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People, Personalisation, Prominence: A framework for analysing the PSM shift to digital portals and interrogating universality across contexts

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Abstract

In the context of enhanced platformisation, Public Service Media (PSM) are once again forced to rethink the ways in which they achieve core public values. To this end, PSM have been prioritising the development of their own video-on-demand portals. To contribute to ongoing research, we propose a theoretical framework that can be applied by future PSM work, based on the operationalisation of platformisation in PSM policy documents and strategy. We identify the shared priorities across ten media organisations in seven media markets: Belgium—Flanders and Wallonia-Brussels, Canada, Denmark, Italy, Poland, and the UK. The study is based on the qualitative analysis of 61 documents, outlining the PSM remit and how they report and present themselves to governments, collaborators, and audiences, contextualised by ongoing national and regional debates. Findings confirm that the framework of people, personalisation, and prominence can serve as a useful theoretical basis for understanding and interrogating universality across contexts.

Keywords

public service media, video-on-demand, online portals, universality, comparative analysis, qualitative document analysis, prominence, personalisation, algorithms, media policy

Introduction

In the past decades, the practices of Public Service Media (PSM) have been significantly impacted by processes of platformisation and datafication. PSM are not only competing with a larger number of commercial players and digital platforms for audience reach, they are once again forced to rethink how they achieve core public values, such as universality (Savage et al., 2020). To this end, public media have been prioritising the development of video-on-demand (VOD) services or digital portals (Lotz, 2017).

The question of how PSM are adapting to these challenges is of key concern to scholars and policymakers. To contribute to this wider interrogation we develop a theoretical framework that can be applied by future PSM work, based on the operationalisation of platformisation in PSM policy documents. Our work focuses on the key challenges and priorities that PSM organisations and regulators identify in a series of diverse markets, and, specifically, the strategies they employ for reaching universality through the VOD portal. We conduct a comparative analysis of ten PSM in the following seven media markets: the Dutch- and French-speaking communities of Belgium (Flanders and Wallonia-Brussels), Canada, Denmark, Italy, Poland, and the UK. The study is based on the qualitative analysis of 61 documents, outlining the remit of PSM as well as how the organisations report and present themselves to governments, collaborators, and audiences. The emphasis lies on audiovisual content portals. This extensive comparative approach incorporates micro and meso factors affecting the respective PSM organisations, as they respond to the global macro structures of platformisation. The article focuses on identifying the shared priorities across the ten case studies, despite the differences in context and stages of development.

Based on a literature review of contemporary PSM studies, we identify three core elements in the process of platformisation of public service media: *people* and connecting with audiences, *personalisation* and algorithmic curation, and *prominence*. Although these priorities are, to a large extent, also relevant to other legacy media, we focus on the challenges posed by digitalisation and datafication to reaching the core PSM mission of universality online. The subsequent analysis of policy documents allows us to map different opportunities, tensions, and challenges for PSM inductively, thus developing a richer framework of interconnected parameters relevant to researching ongoing platformisation processes. Our findings confirm that this is a useful theoretical framework for understanding PSM in multiple contexts, whether comparatively or for in-depth analyses of universality in emerging strategies.

Public Service Media in transition

The shift from Public Service Broadcasting (PSB) to Public Service Media (PSM) has been discussed as a necessary one by numerous scholars (Bardoel and d'Haenens, 2008; Lowe et al., 2018). However, the transition has been slow, due to a number of factors, including infrastructure, financial pressures, organisational resistance, and policy frameworks (Donders, 2021). Achieving universality poses a wider set of challenges for PSM, going beyond access through the provision of a free service and geographical coverage to more intricate matters of reach and appeal. Digitalisation has transformed broad audience reach prerequisites to include minority interests and groups (Horsti and Hultén, 2011). This has also led to a shift from the holistic, full-portfolio PSM package to more targeted service and content offerings, including more diverse genres and (digital) formats (Lowe and Savage, 2020). In light of this, policy frameworks are also in pressing need of revision (Iosifidis, 2020).

In recent years, societal and market trends have driven PSM into yet a new context, shifting the focus to processes of platformisation (Bonini and Mazzoli, 2022), which pose unique challenges to reaching the public remit. Collective and political participation have declined, leading to an individualisation enhanced by audience fragmentation and a decline in the consumption of mainstream content (Donders and Van den Bulck, 2020). The shift online and the development of digital-first strategies are increasingly relevant in an internationalised media market where PSM's connection to audiences and legitimacy are constantly undermined (Syvertsen and Enli, 2018). Scholars have argued that the integration of PSM into the personalised, data-driven, globalised and commercialised context of platforms challenges public values. PSM organisations have been pressured to increase commercial international collaborations (D'Arma et al., 2021), adapt public values to the logics of platforms (Stollfuß, 2021), and offer more personalised services (Sørensen, 2020).

However, there is still much to be revealed concerning the transformative effects of platformisation across organisational cultures and national contexts. To this end, Poell et al. signal the need for insights into 'how changes in infrastructures, market relations, and governance frameworks are intertwined, and how they take shape in relation with shifting cultural practices' (Poell et al., 2019: 9). Although these changes are not unique to PSM, they pose new challenges to stakeholder accountability and reaching the public remit they are tasked with. Thus, van Es and Poell (2020) find platform distribution strategies to be in conflict with core principles of universality, challenged by personalisation practices, and citizenship versus consumerism tensions.

Reaching universality online

The VOD service is seen as a central entry-point into the wider universe of PSM services and brands (Iordache and Raats, 2023). Online strategies have been described by scholars as constantly one step behind technology and competitors (Van den Bulck et al., 2018). Moreover, they are seen as primarily inspired by financial pressures (Thurman, 2021) and techno-optimism (Ramsey, 2018), rather than coherent strategies to reach the public remit in more purposeful or efficient ways. Nevertheless, digitalisation also presents PSM and policymakers with a range of opportunities, either by facilitating previous efforts, or by generating new mechanisms to achieve universality.

The challenge to reach all people

The aim to reach and connect with audiences is central to the public remit. Unlike commercial media, the PSM mission to reach all members of society, including niche audiences and vulnerable groups, is further complicated by matters of access, reach, appeal, and relevance, among the core dimensions of universality (Thomass, 2020). Universal access to the PSM VOD portal also involves overcoming challenges in infrastructure and digital competencies (Michalis, 2018). Channel and content abundance have caused audience fragmentation, leading to a shift from reaching ‘all people all of the time’ to reaching ‘all people some of the time’, in online locations where they are active (Bardoel and d’Haenens, 2008).

