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# The platformization of public service media: A comparative analysis of five BVOD services in Western and Northern Europe

## **ABSTRACT**

*Recent developments in the media industries have signalled the need for public service media (PSM) organizations to reposition themselves in order to reach audiences, and also secure financial sustainability and programming rights. In repositioning themselves, PSM have increasingly embraced some of the core characteristics of platforms by developing a central video-on-demand (VOD) service as portal to PSM services, investing in exclusive content and using data to create richer user experiences and gain insights into audience practices. However, this 'platformization' process comes with both challenges and opportunities to reach the public service remit. This article conducts an analysis of the on-demand portals of PSM, to uncover how platformization is reshaping the PSM core remit and values, and how these are transposed in online services and offerings. The research employs a comparative case study analysis of five VOD services of*

## **KEYWORDS**

PSM  
public broadcasting  
video-on-demand  
online platforms  
European media  
markets  
small media markets  
video portals  
catalogue analysis

*PSM in Western and Northern Europe: Belgium-Flanders (VRT.NU), Belgium-Wallonia (RTBF Auvio), Finland (Yle Areena), Ireland (RTÉ Player) and Norway (NRK TV). The results discuss three main categories: interfaces and features, strategies for catalogue and content curation, and tools for discoverability and prominence.*

## INTRODUCTION

The shift from analogue to digital has seen public service media (PSM) expand their offerings to mobile and on-demand delivery (Jakubowicz 2008; Lowe and Bardoel 2008; Moe 2008). However, recent developments have signalled the need for these organizations to reposition themselves once more. New challenges range from reaching audiences who increasingly shy away from linear broadcasting to dealing with government cutbacks and competition with global subscription video-on-demand (SVOD) services such as Netflix and Disney+ and video-sharing platforms such as YouTube and TikTok (D'Arma et al. 2021; Donders 2019). The competition is not only focused on audience reach and market share, but also on securing exclusive content deals, programming rights and creative talent.

Global streaming services have taken up platform logics through a combination of non-linear content delivery, reliance on subscriber funding, vertical integration through the exclusive control of original content (Evens and Donders 2018), unprecedented scale and algorithmic curation and personalization by creating 'taste communities' (Lotz 2022: 70). These elements have been facilitated by the companies' control over investment capital, which allows them to make strategic decisions on the production and the distribution side, and create closed circuits that provide users with premium content and a smooth streaming experience in high definition.

In their efforts to innovate and reposition themselves in the market, PSM have also adapted to processes of digitization and datafication by: (1) developing a central VOD service as portal to PSM services; (2) investing in exclusive content, catalogue acquisition and production partnerships as ways to expand scale and scope; (3) using data to create richer user experiences and gain insights into audience practices (D'Arma et al. 2021).

However, this platformization process comes with both challenges and opportunities to reach the public service remit. This article conducts an analysis of the on-demand portals of PSM, to uncover the operational and strategic decisions taken by the organizations in their process of platformization. Our overarching research question is: how does platformization reshape PSM's core remit and values, and how are they transposed in online services and offerings? The research employs a comparative case study analysis of five VOD services of PSM in Western and Northern Europe: Belgium-Flanders (VRT.NU), Belgium-Wallonia (RTBF Auvio), Finland (Yle Areena), Ireland (RTÉ Player) and Norway (NRK TV). As they are all online portals connected to the public service broadcaster, we will refer to them as broadcaster video-on-demand services (BVOD). The cases were chosen based on their similarities, such as media systems, small market characteristics, substantial linear market share and audience reach, strong domestic competition and clear commitment to a multi-platform strategy (Puppis 2009; Syvertsen et al. 2019; Van den Bulck et al. 2018).

The following section will set the scene for the discussion on PSM and platformization and the challenges and opportunities for public service organizations. This is followed by the methodology. The subsequent section presents the results in three categories: features and interface, catalogue and content curation and (tools for) discoverability and prominence. The concluding section reflects on the process of platformization and how it reshapes the PSM remit and values. The findings point to a combination of strategies in the development of the BVODs, with both strategies of differentiation from commercial streamers through public interest objectives, and strategies of mimicry, mainly focused on datafication and interface design.

## **PUBLIC SERVICE MEDIA AND PLATFORMIZATION**

The process of platformization comes with a unique set of challenges and opportunities for PSM organizations today. At an operational level, PSM must adapt to developments in the media sector such as enhanced scale, personalization and connectedness, algorithmic curation and content exclusivity. However, scholars have already pointed out the difficulties in innovating because of path-dependence and the legacy of large, hierarchically structured PSM organizations (Direito-Rebollal and Donders 2022). In addition, platformization also challenges the core remit and principles of PSM. Namely, how can a holistic remit be reached, along with audience universality and content diversity, quality, access, accountability and distinctiveness in a context of digitization and datafication?

