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POLICY BRIEF
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Towards a Future-Proof Public Service Media?

Lessons from a comparative analysis in seven media markets

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Public service media (PSM) all over the world have consistently been subject to different forms of societal and technological transition. However, recent years have brought a number of new challenges. These include radical changes in media use, the advent of streaming services and the dominance of big tech. Moreover, the increasing diversity and polarisation of societies have led to the erosion of trust in traditional media. These have challenged the legitimacy of public service media as an institution and project, but have also affected the broadcasters themselves, requiring them to transform into fully digital, online-first organisations. In this context, we present results from the research conducted during the first year of PSM-AP, a large-scale comparative research project analysing 'Public Service Media in the Age of Platforms'. In this brief, we provide an overview of the dimensions of platformisation, and a series of core findings and discussions on PSM and platformisation, based on the analysis of media laws, broadcast contracts and licences, annual reports, and current policy debates in the following markets: Belgium (Flanders and Wallonia), Canada, Denmark, Italy, Poland, and the UK.

Platformisation for public media?

Global media platforms have significantly impacted the media landscape, generating additional challenges for PSM. These players compete directly for viewer attention, putting pressure on existing viewing habits, and making it more difficult for PSM to reach all audience groups, particularly youth and young adults. As a result, there is increasing pressure on the current ways public media provide their content. PSM are forced to rethink existing programming strategies from linear to online, making it more challenging to 'guide' audiences towards relevant public interest content.

In doing so, they increasingly need to balance platform tactics, such as the use of recommender systems and personalisation, with their public remit. While distancing themselves from tech platforms and streamers, public service media have become highly dependent on third-party streamers (resulting in co-production deals) and big tech platforms, for example for sharing news on social media, reaching young audiences through TikTok and Instagram, or providing access to their VOD services through connected devices. However, this gives PSM organisations little control over how the content is watched, who is reached, how people interact with the content, or whether people can still discern PSM content from other types of content. In addition, PSM services struggle to remain visible and make their content discoverable on connected devices, smart TVs and remote controls. All of these challenges combine with financial cutbacks and, in many countries, an erosion of independence from political and commercial influence.

One of the core values of public service media is 'universality'—reaching everyone with a diverse array of genres, ideas, and opinions, through a wide range of outlets, from TV and radio, to online and mobile. Universality is a complex principle that goes beyond simply providing access or reaching everyone, but that also involves providing meaningful public content for all audiences. This also requires paying particular attention to reaching young audiences and vulnerable groups in meaningful ways. As discussed above, processes of platformisation are reshaping the core principle of universality, while adding a series of core operational challenges.

Reinventing Universality...

- Universal appeal and relevance are key to PSM legitimacy.
- Reaching all audiences vs more effort to reach specific groups. Youth is identified as a priority, and targetted through mix of online services and platforms, including social media.
- Concerns over universal access: does mandatory log-in or payment impede this?
- Balancing online-first and linear.
- How can PSM portals and services be easily found?
- How to balance curation and algorithmic personalisation?

...requires core operational transformation

- Organisational reform: towards a horizontal, cross-media organisation.
- Building the attractiveness and user-friendliness of VOD services while lacking the scale of global streamers.
- Redefining commissioning, financing and branding of PSM content.
- Developing strategies for meaningful algorithmic curation.
- Balancing data collection and ethical data use.
- Balancing own services with third-party platforms. Social media essential in some cases, but not without risks.

Key finding from the policy analysis

This stage of the research focused on policy frameworks and the extent to which they are suitable to future-proof PSM in the age of platforms. Public service media are entrusted with a remit that is negotiated with governments, and subsequently monitored and evaluated by regulators. However, these agreements differ greatly depending on context. While some countries have more general contracts or charters to establish their priorities and core values, others follow more detailed agreements, with measurable key performance indicators (KPIs) for obligations and additional responsibilities.

Policy frameworks characterised by incremental changes

All policymakers still consider PSM crucial, and in all cases understand the transformation PSM are required to undertake. Policymakers mostly motivate PSM's importance and legitimacy relative to outside threat. Change is motivated by external big tech 'giants', and the need to preserve cultural identity and local industries. All agree on the need to develop and/or strengthen the PSM online portal, but there are considerable differences between cases in terms of timeline, priorities, or strategy.