Digitalisation has also opened avenues for reaching previously challenging target groups. The most significant are young audiences, a group that has remained elusive to PSM across Europe and beyond, for both news and entertainment (Rodríguez-Castro et al., 2021). However, their wide-ranging consumption of online content and extensive presence on multiple platforms is seen as an opportunity by PSM and policymakers (Lowe and Maijanen, 2019). Similarly, underserved groups in society, such as (ethnic) minorities, are also expected to be reached more easily online (Horsti and Hultén, 2011). This is not only done by ensuring access, but also through content that is appealing and representative of respective groups. Youth is especially targeted through new digital formats and more evocative storytelling (Szczepanik and Vašíčková, 2023). Literature has also discussed the role of citizens, including youth and minorities, as active users. Digital services create opportunities for enhanced interaction and co-creation that PSM are expected to tap into to generate more meaningful participation and audience engagement (Vanhaeght, 2019).

The pressure to personalise

Algorithms are key components of on-demand services, widely popularised by commercial streamers such as Netflix for the personalised curation of content catalogues and interfaces. But the process of

integrating algorithms on PSM VOD services has led to concerns over free access, privacy, and exposure diversity. Personalisation can facilitate the navigation of large catalogues, but, as it presents each user with a different PSM offering, it limits the shared curation that has been central to both universality and diversity (Lassen and Sørensen, 2021). In this context, each programme in the online offering must deliver the public interest mission, and they must be sufficiently appealing for users to choose to consume, rather than be part of the curated ‘push’ strategy on linear. Trust and transparency may also be jeopardised by the collection of user data and personalisation (Van den Bulck and Moe, 2017).

To overcome some of the shortcomings identified in commercial VOD services, scholars have proposed notions of ‘personalised universalism’ (Sørensen, 2020) or ‘diversity by design’ through the deployment of recommender systems that enhance exposure diversity (Helberger et al., 2018). But, in practice, this comes with an increased risk of losing the interest of users or limiting their (perceived) autonomy (Hildén, 2022). In the context of PSM, transparency in decision-making and personalisation processes have been signalled by scholars as instrumental to PSM accountability (Hutchinson and Sørensen, 2020).

The competition for discoverability and prominence

The affordances of on-demand distribution and the enhanced personalisation of interfaces have generated increased attention for the topics of discoverability and prominence. These are not new, as PSM have previously fought for (and benefitted from) measures to enhance their prominence on Electronic Programming Guides (Johnson, 2017) and set-top boxes (Hesmondhalgh and Lobato, 2019), generating early measures for the positive discrimination of public service programming. However, as video interfaces are becoming more elaborate and difficult to navigate, new concerns over power imbalances are raised by algorithmic curation and visibility on connected devices (Hesmondhalgh and Lotz, 2020).

European policymakers have incorporated prominence measures into the latest revision of the Audiovisual Media Services directive (AVMSd), in the hope of increasing the exposure of European works, as well as services and content of general interest in streaming catalogues (García Leiva and Mazzoli, 2023). The requirement is part of a wider set of rules aimed at creating a level-playing field between transnational and domestic on-demand service providers. Canada has also been promoting the discoverability of national content on VOD services (Lobato and Scarlata, 2022). However, the guidelines on implementation and evaluation remain vague and the process of strengthening prominence rules is ongoing.

A possible exception is the UK, where policy frameworks surrounding prominence measures have received considerable attention over the last five years. In the process of updating UK media law,

policymakers have identified the issue of discoverability as a key priority for maintaining the relevance of PSM. In 2019, Ofcom proposed a series of recommendations, for extending existing prominence legislation to cover a range of connected devices and platform interfaces (Ofcom, 2019), that were subsequently supported in the drafting of a new Media Bill (passed into law in May 2024) which mandates appropriate prominence for all public service content on internet provided television selection services.

Methodology

This article builds on existing research to propose a theoretical framework for future PSM work, particularly for comparative analyses that seek to understand how PSM operationalise platformisation within specific policy contexts. We conducted a medium-N comparison (Esser, 2019) of ten broadcasters with a public remit, based on policy documents in seven media markets: Belgium—Flanders and Wallonia-Brussels, Canada, Denmark, Italy, Poland, UK (see Table 1). These are located in six countries. Contrary to the UK and Danish cases, where we investigated different PSM operating within the same cultural community, RTBF and VRT in Belgium are part of two distinct cultural communities with a very different market structure, language, consumption patterns, and regulatory frameworks. Thus, they will be analysed within two separate markets, each presenting characteristics of small media markets (Puppis, 2009). Comparative research is seen as a method for understanding ‘different macro-level units such as media systems or media policy arrangements [...] against the backdrop of their contextual conditions’ (Esser, 2019: 84) through some combination of descriptive and explanatory analysis (Vliegenthart, 2012). Using a comparative approach, this paper seeks to identify shared priorities in the platformisation processes of ten PSM’s VOD portal strategies, despite the differences in context and stages of development. The ways in which these priorities are debated and implemented (or not) varies from context to context, but the key contribution of the article is identifying existing patterns, which can only be done through comparative research.

Cross-national comparison has become increasingly popular in PSM studies as a means of elucidating common trends, strategies, and challenges shaping the construction of PSM across national media contexts. In medium-N studies, where case selection shapes the generalisability of findings (Esser, 2019), the core challenge is to balance explanatory relevance and contextual equivalence. Research remains divided between those who emphasise the value of universalist approaches, seeking comparative explanation through the construction of standardised theories, typologies, and concepts (Hallin and Mancini, 2004), and those who prioritise descriptive contextualisation and emphasise the impracticability of constructing exact equivalence between the different contexts of national media systems (Powers and Vera-Zambrano, 2018).

We analyse the micro and meso factors affecting our particular PSM organisations, towards the formulation and enrichment of a broader theoretical framework. The selection of cases is based on a number of factors. First, the organisations share a series of characteristics that facilitate comparison, such as the organisational model, the political-economic background, tradition of PSM, and the commitment to digital innovation. Second, the cases are also sufficiently varied to help identify patterns and differences, including market sizes, funding models (including both public and commercial broadcasters with a public remit), geographical and historical context, language diversity, and pace of digitalisation. And third, the involvement of researchers based in each market context was instrumental to examining texts in the original language and policy context. Studies of PSM have increasingly sought to balance universalist and contextualist approaches through consulting experts in national media contexts in the final interpretation of data to validate the terms of comparison (Bengesser et al., 2022; Cañedo et al., 2022). Likewise, we have integrated comparison across the whole research process, through a bottom-up approach that embeds contextual knowledge of national media into the construction of equivalent concepts and methods.

