Public Service Media in the Age of Platforms:

Challenges and Recommendations for the Future

PSM

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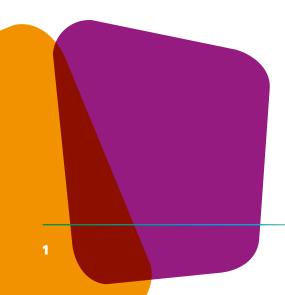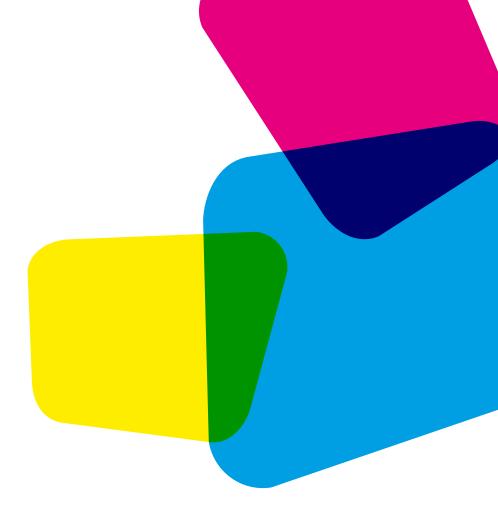
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Foreword

For the last century, Public Service Media (PSM) have been trusted institutions at the heart of democratic, cultural, and social life. Universality of access, diversity of content, independence from political and commercial influence, and public accountability have been the foundation of their legitimacy. In the platform age, these values are harder to deliver and defend.

A small number of global technology companies now control the main routes to audiences, set the terms of discoverability, and shape the economics of distribution. Streaming giants have reset expectations for choice, personalisation, and user experience. Social media platforms dictate the pace, tone, and terms of public conversation. The rapid rise of AI, embedded across these platforms, adds a new layer of disruption — blurring the boundaries between fact and fabrication, and undermining public confidence in what is real and trustworthy. For PSM, this is not cyclical disruption but a permanent structural reconfiguration of the media environment, altering audience habits, competitive dynamics, and the conditions for fulfilling the public service remit.

The challenges are strategic and operational in equal measure. Audiences — particularly younger, mobile-first segments — are fragmenting. Brand relevance is contested by platform-native competitors. Funding is under pressure as distribution, production, and technology costs increase. Political pressures are relentless, often reflecting misunderstanding of altered operational realities more than genuine critique of strategy or leadership.

In my role at the European Broadcasting Union (EBU), I see these issues play out every day. There is no playbook for this environment. Every example, piece of evidence, and shared practice is valuable in building a common language for change. Within the EBU community, these conversations are constant: about audience reach, organisational agility, sustainable funding, partnerships, and platform governance. For policymakers, the job is equally fraught: the arguments for change, and the means to enable it, are still being written.

PSM must not only adapt once but continually renew. At the EBU we call these 'shapeshifting organisations': those that can reconfigure their strategy, structures, and ways of working as an everyday capability, while staying anchored in their mission. This is not reactive crisis management. It is building change into the DNA of the organisation.

This report offers valuable material for that work. Drawing on research from ten PSM across seven markets, it identifies four shared challenges — audience reach, brand awareness, organisational transformation, and sustainability — and examines how these pressures are reshaping PSM values. The case studies give concrete examples of how leaders and teams are addressing them: rethinking commissioning for fragmented audiences, designing algorithms that broaden rather than narrow horizons, and restructuring teams to bring editorial, data, and product together in delivering the 'total offer' that platformatization demands.

The findings can also help reduce political pressure — replacing assumption with evidence and perception with operational reality. Providing stakeholders, policymakers, and practitioners with a clearer, shared understanding of the challenges PSM face is one of the most effective ways to enable constructive change. They should be read as both a challenge and an invitation — for policymakers and practitioners alike — to renew, enable, and support the kind of shapeshifting capacity essential to sustaining the public service mission in a permanently altered media landscape. In this environment, strength comes from adaptability — and adaptability must serve the values that have always defined public service media: universality, diversity, independence, and trust.

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Dr Sasha Scott,
Head of Transformation Services, EBU

Introduction

For almost 100 years, public service media (PSM) have been at the heart of European culture and society, providing universal access to the information, education and culture necessary for democracy.[1] With rising polarisation and social fragmentation, PSM has never been more important to our democracies, societies and culture.

Yet today PSM face unprecedented challenges from the growth of global platforms, such as Google, Amazon, Meta/Facebook and Apple, and streaming services, such as Netflix, Amazon Prime Video and YouTube. Once the dominant providers of national culture, public service broadcasters (PSBs) are now competing with better resourced players operating at transnational scale.

This small number of largely US platforms increasingly determine the rules of the game for PSM.[2] Google dominates search and, with Facebook/Meta, controls the online advertising market. Amazon, Google and Apple provide operating systems for TV sets and connected devices that enable them to exert influence about how TV programmes and services are presented to audiences. Amazon and Google also provide the web services needed to operate online.[3]

For PSBs this presents a double-bind: as they have lost audiences to streaming services and platforms, they have had to develop new on-demand services and content that can only be delivered through the infrastructure owned by the global platforms with whom they complete for audiences, revenue and talent.

What impact is this new 'age of platforms' having on PSM? And is this challenge experienced in the same way in different countries and media markets?

Understanding Public Service Media in the Age of Platforms

The 'Public Service Media in the Age of Platforms' project has been investigating these questions through comparative analysis of public service television by ten PSBs across seven media markets.

The countries and PSBs selected enable us to compare how PSM is faring across very different sizes of nation, media market and language, as well as differences in regulation, funding model and legitimacy of PSM.

The research makes three distinctive contributions:

1. It examines how the age of platforms is reshaping the dynamics between policy, PSM organisations and content/services.
2. It extends beyond news to examine the impact of the age of platforms on the commissioning and distribution of the wide range of programmes that PSBs produce.
3. It adopts a highly collaborative comparative approach in which all data was collected and analysed by a team of experts from across the markets included in the study.

We examined 61 regulatory and policy documents, conducted 81 semi-structured interviews, analysed more than 100 trade documents, briefs and public speeches, and compared the linear schedules, video-on-demand (VoD) interfaces and programme output of each broadcaster (see Methodology).[4]
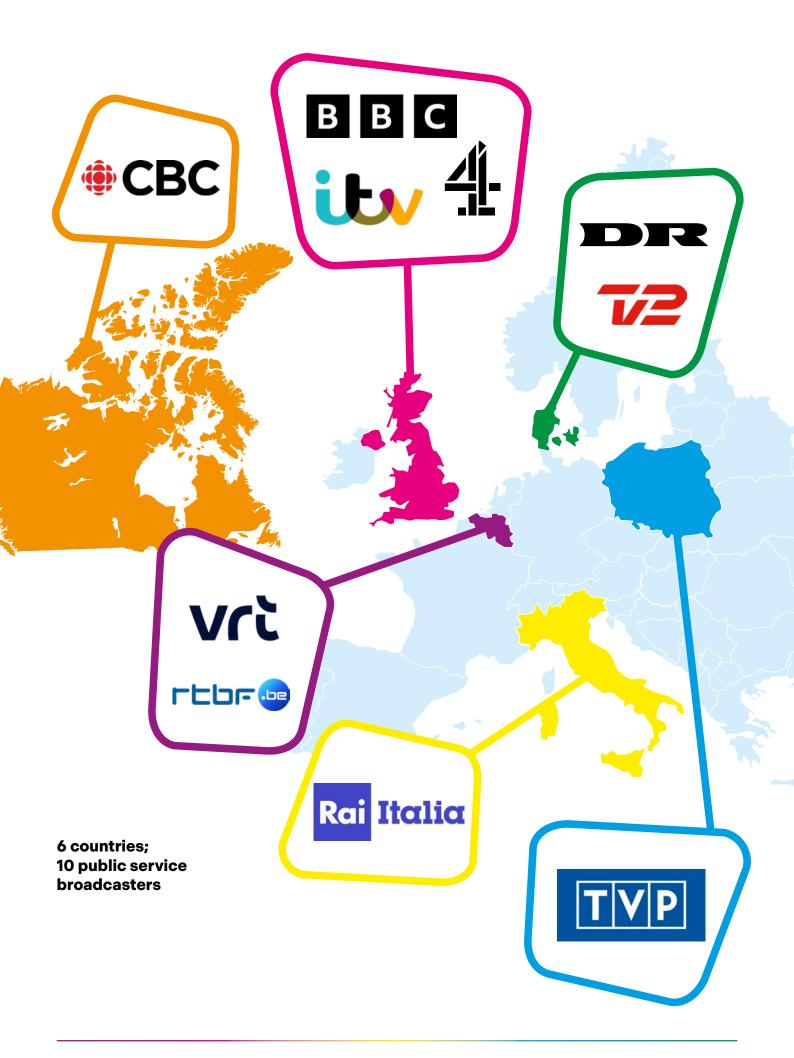
In this report we set out four core challenges that were experienced across all these very different media markets and examine how these are affecting the values underpinning PSM. Throughout we offer case studies to illuminate the key issues facing PSM in the age of platforms.

1 Council of Europe (2012) *Recommendation CM/Rec(2021)1 of the Committee of Ministers to member States on public service media governance*. Adopted by the Committee of Ministers on 15 February 2012 at the 1134th meeting of the Ministers' Deputies.
2 van Dijck, J et al, (2018) *The Platform Society: Public Values in a Connective World*. Oxford and New York: Oxford University Press
3 Johnson, C (2019) *Online TV*. London: Routledge; Johnson, C (2021) 'The Online Television Industry'. In P. McDonald (ed.) *The Routledge Companion to Media Industries*. London: Routledge.
4 Comparative analysis was conducted across all the European PSBs. Canada was included in the analysis of regulation/policy and VoD interfaces/linear schedules.