D'Arma et al. (2021), building on Napoli's (1998) framework, identify a series of PSM responses to the increasing competition with SVOD services. These are combinations of (1) *complacency* – obliviousness to competitive threats posed by new technologies; (2) *resistance* – efforts by legacy players to preserve the status quo, through lobbying efforts, as well as rhetorical and economic means; (3) *differentiation* – focusing on domestic content or specific genres to differentiate from global players; (4) *diversification/mimicry* – efforts to expand PSM activities online, some of which also involve adopting similar strategies as SVOD services. They also add (5) *collaboration* to the four strategies, as European PSM have expanded their long-lasting traditions of regional/international co-productions to collaborations with large US streamers such as Netflix and Amazon Prime Video. In the sections below, we identify three series of challenges in the shift to a VOD 'portal' logic as part of a broader platformization strategy: reaching audiences, balancing universality and personalization and the question of scale.

### ***Reaching and connecting with audiences***

PSM still hold significant market shares in most Western and Northern European markets for linear television. However, linear viewing has steadily decreased, and this loss has not been compensated by an uptake in on-demand consumption. Given PSM's obligation to reach as wide an audience as possible, as part of the universality mission, this challenge is enhanced by the growing competition with new platforms and SVOD services, especially for young viewers. Reaching audiences is also about connecting with them through content that is considered relevant and trustworthy. In that regard, scholars have pointed to increasing struggles of PSM to meaningfully connect to audiences (Vanhaeght 2019). This is particularly relevant in increasingly polarized and fragmented societies, as PSM are often included in the broader

criticism on mainstream media (Donders 2021) for insufficiently capturing and representing society in its entirety.

Additionally, PSM brands struggle to remain visible to audiences in an environment of connected devices, on remote controls, interfaces, online catalogues or electronic programming guides. In that regard, some governments have already taken steps to enhance the prominence of PSM channels (European Commission et al. 2022; Hesmondhalgh and Lobato 2019). The challenge of discoverability also comes with two crucial strategic considerations. The first relates to branding and to what extent the portal is complementary to or independent of the existing PSM brand. The second relates to reaching a balance in the PSM distribution strategy, between delivering content directly to audiences via one central portal, and existing practices of distribution through a multitude of channels, including competitors such as YouTube and Spotify. This, in turn, invokes privacy and data protection concerns, and questions of dependence on third-party services whose content moderation and data management practices are outside of PSM control (Hildén 2022; van Es and Poell 2020).

### ***Balancing curation and personalization***

The second core challenge relates to the universality principle and the positioning of content online. This development creates an apparent paradox between the aim to reach and unify all citizens, and the goal of personalization, which seeks to serve individuals as consumers (Sørensen 2020).

Traditionally, PSM's holistic, 'full-portfolio' approach (Bardoel and d'Haenens 2008: 344) ensured that offerings were sufficiently diverse and appealed to all audience segments, through certain programming strategies. The BBC and many others still defend broad entertainment programming as a means to connect to audiences and lead them to news or educational programmes. In an on-demand environment, traditional programming push-strategies are less meaningful. This has two main repercussions. First, every programme has to deliver the public remit aim on its own, as it cannot be considered a vehicle for other content that may be considered a better public remit fit. Second, PSM need to guide audiences in new ways to their content, and specifically to programming considered relevant for particular target groups and audience preferences. In that regard, Bruun proposes the term 'trans-programming' to refer to the combined 'result of the integration of linear channels and non-linear services *within* the companies' portfolios, which is leading to a merger between linear and non-linear promotion and distribution strategies for the content' (2021: 613, original emphasis).

However, in VOD environments, content recommender systems offer personalized 'content flows' defined as 'interactive pathways we take through data, guided by software' (McKelvey and Hunt 2019: 2). Personalization involves a combination of editorial curation of programmes and algorithmic curation based on the reactions and activity of users. PSM are increasingly exploring algorithm-based recommendations to better fit the needs of audiences through the personalization of PSM offerings and their positioning (Kelly and Sørensen 2021; Rotermund 2018). In an account of BBC iPlayer, Kelly asserts the use of personalization, albeit limited, which he considers 'unsurprising given their public service remit and [...] consequence of their obligation to appeal to both a collective public as well as a range of niche identities and tastes' (2021: 270).