Table 1. The market contexts of the ten PSM case studies. Sources: Various company and industry reports. Unless otherwise stated, all information is correct to 2022.

	Belgium		Canada	Denmark	Italy	Poland	UK
	Flanders	Wallonia-Brussels					
PSM	VRT	RTBF	CBC/Radio-Canada	DR TV 2	RAI	TVP	BBC ITV Channel 4
Population (million)	6.7	3.7	38.45	5.94	59.11	37.75	67.33
Language PSM	Dutch	French	English	Danish	Italian	Polish English	English BBC: Welsh, Gaelic
PSM funding	Government grant, advertising	Government grant, advertising	Government grant, advertising, subscriptions	DR: Taxation TV 2: Advertising, subscription	Licence fee, advertising	Licence fee, advertising, subscriptions	BBC: Licence fee ITV: Advertising C4: Advertising (non-profit)
Annual revenue (€million)	487.4	442.7	451.43	DR: 530.7 TV 2: 516.7	1,263	739	BBC: 6761 ITV: 4306 C4: 1316

TV households (million)	4.9				15.8	2.1	24.8	14.28	28.54	
PSM linear market share	38.82% (2021)		26.7%		4.4%		DR: 28% TV 2: 53%	36%	27.12%	BBC:31.38% ITV: 15.83% C4: 5.27%
VOD launch	VRT (2017)/ VRT (2022)	NU Max	RTBF 2016	Auvio	CBC 2018	Gem	DRTV 2006 TV 2 Sputnik (2012)/TV 2 Play (2021)	RaiPlay 2016	TVP 2010	VOD BBC iPlayer: 2007 ITV Hub (2008)/ ITVX (2022) 4oD (2006)/All4 (2015) /Channel 4 (2023)
VOD Type	AVOD		AVOD		FVOD, SVOD		DRTV: FVOD TV 2 Play: SVOD	FVOD	FVOD, SVOD	BBC: FVOD ITV: AVOD, SVOD C4: AVOD, SVOD
Highspeed broadband (% of households)	97.2				93.5	95	48.5	92.6	97	

Using qualitative document analysis as a principal method for elucidating the ideas, discourses and beliefs underpinning media policy and regulation (Michalis, 2021), we analysed 61 documents according to a common but contextually informed framework. The documents belong to four categories, ranging from media law and broadcast contracts and licenses—which contain formal obligations, annual reports of PSM activity and strategy, and current policy debates which ensure accurate interpretation and contextualisation of the previous categories. We analysed these documents thematically (Fereday and Muir-Cochrane, 2006), expanding on shared dimensions which characterise three key concerns for current PSM policymaking: reaching all audiences through the VOD portal, algorithmic curation and personalisation, and maintaining discoverability and prominence.¹ Key priorities for each PSM organisation were identified particularly in management contracts and annual reports, and contextual expertise provided an interpretation of how platformisation is being rationalised and operationalised in the documents.

¹ Selected quotes for each dimension are available online at <https://doi.org/10.5518/1588>.

From catch-up to 'digital-first mentality'

The variety of cases presupposes diverse strategies that are highly dependent on market context. The PSM organisations find themselves in different stages of formulating, implementing, and evaluating their digital strategies, which makes comparisons across the case studies challenging, but also valuable. Nevertheless, the core principle of universality functions as the connecting element, providing a sharp analytical focus. Based on the policy documents examined and the ongoing policy debates, several connected themes emerged. Figure 1 presents the elements identified as priorities for reaching various facets of universality through the PSM digital strategy, in each of the cases. These allowed us to further develop the framework of people, personalisation, prominence while focusing on the shared priorities.

The documents make numerous references to PSM becoming a digital-first company/organisation (BBC, CBC/Radio-Canada), having a 'digital-first mentality' (VRT), and a 'digital-first and digital-only offer' (RAI). Some organisations are also looking beyond national borders, aiming to transform the service 'into a global media company' (RAI), by offering content that is relevant internationally (BBC, ITV), or specifically for their diaspora (DR, TVP). Regardless of the terminology, the shift online is identified by all organisations and regulators as both a challenge and an opportunity for reaching universality. The VOD portal is positioned at the heart of this transition, with a focus on the organisations' digital transformation. But, as DR cautions: 'Digital development is not a goal in itself, but a prerequisite for DR to live up to its public service ambitions in a digital reality' (DR, 2022: 3).