CBC

BBC

itv

4

DR
TV2

vrt

rtbf.be

Rai Italia

TVP

**6 countries;
10 public service
broadcasters**

Executive Summary

Support remains for PSM from policymakers across the six countries in our study. Many argue that, with the rise of platforms, PSM has never been more important to democracy, society and culture.[5]

The Four Challenges Facing PSM
The rise of global platforms and streaming services is presenting challenges to all the PSBs in our study, despite significant differences in size, language, media market and digital transition. These challenges should be on the agenda of policymakers and regulators if we are to future-proof PSM.

1. Audience Reach
Audiences are fragmenting and younger audiences are spending less time with PSM in favour of streaming services. To meet requirements to provide universal access, all PSBs are balancing broadcast and online provision, but it is increasingly hard for PSBs to reach all audiences.

For those PSBs dependent on advertising, in countries where high-speed broadband uptake is lower, and/or where linear viewing remains more resilient, retaining a presence on linear broadcasting is more important. However, in all cases, PSBs recognised the need to prioritise online delivery – mainly through VoD services – to engage audiences spending less time with broadcast TV.

The prioritisation of VoD is leading to changes in **commissioning and programming strategies**. Commissioners are focusing on 'hero genres' – largely fiction, entertainment and documentaries – designed to attract and retain audiences to VoD services. These genres dominate the most visible parts of the VoD homepages with news and current affairs largely left to linear channels.

2. Brand Awareness and Value
Younger audiences are perceived as harder to reach in part because they are not familiar with, or have low attachment to, PSM brands.

Some PSBs have responded to this by consolidating their brands, for example by centring the VoD as a 'front door' to audio as well as audiovisual content. Others have focused on a more incremental strategy of modernising content and distribution strategies, while preserving a position as a trusted national broadcaster.

Channel 4 is an outlier in our study in actively diversifying its brand through a strategy of platform-neutral distribution, including across social media and video-sharing platforms (VSPs). A consequence of its remit to appeal to younger audiences, Channel 4 aims to be where its audience is, rather than trying to bring viewers to its VoD and broadcast channels.

For the other PSBs in our study, the primary **use of social media and VSPs** is to drive audiences back to their VoD and broadcast channels. Regardless, all PSBs noted significant challenges in distributing on social media/VSPs, including lack of transparency for content visibility and recommender algorithms, reduced access to data, low revenues, and lack of accountability.

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5   Puppis, M and Ali, C (2023) *Public Service Media's Contribution to Society: RIPE@2021*. NORDICOM, University of Gothenburg. Available at: **https://www.diva-portal.org/smash/get/diva2:1760972/FULLTEXT01.pdf**

The prioritisation of VoD is leading to changes in commissioning and programming strategies

3. Organisational Transformation

Transitioning from broadcast to digital-first requires organisational transformation. Increased agility in response to the faster pace of change is a key motivator, as is the need to integrate new tech/product and data science teams.

All PSBs in our study had undergone a process of organisational change. However, this was seen to be hampered by regulatory burdens and bureaucracy, organisational silos and the difficulties in integrating digital skills and altering broadcast mindsets. In most contexts, there was a specific challenge in adapting new digital ways of working to longstanding public service traditions and values devised for broadcasting.

These challenges are apparent in the adoption of **personalisation** by PSBs. All PSBs in our study are developing or have developed algorithmic recommenders, but in 2023, most were only offering a light degree of personalisation on their VoD services. Financial and technological challenges were barriers. In addition, all PSBs emphasised the importance of maintaining editorial curation to protect the fundamental values of PSM in meeting wider societal, not just individual, needs.

Some PSBs have been developing 'public service' algorithms (e.g. BBC and VRT). However, this was seen to require a trade-off between using recommenders to increase audience reach and meeting core public values, such as impartiality and diversity. It is also far more costly than purchasing a commercial algorithm designed to drive use through offering more of the same.

4. Sustainability

All PSBs in our study are facing these challenges with declining revenues and increased costs. Public funding has decreased across Europe while commercial PSBs also face declining advertising revenue. At the same time, distribution, production and technological innovation costs have all increased.

Financial challenges are limiting the ability of PSBs to compete with well-resourced global streamers, both in terms of content and the user experience offered by their on-demand services.

Prominence legislation is being introduced and/or debated in many countries to increase the discoverability of PSM in online environments. However, there remain challenges around how to define and measure prominence, made more difficult by the lack of transparency of search and personalisation on devices and platforms.

PSM face declining revenues, while innovation requires increased costs

The Transformation of PSM Values

These challenges are transforming the values that underpin PSM. Our research identified seven core values for PSM in the age of platforms.

1. **Universality**
   Universality of access is threatened by the challenges of reaching all audiences, placing pressure on PSBs to prioritise reach to justify their position as national broadcasters.

2. **Diversity**
   The emphasis PSBs are placing on universal reach undermines their diversity of content, presenting risks to the provision of niche content and the needs of minority audiences.

3. **Quality**
   As PSBs face competition from better funded global streamers, quality is being redefined as programming that protects national, regional and linguistic cultures.

4. **Pluralism**
   With the rise of mis/disinformation, particularly on social media and video-sharing platforms, PSM is positioned as particularly important in maintaining pluralism and supporting democracy through the provision of trusted programming about contemporary issues.

5. **Independence**
   Trust in PSM depends on sufficient independence from political interference, which not only helps to ensure public trust, but also creates the organisational stability needed to transition to digital-first distribution.

6. **Innovation**
   Innovation has become a more important value as PSBs adapt to competition from global platforms. Yet, for some, it was inhibited by regulation and/or a lack of independence.

7. **Accountability**
   Accountability to the public has become more important to maintain PSM legitimacy and trust. However, the shift towards online distribution makes it far harder to hold PSBs to account, given the lack of transparency about the use of algorithms, AI and data.

Recommendations

1. Greater integration of platform/digital and PSM policymaking, recognising global platforms as key players in media markets that can impede the ability for PSM to fulfil vital social and cultural functions.

2. Technology-neutral definitions of PSM remits that balance universal appeal and broad reach with diversity metrics.

3. Incentives for PSBs to innovate in the public interest, including through the development of public service algorithms, with regulatory oversight focused on strengthening the social and cultural value of innovation over competition concerns.

4. Regulation to protect and encourage the distribution of PSM content on social media and VSPs including prominence and discoverability frameworks, terms of trade to ensure appropriate revenue and data sharing, and algorithmic transparency.

5. Clear and transparent metrics with methods and measures in place to enable independent evaluation of compliance with PSM remits across broadcast and streaming that take into account personalisation.

6. Independence from political interference in the management and funding of PSM, with increased transparency, including in the use of data and AI, and greater engagement with the public to increase accountability and trust.

7. Sufficient and sustainable funding that recognises the increased costs for PSBs of competing with global streamers and fulfilling vital social and cultural roles in the age of platforms.

Challenges

Policymakers in all our case study countries continue to support PSM as central to society and democracy. Yet there was also clear recognition that PSBs face seismic shifts. In this section, we set out four core challenges that are being experienced across all the PSBs in our study. We also explore how the implications of these challenges vary from country to country.

Challenge 1:
Audience Reach

Although all PSBs have a remit to provide universal access to television, it is increasingly hard to reach all audiences. Younger audiences, in particular, are spending less time with PSM in favour of online services.[6]

How PSBs experience the challenges of audience reach is determined by four key market factors.

Funding available to PSMs
A key factor for ad-funded PSMs is the balance between rates of decline in broadcast ad revenues and the challenges of generating sufficient ad revenues online. Meanwhile, declining public revenues can exacerbate the challenges of providing both broadcast and online delivery.

Audience behaviours
The extent and rate at which audiences are shifting to online viewing or continuing to view broadcast television has a significant impact on the strategies adopted by PSM whose requirements for universality oblige them to continue to provide for all audiences.

Infrastructure
Challenges differ in markets heavily dependent on DTT, where a shift to internet-delivery depends on a different infrastructure, vs those more dependent on cable/satellite, where broadcast and online TV can be delivered through the same infrastructure.

Uptake and use of high-speed internet
How widespread uptake and use of high-speed internet is has a significant impact on audience behaviours and PSM strategies.

6   EBU (2025) Audience Trends: Television 2025 (Public Version). Available at: **https://www.ebu.ch/files/live/sites/ebu/files/Publications/MIS/login_only/audiences/EBU-MIS-TV_Audience_Trends_2025_Public.pdf?site=ebu**.

The intersection of these factors determines decisions about the speed and nature of PSBs' transition to digital-first.

RAI (Italy)
Linear broadcasting remains essential, despite the rise of streaming.
- Internet uptake:
  - High-speed internet unevenly distributed across the country.
- Audience behaviour:
  - Many viewers still depend on linear broadcast TV.
  - RAI's linear broadcast channels continue to dominate prime-time ratings.
- PSM funding:
  - Mainly from licence fee.

Consequence: Strong commitment to retaining PSM presence on linear broadcasting and slower adaptation to streaming.

TV 2 (Denmark)
Streaming is essential, but financial challenges make it hard to abandon linear broadcasting.
- Internet uptake:
  - Almost universal access to high-speed broadband in Denmark.
- Audience behaviour:
  - High use of streaming services.
- PSM funding:
  - TV 2 is dependent on advertising and subscription income from cable and linear broadcast TV channels.

Consequence: Must develop an online first strategy but can't abandon linear. Dual distribution places a strain on the resources left for programme production.

BBC (UK)
Online first, but campaigning for transition to internet TV.
- Internet uptake:
  - 75% of premises had taken up high-speed broadband by 2024.[7]
- Audience behaviour
  - High use of streaming services, but key audiences are dependent on broadcast TV.[8]
- Infrastructure:
  - Required to fund distribution on digital terrestrial television (DTT) and internet protocol television (IPTV).[9]

Consequence: Broadcasting still essential to reach all audiences, but the costs of distributing on broadcast and online are an increasing challenge. BBC calling for an accelerated transition to internet-distributed TV.

