-deal.html
[48] Details provided by Pitchbook, September 2025; see also Appendix.

In addition, PSMs' willingness to use small and medium-sized companies[49] seemed to be patterned by their operational needs and approaches to data privacy and security. High-income PSMs, which had vast, multilingual operations, did not cite any small or medium-sized companies. Instead, they tended to deal with heightened privacy and security concerns by developing in-house tools and systems, and by paying higher fees for AI products from large technology companies: arguing that both strategies allowed them to better ring-fence their data and content.

An update we received from ABC (Australia) in May 2025 suggested that they were continually checking for emerging risks relating to data privacy and security. An ABC manager told us that they had banned staff who had been using a popular transcription tool from medium-sized US company, Otter.AI, on an unauthorised basis from doing so in future. A federal lawsuit seeking class-action status was later filed by a US individual, alleging that Otter.AI was "deceptively and surreptitiously" recording meetings to train its transcription tool, as third parties had not consented to being recorded[50]. However, an ABC manager clarified that their key concern was "the software's behaviour of transferring recordings of conversations" outside the organisation, which was found to be unacceptable, regardless of whether or not this was disclosed to participants."

Earlier comments by the same interviewee suggested that ABC was also wary of using small, new companies, arguing that these were more likely to go bust or be acquired by larger companies. However, what they stressed most was that small start-ups were "the least likely to… armour up their software stack in such a way that you can have some confidence in the security." However, the manager was aware that this approach could perpetuate undemocratic forms of commercial AI concentration: explaining that trying to procure AI responsibly often "felt like a choice between…rampant Big Tech that wants to have you over a barrel and the Wild West [of small start-ups] about whom we know little."

Low- and medium-income PSMs did not have the same technical capacity requirements as high-income PSMs, and some mentioned that they had statutory obligations to foster AI 'innovation' in their own countries, which inclined them to foster supportive relationships with smaller companies, including new start-ups. When reflecting upon their consideration of a large AI company (OpenAI), one medium-income PSM (SR in Sweden) also stressed the need to use a range of AI providers to avoid creating "single points of failure". But having a range of AI providers (whether large or small), may be problematic for PSM with low incomes. For example, interviewees at Suspilne (Ukraine) said that they preferred to have as few AI providers as possible, so that post-procurement checks were manageable.

Heightened privacy and security concerns also seemed to be an important factor in their thinking: many preferred tightly-regulated European companies, which were smaller than their US counterparts, even when they were based in other regions. An update from VRT (Flemish-Belgium) in October 2025 expanded on this finding. The interviewee said that, in their opinion, Europe had a "completely different" approach to developing AI, including the EU's AI Act (2024), which had substantial "guardrails". So, for them, it made sense to "empower European companies to develop", particularly since they believed that **"We can't rely on the United States in the same way as we did before because things are really changing there."**

VRT was also keen to be transparent with staff about why they chose to use, or not use, certain AI tools. As the interviewee explained, VRT's new AI panel would

> **… create an overview of all the tools we discussed, explaining why we agreed to use them or …not use them.**
>
> **So, everybody in the company in the newsroom knows which tools can be used, which tools cannot be used, and the reasons behind that.**
>
> **Why is that? Because we want to create awareness in the newsroom: what we stand for, what are the opportunities, and what are the dangers.**

[49] Previously discussed by Piasecki and Helberger (2025) A nightmare to control: Legal and organizational challenges around the procurement of journalistic AI

[50] "Justin Brewer versus Otter.AI, Inc" (2025). Filed 15 July. documentcloud.org/documents/26052769-otter-complaint

[51] These were provided by the Economist Intelligence Unit and V-Dem (2025)

[52] P.14 in Bria, F., Timmers, P. and Gernone, F. (2025). euro-stack.info

[53] academic.oup.com/ia/article/98/6/1977/6783036

5.3 AI Providers in Full Democracies and AI 'Sovereignty'

As Figure 1 showed, the largest concentration of AI companies based in full democratic countries was in Europe (6 companies or 20% of the sample). These were: Belgium, Denmark, France, Luxembourg and the UK, all of which were, at the time of writing, classed as full democracies according to international democracy indices consulted[51].