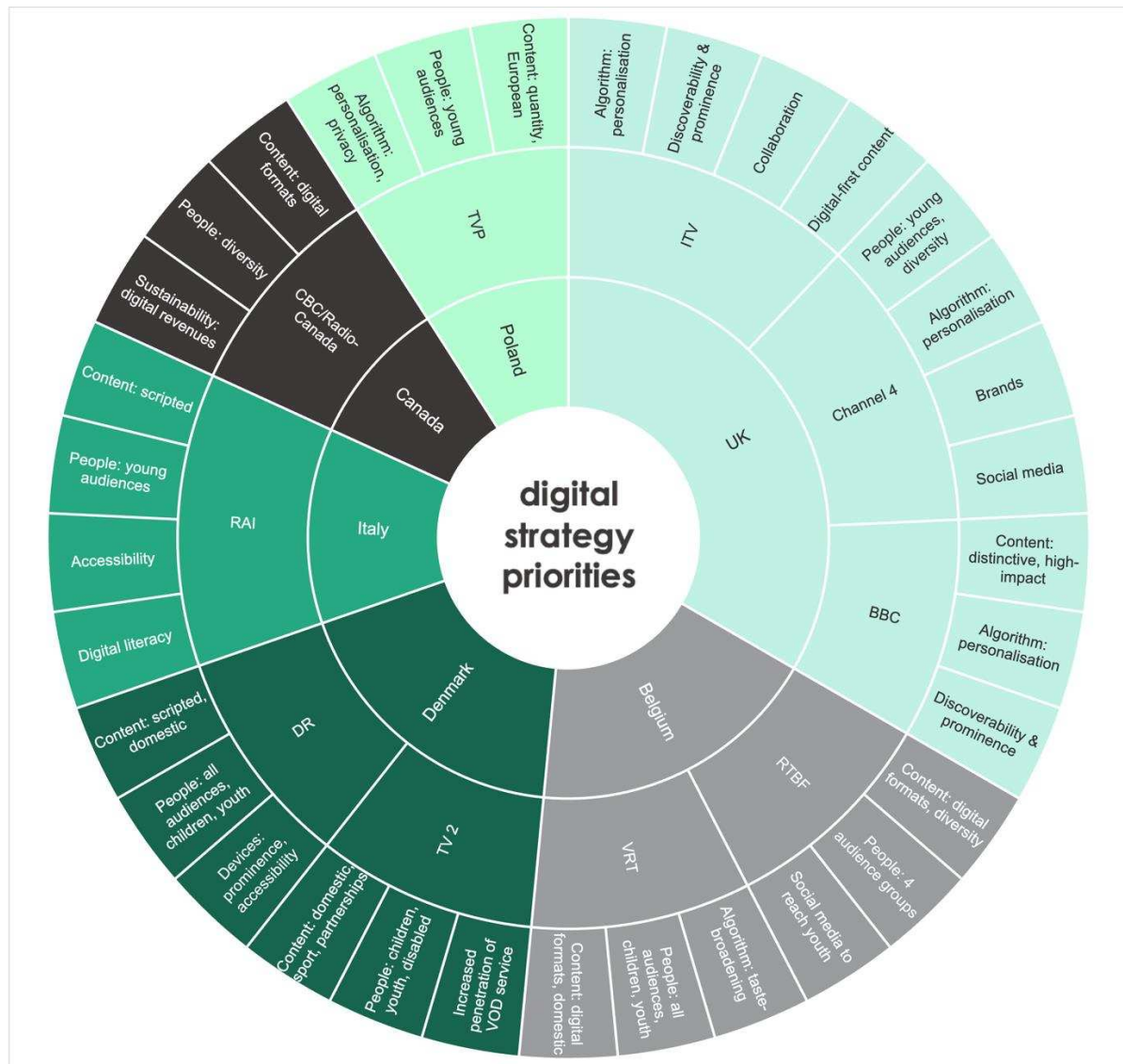


Figure 1. Elements identified as priorities of PSM digital strategies. Source: PSM annual reports strategies. Source: PSM annual reports and management contracts, authors' development.

Although all PSM organisations agree on these priorities, the digital strategies of some PSM are still of nascent formulation. Media regulation in Poland is rather outdated with regard to digitalisation and TVP's development of its VOD service is primarily based on practice rather than formal arrangements or internal strategy documents. A step in this direction is the creation of TVP+, the unit responsible for synchronizing the PSM's multi-platform offer. However, information on its activities is limited, as are details regarding TVP's priorities for the VOD portal.

PSM organisations are aiming to transform their VOD portals into the 'central viewing destination' (VRT) that offers 'more than catch-up' (Channel 4). In that regard, investment in the online service(s) is often mentioned as a priority, or even policy requirement. Most often, strategy documents—primarily annual reports and management contracts—indicate the need for investment in technology and technical standards, functionality, infrastructure, and improving user experience. Nevertheless, this remains a

debated topic. According to financial reports, spending on online services and content remains limited compared to PSM budgets for TV and radio, creating linear content that is subsequently repurposed online. In some cases, regulators also caution against shifting all attention to online, in contexts where PSM still reach most audiences through linear, as discussed in more detail below.

VOD portals also need to take on the growing competition with commercial streamers or ‘the global OTT challenge’ (CBC/Radio-Canada), not only through enhanced online presence, but also through content offerings. To create scale, the portals aim to integrate existing PSM channels and brands, including children’s ‘universes’, live streaming, audio offerings, news, and special ‘event channels’ (DR). In some cases, PSM are rebranding entire channels as a way to push the portal brand or revisit their publishing strategy to meet the needs of the VOD service (TV 2). In part, this shift also entails PSM taking up more active roles to drive innovation (RAI) or help sustain the wider media ecosystem (RTBF, VRT).

Forms of distinctiveness, from competitors and linear, are sought through a separate online offering ‘in its own right’ (DR). This is generally achieved through domestic productions and culturally-specific content. Original quality or ‘high-impact content’ (BBC) is identified as a priority, but there is also focus on quantity by digitising archives (RAI, TVP) and offering ‘box-sets to binge’ (BBC). All strategy documents mention the need for ‘content dedicated to online’ (TVP). Online-only content is also identified as a potential strategy to go beyond catch-up, through exclusive titles or entire channels, such as DR's offering for young people, distributed exclusively on DRTV.

Three areas of attention: People, Personalisation, Prominence

Across the ten cases, we expand on three core areas of attention, recognised in the strategy documents as priorities for PSM to meet their universality obligations: reaching audiences and connecting with *people*, *personalisation* and the use of algorithms, and concerns of *prominence*. Based on our comparative analysis, we provide a detailed framework of sub-dimensions and contextually-informed considerations that can be applied across varied cases. These are inevitably interconnected, but each one focuses on a number of elements that we indicate in Figure 2, and discuss in more detail below.