The need to be online
Despite these differences, all broadcasters recognised the need to prioritise online delivery – mainly through VoD platforms – to engage younger viewers that spend far less time watching PSM and broadcast television.

For some broadcasters, this challenge extends beyond younger viewers. For example, VRT (Flanders, Belgium) also identified professionals in their 30s and 40s as a group that is becoming increasingly difficult to reach due to competition from foreign streamers like Netflix, Disney+ and Amazon Prime Video. The drama series and light entertainment offered by these streamers is an appealing proposition for those audiences that can afford the subscription costs.

7   Ofcom (2024) Full-fibre broadband reaches nearly 7 in 10 homes. 5 December. Available at: **https://www.ofcom.org.uk/phones-and-broadband/coverage-and-speeds/full-fibre-broadband-reaches-nearly-7-in-10-homes**

8   Vernon, J et al (2024) *Future of TV Distribution.* Report for the DCMS. 7 October. Available at: **https://assets.publishing.service.gov.uk/media/672cafe262831268b0b1a2f4/Future_of_TV_Distribution_FINAL__7_Nov_2024_-accessible.pdf**

9   Tim Davie (2025) The BBC – A Catalyst for Building Trust. 14 May. Available at: **https://www.bbc.co.uk/mediacentre/speeches/2025/tim-davie-director-general-bbc-catalyst-for-trust**

Commissioning for online

In the online environment, PSBs find it harder to compete with global streamers through public value content. Our research revealed that concerns about declining audience reach, particularly online, are leading to commissioning and publishing strategies that prioritise a narrow range of genres – largely high-profile fiction, entertainment and documentary – designed to attract and retain audiences on the VoD.

PSBs used different terminology to describe these commissioning strategies, but were united by an emphasis on 'hero genres', programming that burns brightly enough to attract and bring audiences to the VoD and long enough to hold them there and keep them coming back again and again.

VRT (Flanders, Belgium) prioritised 'bullseye content', a concept borrowed from the Swedish PSB, SVT. Bullseye content is designed to perform well across both linear and VoD. It offers an affordable strategy to use the same programmes to reach multiple audience groups via different distribution channels.

Bullseye content is a Swedish concept from SVT and it's content which is doing extremely well on linear, but also which we think will do well on digital.

–Director of Connection, VRT

DR (Denmark) referred to 'lighthouse programming', a metaphor that aptly describes the need for programming that attracts attention in a crowded marketplace and brings it to the VoD. The focus is on hit programmes that grab audience attention, emphasise social cohesion and appeal to universal audiences.[10]

ITV (UK) adopted the terminology of 'fireworks' and 'bonfires' to describe its VoD content strategy. As the Director of Brand and Marketing explained,

fireworks [...] big noisy shows that are the things that catch peoples' attention and bring them into a service [...] big dramas and big reality shows like Love Island might be examples of those. But then once they're in you also need the bonfires, the long-running, thousands of hours of boxsets.

–Director of Brand and Marketing, ITV

Programming strategies focus on key genres

Our analysis of VoD homepages revealed how this commissioning strategy played out in the programmes that were most prominently promoted to viewers.
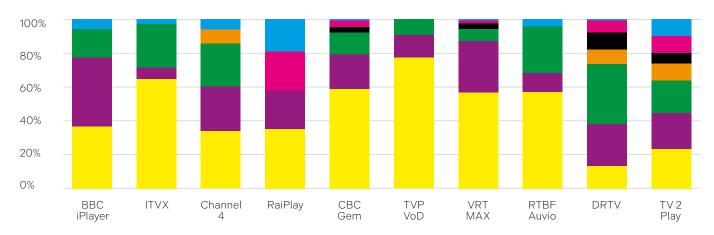
The genre profile of the 'prime space' of the VoD homepages – what you can see without scrolling down or across – was dominated by three genres: fiction, entertainment and documentary. These are also the genres that tend to be prioritised by global streaming services. By contrast, the primetime linear schedules in the same week contained a wider range of genres. In particular, news and current affairs are largely left to the linear channels.[11]

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10   Bruun, H and Lassen, JM (2025) Content commissioning and risk in Danish online public service television, *NordMedia,* August.

11   Bruun, H et al (2025) Publishing public service media on demand: A comparative study of public service media companies' editorial practices on their VoD services in the age of platformization. *Journal of Digital Media & Policy.* January; Bruun, H et al (2025) *Streaming public service television in the age of platforms.* Available at: **https://psm-ap.com/policy-brief-streaming-public-service-television-in-the-age-of-platforms/**
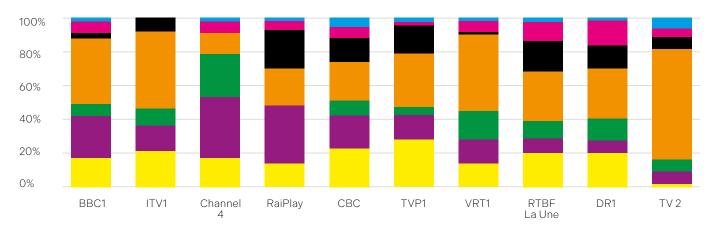
Percentage of programmes by genre in VoD prime space (November, 2023)
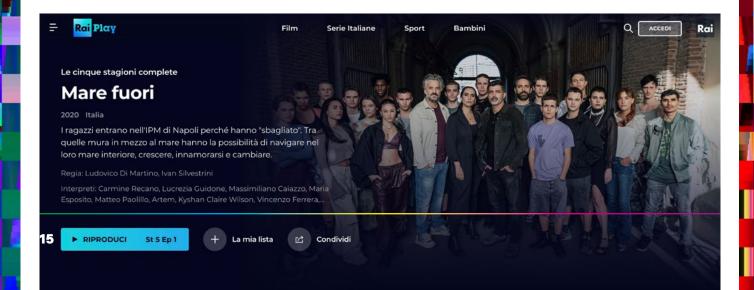
Percentage of programmes by genre in main channel prime time (November, 2023)

Key

- ● Fiction
- ● Entertainment
- ● Documentary
- ● News
- ● Current Affairs
- ● Culture and Lifestyle
- ● Sport

Reaching Younger Audiences: The Case of *Mare Fuori* on RaiPlay and the challenges of "streamcasting"

Linear broadcast television remains robust in Italy largely due to its strong appeal among older viewers who value the familiarity and simplicity of traditional TV, relying on it for trusted news, cultural programming, and live events. PSBs like RAI offer content that resonates with this audience, reinforcing habits formed over decades. In contrast, younger generations increasingly consume entertainment via streaming platforms like Netflix and RAI's VoD service, RaiPlay, favouring flexibility and personalised choices. This generational divide sustains high viewership for broadcast TV while driving the parallel growth of digital media consumption.

The Case of *Mare Fuori*

The Italian television series *Mare Fuori (The Sea Beyond)* represents a quintessential example of how a multichannel distribution strategy, structured along two parallel tracks – traditional linear broadcasting, and non-linear, on-demand streaming – can transform a television product from a more marginal offering into a real cultural phenomenon.

The series, commissioned by RAI Fiction and produced by the independent production company Picomedia and set in a juvenile detention centre in Naples, premiered on RAI 2 on September 23, 2020. Despite the originality of its subject matter and high production values, the first season achieved only moderate viewership, averaging 1.6 million viewers and a 7.2% share, with peaks of 9.4% during the final episode. The second season, aired in 2021, saw a further decline in linear ratings (1.2 million viewers and a 5.8% share). However, it revealed an interesting trend: the share amongst the 15-34 age group grew from 7.4% to nearly 13% between seasons one and two, indicating the emergence of a growing youth audience.

The real turning point for *Mare Fuori* came in June 2022, when the first two seasons were added to Netflix's catalogue. The platform provided the series with unprecedented national and partially international visibility, turning it into a popular success. For 18 consecutive weeks, the first two seasons remained in the top 10 most-watched series in Italy on Netflix. The agreement with Netflix also included the distribution of subsequent seasons and the prequel film *Io Sono Rosa Ricci*. Thanks to its distribution on Netflix, the series reached a younger audience less accustomed to consuming traditional television content.

In light of these results, RAI adopted a novel distribution strategy. Starting with the third season, released in February 2023, it chose a 'digital-first' approach by premiering the first six episodes on RaiPlay. After a few days, the series was included in RAI 2's regular schedule, with back-to-back programming of two episodes per week, reaching a more adult audience.

This move yielded extraordinary results, surpassing 163 million streams (or Legitimate Streams, according to Auditel's measurement of 'total audience') online and reaching a total of 5.6 million connected devices, making *Mare Fuori* the most-watched content in RaiPlay's history. All this without significantly lowering the linear TV figures compared to those achieved for season two.

Transforming the RAI brand

Beyond a numerical success, the distribution strategy of *Mare Fuori* had a significant impact on the RAI brand. The use of RaiPlay, in synergy with linear broadcast television, allowed RAI to reclaim a demographic that had long distanced itself from traditional media consumption. The series' popularity among young people gave the RAI brand a renewed, dynamic image, capable of addressing contemporary issues in a modern language, and according to the Head of RaiPlay contributed to the popularisation of RaiPlay among the younger audience.

The consolidation of the series' youth-oriented identity was supported by a range of visibility strategies, including the cast's presence at the Sanremo Music Festival (the most important national TV event), collaborations with national brands such as Lavazza, OVS, and MSC Cruises, and a strong presence on social media, both with official and grassroots content.

Recognising the strategic importance of the phenomenon, RAI renewed the series through its sixth season. The fifth season, released in March 2025, maintained high visibility and showed another example of innovation: its first episode was live streamed on TikTok with members of the cast which was a success thanks in part to the 450,000 followers that the official account had. Additionally, the traffic on RaiPlay was so high that the platform crashed within the first 40 minutes after the episodes were made available.