Existing paradigms persist, however, and we identified strong path-dependence across cases. The funding and auditing of online strategy and practices are still dominated by a linear logic. Online strategies generally go beyond catch-up offerings, but are still largely built on linear practices, content archives, and funding prioritised for television and radio production.

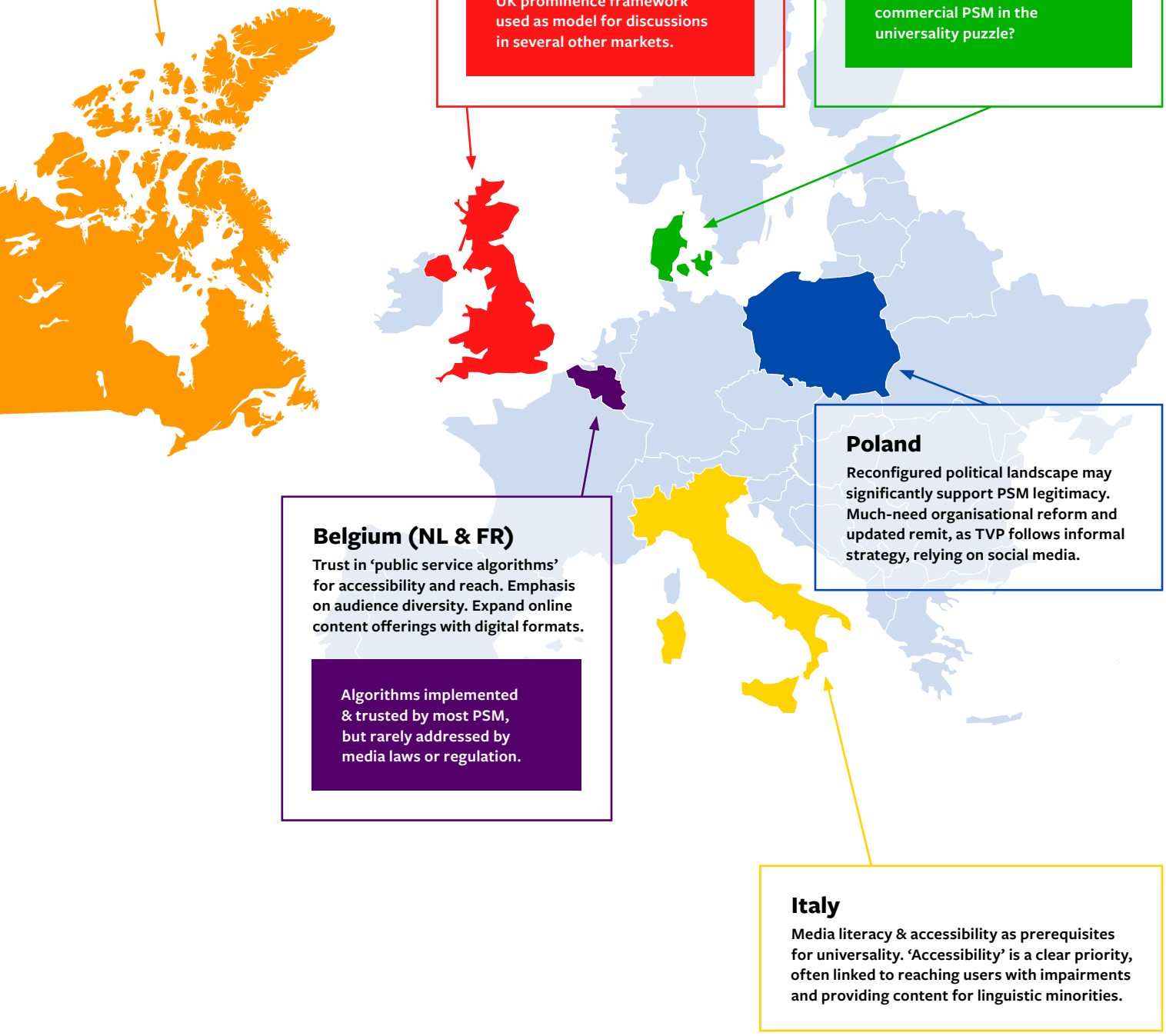
At the same time, current policy frameworks leave sufficient leeway for PSM to develop online strategies and experiment with new ways of reaching audiences in meaningful ways.

Metrics and KPIs for reaching audiences online are different across policy contexts. They are also, in general, flexible and broadly defined. This leaves room for experimentation, but may also maintain persistent dominant linear logics. Regulators in most markets are looking for more relevant ways to measure access, reach, and engagement.