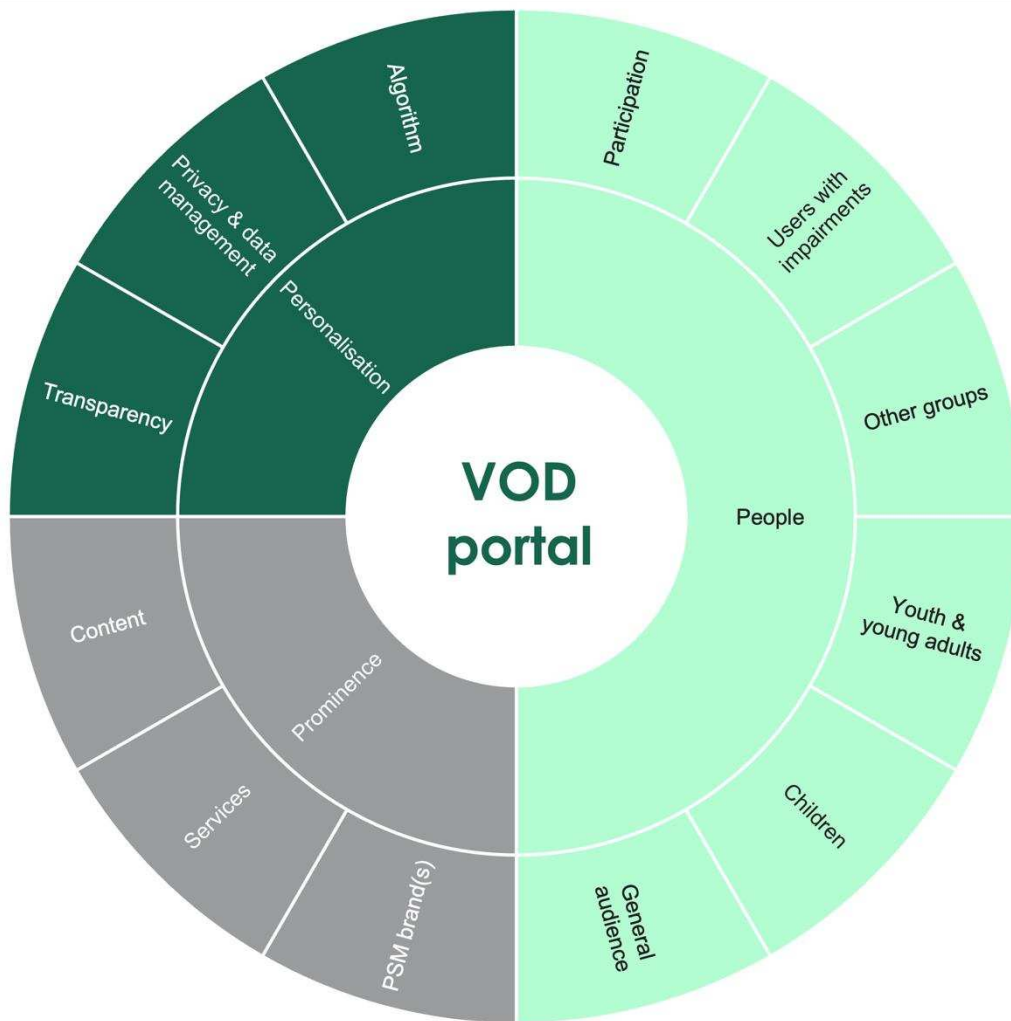


Figure 2. Three core areas of attention: people, personalisation, prominence. Source: policy documents, authors' development.

As previously discussed, the cases analysed are highly diverse, and the contexts in which they activate have significant influences over their level of digitalisation and the priorities identified in online strategies. For example, cultural diversity is identified as a clear priority in multi-cultural contexts, such as Canada and the UK. More conservative political contexts lead to a focus on national protectionism (e.g., Denmark, Flanders, Poland). The digital shift is seen as a necessary step in countries with widespread Internet access such as Denmark, where the majority of the population is already online, while in countries such as Poland, digital practices still follow an informal trajectory that heavily relies on social media. The cases are also at different stages of adopting, implementing, and evaluating algorithms. iPlayer introduced and refined the use of its recommender system over the past several years, while others are only now considering the development of a personalisation strategy. The adoption of due prominence rules is the most evident example of diversity across cases, as UK regulators have long identified the prominence of PSM content and services as a policy priority, while

most other countries are only now formulating strategies for this purpose. However, regardless of market-driven variances, the shared priorities across the cases confirm that the three areas of attention remain significant regardless of context. Below, we discuss these trends in more detail, illustrated through examples from different cases.

People

The most important component of universality remains reaching all people in society. The documents identify a number of key priorities with regard to targeting and connecting with different audience groups through VOD services. As discussed below, these combine elements of strategy with context-based challenges and opportunities online (see Figure 3).

3General audience. Reaching all audiences remains a priority for PSM, with digital strategies based on audience groups. The VRT brands are the exception as (discounting the children's channel Ketnet) they 'do not serve target groups, but seek to connect with the needs, behaviour, preferences, context, characteristics and interests of media users' (VRT and Vlaamse Gemeenschap, 2021: 22). It is also worth noting that some groups are better defined than others, generally based on age and accessibility. However, there are also mentions of more generic divisions that are difficult to identify, such as RTBF's 'affinity audiences', Channel 4's 'unheard voices' or the BBC's 'underserved groups'.



Figure 3. Priorities in strategies to reach audiences. Source: PSM annual reports and management contracts, authors' development.

The documents make distinctions between mere access to the PSM online services and actual reach of audiences. This is significant for the framing of universality as the latter involves more meaningful connections with citizens through content and branding, beyond access. Similarly, the differentiation between registered and active users on the portal is made both at policy and organisational levels, as PSM are increasingly required to measure reach by tracking real consumption and interaction with content.

Children. All cases prioritise the creation of a distinct online offering and space dedicated to children, envisioned as a playful, advertising-free space with distinct programming and interactive services. Content specifications are also mentioned for these environments, either in terms of age, genre (e.g., entertainment, news and cultural programming), or language (e.g., both English and French on CBC/Radio-Canada). The most important concerns regarding this environment are those of safeguarding from harmful content, and the importance of privacy and data protection. Spaces

dedicated to children are typically separated from (and sometimes required to be separated from) the general offering, either through a distinct channel/section on the VOD portal or a separate profile.

Youth and young adults. PSM strategies identify this as the most important group to be reached through the VOD portal. Digitalisation is seen as an opportunity to attract an audience segment that has traditionally been unreachable by PSM: 'audience profiles who have now abandoned the linear method of consumption and use the contents mainly through mobile devices and in on-demand mode' (RAI, 2021: 195). Young audiences are seen as easier to reach online, and the portal is seen as a means to give them the content they want, where they want it. To reach these groups, PSM propose attractive content offerings that are 'original and relevant' (DR), especially through scripted series, and formats for mobile devices. Means of accessing content are often mentioned, as PSM aim to develop distinct applications or sections dedicated to them on the portal. Competition with commercial streamers is often highlighted as a challenge in reaching this age group, which, in the UK, is also linked to potential brand dilution.

Users with impairments. Universal access to PSM services and content is particularly relevant through the inclusion and reach of people with sensory impairments. From the implementation of a so-called 'universal design' (DR) to specific requirements and tools, the usability and accessibility of the VOD portal and ancillary apps are identified as key priorities for all PSM. Subtitling is mentioned in all cases, both as a highly relevant feature, and as a point for future improvement online. In addition, users are given the possibility to adjust font size and, in some cases, contrast. Audio descriptions and sign language interpretation are widely available, mainly for news and current affairs programming, as is generally the case on linear. Delayed playback is also offered by some portals. RAI has developed a website dedicated to people with visual impairments (Rai Easy Web), which is virtually embedded in the RaiPlay portal and accessible via a Braille bar and vocal synthesis.