Mare Fuori is a virtuous example of how a complex distribution strategy, based on the integration of traditional broadcast TV flow and digital channels (SVoD, BVoD and social media), can generate high visibility for a TV programme across generations and redefine the identity of an entire PSB, reaffirming the principle of universality.

The case demonstrates that adopting a transmedia logic and focusing on the consumption habits of young audiences can renew public service TV. *Mare Fuori* is not just a successful series but an example of innovation for a broadcaster whose identity is increasingly that of a 'streamcaster', that coordinates distribution across linear and non-linear platforms, between scheduled programming and on-demand catalogues.

Challenge 2: Brand Awareness and Value

As the case of *Mare Fuori* attests (see Case Study: Reaching Younger Audiences), reduced awareness and value of PSM brands presents an additional challenge for PSBs facing declining audiences. In our interviews with PSBs, younger audiences were frequently described as harder to reach because they don't know, or have low attachment to, PSM brands, particularly when compared to streaming services, social media and VSPs.

PSBs have adopted different strategies to try to improve the awareness and value of their brands.

Rebranding and Consolidation
One response has been to bring disparate brands together under one to two 'mother brands' that are more heavily promoted to viewers.

VRT (Flanders, Belgium) has centralised its offer into two main services: VRT NWS (its online news portal) and VRT MAX (its online VoD portal). They have undertaken a visual rebrand and ensured consistent use of the same VRT logo across both services. Live video, audio and podcasts have been integrated into VRT MAX, to provide a combined video and audio streaming offer.

RTBF (Wallonia, Belgium) has centralised content from several channels into its VoD service, Auvio, to strengthen its brand. This includes bringing content from the youth-targeted Tipik channel, audio and podcasts all into the Auvio portal.

Modernisation and Preservation
Modernising content, while preserving PSM's key role as a trusted national broadcaster is another response to this challenge.

RAI (Italy) has found maintaining audience attention more difficult in the face of increased competition from global streaming platforms and independent content creators. Younger audiences, in particular, often prefer digital-first entertainment. Legacy perceptions of bureaucracy and outdated programming can hinder its appeal. In addition, political affiliations and funding debates can impact public trust. RAI is navigating these hurdles by focusing on modernising its content, exploring different strategies for engaging audiences online, while preserving its role as a trusted national broadcaster in a fragmented media environment (see Case Study: Reaching Younger Audiences).

Diversification

While the PSBs in our study mainly focused on consolidation and modernisation to address declining brand awareness, Channel 4 was an outlier in actively diversifying its brand.

Channel 4 (UK) has a specific remit to appeal to younger audiences, making declining brand awareness amongst youth audiences particularly existential. As part of a larger approach to distributing content on VSPs (see Case Study: Public Service Media on Social Media), Channel 4 launched a bespoke youth-oriented YouTube channel in 2022: Channel 4.0. Made financially viable through a deal by which Channel 4 sells its own advertising around its content on YouTube, 4.0 represented an attempt to diversify the brand to reach those viewers will little attachment to Channel 4 as a linear channel or VoD. Although aligned with existing brand values – such as ethnically diverse casting and culturally diverse programme topics – Channel 4.0 has its own brand identity that capitalises on distinctly YouTube affordances like the prank gameshow format and the foregrounding of talent with an independent social media following.

The thing about 4.0 which has been a big point of difference [...] is we purposefully made the decision not to connect it to anything else. [...] What we wanted to create was fandom and you can only do that by building community. We wanted 4.0 to feel like a person. So, in the same way people talk about shows – "I love the show," – we actually wanted people to talk about 4.0, to personify it.
–Digital Commissioner, Channel 4

Meanwhile, in **Poland**, where PSM has been the subject of political interference since 2016 (see Case Study: Media Capture), the TVP brand was understood by some as a hindrance to engaging audiences. With many audience groups perceiving TVP as 'state media', trust in the brand is low. Several interviewees at TVP admitted that they had considered changing the name of their VoD service to one that didn't correspond to the TVP brand.

These examples present a clear indication of the complex juggling act that PSBs are attempting to negotiate in the age of platforms. To meet the needs of all, they need to engage and appeal to audiences with very different viewing habits – across linear and on-demand – and with different values and expectations of TV and of PSM.

Public Service Media on Social Media

For PSM, remaining relevant in this new media ecosystem requires a presence where younger audiences are most active—on social media and VSPs that they do not own or control. This has led to a growing and increasingly complex dependency on third-party players whose priorities often conflict with the public interest mission of PSM.

In the 2000s, the digital expansion of PSM was largely characterised by the launch of thematic television channels, catch-up services, websites, and proprietary mobile applications. These initiatives aimed to offer more diverse and accessible content, tailored to specific audience needs. However, today's media consumption is increasingly filtered through algorithmically-driven platforms such as TikTok, Instagram, YouTube, Facebook, and X. As a result, public service content is often consumed indirectly, through curated feeds and recommender systems controlled by private commercial companies.

An essential but challenging relationship
Interviews revealed a shared understanding among PSM managers that presence on these platforms is no longer optional. To fulfil their mandate to serve all audience groups—especially younger demographics—PSBs must actively engage with social media. However, the level of investment and strategy differs across organisations, depending on factors such as size, market context, and institutional mandate.

Despite this strategic necessity, the relationship between PSM and platforms is fraught with tension. These platforms are not genuine partners; rather, they function as gatekeepers with opaque rules, shifting policies, and little accountability. Interviewees consistently raised several key concerns about this dependency.

Platforms function as gatekeepers with opaque rules, shifting policies and little accountability

1. Lack of transparency

There is a lack of transparency regarding content visibility. Several managers mentioned experiences with so-called 'shadowbanning', where public service content becomes less visible without any clear explanation or recourse. This undermines discoverability and limits the reach of PSM content, directly contradicting their universality mission.

2. Reduced access to data

PSM often lack access to granular and reliable audience data from social media platforms. These metrics are crucial for understanding user engagement, informing editorial and strategic decisions, and demonstrating fulfilment of remits. Platforms typically withhold such data or provide only high-level insights, frustrating PSBs' ability to develop responsive, data-informed content strategies.

3. Platform architecture

The architecture of these platforms poses inherent risks. The same systems that allow PSM content to circulate are also responsible for the amplification of harmful or misleading content, as well as encouraging addictive user behaviours through opaque recommender algorithms. PSM managers expressed concern that their presence on such platforms may inadvertently lend legitimacy to environments that are at odds with public interest values.

4. Accountability

There is often no clear line of communication in the event of moderation issues or take-downs. Posts may be removed or accounts restricted with no explanation or avenue for appeal, leaving PSM with little recourse to protect their editorial integrity.

5. Revenue

For commercial PSBs, standard revenue-sharing agreements make it challenging to generate sufficient revenue from distribution on social media and VSPs to cover production costs, particularly because of poor revenue-sharing agreements.

Is more regulation needed?

Many PSM leaders emphasised the need for stronger regulatory frameworks at the national or EU level to mitigate these risks and establish fairer terms of engagement. While the Digital Services Act in the EU, Online Safety Act in the UK, and other legislative efforts represent steps in the right direction, interviewees expressed scepticism about their effectiveness in curbing the power asymmetry between platforms and public service institutions.

Interestingly, the interviews also revealed that some broadcasters have entered commercial partnerships with these platforms. For instance, Channel 4 has developed a monetised relationship with YouTube to distribute and promote its content. This shows that while tensions exist, strategic collaboration remains possible—albeit under uneven terms. However, such negotiations are difficult, with one interviewee at the BBC stating that it could be difficult to get the major platforms to even speak to them.

Even for a company like the BBC, of our scale, we would struggle often times to get the right contacts at the big tech companies because they are quite secretive or they're organised deliberately in a way that doesn't actually give you access to certain areas of the company.

–Distribution Manager, BBC

Ultimately, the challenge for PSM lies in balancing the imperative to reach younger audiences with the risks of becoming too dependent on platforms that operate according to commercial logic, rather than democratic values.

Challenge 3: Organisational Transformation

The changes in commissioning, programming and distribution strategies resulting from the challenges of audience reach and declining brand awareness demand organisational change. All the PSBs in our study have undertaken a programme of organisational transformation in response to the rise of platforms. Typical changes include re-structuring, introduction of new teams, and the development and integration of new skills, particularly in relation to digital, AI and data. Organisational transformation was often motivated by a need to operate with greater agility in a more fast-paced and responsive marketplace, although financial challenges also underpinned efficiency and productivity changes for some.

Organisational transformation was largely driven by the need to streamline and/or reorientate processes and skills towards the new ways of working required in a digital-first environment. This included:

- Restructuring to transition commissioning decisions from channel heads to genre heads in response to the declining importance of channel brands and the increased importance of the VoD service (e.g. BBC, ITV, DR, TV 2).

- Creating teams with specific expertise in the production and/or commissioning of social media and short-form content (e.g. Channel 4, TV 2, RTBF, VRT).

- Integrating commissioning and VoD/publishing teams (e.g. DR, TV 2, RTBF).

- Integrating editorial and data science teams to develop recommender systems (e.g. BBC, VRT).

- Digital skills development and training across departments (e.g. VRT, BBC).

- Placing audiences and audience data at the centre of new organisational structures and decision making (e.g. RTBF, ITV).

However, PSBs experienced challenges in developing from broadcast-first into digital-first organisations. Key among these were:

Departmentalisation, regulatory burdens and bureaucracy

At **RTBF** (Wallonia, Belgium) decision-making was compromised by lack of clarity on where the responsibility for digital lay. This made it challenging to formulate a clear vision for the VoD portal, and position it within the broader organisational strategy.

At **VRT** (Flanders, Belgium), the financial architecture prioritised linear, limiting the PSB's ability to adapt quickly to digital transformation.