Increasing importance is awarded to media and digital literacy. Bridging existing digital divides and promoting critical skills is seen as a more meaningful way of ensuring the reach of all audience groups, including older demographics and vulnerable groups. It is also seen as a way to reduce risks of misinformation and eroding distrust in legacy media.

Core discussions in different markets relevant for all PSM

In the figure below, we present a selection of priorities and ongoing discussions in different markets, which are relevant across the cases. Noting that the socio-economic and political context is crucial to agenda-setting and shaping the regulatory framework, the dimensions of universality and audience reach, algorithmic curation, and media literacy are increasingly seen as core to the platformisation process of PSM across all cases



Key recommendations

Policymakers must bridge the disconnect between obligations and funding

The need for PSM to develop and implement coherent online strategies generates more responsibilities and a strategic re-organisation at institutional level. Policymakers over the past decade have increasingly entrusted PSM with new responsabilities and tasks; they expect PSM to compete with platforms in the same ways platforms are operating; and they require PSM to still meet audience universality. At the same time, these endeavours are suggested in a context of increasing monitoring and reduced funding for PSM. A policy framework fit for the platform age requires a financial framework that is fully aligned with these ambitions.

PSM should prioritise extensive experience over novel digital tools

PSM should cleverly adopt platform strategies while maintaining distinctiveness. They should continue building on the experience gained over decades of scheduling, editorial curation and commissioning over the use of algorithms and recommender systems. The transparent and responsible handling of personalisation and user data can strengthen audience trust. Approaches to platform regulation need to look beyond competition policy and/or online harms, by formulating a more integrated approach that considers the impact of platforms on PSM and how PSM might offer solutions to some of the challenges raised by platforms.

Stakeholders must adapt existing performance metrics to online environment

Media regulators, policymakers, and PSM must review existing performance metrics, by carefully considering differences between on-demand and linear. This entails updating audience reach expectations to the digital age, finding accurate measurement tools, and creating meaningful connections with active users, rather than counting registered accounts.

Digital-first over digital-only

Digital-first should continue to be the rationale for PSM portals, as a digital-only strategy has repercussions for universality. Media literacy alone cannot solve that and matters of bridging digital and socio-economic divides remain pertinent across the cases. Moreover, a digital-first PSM must be grounded in a comprehensive digital strategy, that interweaves all dimensions of the public remit and organisational reform.

About our study

This study was based on a comparative policy analysis of ten public service broadcasters, both publicly and commercially-funded in six countries: Belgium (RTBF, VRT), Canada (CBC), Denmark (DR, TV 2), Italy (RAI), Poland (TVP) and UK (BBC, Channel 4, ITV). For this research, we analysed 61 documents including media laws, broadcast contracts and licences, annual reports, and documents detailing current policy debates. The aim was to identify how public media and governments frame challenges, priorities and policy needs for making the shift to a 'digital-first' public media institution amidst increasing competition from streamers and platforms. The majority of policy and strategy documents concern the period 2021-2022. Recent policy debates have also been considered for context.

The policy study is the first milestone of PSM-AP, a three-year research project that examines how public service media organisations, regulators and policymakers are adapting to the new platform age, with a focus on television. The project is supported by the CHANSE ERA-NET co-fund programme, which has received funding from the European Union's Horizon 2020 Research and Innovation Programme, under Grant Agreement no 101004509. PSM-AP is led by Catherine Johnson (University of Leeds, UK), together with Principal Investigators Tim Raats (Vrije Universiteit Brussel, BE), Michał Głowacki (University of Warsaw, PL), Hanne Bruun (Aarhus University, DK), co-investigators Massimo Scaglioni (Università Cattolica del Sacro Cuore, IT) and Serra Tinic (University of Alberta, Canada), together with postdoctoral researchers Catalina Iordache (Vrije Universiteit Brussel, BE), Dan Martin (University of Leeds, UK), Julie Mejse Münter Lassen (Aarhus University, DK), Filip Świtkowski (University of Warsaw, PL), Antonio Nucci (Università Cattolica del Sacro Cuore, IT), and supporting researchers Jacek Mikucki (University of Warsaw, PL) and Katarzyna Gajlewicz-Korab (University of Warsaw, PL). More information on the project can be found here: **https://psm-ap.com/**