Other groups. Depending on the historical, cultural, economic or political contexts, other target groups are prioritised, including various 'underserved' audiences. Among them, ethnic and language minorities are identified as key targets towards 'inclusive diversity' (RTBF) and more 'balanced and accurate representations of all types of lived experience' (Channel 4, 2022: 35). CBC/Radio-Canada aims to 'pay special attention to the needs and reflection of the Indigenous Peoples in Canada' (CBC/Radio-Canada, 2022: 5). Economically vulnerable/marginalised people are also identified as priorities in some cases (BBC, VRT), as are diasporas (DR, TVP), and foreigners (RAI).

Participation. Audience participation continues to be mentioned in PSM digital strategies. Most often, this comes in the form of facilitating the use of online tools to receive feedback from users, as well as forms of interaction and co-creation. In some cases (DR, TV 2, TVP), PSM involve listener and viewer

organisations to facilitate this dialogue. However, we notice a shift from participation being overly stressed in policy documents, in the beginning of the 2000s (see Lowe and Bardoel, 2008; Vanhaeght, 2019) to a more modest position, as participation did not result in fundamentally new ways of interacting between PSM and their audiences. What is new, however, is the importance of media literacy and digital education as prerequisites for true universality and more meaningful participation, by setting up campaigns and experimenting with programming for digital education.

Personalisation

Algorithm. The integration of algorithms and personalisation are key elements in the process of online curation (see also Figure 4). The documents reflect, to varying degrees, on the opportunities of using personalised recommendations on the PSM portals. In some cases, challenges associated with privacy, data management, and transparency are also underscored. However, these are limited, as the documents generally denote a level of techno-optimism with regard to the advantages of using algorithms, regarded as means to increase ‘user loyalty’ (RTBF) and provide ‘a relevant and intuitive experience’ (BBC). Importantly, they are seen as ways to reach the public remit in more innovative ways, but also to compete with commercial streamers.

4Algorithms are presented as opportunities to avoid polarisation and the creation of filter bubbles. VRT is the most explicit case in terms of rolling out a ‘taste-broadening algorithm’. This is meant to increase ‘discovery, serendipity and diversity in media use’ (VRT and Vlaamse Gemeenschap, 2021: 37), by suggesting content that is identified by PSM editors to be in the public interest. In most cases, algorithms are developed/employed to improve the user experience and increase engagement. Others specifically refer to the development of ‘public service algorithms’ meant to promote ‘the discovery of diversified and quality content’ (RTBF and Wallonie-Bruxelles Fédération, 2023: 44). Nevertheless, information on actual application and evaluation of recommender systems is scarce, as their development and roll-out is still ongoing in most cases. Because of this, PSM continue to underscore the importance of combining algorithms with editorial curation.

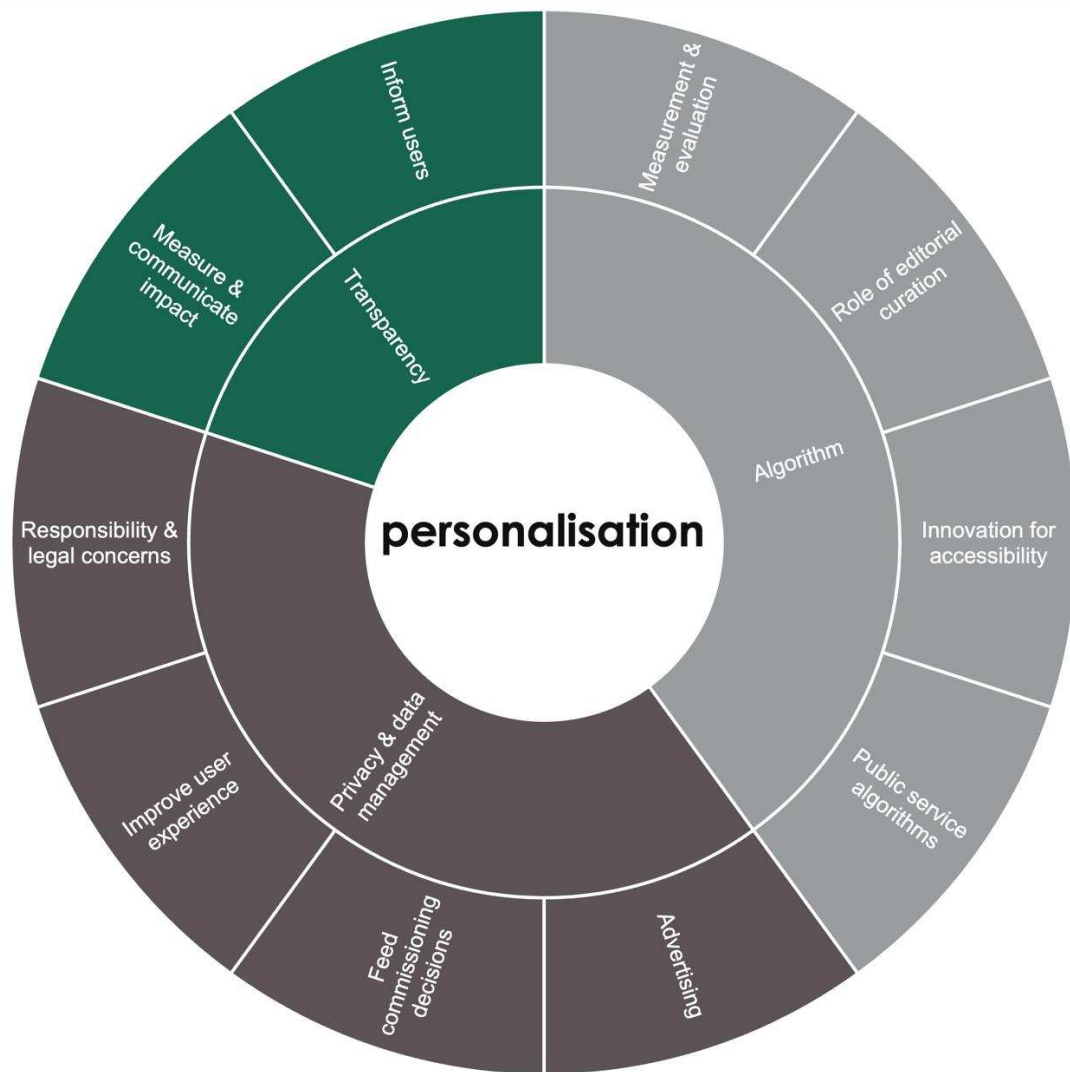


Figure 4. Priorities in strategies of personalisation. Source: PSM annual reports and management contracts, authors' development.