However, these European AI providers were all small or medium-sized companies, so are unlikely to have the large-scale capacity needed by bigger PSMs. The EU has been criticised for failing to scale up AI companies for security, as well as economic reasons, as dependence on externally provided AI products and foundational models, could "be weaponised in times of geopolitical tension[52]." Currently, efforts to safeguardEuropean digital 'sovereignty' are also limited by the mobility of developers and international patterns of investment[53].

Evidence of European companies' structural dependence on the US was evident in this study. For example, one PSMs which preferred European providers for security reasons, used FasterWhisper for transcription and translation. FasterWhisper is provided by the French company, Systran, which was acquired in 2024 by another French firm, ChapsVision. However, FasterWhisper is based on OpenAI's open-source model, Whisper, combined with a fast inference model, CTranslate2.

While the UK is not subject to the EU's AI Act (2024), UK companies do comply with General Data Protection Regulation (GDPR), and two PSM used the UK-based synthetic voice company, ElevenLabs, for that reason. However, ElevenLabs was set up by Piotr Dąbkowski, an ex-Google engineer, and Mati Staniszewski, an ex-deployment strategist at Palantir. As previously mentioned, Palantir is reported to be working with the Trump administration to create a "super-database" of information on US citizens from all federal agencies: it already provides ICE with the technology used to track immigrants[54]. ElevenLabs has also received investment from the US venture capital firm, Andreesen Horowitz, which was co-founded by Marc Andreesen, who is reported to have been a key recruiter for Elon Musk's DOGE[55].

The only other commercial AI provider in this study that was based in what researchers describe as a full democracy was the large, Australian image-editing firm, Canva. This was described by respondents as a valuable, regional alternative to the US giant, Adobe. However, Canva partners with OpenAI to drive its text-work and uses Google's LLM for video products. Canva has also received investment from a Chinese firm, HongShan, and the US-based Founders Fund, which was co-founded by Peter Thiel, who owns Palantir[56]. This is not to imply that any of these companies are currently subject to external political influence. However, this data points to a broader question: that is, the meaning and limits of AI sovereignty, given the finite number of foundational models and the transnational nature of AI investment.

It seems almost impossible for PSMs to unpick and assess the likely risks arising from these complex international relationships and dependencies. Yet the fact that we could find this information at all suggests that the AI providers that PSMs rely upon are not as lacking in company transparency as many popular providers of journalistic AI. Whereas, Martin[57] found that two-thirds of the companies providing tools to journalists did not publish such information, we were only unable to locate these details for five companies (20% of the sample). Predictably, these included the four companies in authoritarian countries, used by two PSMs, while the fifth was a small, private US-based transcription company, Sonix, used by two other PSMs.

Our fruitless search for information about this fifth company served to raise an important point: that is, that in the US, private companies are not required to make their financial reports public or submit them to the Securities and Exchange Commission.

Since some AI elites and companies have reportedly played leading roles in rapid democratic backsliding in the US[58], the lack of transparency required of these companies is potentially problematic. So, we would advise PSMs not to try and counter commercial AI concentration by using smaller companies without first checking out what other risks this might expose them to.

[54] theconversation.com/tech-giant-palantir-helps-the-us-government-monitor-its-citizens-its-ceo-wants-silicon-valley-to-find-its-moral-compass-260824

[55] techcrunch.com/2025/03/26/19-founders-and-vcs-working-with-elon-musks-doge

[56] Details provided by Pitchbook, June 2025.

[57] journalismresearch.org/mapping-the-finances-and-ownership-of-ai-companies-used-by-journalists

[58] James (2025) tandfonline.com/doi/pdf/10.1080/01442872.2025.2521170 and Nord et al. (2025) tandfonline.com/doi/pdf/10.1080/13510347.2025.2487825

5.4: Three Specific Warnings About Emerging Risks in the USA

As PSM managers consider how to respond to Trump's removal of risk-based regulation in July[59] 2025, we want to take the opportunity to warn them of three other, emerging risks.

5.4.1: Warning one

Our first warning pertains to Trump's Executive Order on Preventing Woke AI in the Federal Government[60], which indicates that government contracts will not be given to the providers of politically biased LLMs. This Order does not attempt to regulate LLM output, which might impinge on the constitutional right to freedom of expression[61].