RAI's (Italy) bureaucratic structure can present obstacles to streamlined decision-making and innovation. The Head of Daytime Entertainment at RAI described the PSB's operational structure as akin to 'moving an elephant', alluding to the extensive bureaucracy involved in its decision-making. This can limit RAI's agility in responding to market demands, leading to gradual evolution rather than revolutionary shifts in strategy.

Organisational silos

At **TVP** (Poland) there are still rigid structural divisions between linear and digital, especially in relation to programming. Three independent departments participate in the co-creation of TVP VoD but remain formally separated silos.

RAI's (Italy) content production and delivery processes are inherently complex because of its extensive operational footprint. RAI operates numerous production centers with varying levels of efficiency, which sometimes results in a patchwork of highly skilled teams coexisting alongside areas of inefficiency.

Channel 4 (UK) has introduced a new strategy to overcome organisational silos. The VoD homepage team, planning and commissioning are now on the same floor, commissioning, planning and product teams all work across both broadcasting and streaming, and the tech team has been literally and figuratively moved out of the basement. But there was also a sense of continual (and sometimes circular) reorganisation in an ongoing attempt to avoid silos. The editorial team for VoD, for example, used to sit with commissioning, but were then moved to the product team, only to come back to commissioning in the most recent restructure.

Skills and mindsets

VRT (Flanders, Belgium) and **RTBF** (Wallonia, Belgium) identified varied levels of digital literacy among staff, which can make data-informed decisions difficult. At both organisations, changing mindsets to make digital the norm in devising production and distribution decisions was identified as a core challenge.

RAI and the **BBC** identified the challenge of reskilling their workforce. At RAI this was often met with resistance, as many employees were accustomed to traditional broadcasting methods and lacked familiarity with the latest digital strategies. The BBC identified cultural differences between technologists and editorial staff. Technologists tend to have a higher tolerance for risk and could see editorial as slowing down their work. Software requires agile and iterative ways of working, but this necessitates a wider paradigm shift at the BBC – an organisation that many see as still being led by an editorial, or even a 'broadcast', mindset.

The transition from public service broadcasting to public service media requires the transformation of organisational structures, mindsets and cultures in ways that adapt new digital ways of working to longstanding traditions of public service devised for broadcasting. This challenge is particularly evident in the implementation of personalisation algorithms within PSBs.

Personalisation and Public Service Algorithms

Personalisation has become a key issue for PSBs, driven by audience expectations shaped by commercial streamers like Netflix.[12] Where SVoDs use personalisation to capture and retain viewers, PSBs face a more complex challenge: how to reconcile algorithmic recommendation with core values, such as universality, diversity and editorial independence.

Limited Personalisation

All the PSBs in our study were developing algorithmic recommendation. However, as of 2023, most were only offering a light degree of personalisation on their VoD services. Where personalisation was 'strong', as in the case of iPlayer, it was still significantly lighter than similar studies of Netflix.[13]

There are multiple reasons for this. Developing personalisation algorithms requires technology, training and consistent metadata. There are financial challenges in creating recommenders that match the experience offered by global streamers at a time when incomes are declining for PSBs (see Challenge 4: Sustainability).

[big commercial SVoDs] create a standard and we cannot follow this standard. It's not that we don't want to, it's just that we don't have the means to do it.

–Director of Research, RTBF

In some contexts, concerns about the use and collection of user data and sign-in limited the implementation of personalisation.

Sometimes we will know that this is what users demand but still make a different choice because we are a public service provider.

–Head of Publishing, DRTV

Maintaining editorial curation is also paramount. Fears remain that algorithmic recommenders will narrow exposure and fragment the public sphere, undermining the PSM mission to meet wider societal and not just individual needs

However, our research suggests a different story – that personalisation can serve public service goals when carefully designed with the public interest at heart.

12   Johnson, C and Dempsey, L (2023) Public service television in the age of subscription video on demand: Shifting TV audience expectations in the UK during COVID-19. *Media, Culture & Society* 46(3). Available at: **https://doi.org/10.1177/01634437231203875**

13   Bruun, H et al (2025) Streaming public service televison in the age of platforms. January. Available at: **https://doi.org/10.48785/100/298**

Public Service Algorithms

Our research identified two cases where PSBs are developing and implementing 'public service algorithms': the BBC in the UK and VRT in Flanders.[14]

VRT is mandated to develop a 'taste-broadening' algorithm to broaden the diversity of content that users are exposed to on its VoD. A 'taste score' is created based on each user's consumption of different content categories. A user that only watches one kind of content would get a score of zero. Watching the full range of content would return a score of 100. Collaborative filtering algorithms are designed to broaden content exposure. Recommendations are in line with user preferences, gently nudging viewers to step out of their familiar patterns of behaviour.

By contrast, there are no specific requirements related to the BBC's use of personalisation, and little policy debate. The BBC's integration of public service values into its recommender algorithms is driven primarily by a concern to ensure compliance with the Broadcast Code that instils protections for audiences across the UK broadcasting sector. To this end, the BBC builds 'business rules' into its algorithms to ensure that its use of algorithms remains compliant with requirements in areas such as impartiality and protection from harm and offence.

In both cases, editorial oversight remains central. At VRT, editorial curators currently oversee the use and placement of algorithms on the VoD service. The BBC integrates editorial leads into its recommender teams to ensure that editorial insight informs the development of personalisation algorithms.

Personalisation can serve public service goals

Ongoing Barriers

These two cases show that personalisation can support public service values. But this is not without its challenges. Both the BBC and VRT spoke of a trade-off between reaching audiences and offering them a diverse range of content. This reflects a persistent dilemma in PSM: balancing diversity remits with the obligation to reach a broad, universal audience. As PSBs strive to remain visible and relevant in an increasingly saturated and competitive digital landscape, this balancing act becomes even more acute.

It would be much easier if we were a commercial organisation. We would just create a quite simple algorithm, just give you more of the same, and we will know you will be watching. But because this taste-broadening is included, it's much more difficult to get a strongly performing algorithm than what we are used to from, for example, Netflix.

–Market Research Advisor, VRT

While personalisation is not inherently at odds with PSM, building public service values into algorithmic recommenders is more resource intensive than simply purchasing a commercial algorithm designed to drive use through offering more of the same. It also potentially involves a trade-off with audience reach at a time when PSBs are facing declining audiences and revenues. In practice, then, the development of public service algorithms demands continual negotiation between sometimes competing public service values and a market context in which audience and industry expectations of personalisation are largely driven by global platforms.

Figure 2: The strength of personalisation on VoD services (November, 2023)

TVP VOD	Rai Play	rtbf auvio	vrt max	DR	BBC iPLAYER
Light	Light	Light	Light	Medium	Strong

14   Iordache et al (2025) Public service algorithms: Balancing the scales between public mission and market pressures at the BBC and VRT. *MedieKultur: Journal of Media and Communication Research* 40(78). Available at: **https://doi.org/10.7146/mk.v40i78.147182**

Challenge 4:
Sustainability

All the PSBs in our study are facing the challenges of audience reach, brand awareness and organisational transformation with declining revenues and increased costs.

Taking inflation into account, PSM funding in Europe dropped by 10.9% over the decade to 2023 and PSM funding as a percentage of GDP decreased from 0.18% to 0.14% between 2014 and 2023.[15] This decline stems from reductions in public funding, which have not kept in step with inflation, combined with declines in advertising revenue. As audiences move from broadcast to streaming television, it becomes harder for PSBs dependent on ad funding to generate the same level of revenue from the sale of advertising. The online advertising market is more competitive, particularly now that global streamers increasingly offer advertiser-funded tiers. In addition, there are more players in the value chain of the personalised online advertising market, increasing costs for PSBs and reducing the amount of revenue generated from ad sales compared to broadcasting.

Our research identified three broad areas where PSBs are facing increased costs.

Distribution
Despite the move towards online first delivery, PSBs are having to maintain dual distribution – on linear broadcast television and on VoD portals – to enable universal access to all. As more viewers transition from broadcast to VoD, PSM distribution costs increase every year.

we don't want to reduce the amount we spend on content, and we can't reduce the amount we spend on broadcast infrastructure – digital terrestrial television is a series of long-term contracts. [...] and we can't not distribute via IP [internet protocol television]. So the only place you can go is overheads.

–Group Strategic Partnership and Distribution Director, ITV

This is particularly acute in contexts such as the UK, where terrestrial broadcasting costs are fixed and don't decline as audiences move away from broadcast TV.

15   EBU (2025) *Funding of Public Service Media (Public Version).* April.

Developing innovative, distinctive PSM services that can compete with commercial streamers requires investment at a time of scarce resources

Innovation

Creating online VoD services not only adds distribution costs, but it also requires investment into technological innovations to compete with the user experiences offered by global streamers. This includes creating algorithms, improving metadata (often not originally created for an online streaming context), and enhancing user experience. For example, at our first Knowledge Exchange Workshop one PSB told us that personalised thumbnails were particularly successful in engaging and retaining audiences, but that it had proven too expensive to roll this out as a permanent feature.

More well-resourced PSBs, such as the BBC, have the teams and expertise to create their own algorithms. Others have to depend on off-the-shelf solutions that are not designed with public values at heart.[16] Creating innovative PSM services that are distinctive from the commercial streamers, but still competitive in the market, requires financial investment at a time when resources are stretched. Some PSBs, such as TVP, also felt that innovation was hampered by regulation.

More broadly, stretched resources can mean that senior staff lack time to develop and instigate the kind of long-term vision needed at a time of significant market transformation.

Production

The move of global streamers into content creation has pushed up production costs in all markets.[17] At the same time, increased distribution costs and innovation demands are taking already strapped budgets away from programme production. This is leading to PSM commissioning strategies focused on 'less but better' and increased dependence on co-productions.

In collaborations, in co-productions, we work with everyone […] In drama co-productions, we believe the more you're doing it together with partners […] the bigger you can make it. But of course, it's always a matter of budgets.