Privacy and data management. The use of algorithms on the PSM portals also entails the extensive collection and processing of user data. In line with their public remit and responsibilities towards citizens, policy documents highlight the importance of using the data responsibly and in the users' interests. Privacy and security are identified as key priorities, and particularly protecting the rights and personal data of minors, whose data cannot be processed for commercial purposes. PSM strategy documents also refer to extensive risk assessment activities with regard to safeguarding confidential data, including from potential cyber-attacks (BBC), and developing protocols and adopting technologies to anonymise personal information (CBC/Radio-Canada).

Regulators also have concerns regarding universality in cases where PSM portals require that users log in to personal accounts in order to access content online: 'the processing of the user's personal data or the insertion of advertising' mean that the service is no longer 'free' for consumers (CSA-Conseil

Superieur de l'Audiovisuel, 2022: 29–30). In addition to feeding algorithms for enhanced personalisation and content recommendations, BBC also mentions using digital analytics to make informed commissioning decisions. Moreover, there are references to the commercial benefits of targeted advertising, especially in the case of services that charge users for access/content, like ITVX Premium.

Transparency. All stakeholders agree that it is instrumental to provide users with sufficient, accurate, and updated information on how personalised recommendations work, and how their data is used and safeguarded.

Prominence

Prominence has become a central theme in media policy and distribution strategies. We find three core directions, discussed in more detail below (see also Figure 5): the prominence of specific content, the digital services, and the PSM brand(s). These are framed by a series of considerations, especially in the UK, where prominence has been emerging as a key priority in recent years. The first is competition in the respective markets and the exploration of a level playing field that would strengthen the position of PSM. The second consists of the ongoing development, implementation, and evaluation of prominence rules. For example, Ofcom recommends that regulatory frameworks based on 'principles-based rules are likely to be better than detailed requirements at this stage' (Ofcom, 2019: 3). The third is the forging of potential collaborations and negotiations with commercial players, including manufacturers and other platforms, for 'favourable positioning' on aggregator platforms and devices (Ofcom, 2020: 41).

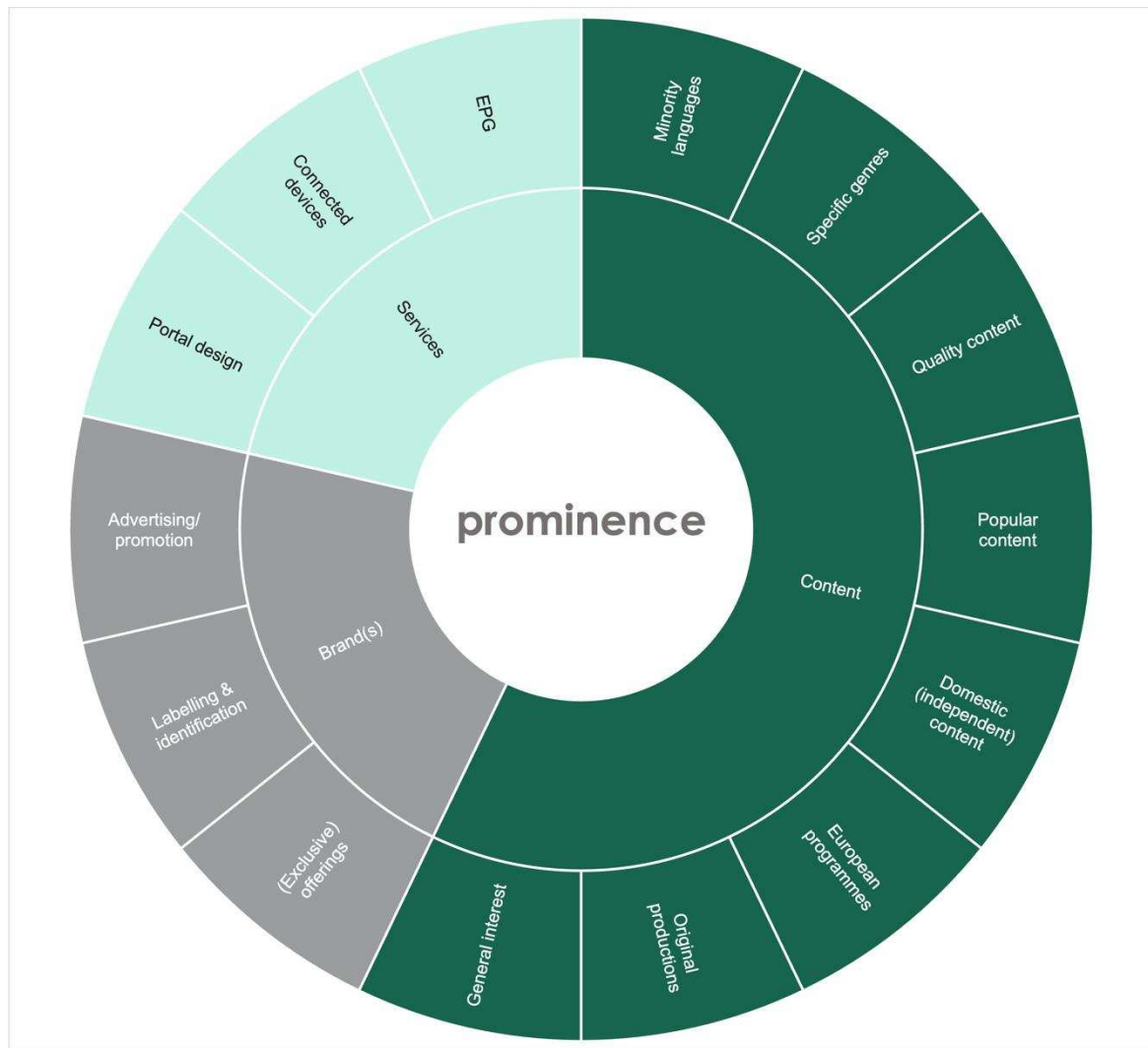


Figure 5. Priorities in strategies of ensuring prominence. Source: PSM annual reports and management contracts, authors' development.

Content. The prominence of specific types of content on the VOD portals was most often encountered in the documents. PSM refer to prioritising content by placing it in banners and top decks on the interface, making use of recommender systems, creating distinct sections or categories in menus, and the use of search through keywords and labelling. In line with EU audiovisual policy, documents also incorporate rules for the prominence of European works. Most often, PSM must prioritise the prominence of domestic programming, in the form of national/regional (independent) productions, works of national cultural expression, or in local languages. Content in minority languages is also prioritised in Canada and the UK. This is not only seen as a formal requirement to reach and represent the entire population, but also as a valuable form of distinctiveness from (foreign) commercial players. The documents also refer to the importance of highlighting original or exclusive productions and formats, seen by RAI also as a form of strengthening the RaiPlay brand and increasing public awareness of its activities and contributions.