However, federal contracts are lucrative, and previous research on public administration has found that the incentives and disincentives structuring federal contracting tend to exert a powerful disciplinary effect on the industry, operating as a "soft" form of governance[62].

Researchers have begun to investigate the political bias of LLMs, which seem to vary around the world[63]. Concerns about the non-neutrality of training data and processes are obviously relevant to PSMs, given their statutory requirements regarding non-partisanship. However, allegations of political bias by pro-Trump politicians have been used since the first Trump administration to silence critics, and this pattern has been repeatedly used in state-led democratic backsliding in other countries[64].

What appears to be the slight progressive bias of some LLMs in the US may also be inevitable because of alignment procedures relating to empirical truthfulness and the avoidance of social[65]. As Hagendorff argues,

> **Aligned LLMs are trained to provide factually correct answers and avoid spreading falsehoods. In domains such as science, medicine, or current events, "truthful" often means aligning with the best available evidence or expert consensus. This can put LLM outputs at odds with ideological positions that reject mainstream expert views – for example, the denial of climate change or vaccine efficacy, which are more prevalent on the far-right[66].**

Importantly, any changes to LLM training methods and datasets would be difficult for PSMs to detect and assess because commercial companies routinely obscure technical details to enhance competitiveness[67].

[59] brookings.edu/articles/trumps-executive-orders-politicize-ai
[60] whitehouse.gov/presidential-actions/2025/07/preventing-woke-ai-in-the-federal-government
[61] economist.com/international/2025/08/28/donald-trump-is-waging-war-on-woke-ai
[62] Coglianese (2024) doi.org/10.4337/9781803922171.00026 see also Dor and Coglianese (2021) ieeexplore.ieee.org/stamp/stamp.jsp?arnumber=9540751&casa_token=9oecWf20ElUAAAAA:hcgHkWo5g2R0A4gF-gy0YBnwursT9H83hgYrfwhYs2AZac1pgHxOh0rbxEm4Fwh-XGoXCgfuXw&tag=1
[63] See Buyl et al. (2025) doi.org/10.48550/arXiv.2410.18417, Rozado (2025) doi.org/10.48550/arXiv.2503.10649 and Shalevska and Walker (2025) eprints.uklo.edu.mk/id/eprint/10820/1/IJRPR40238-Are%20AI%20Models%20Politically%20Neutral.pdf
[64] academic.oup.com/book/57598

5.4.2: Warning two

Our second warning pertains to privacy policies. The policies of US-based AI providers in this study tended to contain routine clauses indicating that companies would release personal data if required to do so by a legal or federal investigation. Otter.AI went further, stating that it would disclose personal data

> **if…we have a good faith belief that such use is reasonably necessary to comply with a legal obligation, process or request; enforce our terms of service and other agreements, policies and standards, including any investigation of any potential violation thereof; detect, prevent or otherwise address security, fraud, or technical issues; or protect the rights, property or safety of us, our users, a third party or the public as required or permitted by law**[68].

In full democracies, such policies ensure that AI companies help uphold law and order. But during state-led democratic backsliding, government inquiries and judicial investigations are often used selectively and weaponised to intimidate and silence critics, including PSMs[69]. So, PSMs may wish to reconsider their reliance upon US-based AI companies, especially for the transcription of interviews with critical or vulnerable sources.

5.4.3: Warning three

Our third warning involves data storage. A former senior official at the Federal Communications Commission, Matthew Conaty, has argued that section 706 of the US Communications Act (1934) permits the President to seize control of the country's material "means of communication" during a war or national emergency—the definition and duration of which are decided by the President[70].

While this decades-old legislation was originally intended to cover radio masts, in Conaty's judgement, the Act gives the President the legal right to take control of US-based data centers and other digital infrastructure. A few months ago, this scenario might have seemed fantastical. However, democratic backsliding is continuing at such a rapid pace in the USA, that we would urge PSM and other news organisations to seriously consider the kinds of risk that Conaty outlines.

Questions for further discussion:

1. How can PSMs ensure a values-driven approach to AI procurement, given the structuring of the AI industry?
2. How can they balance public service values and their broader democratic mission with ensuring that the tools they procure meet their operational needs?
3. Is there a case for privileging companies based in full democracies?
4. Should PSMs consider some or all of the following factors when procuring AI: company transparency, foundational models, and the identities of investors?