More recently, PSM have emphasized the need and exploration of 'public service algorithms' (e.g. DR) or 'taste-broadening algorithms' (e.g. VRT) to guide audiences to content that is more diverse or considered more 'public service relevant'. The use of these algorithms and recommender systems not only prompts new questions on who decides what is considered 'public service relevant', but also to what extent PSM needs to employ algorithmic transparency and give audiences the choice to decide what data is collected, how it is used and how far-reaching the personalization is (Hutchinson and Sørensen 2020; Sørensen and Van den Bulck 2020).

A final strategic challenge is found at the level of staff, as highly qualified workers are also in high demand in various segments of the digital economy. This leads to questions on how programmers and technical staff are managed and collaborate with channel controllers, commissioners, editorial and production staff.

### ***Developing scale in a restricted market***

The third challenge in the platformization process relates to the key characteristics of building competitive advantage in the on-demand ecosystem: scale. Large streaming services achieve scale by operating in multiple markets and capitalizing on significant revenues (Evens and Donders 2018). This generally results in large catalogues and support investment in high-budget exclusive content, but also in branding, user-friendly design, technological infrastructure and algorithms. Although PSM usually generate revenue from exports and programming sales, they operate primarily within the confines of national markets, targeting limited audiences with limited financial means. This is especially the case in smaller markets, which already experience reduced PSM budgets, fewer revenue opportunities and limited means to invest in local content (Lowe and Nissen 2011; Raats and Evens 2021).

In most cases, online portals contain content that is also available on linear channels. It could be said that a platformization strategy which creates a closed circuit goes against the 'platform-neutral' approach of the PSM ideal. Scholars point out that, instead of turning their VOD services into the focal point and base for commissioning, producing and distributing content, PSM online services have mainly been used as outlets to distribute existing content (Donders 2019). To this end, 'online TV does not (as yet) represent a radical new interpretation of PSB because VoD services are closely linked to linear offerings' (Michalis 2022: 525). Some, mostly larger, public broadcasters have expanded their online portfolios with exclusive content, primarily as a means to appeal to younger audiences (Vašíčková and Szczepanik 2018) and in line with global streamers' exclusive 'originals' meant to attract new subscribers (Raats and Evens 2021). This strategy combines elements of a 'distributive model' and an 'editorial model', according to online business models developed in the domain of creative industries (Lyubareva et al. 2014), which are still in constant development and increasing hybridization.

For PSM in particular, the consideration of attracting audiences to online portals involves strategic decisions on what content to commission and license exclusively online as a means to attract audiences, and how to balance this with investments in linear content, which remains more popular. Especially in small markets, the development of on-demand catalogues generates questions on prioritization. One strategy to build scale consists of partnerships with global SVODs, in the form of co-investments and co-productions. This

enables PSM to programme and invest in productions with larger budgets. At the same time, it provides global services with additional library content that can be distributed globally, and a way to meet the increasing quota requirements and investment obligations in European markets (Iordache et al. 2022).

## METHODOLOGY

Comparative case study designs complement the analysis of audio-visual developments with contextual factors that have shaped the respective markets and their PSM organizations. Therefore, market size, forms of funding, political and government support, and cultural factors can all play key roles in how PSM reposition themselves towards online distribution and increasing platformization (D'Arma et al. 2021). The research employs a small-N comparative case study analysis (Esser 2019) based on the quantitative and qualitative research of five PSM on-demand services in the following small markets in Western and Northern Europe: Belgium-Flanders (VRT.NU), Belgium-Wallonia (RTBF Auvio), Finland (Yle Areena), Ireland (RTÉ Player) and Norway (NRK TV) (see Table 1). The selection is based on a most similar cases design (Esser and Hanitzsch 2012; Przeworski and Teune 1982), considering factors such as: media system, small market characteristics, substantial market share and audience reach and strong domestic competition. The studied PSM organizations have all embarked on a multi-platform strategy that involves the development and promotion of their VOD services towards reaching their public service remit. All five organizations rely primarily on public funding, either through license fees or state financing. VRT, RTBF and RTÉ complement this with advertising.

The study combines a quantitative analysis of VOD catalogues with a qualitative analysis (see also Kelly 2021; Kelly and Sørensen 2021). The quantitative approach focuses on the number of titles and the content diversity in terms of genre and country of origin. Qualitatively, we combine the document analysis (Bowen 2009) of PSM annual reports, communication to stakeholders and strategy papers, with the textual analysis of the interfaces and online strategies employed. These complement the data on offerings and provide valuable context as well as a closer look at the services' designs and affordances. The features and parameters of analysis are based on previous research on

Table 1: Case studies.