In selected cases, there are clear rules on prioritising content of general interest, such as cultural and educational programming, or trusted information and current affairs, including ‘environmentally responsible messages’ (RTBF). Quality content is also identified as a priority (DR, RTBF, BBC), a category that has generally been defined in previous policy documents. There are also references to the prominence of popular content, signalled through categories such as ‘Top 10’ (RAI) or top placement on landing pages (VRT). Specific genres are also prioritised, either in line with universality and distinctiveness ambitions (e.g., BBC: current affairs, factual content) or with considerations of popularity and attractiveness (e.g., TV 2: sports), especially for certain target groups (e.g., DR: fiction for young audiences).

Services. The discoverability and prominence of the PSM portals themselves are brought into question in the current media landscape. To this end, rules on the due prominence of PSM apps and services are still in the process of adapting to new aggregators and devices, but also digital consumption trends. Connected devices are given notable attention in the policy documents, particularly Smart TVs. PSM raise concerns regarding the lack of control over ‘the integrity of [PSM] content, [Auvio’s] clear identification and its visibility, discoverability and referencing’ (RTBF and Wallonie-Bruxelles Fédération, 2023: 43). In the UK, leading platforms, TV manufacturers, and applications are seen as gatekeepers ‘with potential for anti-competitive exercise of market power’ (Digital, Culture, Media and Sport Committee, 2021: 27). Ofcom advises collaborations with third-parties through which PSM could ‘request platforms to give prominence to a single PSB portal or ‘tile’ through which all of the PSBs’ players are made available’ (Ofcom, 2019: 39). Concerns are also raised about the challenge of discovering minority language services, such as S4C on Smart TVs. EU countries refer to the AVMSd framework, for example, ‘to ensure that apps from Danish public service media get a prominent position on digital devices’ (Kulturministeriet, 2022: 12).

Brand(s). The documents also indicate the importance of promoting the PSM brand(s). Strategies contain references to increasing the exposure or promotion of these by creating campaigns ‘aimed at both traffic building and brand awareness’ (RAI, 2022: 142). This is also proposed by the UK Digital, Culture, Media and Sport Committee through the display of logos, especially for PSM-produced content available on other platforms, in order to make it clearly identifiable.

Conclusions

As informed by literature, the core aim of ongoing PSM research is to understand how platformisation is (re)shaping the values underpinning PSM services and organisations. Our findings suggest that, from a policy and strategy perspective, universality emerges as a particularly important, and contested, value for PSM in the age of platforms. To this end, the framework of *people, personalisation and prominence*

can serve as a useful theoretical framework for understanding and interrogating universality across contexts. Although we cannot generalise beyond our findings, the shared foci in our PSM cases, located in very different markets, point to these areas as significant regardless of context. Nevertheless, we acknowledge that these similarities may be in play because most of the countries are within the same broader regulatory/industrial system (the EU) or build on similar PSM traditions. Despite this, PSM policy remains national/regional and there are quite significant differences in policy and regulation between our case studies that make the identification of these similarities significant and useful for research into PSM and platformisation.

The focus on people, personalisation, and prominence is not restricted to PSM, as commercial broadcasters and other legacy players currently face similar challenges. However, PSM need to balance the shift online with their public mission and accountability to citizens. The trade-offs between platformisation processes and respecting their core public interest values create notable tensions in the three areas discussed in our framework.

The questions of how PSM can effectively reach and engage all audience groups remain of key concern, as VOD portals are seen by policymakers as tools for PSM to adapt to the current platform age. Universality emerges as a key value and there is a strong emphasis on adapting to online but the PSM strategies put forward are unable to step outside of existing definitions and theorisations of universality to consider fully how it might need to be *adapted* to an online context. The traditional mission of wide universal reach is now in tension with personalised delivery, competition with transnational players, and structural changes in the media landscape. Universal access is complicated by infrastructure, data collection, digital inequalities, and concerns of prominence. Meanwhile, universal appeal is discussed in connection to principles of diversity, distinctiveness and quality, as well as relevance to specific audience groups. Most evident is the reach of young audiences, whose online behaviour is yet to be fully understood and captured by online strategies.

PSM highlight the importance of online-first/only content and strategies, but this does not result in significant strategic shifts that place the portal at the heart of their practices. This rhetoric is in contrast with the emphasis that the policy documents continue to place on linear over digital strategies. Although the portal seeks to distinguish itself from other players and PSM brands, policy documents continue to position the portal as complementary to linear broadcasting.

The shift to portals involves confidence in algorithms to guide users while meeting audience demands and tastes. But, unlike commercial organisations, PSM have a responsibility to balance the use of algorithms with editorial curation of public interest content, in order to meet the public remit. They must also be accountable to policymakers and citizens regarding their responsible and transparent use

of personal data. Moreover, there is a risk of overemphasising personalisation at the expense of pursuing distinctiveness and drawing upon decades of scheduling experience. Public service algorithms are presented as the online alternative of using broad programming to guide audiences to public interest content, but details on their implementation and evaluation are scarce. Techno-optimism is also present in plans to reach audiences, with policy documents echoing the confidence in digitalisation from the 2000s. Once more, portals are seen as ideal ways to reach young audiences, and adding interaction is assumed to automatically generate participation. However, there is a novel, yet underdeveloped, attention to media and digital literacy as a prerequisite for true universality, especially for specific audience groups.

Prominence of content, services and brands is of concern in all contexts, but at different levels of policy development. Literature confirms that it is an emerging point of attention across international settings, and a key point of attention in researching platformisation processes, both for public and commercial media players. Nonetheless, PSM run the risk of overstating the importance of portal strategies as a means to meet true universality, as access to PSM services does not always mean engagement with PSM brands, and prominence does not automatically lead to consumption. Thus, investment in connecting to audiences through devices, content and brands is inefficient if not aligned with efforts to build meaningful connections with people, as a trusted and independent source of information and entertainment.

It is important not to over-rationalise the findings from this study without appropriately situating them within wider debates and historical developments. Nevertheless, the comparative approach provides a complex framework of three interconnected policy priorities across the different cases. This sets the scene for more in-depth investigations into the organisational, editorial, and regulatory changes generated by the emerging strategies.

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