[65] doi.org/10.48550/arXiv.2507.15328
[66] P.4, ibid.
[67] See Carabantes (2023) Chapter 37: Why artificial intelligence is not transparent: a critical analysis of its three opacity layers in: Handbook of Critical Studies of Artificial Intelligence and Coglianese (2024) Chapter 18: Procurement and artificial intelligence in: Handbook on Public Policy and Artificial Intelligence
[68] https://otter.ai/privacy-policy.
[69] academic.oup.com/book/57598
[70] Volume 77; 2024-2025 • Issue 2 - FCLJ

6. Study Limitations

We are grateful to participants for sharing their insights with us, but we are conscious that this study has several limitations. First, we relied on PSMs' self-reporting, so there will be tools, companies, and issues that we did not touch upon. Second, some PSM were uncomfortable having the tools they used linked to their organisations, so the list of AI companies contained in the Appendix has been de-linked from the PSM that relied upon them. Third, our sample was not fully comprehensive, and we could do little about most PSMs' reluctance to speak about the challenges involved in procuring AI after January 2025, when such issues became more politically sensitive.

Finally, this study does not address structural dependencies relating to chips and AI infrastructure[71]. These issues are increasingly important partly because of the deal, struck in June 2025, between the EBU and the US giant Nvidia, which purports to enable European PSM to utilise "European cloud infrastructure and AI services that are exclusively governed by European policy, comply with European data protection and privacy rules, and embody European values[72]". The extent to which, and the ways in which, this deal embodies "AI sovereignty[73]" merit further exploration.

In addition, in September 2025, a new "Tech Prosperity" agreement was also announced by the US and UK governments, worth £31 billion, including significant investment in the UK's AI infrastructure by major US firms including NVIDIA, Google and Microsoft[74]. Although the UK's AI Action Plan stresses the prioritisation of "sovereign AI[75]", this deal has raised serious concerns about the UK's future sovereignty, security, and governance[76]. As one technology commentator put it, "We know there will be a quid pro quo—we just don't know what it is yet[77]." The UK government's approach could drive political differences between it and mainland Europe, whose own approach seems geared towards reducing dependence on the US, as well as China[78].

Given the rapidly changing geopolitical contexts of AI, there is clearly much more research to be done in this area.

[71] tandfonline.com/doi/full/10.1080/21670811.2024.2377078
[72] blogs.nvidia.com/blog/european-broadcasting-union-sovereign-ai
[73] ebu.ch/news/2025/06/ebu-and-nvidia-join-forces-to-strengthen-ai-sovereignty-for-psm
[74] techinformed.com/us-uk-31bn-tech-prosperity-deal-raises-questions
[75] gov.uk/government/publications/ai-opportunities-action-plan/ai-opportunities-action-plan
[76] eetimes.eu/will-u-s-u-k-tech-deal-cost-the-u-k-its-digital-sovereignty
[77] theguardian.com/commentisfree/2025/sep/18/uk-us-tech-deal-31-billion-ai-government-answer-questions
[78] euronews.com/next/2025/10/08/european-commission-eyes-ramping-up-ai-to-keep-up-with-us-and-china#:~:text=The%20European%20Commission%20has%20identified,across%20healthcare%2C%20manufacturing%20and%20defence.

Image: Abstract tech background. Floating Numbers HUD Background. Matrix particles grid virtual reality. Smart build. Grid core. Hardware quantum form.
Credit: Dmitriy Rybin / Shutterstock.com

7. Conclusion

This second report on PSM and AI has sought to move the discussion about 'Responsible AI' in a new direction: focusing not only on PSMs' responsible use of AI, but also on what responsibilities PSM think are most important in procuring it. 'Ensuring data privacy' and 'minimising risks to national and international security' were ranked as most important overall by our sample, although some PSM ranked these options much higher than others.

PSM tended to see themselves as having more responsibility than private media to safeguard data privacy, given the significance of public trust. But the responsibilities they outlined did not seem qualitatively different to other kinds of media organisations. By contrast, concerns about security did seem to involve distinctive concerns relating to why PSM were targeted by cyberattacks, and how to manage their relationship to their respective governments without compromising their independence.