–Head of Fiction VRT1, VRT Canvas, and VRT MAX

In some contexts, these financial challenges are motivating the organisational changes examined above. For example, ITV and Channel 4 described the shift towards increased organisational agility as a response in part to declining financial resources. In other cases, ongoing financial challenges were described as hampering organisational transformation. The BBC, for example, argued that it can be hard to initiate further organisational transformation because there have already been significant efficiency and productivity changes over the past decade in the wake of a real-term decline in public funding of 38% since 2010.[18]

16   Sørensen, JK and van den Bulck, H (2020) Stop spreading the data: PSM, trust and third-party services. *Journal of Information Policy*. 10. Available at: **https://doi.org/10.5325/jinfopoli.10.2020.0474**

17   Meir, C (2021) European conglomerates and the contemporary European audiovisual industries: Transforming the industrial landscape amid the arrival of SVoD platforms, a high-end television boom, and the COVID-19 crisis. *European Commission Report 23*.

18   VLV (2024) *VLV report into BBC funding: 2010/11 – 2023/24*. 21 October. Available at: **https://vlv.org.uk/wp-content/uploads/VLV-Report-into-BBC-public-funding-Revised-November-2024.pdf**

Ensuring Prominence for Public Service Media

The need to ensure that PSM content and services remain accessible has led to growing support for 'due prominence' measures—regulatory frameworks to ensure that PSM content occupies visible and meaningful positions across digital interfaces.

Why is prominence legislation needed?

A handful of powerful platform and hardware providers increasingly control content accessibility. Many user interfaces—such as those developed by Apple, Google, Sony, and Samsung—tend to prioritise their own content or that of global streaming services with which they have commercial agreements. These arrangements frequently grant prominent placement on smart-TV remote control buttons, landing pages, or via pre-installed apps.[19] It is common for PSBs to negotiate directly with device manufacturers to try to secure prominence for their apps and content. Despite the curated and commercially driven nature of their interfaces, hardware manufacturers often invoke 'user sovereignty' to argue against prominence regulations.[20] Yet commercial prominence is often secured without adequate consideration for user preferences or the public interest.

It's also about increasingly sophisticated algorithms and interfaces [...] the negotiation is still, is iPlayer number one, two or three but that part of the UI isn't as used now as promotional spaces and disaggregated programmes. So, it's hard when you walk in for a negotiation to say, we want to be number one, they say, well [...] negotiate with the algorithm.

–Director of Distribution and Business Development, BBC

19   Lobato, R et al (2023) Smart TVs and local content prominence: A submission to the Prominence Framework for Connected TV Devices Proposal Paper. RMIT University/ADM+S. DOI: 10.25916/ma06-3y46.

20   Van der Elst et al (2025) Challenges and requirements for implementing due prominence: aligning stakeholder interests in Flanders. *Frontiers in Communication*, 10. Available at: **https://doi.org/10.3389/fcomm.2025.1569132**

Among our case studies, the UK was at the forefront in legislating prominence for PSM. The passing of the Media Act in 2024 established a mandate for 'appropriate' prominence of PSM content and services on the most-used smart TVs and connected devices.

At the European level, Article 7a of the EU Audiovisual Media Services Directive (AVMSD) offers Member States the option to introduce due prominence measures for audiovisual services of general interest. Several Member States have begun exploring or implementing such measures.

Implementing prominence legislation
Despite broad support, implementation of prominence legislation raises multiple challenges.

1. Conceptual Ambiguity and Measurement Complexity
There is a lack of clarity surrounding the definitions and distinctions between 'findability' and 'discoverability'. In addition, in the UK, legislation specifies, but does not define, 'appropriate' prominence for PSB content and services. This conceptual vagueness can undermine the effectiveness of any legal framework. Interfaces vary widely across brands, platforms, and device types—ranging from smart TVs and smartphones to voice assistants and in-car systems. These interfaces each rely on different technical mechanisms such as personalisation, landing page design, search and auto-suggestion functionalities, or pre-installation. As a result, it is extremely difficult for policymakers to define uniform or sufficiently detailed rules regarding how PSM content and services should be displayed or prioritised. This heterogeneity also makes it highly challenging to monitor compliance or measure whether prominence obligations are being met in practice (see Case Study: Accountability).[21]

2. Opaque Gatekeeping Practices
There is little transparency about how devices and platforms prioritise or surface specific services. Without insights into how search results, voice commands, or personalised recommendations are structured, regulators have limited means to verify whether public interest content is discoverable or systematically deprioritised.

3. Defining 'General Interest' and 'Public Service Remit' Content
Within the EU case, prominence applies to services of general interest. While PSM clearly qualify, other content providers—such as cultural institutions or

educational platforms—may also claim the right to prominence. Given the limited screen real estate and interface visibility, granting prominence to one service often comes at the cost of others. This raises complex questions about prioritisation, fairness, and potential market distortion.

In the UK, prominence legislation applies to all PSBs if 'public service remit content' is 'readily discoverable' within their VoDs. This raises questions of what counts as 'public service remit content' and how to define 'readily discoverable'.

4. Regulatory Interoperability and Legal Overlap
In the EU context, there is need for greater clarity around how prominence obligations under Article 7a of the AVMSD interact with other legislative frameworks, such as the E-Commerce Directive or the European Media Freedom Act. Although Member States are free to develop prominence rules, these may come into tension with broader principles of platform neutrality or freedom of commerce. The absence of clear guidance from the European Commission on how to navigate these intersections risks legal fragmentation and regulatory uncertainty.

In sum, the call for prominence reflects a fundamental concern about media pluralism and the visibility of PSM in a platform-dominated environment. As digital interfaces become more complex and commercially curated, it is essential that regulatory frameworks evolve to ensure that PSM remain meaningfully accessible to all audiences.

Lacking insight into algorithms, regulators cannot verify whether public interest content is discoverable or deprioritised

21   Benest, G et al (2025) *Behind the Screen: How streaming is changing public service media*. University of Leeds: **https://eprints.whiterose.ac.uk/id/eprint/229430/**

Public Service Media Values

At its heart, PSM is an intervention into media markets to achieve key values understood to be essential to modern democratic societies.

Our research examined how the challenges PSBs are facing in the age of platforms might be transforming the values underpinning PSM. We identified seven core values for PSM in the age of platforms.

1. Universality

Universality – ensuring that everyone has access to high quality media that operates in the public interest – has been a core tenet of PSM since its inception. Yet the challenge of reaching all audiences, combined with a perception of content abundance in the age of platforms, places the value of universality under strain. In some contexts, such as the UK, political debates have questioned whether PSM needs to reach and appeal to all audiences given the amount of media choice audiences now have. In this context, market failure arguments re-emerge in which it is argued that PSM should only provide niche services – such as news, documentaries and investigative journalism – that are socially and culturally beneficial, but not profitable enough to be produced by the market. Others argue that the rise of commercial, and largely unregulated, online media makes the argument for universally available PSM even stronger.[22]

For the PSBs, the requirement to reach and appeal to all audiences underpins the commissioning strategies outlined above in which many PSBs are prioritising programmes that drive VoD viewing (see Challenge 1: Audience Reach). Here PSBs are focused on trying to achieve levels of online reach that justify their legitimacy as national broadcasters and continued public funding.

2. Diversity

The drive for universality sits alongside, but also in tension with, the requirement for PSM to provide a diverse range of programming that meets the needs of all audiences. Our research shows that PSBs are prioritising universal reach through the commissioning of programmes designed to engage large audiences, over serving the needs of niche audiences or providing a wide range of programmes online. Commissioning strategies focused on 'less but better' can also reduce capacity for the production of niche content.

Fewer but bigger – i.e. we demand fewer programmes, but they must have greater impact and value, because 10% of the content accounts for 90% of the consumption on Play.

–Director of Programmes, TV 2

Personalisation does offer the opportunity for PSBs to target content to specific audiences. In theory, this could open up the possibility for programmes that meet the needs of narrow demographics to find their audience more easily. VRT's taste-broadening algorithm demonstrates one way in which personalisation could be used to increase the diversity of content that audiences engage with (see Case Study: Personalisation and Public Service Media). In reality, most PSBs do not have the resources to create bespoke personalisation algorithms and are unlikely to do so without regulatory intervention.

3. Quality

For decades many PSBs have been the primary providers of high-quality national broadcasting. Today, however, it can be hard for PSBs to match the quality of content produced by the global streamers who have pushed up production budgets in the competition for audiences, particularly in key genres, such as fiction and entertainment.

22   Martin, D. and Johnson, C. 2024, Universality: A Battleground for UK Public Service Media in the Platform Age. *The Political Quarterly*, 95. Available at: **https://doi.org/10.1111/1467-923X.13342**

Our research revealed that in this context, PSBs are redefining 'quality' as a core value. In our interviews, quality programming was that which protected national, regional and linguistic cultures.[23] In addition, the contribution that PSBs make to national creative economies was also evoked. Here PSM was seen as essential for the production of European and national dramas, documentaries, cultural and children's programming, as well as news and current affairs.

4. Pluralism

Tied to discussions of quality was the value of pluralism; specifically the importance of PSM to democracy. In particular, PSM was positioned as having a key role to play in challenging mis/dis-information through the provision of trusted programmes across a range of genres providing vital insights into contemporary issues.

EBU research suggests that countries with well-funded PSM consistently experience lower levels of political polarisation.[24] However, the ability for PSBs to challenge mis/dis-information is reduced if their content is not visible and easy to find online, where audiences are more likely to encounter it.

Research from Ofcom in the UK suggests that those primarily using online news sources are less likely to correctly identify important factual information, have lower levels of trust in institutions, and are more polarised than respondents who used PSM.[25] For PSM to be able to reach these audiences, their news content needs to be more accessible online, yet our research revealed that news is not prominent on PSBs' VoD services, largely being left to linear channels. In addition, the challenges that PSBs face when placing their content on social media and VSPs (see Case Study: Public Service Media on Social Media) is, therefore, a potential barrier to their ability to drive pluralism.