Market	Flanders (BE)	Wallonia (BE)	Finland	Norway	Ireland
BVOD	VRT.NU	Auvio	Yle Areena	NRK TV	RTÉ Player
Broadcaster	VRT	RTBF	Yle	NRK	RTÉ
Audience reach VOD (2020–21)	N.A.	20–25%	53–58%	50–55%	45–50%
Audience reach linear	90%	65–70%	90%	90%	75–80%
PSM funding	61.2% public donation	72% public donation	97% public	97% license fee	59% license fee

Source: Annual reports of media regulators and PSM.

both commercial and public VOD services (Iordache 2022; Johnson 2017; Kelly and Sørensen 2021; McKelvey and Hunt 2019; Michalis 2022). To some extent, the affordances and strategies of transnational streamers are increasingly seen as the dominant mode of online content curation. However, the aim of the study is not to present these as a dominant design, but rather identify how PSM-specific features such as those aimed at accessibility, universality and transparency are applied in the streaming context.

The data was collected between March and August 2022, which allowed us to track changes in content volume and personalization features. VRT.NU was relaunched in September 2022 under the name VRT Max, a service with ambitious plans to become the central portal for the VRT brand. Although our data was collected on the previous service, we believe our findings remain relevant as a brief analysis of the BVOD did not point to fundamental changes.

The research takes a step-by-step approach. First, we analyse and compare the portals' features, interfaces, accessibility and representation (e.g. minority languages, sign language/audio description). Second, we compare catalogue sizes (by number of titles), content diversity and curation: whether they include catch-up content, online-only content or extensive archives of linear offerings. Third, we discuss elements of discoverability and prominence of content, specifically the use of technical affordances and personalization.

## RESULTS

### *Features and interface*

The analysis of digital interfaces and features explores how the services are designed to structure and organize online offerings 'in ways that might enable certain experiences and limit others' (Johnson 2017: 124). All five services have adopted similar homepage structures of tiles organized in rows and carousels based on different formats (e.g. film, series, web-series, audio/podcast), genres (e.g. drama, documentary, human interest) and specific categories (e.g. 'our selection'/'we recommend', 'best series to binge', archive) (see Table 2). The style and presentation of the catalogues follow those established by popular streaming services such as Netflix, in line with the mimicry strategy discussed by D'Arma et al. (2021). Unlike commercial SVODs, four of the five PSM portals also provide a clear presentation of their entire offerings,

*Table 2: Features and interface.*

<b>BVOD</b>	<b>VRT.NU</b>	<b>Auvio</b>	<b>Yle Areena</b>	<b>NRK TV</b>	<b>RTÉ Player</b>
Subtitles/dubbing	Yes	Yes	Yes	Yes	Yes
Alternative/minority languages	No	No	Yes	Yes	Yes
Accessibility: sign language, audio description, captions	Limited	Limited	Limited	Notable	Limited
Thematic genre categories	Yes	Yes	No	Yes	Yes
Alphabetic overview	Yes	Yes	No	Yes	Yes
Geo-blocking	Yes	Yes	Yes	Yes	Limited
Profile and sign-in	Required	Required	Optional	Optional	Optional



in alphabetical order or by category. Yle Areena offers the closest experience to an SVOD service, as each content category is sub-divided into tabs (e.g. recommended, latest additions, most popular), as well as carousels of sub-genres, domestic content, recommendations and tiles for upcoming content. NRK TV has a unique visual identity based on 'colour algorithms and contrast guidelines' (Heydays 2019: n.pag.). This gives every series a distinct colour palette based on the content's cover art, with the aim of retaining user focus and establishing an identity for the streaming service as a whole.

Accessibility and inclusivity are distinctive factors of the public service remit. To this end, it is important to determine what type of features support these on the five BVOD services, and to what extent they are available to audiences. All five services provide options for subtitles and/or dubbing for content in foreign languages. Yle Areena, NRK TV and RTÉ Player provide subtitles, content or alternative versions of the service in (minority/other) official languages such as Saami, Swedish, Nynorsk and Gaelge, respectively. This is due to historical and cultural contexts in which PSM needs to preserve cultural identity as well as diversity. An exception is the Belgian services that already target specific audiences within the country, whose language and culture they aim to promote. VRT provides Dutch-language subtitles for foreign content and dubbing for children's programming/animation, while RTBF promotes French through dubbing (the default setting for all content) and subtitles. Most titles for foreign content are also translated and adapted to French in the Auvio catalogue.