This report has also raised interesting questions regarding how procurement discussions take place within PSM. Participants not only varied in terms of their governance structures, but also the extent to which, and the ways in which, they included a wider range of staff. We were also intrigued to find how difficult PSM sometimes found it to talk to other PSM about these issues, without triggering further political and security risks. While managers' caution seems justified in some situations, this could leave PSM less able to formulate unique, value-driven, and sector-focussed approaches to AI procurement, as well as leaving some low-income PSM isolated and exposed to authoritarian threats. So, we wonder if the development of regional and cross-regional structures that allow the sharing of information and anonymisation, could be a solution?

But perhaps the most fascinating part of this study involved investigating the companies that supply PSM with AI tools and the products used in hybrid tools. This presented some challenging findings: first, that nearly three -quarters of the AI tools and products cited by PSM were sourced from companies based in countries that are not fully democratic, including the USA which has been labelled as a "flawed democracy" in the EIU Democracy Index[79]. Second, PSMs' willingness to use smaller companies seems to be shaped by various causal factors including their operational needs, statutory obligations, and approach to data privacy and security. We then proceeded to unpick the tangled international web of financial and technical dependencies underpinning the relationship between geographic and commercial AI concentration.

Nevertheless, we want this report to be of practical use to PSM. For this reason, we gave three specific warnings to PSM of emerging risks pertaining to state-led democratic backsliding in the US, relating to LLMs, privacy policies, and data centres. We will now conclude with some recommendations for PSM that intend to use AI in the production of journalism.

[79] eiu.com/n/campaigns/democracy-index-2024

Recommendations for action

In our view, PSM should:

1. Consider prioritising AI providers based in full democracies, wherever possible.
2. Regularly audit AI providers' privacy policies, the location of data storage and processing, as well as interleaving vulnerabilities pertaining to foundational models.
3. In addition, they should be aware that their respective governments may use security concerns to try and compromise their operational independence.

Nonetheless, we acknowledge that PSMs' efforts to enforce boundaries with their own governments may be difficult, especially when facing budget cuts and criticism from political and commercial opponents. In addition, the resources needed to conduct sophisticated pre- and post-procurement checks may be far beyond the reach of some low-income PSM, including those based in countries directly threatened by authoritarian states. Therefore, we urge PSM to constantly engage in re-evaluating what it means to procure AI responsibly: considering not only their obligations to their respective audiences, core values, and states, but also to each other and to global democracy.

8. Appendix

Commercial providers of AI tools analysed in this study

Method: Analysis was carried out using targeted online searches and the technology company database, Crunchbase, as well as the high-end investor database, Pitchbook. When company details could not be found, we also consulted S&P Cap IQ Pro, LSEG, Workspace and Bloomberg, emailed the companies concerned, and sent enquiries to national business registers in the countries where they were located. This data was all collected between August and September 2025.