5. Independence

Supporting pluralism and democracy depends, of course, on PSBs being sufficiently independent from government. Political interference emerged as an issue across our case studies, particularly in southern and eastern European contexts. The Polish case demonstrated how damaging political interference can be to public trust in PSM. Furthermore, political interference also creates organisational instability, inhibiting the ability of PSBs to make the changes required to respond to the age of platforms.

6. Innovation

The ability to innovate in the context of significant disruption to the media market was seen by all PSBs as an essential value. Innovation was often evoked in relation to technology, and the need to improve the audience's experience of PSM online services. However, innovation also emerged in the context of strategy and commissioning (see Case Study: Public Service Programming).

For some PSBs, however, innovation was seen as being inhibited by remits and regulatory requirements. In some contexts, public interest tests designed to ensure PSM does not distort commercial markets prevented PSBs from responding with speed and agility to a rapidly changing marketplace. In other contexts, lengthy and detailed KPIs and remits proscribed what PSBs could do and limited opportunities to experiment outside of those requirements.

7. Accountability

The legitimacy, trust and independence of PSM depend on PSBs being accountable to the public. Yet transformations in the age of platforms make accountability more challenging. PSBs are increasingly offering services underpinned, at least in part, by data and AI. Yet there were very broad differences in algorithmic and data transparency across our case studies and not all countries required PSBs to be transparent about their use of personal data and algorithms.

Furthermore, the shift towards online delivery of PSM makes it far harder to hold PSBs to account. It becomes more difficult to understand what content PSBs are making available, how visible that content is and what people are actually watching. This raises the question of how, in the future, regulators, researchers and civil society organisations will be able to monitor how PSBs are fulfilling their remits and contributing to society. Greater data and algorithmic transparency is required to understand the contribution that PSBs are making to society in the age of platforms.

23   Bruun, H and Lassen, JM (2025) Content commissioning and risk in Danish online public service television, *NordMedia*, August.

24   EBU (2025) *Funding of Public Service Media (Public Version)*. April.

25   Ofcom (2024) *Review of Public Service Media (2019-23): Challenges and opportunities for Public Service Media*. 17 December. Available at: **https://www.ofcom.org.uk/siteassets/resources/documents/tv-radio-and-on-demand/broadcast-guidance/psb/2024/review-of-public-service-media-2019-2023.pdf?v=389567**

Public Service Programmes

Popular, big statement programmes have become an increasingly important part of how PSBs showcase their public service value. Driven by the need to appeal to mass audiences on both broadcast and on-demand services, programmes with broad universal appeal are prioritised over a diversity of content offered across services and channels.

This is evident across the PSBs we studied, from organisations in large and small media markets, across languages, and regardless of funding model. Even in contexts where broadcasting remains strong – such as RAI in Italy – there is still a prioritisation of popular individual programmes suited to on-demand success: an indication of growing concern around losing younger viewers. We identified three values that are re-defined by the shift towards big statement programmes.

Innovation

Innovation is primarily defined in terms of adapting existing formulas to on-demand viewing, with the goal of translating broadcast event television to a digital environment. A theme across multiple cases was the need to rework traditional live entertainment (or 'shiny floor' programming, as TV 2 labels it) for on-demand television. Innovation here aims to recapture the effect of liveness with programmes that can spark conversation through live collective viewing combined with long tail word-of-mouth success. In different contexts, RTBF (Wallonia, Belgium) and TV 2 (Denmark) discuss a strategy of gamification, creating drivers within programmes – as is the case with tasks and elements of suspense in TV 2's *The Traitors* – which can sustain momentum across multi-episode series.

Another strategy is the commissioning of ancillary programming – including video and audio podcasts – to construct a televisual event within the VoD.

A key factor in this redefinition of innovation is to attract younger viewers while still retaining wide demographic appeal. Reaching younger viewers was a consistent priority across our cases, such as the VRT series *Knokke Off*. The consensus was that this is best achieved by adapting popular formats to younger viewers' tastes rather than commissioning specific youth-skewing programmes. Multiple PSBs noted a shift towards casting younger talent in their big statement programmes, with these titles increasingly seen as the place for new rather than established talent.

National Identity

All the PSBs made a case for their difference from global streamers based on their unique ability to speak to a local audience, but this value is interpreted in different ways.

For smaller language markets, like Denmark, national address is important for social cohesion in an increasingly polarised world. DR's *Home Alone on the Internet* – a documentary about young people's experiences of the internet – is framed through a commitment to 'bring together' Danes in shared conversations to address the online alienation posed by global platforms. For smaller PSBs, nationally-specific subject matter contains an inbuilt appeal that helps guarantee ongoing relevance and commercial sustainability. TVP's priority programmes remain their long-running Polish language drama and comedy series like *Krujcata* and *Commissioner Alex* which have an established linear audience and don't require the kind of production spend needed to compete with popular international titles.

This differentiation is apparent in larger media markets also, but here we saw evidence of PSBs negotiating between the values of local representation – with the attendant benefits to national production sectors – and the need for programmes to be marketable transnationally. The BBC's Northern Ireland-set crime drama *Blue Lights* is promoted for showcasing the UK nations *and* for its syndication in '160 territories' internationally. Co-productions can facilitate this balancing act between the national and transnational. RAI's *My Brilliant Friend* – a co-production with HBO – is valued for bringing national literature to the screen and promoting Italian culture overseas.

Social Impact

In some contexts, social impact is mandated in regulation. For instance, VRT's contract with the Flemish government contains a KPI which requires that it measure the 'direct social impact' which viewers attribute to its programmes. In the case of the documentary *Godforsaken*, which detailed issues of abuse in the church, factors such as provoking 'political debate' and making 'difficult themes discussable' were assessed.

In larger markets with less specific regulation, we saw a tendency to conflate impact with popularity. Among advertising funded broadcasters, there was a growing anxiety that it was financially untenable to make socially specific and politically engaged flagship programmes. While heralded for provoking Parliamentary debate and growing users of ITVX, ITV claimed that *Mr Bates vs. the Post Office* lost money because of its socially specific content.

As with innovation, social impact is often embedded within entertainment: RAI promotes its *Sanremo* festival as an opportunity to inform viewers of cultural heritage; DR's flagship drama *Carmen Curlers* presents a feminist subject matter that is 'light, funny, and food for thought at the same time'; and Channel 4 publicises the dating reality programme *Married at First Sight* as unique from commercial offerings because of its LGBTQ+ representation. In opposition to criticism of PSM entertainment as insufficiently distinctive in the global media market, we found the PSBs to be doubling down on the social impact of popular programming.

Media Capture and Democracy: the Case of Poland

Independent PSM are the foundation of democratic society and a driving force for technological innovation and social cohesion. Yet debates about the future of PSM rarely leave the political domain and audience voices are often absent.

Media Capture in Poland: 2015-2023

The University of Warsaw's team began work on the PSM project in November 2022 when all eyes were on the capture of PSM by the conservative United Right and Law and Justice Party coalition.[26] The creation of the National Media Council in the summer of 2016, political appointments to TVP management, and control of PSM funding all challenged the ambitions of Poland's Constitution to halt the decline of media freedom.[27] International communities and organisations, including the European Commission, the Council of Europe, Article 19 and Reporters Without Borders, noted the rise of political propaganda from TVP.

PSM Under Pressure Again: 2023-present

Following the aftermath of the 2023 elections, in which the Law and Justice party were ousted by the liberal Civic Coalition, the narrative of political interference in PSM shifted. The conservative opposition accused the new government of shutting down the TVP Info signal on December 21, 2023. This latest TVP takeover by government, and controversies over the subsequent state liquidation of TVP, increased political tensions over Polish PSM, stoking existing political divisions, rather than forging a narrative of PSM operating for the public good.[28]

26   Jaskiernia, A and Pokorna-Ignatowicz, K (2017) Public Service Media vs. Sovereign National Media. In: M. Głowacki and A. Jaskiernia (eds.), *Public Service Media Renewal. Adaptation to Digital Network Challenges*. Frankfurt am Main: Peter Lang GmbH. Gajlewicz-Korab, K., and Szurmiński, Ł. (2022). Głowacki, M. (2024). Public Service, No Deliberation. *ORF Public Value: TEXTE – Public Service Media in Europe:* **https://zukunft.orf.at/show_content.php?sid=147&pvi_id=2415&pvi_medientyp=t&oti_tag=TexteEnglish**

27   Dzięciołowski, K (2017) *Is there a chance for non-partisan media in Poland?* University of Oxford: Reuters Institute Fellowship Paper.

28   Głowacki, M (2024) Public Service, No Deliberation. *ORF Public Value: TEXTE – Public Service Media in Europe:* **https://zukunft.orf.at/show_content.php?sid=147&pvi_id=2415&pvi_medientyp=t&oti_tag=TexteEnglish**

Media Capture and Society

Media capture results when governments take control of PSM, asserting their interests over the public interest. During the Citizen Debate organised by PSM-AP in Warsaw, January 2025, Marius Dragomir outlined the practices of media capture:

- intervention in regulation and media law;
- rigidity of work roles and procurement frameworks;
- partisanship in supervisory and governance bodies;
- public funding for political interest and agendas.

He also mapped another dimension of media capture: that of political capture by big-tech platforms.[29]

Media capture challenges deliberative traditions, undermining the importance of civil society, academic organisations and citizens in PSM policymaking. The response from government to citizen-driven debates calling for more in-depth and citizen-oriented media in Poland has, thus far, been insufficient.

Media Capture Inhibits Organisational Transformation and Innovation

Medic capture also has internal consequences for PSBs. TVP employees told us that media capture inhibits innovation in production, distribution and collaboration.

One example of the impact of political pressures on organisational transformation, was the decision to build a strict separation between TVP's VoD portal and digital Sport services. This stemmed from the desire from middle managers to maintain independence and control over organisational structures and teams. Political influence in appointments to the most important positions in the organisation also caused 'mental impregnation' – the development of simple work-pathways that are easily followed regardless of changes in management. This actively inhibits innovation and the implementation of new solutions, organisational processes and ways of working, due to the fear of 'being unnecessary' in the future.

Creating a space for dialogue

For the PSM-AP project, the change in government led to some of our scheduled interviews being cancelled under the incoming PSM establishment. In this context, one of the critical goals of the PSM-AP project has been to reestablish relationships between researchers and TVP to facilitate dialogue. This included holding our second Knowledge Exchange workshop at TVP's headquarters in Warsaw in January 2025. We focused on creating a space for constructive debate with the aim of forging PSM as a space of social cohesion and open deliberation.[30]

Participants at our workshop called for PSM to function as a new site of social assembly, giving more space to a wider a range of voices and interests, as has been seen with social resistance, student and activist protests for deliberative PSM in Poland, Bulgaria and Serbia. This is a call to empower citizen bodies to imagine and test new forms of public interest media and the need for more media services that operate for the 'public good', particularly with the rise of globalised, commercial and highly personalised media platforms.

Media capture inhibits innovation in production, distribution and collaboration

29   Dragomir, M (2024) The Capture Effect: How Media Capture Affects Journalists, Markets and Audiences. *Central European Journal of Communication* 17(2): **https://doi.org/10.51480/1899-5101.17.2(36).586**

30   Świtkowski, F. (2025). Konferencja naukowa "The Knowledge Exchange – Reinventing Public Service Media for the Age of Platforms: Organisation, Culture and Independence" (Warszawa, 23.01.2025-24.01.2025), Studia Medioznawcze, 100: **https://doi.org/10.33077/uw.24511617.sm.2025.1.848**

Accountability and Cultural Heritage

The legitimacy and trust of PSM depends on ensuring accountability to the public. In the platform age, this has become increasingly challenging because researchers and civil society organisations face material and methodological challenges in analysing online television.

Some public libraries archive individual television programmes as part of wider remits to preserve cultural heritage. In Denmark, the Royal Library maintains such a media collection and provides access to broadcast programmes, as does the British Film Institute in the UK. Furthermore, the programme schedules or TV guides are often possible to retrieve either from databases publishing the weekly schedules or by retrieving the actual on-air broadcast flow of programmes including its continuity sequences, trailers, and commercial breaks. However, these data collections are based on a broadcast paradigm that is not sufficient anymore as television has shifted online.

There are several barriers to archiving and analysing the VoD services run by PSBs.

VoD services shape viewing habits and cultural change, yet vital knowledge of their design and algorithms is currently not archived

1. Login

Many require login to access the interface. Login prevents VoD interfaces from being systematically archived. The consequence is that current and future researchers lack access to reliable public information on the content, design and layout of VoD interfaces – a challenge for both PSB and non-PSB services.

2. Personalisation

The increasing use of personalisation presents a further challenge for researchers. Without transparency about the criteria underpinning the algorithms used by VoDs, researchers have to undertake time-consuming and complex reverse engineering (see Methodology section) to understand how personalisation is shaping users' experiences of PSM. Again, this inhibits systematic archiving, meaning that evidence of how recommender systems work and change over time will be lost.

3. Data transparency

Understanding what is in the catalogues of VoD services and how those programmes are organised and presented to audiences is inhibited by a lack of data transparency. PSBs do not routinely use public APIs (the software protocols behind all websites) which would enable public scrutiny and analysis of their VoD catalogues. Instead, researchers have to resort to technologically challenging and resource-intensive web-scraping methods that are beyond the reach of most academics, heritage organisations and civil society groups.[31]

Combined, these barriers prevent us from being able to answer questions about content publishing strategies, the prominence of specific types of content, or diversity of content on VoD services. It is not possible for researchers, civil society groups, or even regulators, to independently measure and evaluate the performance of PSM VoD services, undermining public accountability.

A Risk to Cultural Heritage

This also represents a loss of significant cultural heritage. Knowledge about the design, composition, and functionality of VoDs is lost for good and can likely not be recreated. Evidence of how specific recommender systems supporting AI-driven personalisation worked is disappearing daily. VoD services influence people's viewing habits and everyday lives, and they hold knowledge of how the cultural-political fabric and developments in a country have been changing over time.

Currently, the changes in publishing practices are happening very fast. A handful of archives created by university scholars are documenting a small portion of this cultural heritage. These kinds of archives are less reliable, difficult to access and will likely not be sufficient to answer important questions today and in the future about the development of PSM in the age of platforms.

Fundamentally, this is a question of the accountability, legitimacy and trustworthiness of PSM. We strongly hope that politicians and policymakers will soon support better national collections of these interfaces and ensure better transparency around VoD publishing practices. Without this it will be very difficult to monitor and regulate VoD services, to settle questions of misconduct and to hold PSBs accountable to the public.

It is not possible for researchers, civil society groups, or even regulators, to independently measure and evaluate the performance of PSM VoD services

31   Benest, G et al (2025) *Behind the Screen: How streaming is changing public service media*. University of Leeds: **https://eprints.whiterose.ac.uk/id/eprint/229430/**;
Lobato, R et al (2024) Video-on-demand catalog and interface analysis: The state of research methods. *Convergence* 30(4). **https://doi.org/10.1177/13548565241261992**

Methodology

The project examined three broad areas: regulation and policy; the organisational practices of PSBs; and the cultural outputs of PSBs. For each area we constructed a comparative framework to ensure that all data was collected in a way that enabled comparison across the different broadcasters, markets and countries selected. Data collection was conducted in each country, but comparative analysis was collective. This enabled us to develop a robust understanding of the shared issues affecting PSM, as well identifying key differences across the cases.

The project consistently applied a comparative analysis across the PSM cases, facilitated by local experts in each of the six countries

Regulation and Policy

To understand how the age of platforms was shaping PSM regulation and policymaking, in 2023, we analysed 61 policy and regulatory documents, from across Belgium, Canada, Denmark, Italy, Poland and the UK.

The documents belonged to four categories:

1. media law
2. broadcast contracts and licences—which contain formal obligations and remits
3. annual reports of PSM activity and strategy
4. current policy debates – to ensure an accurate interpretation and contextualisation of the findings.

We analysed these documents by theme, after identifying a series of shared dimensions of concern and regulatory focus. These were:

- PSM values and mission
- strategic objectives for the current Government or charter, in place at the time of the analysis
- audience considerations and priorities
- multiplatform requirements
- algorithms, personalisation, and data management
- prominence
- collaborations, partnerships, and use of third-party platforms.

Organisational Practices

To examine how PSBs were adapting to the age of platforms in practice, we conducted 81 semi-structured interviews with middle and top management at 9 PSM organisations: Belgium (RTBF, VRT), Denmark (DR, TV 2), Italy (RAI), Poland (TVP) and UK (BBC, Channel 4, ITV) and analysed more than 100 trade documents, briefs and public speeches.

The analysis was based on six basic thematic categories:

1. PSM values
2. perception of the organisation's position and role
3. perception of audience needs
4. priorities regarding content production and distribution
5. organisational culture, skills and working practices
6. technology.

The analysis of the results was supported by reports prepared by project partners within each country concerning the context of the functioning of a given organisation in the domestic market.

Cultural Outputs

Finally, we sought to understand how the age of platforms might be affecting the programmes produced by PSBs and how those programmes are delivered to audiences. There were two components to this work: analysis of VoD interfaces and linear schedules; analysis of key programmes.

VoD Interfaces and Linear Schedules

In 2023, we analysed the linear schedules and video-on-demand (VoD) interfaces and AI-driven personalisation practices of 10 PSM organisations: Belgium (RTBF, VRT), Canada (CBC), Denmark (DR, TV 2), Italy (RAI), Poland (TVP) and UK (BBC, Channel 4, ITV). We did this by taking a snapshot of the structures and content on the home page of each PSM VoD.

Personalisation

To understand how PSBs are using algorithmic recommendations, we conducted a study of AI-driven personalisation on the VoDs included in the PSM remits in 2023 (RTBF Auvio, VRT MAX, DRTV, RaiPlay, TVP VoD, BBC iPlayer). We created three accounts for each VoD which we 'fed' over a period of months in the summer of 2023:

1. 'Crime drama account': only watched crime dramas
2. 'Quiz account': only watched quiz and competition shows
3. 'Documentary account': only watched documentaries.

Screenshots were taken of the homepage of each account over a one week period between 13-19 November 2023. These were compared with screenshots from a 'neutral' account that was not signed in and had all cookies removed. Analysis assessed the extent of personalisation against the following criteria:

- Whether the hero board differs from the neutral account or stays the same across all four accounts.
- Whether decks are added compared to the neutral account AND are personalised in accordance with the usage of the account.
- Whether, on decks that are also present on the neutral account, different/new programmes are offered in line with the preferences of the personalised accounts.

VoD vs Broadcasting

To understand how the VoD services of PSBs differed from their linear broadcast schedules, we compared the 'prime space' of the 'neutral' account with the prime time linear schedules for each broadcaster. Prime space refers to what is visible to the user on the VoD service without scrolling down or right. Again, this data was collected between 13-19 November 2023.

Programmes

We also sought to understand how the platform age was affecting the programmes produced by PSBs. To this end, we examined the programmes positioned as emblematic of the PSM mission by the PSBs in our study. 30 programmes were identified by cross-referencing the content strategy priorities identified in the interview data sets, with publicly distributed PSM strategy documents and promotional materials from 2024 and 2025. Thematic analysis of these data sets elucidated how PSM organisations understand and discursively communicate the value of the programmes that they position as most important in the age of platforms.

We compared the 'prime space' of the 'neutral' account with the prime time linear schedules for each broadcaster

Hero board

Deck

Tile

Prime Space

Decreasing prominence