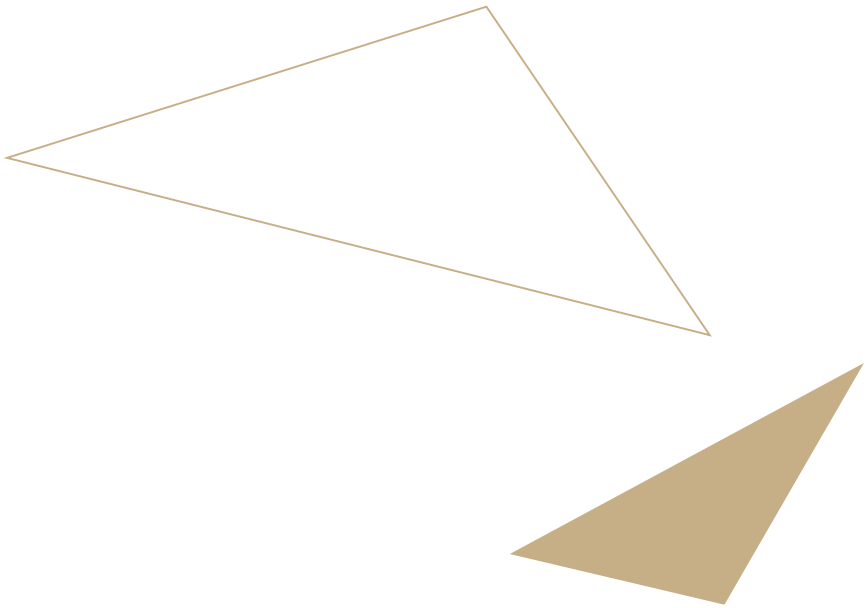
AI provider	Product	Number of PSM citing	Status	HQ	Founder/s	Employees	Valuation (USD)	Revenue (USD)	Total Funding (USD)	Shareholders/ Partners	Funding rounds	Major investors (in alphabetical order)	Primary services
Adobe	Photoshop Firefly	3 3	Publicly traded company Owned by shareholders	USA	John Warnock and Charles Geschke	29,945	–	20.95Bn (Aug 2024)	4.15B	85.08% institutions 14.66% public/other 0.15% individuals Adobe also partners with Microsoft to connect Adobe Experience Cloud workflows and insights with Microsoft Copilot	–	15 former investors and 14 lenders listed. Major investors inc: Blackrock, Vanguard Group, State Street Corporation, Geode Capital Management, Morgan Stanley.	Multimedia/ Design Software
Anthropic	Claude LLM	1	Public benefit corporation Privately held so owned by shareholders; venture capital backed	USA	Daniela and Dario Ademoi (Former members of OpenAI)	500	19.35B (2024)		12.75B	Shares are held by founders, management, employees, venture capital funds, or other private individuals and institutional investors. Amazon is a minority stakeholder. In 2023, Amazon and Anthropic announced a strategic partnership, which was developed further in 2024. Amazon has invested up to $4 billion in Anthropic and has made AWS its primary cloud and training partner. This collaboration involves Anthropic using Amazon's Trainium and Inferentia chips for training and deployment of its future foundation model.	11	104 investors listed. Major investors inc: Alphabet (Google), Amazon and, Menlo Ventures, and Amazon. Other investors inc: Australian Gulf Capital (UAE); DAMAC (UAE); Assured Asset Management (HK); Hermitage Capital (HK) Manhattan Venture Partners Seven Rivers (UAE); Spark Capital (India) Vision Capital (Singapore)	Media and Information Services (AUI, Big Data, SaaS)

Amazon Web Services Inc.	AWSBedrock AWS Transcribe	1 2	Private company Privately held; wholly owned subsidiary of Amazon.com Inc	USA	Jeff Bezos	129,265	Estimates vary widely 1.4-3T	90.8Bn (2023)	–	–	–	Amazon.com inc is a publicly traded company, so is owned by shareholders, inc. Its founder Jeff Bezos, and institutional investors e.g., Vanguard Group, BlackRock, and State Street Corporation	Web/cloud computing services
Canva	–	1	Private company Debt-financed; venture capital backed	AUS	Melanie Perkins Cliff Obrecht Cameron Adams	5,000	26B (Jan 2024)	2.3Bn (Dec 23)	581.49M (Oct 2024)	44 investors	14+	Blackbird Ventures, Felis Ventures, General Catalyst, Sequoia Capital Global Equities, Skip Capital, Stack Capital Group; Five V Capital, and Premji (India) Other investors inc: Founders Fund; HongShan (China)	Graphic design platform ** The company runs its platform on Amazon ECS, with Amazon S3 and AWS KMS to store and encrypt data.
Chartbeat Inc.	–	1	Private company Debt financed, private equity, venture capital backed	USA	Tony Haile	99	70.47M (May 2015)	7.0M	39.06M (May 2015)	2 main stakeholders currently, 26 records of previous investors.	3	Majority stake acquired by Cuadrilla Capital (July 2022) for an undisclosed amount. Minority stake held by Bain Capital Credit. Other investors include: DFJ Element Harmony Partners Index Ventures North Atlantic Capital	Content Intelligence Platform
CSubtitle	CSubtitle	1	NO COMPANY DETAILS IDENTFIED	R& D team listed as HK (China)		NO EMPLOYEE DETAILS IDENTIFIED	NO FINANCIAL DETAILS IDENTIFIED	–	–	–	–	–	Transcription and Translation
ElevenLabs	–	2	Private company Owned by co-founders, venture capital backed	UK	Mati Staniszewski Piotr Dabkowski	181	1.10B (Jan 2024)	25M (Dec 2023)	103.04M (June 2024)	28 investors	4	Andreesen Horowitz, Credo Ventuires,, FFL Partners, ICONIQ, Broadlight, Capital, Sequoia Capital, Smash Capital, SV Angel	AI voice dubbing tool, permits linguistic translation
EMEA RoboticsLtd.	PimEyes	1	–	UAE (Dubai)	Giorgi Gobronidze	NO EMPLOYEE DETAILS IDENTIFIED	NO FINANCIAL DETAILS IDENTIFIED	–	–	–	–	–	Listed on company site as AI Algorithms, Machine Learning, Big Data and Facial Recognition

AI provider	Product	Number of PSM citing	Status	HQ	Founder/s	Employees	Valuation (USD)	Revenue (USD)	Total Funding (USD)	Shareholders/ Partners	Funding rounds	Major investors (in alphabetical order)	Primary services
Findclone	–	1	–	Widely cited as Russian, although Bellingcat notes that its domain registrar is in the Bahamas.	NO COMPANY DETAILS IDENTIFIED	–	NO FINANCIAL DETAILS IDENTIFIED	–	–	–	–	–	Facial Recognition
Good Tape ApS	–	1	Private limited company Wholly owned subsidiary of Zetland Media (Denmark)	Denmark	Tav Klitgaard	11-50	–	536,000 (Dec 2023)	–	Zetland Media is a private company, privately held and venture capital backed.	–	Zetland media investors inc: KickAss Capital, Keystones, Stig Myken	Automated transcription
Google LLC	PinPoint Reverse Image Search	1 1	Limited Liability Company Wholly owned subsidiary of Alphabet Inc	USA	Larry Page and Sergey Brin	10001+	–	1.53B (Dec 2023)	26.1M (1999)	Subsidiary of Alphabet Inc.	3	Blackrock, Vanguard Group, State Street Corporation, Geode Capital Management, Morgan Stanley. Andy Bechtolsheim Angel Investors Kleiner Perkins Sequoia Capital	Multinational tech company including: Search engine Cloud computing Software Hardware E-commerce AI Quantum computing
Grammarly Inc	–	1	Private company Venture capital backed	USA	Alex Shevchenko, Dmytro Lider, Max Lytvyn	1716	13B (Nov 2021)	178.9M (Dec 2023)	400M (Nov 2021)	Primary owners are the founders	2	Baillie Gifford BlackRock General Catalyst Other investors inc: IVP Breyer Capital SignalFire Sozo Ventures Spark Capital	Writing assistance technology
Graylark Technologies Inc.	GeoSpyPro	1	Private limited company Privately held-backing	USA	Daniel Heinen	8	–	–	0.08M (Oct 2024)	2 investor records	2	AI Grant Hatch (Singapore)	Cyber security
Midjourney Inc.	–	2	Private company Privately held corporation	USA	David Holz	11	–	200M (Dec 2023)	–	–	–	–	Graphics software, designed to convert text to imagery

Microsoft	Bing Copilot Unspecified product used in hybrid tool	1 1 1	Public company	USA	Bill Gates Paul Allen	10001+	3.90T	254.19B	1M	2 investor records AI is the second most popular area Microsoft invests in: 53 investments to date.	2	Blackrock Vanguard State Street Securities Other investors inc: Fidelity, Geode Capital, JP Morgan, KB Securities Technology Venture Investors	Develops and licenses consumer and enterprise software.
OpenAI LLC	ChatGPT Dall-E Whisper (open source)	2 1 1	Limited Liability Company, subsidiary of OpenAI.Inc. Debt-financed, venture capital backed. Although the LLC is a for-profit company because OpenAI Inc is a non-profit, the profits of the LLC have historically been capped. In May 2025, OpenAI announced that the LLC will become a public benefit corporation, which will remove the profit cap, but after a heated dispute, the LLC will remain under the control of OpenAI Inc's non-profit board.	USA	OpenAI inc was founded by: Altman Elon Musk Ilya Sustkever Greg Brockman Trevor Blackwell Vicki Cheung Andrei Karpathy Durk Kingma John Schulman Pamela Vagata Wojciech Zaramba	3000	157B (Oct 2024)	3.7B (Dec 2024)	21.91B (Nov 2024)	33 investor records OpenAI hsa a longstanding partnership with Microsoft, which has OpenAI's tools to its Azure cloud-computing service, to its Bing earch engine, and to its Edge browser.	10	Andreesen Horowitz Founders Fund K2 Global (Singapore) Khosla Ventures K2 Global Microsoft Nvidia Reid Hoffman Foundation Sequoia Capital Thrive Tiger Global Management Thrive Capital Y Combinator Other investors include Legendary Ventures, SoftBank, NVIDIA Corp, Al Moammar Information Systems Company (Saudi) and MGX (UAE)	AI and APIs
OtterAI Inc.	–	1	Private company Venture capital backed	USA	Sam Liang Yung Fu	200	93.93M (Feb 2021)	–	63M (Feb 2021)	19 investor records	–	DFJ DragonFund (China) Draper Associates Horizon Ventures (HK) Spectrum Equity Other investors incl: David Cheriton Draper Dragon (China) Duke Angel Network Edith Cheung Fusion Fund Harrison Barton HVL Ventures (HK) Harrison Barton NTT Docomo Ventures (Japan) Slow Ventures	Transcription, Team collaboration platform

AI provider	Product	Number of PSM citing	Status	HQ	Founder/s	Employees	Valuation (USD)	Revenue (USD)	Total Funding (USD)	Shareholders/ Partners	Funding rounds	Major investors (in alphabetical order)	Primary services
Search4 Faces	–	1	–	Widely believed to be Russian (e.g., Bellingcat)	NO COMPANY DETAILS IDENTIFIED	–	NO FINANCIAL DETAILS IDENTIFIED	–	–	–	–	–	Facial Recognition
Sonix.AI	–	2	Private company – corporation (Privately held, no backing)	USA	David Nguyen Jamie Sutherland Stephen Hopkins	11-50	NO FINANCIAL DETAILS IDENTIFIED	–	–	–	–	–	Automated transcription, audio file sharing
Systran	Faster Whisper	1	Acquired by ChapsVision (France) in 2024. Previously acquired by LLOSOLLU in 2014, leading to its delisting.	France	Peter Toma	112	The purchase of Systran by Chaps Vision was for an un-disclosed amount	–	–	-21.65M (May 2014)	–	The sale of Systran in 2024 was assisted by Bpifrance, Qualium Investissement, GENEO Capital Entrepreneur and Tikehau Capital. Previous investors: SBVA, Korea Investment Partners, STIC Investment, Korea Investment Securities	Language translation software
Talkwalker S.a.r.l.	–	1	Private company Debt and equity financed Venture capital backed	Luxem-bourg	Christophe Folschette Thibaut Britz	550	–	–	15.18M (2017)	1 investor record	2	Company bought by Hootsuite in Canada for undisclosed amount. Previously funded by Main Mezzanine Capital	Social media analytics and monitoring platform
Trint Ltd.	–	1	Private company, owned by founder. Venture capital backed	UK	Jeff Kofman Mark Boas	110	49.48M (Oct 2022)	–	20.14M (Oct 2022)	11 investor records	2	Google Digital News Initiative Innovation Fund NYT Company TechNexus Venture Other active investors include: Associated Press Baillie Gifford, Bond Capital Partners Edge VC The Founders Circle Capital Horizon Labs (HK), Robert Gall Knight Enterprise Fund	Automated transcription platform
Wobby BV	–	1	Private company Accelerator/ incubator backed	Belgium	Amra Dorjbayar Nathan Tetroashvili	9	4.41M	–	1.58M (Oct 2024)	4 investor records	1	IMEC NV Shaping Impact Group S13Fund V Ventures	AI-enabled data analysis



Public Media Alliance

Published by the Public Media Alliance

Image: Produced using Adobe Firefly / PMA

Wright, K. & Porter, K. (2025).

PSM and AI Part Two: Governance, Geopolitics and Procurement. Norwich, UK: Public Media Alliance. Zenodo.

doi.org/10.5281/zenodo.17434345

November 2025

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