All five organizations highlight the importance of providing services and content in line with the concepts of universal reach (Goodwin 2020; Lowe and Savage 2020), including audience members with visual and hearing impairments. To a certain extent, they all provide various levels of support in the form of sign language, audio description, high-contrast subtitles, different playback speeds or closed captions. In some cases, these are options that can already be indicated as preferences in user profiles (RTÉ Player), while in others they are listed under specific tabs/categories on the service. Most of the programming with sign language consists of news and current events. NRK promotes an inclusive design strategy at organizational level and hired an accessibility manager and experts in the field who are visually or hearing impaired (DOGA 2020). NRK also builds on a long-term tradition of providing a combination of audio subtitling and audio description on their linear channels. Moreover, some online video players do not allow for more than one audio-track, forcing some broadcasters to create separate videos for audio description (Taylor and Perego 2022).

Due to their core target audience being national, but also to licensing agreements, the services are geo-blocked, making them only freely accessible to users with a domestic IP address. In certain circumstances and for selected programmes (mostly news and current affairs), users can also access the content from other European Economic Area (EEA) countries, when signed into their profiles. RTÉ Player provides live content also outside of Ireland or without a user profile, and generally makes most of its other content also freely available abroad, to reach the large Irish diaspora in Europe (Raats et al. 2022).

All services provide the option or requirement to create a user account. The account is required in order to watch catalogue content on VRT.NU, and both live and catalogue content on Auvio. Aside from access to content, user accounts generally allow for personalized recommendations (discussed

below), bookmarking and continued viewing, managing parental controls or saving preferences for language or accessibility.

### **Catalogue and content curation**

The most striking differences between the five cases can be found in the quantitative catalogue comparison, as the wide variations in titles (between 200–3500) point to different digital distribution strategies (see Table 3). The BVODs started off as catch-up services for the linear PSB channels. Over time, the platformization of PSM took on different forms. The ones with smaller catalogues, such as VRT.NU and RTÉ Player, still rely more heavily on linear content and offer shorter catch-up windows. The ones with large catalogues combine catch-up content with content from the PSM archives, and exclusive online-only content such as short-form videos and web series. Auvio, Yle Areena, NRK TV and VRT.NU (to a lesser extent) all provide content from their archives. The high volumes of titles on Nordic VODs can be partly explained by the higher number of in-house productions, for which broadcasters retain all rights. PSM services are increasingly trying to compete with large streaming services by offering full seasons of series, categories such as ‘best series to binge’ or tabs/categories labelled box sets, in order to attract and keep users on the portal for longer.

*Table 3: Catalogue data and content curation.*

<b>BVOD</b>	<b>VRT.NU</b>	<b>Auvio</b>	<b>Yle Areena</b>	<b>NRK TV</b>	<b>RTÉ Player</b>
All titles (audio and video)	650–700	±1000	3500–600	3600–700	220–50
Preponderant genres (>35%)	Scripted series and children’s content	Documentary and human interest	Documentary and human interest	Documentary and human interest	N.A.
Country of origin labels	No	No	No	No	No
Country diversity	80% domestic	All content: 65% domestic, video: 49% domestic	Majority domestic and regional (Scandinavia)	95% domestic	Majority domestic
Linear live viewing	Yes	Yes	Yes	Yes	Yes
Link to archives/ external sites	No	Archive, Sooner	Archive	Archive	No
(Link to) other PSM content/ channels	Yes	Yes	Yes	Yes	Yes
Original productions	Yes	Yes	Yes	Yes	Yes
Catch-up content	Yes	Yes	Yes	Yes	Yes

All services offer original content, produced and/or commissioned by the BVOD service, and sometimes exclusive titles. The novelty lies in the attention to new formats, such as web series and short format scripted and non-scripted content. Interestingly, most of these online exclusives are targeted at young audiences, where all five PSM services have a lower reach, according to their annual reports and communication with stakeholders. To this end, RTBF started a collaboration with commercial channels AB3 and ABXplore to produce content for young audiences, while also linking to their channels through the Auvio portal (RTBF 2019). Yle Areena has also made increasing investments in youth series in order to gain the attention of young audiences, where weekly reach and relevance are the lowest (Yle Asiakkuudet 2021). In some cases, most notably on VRT.NU, online content consists of (often low-budget) add-ons to existing programmes, often in line with less popular content on generalist channels, such as education, philosophy or art clips.

The strategy to reach audiences is not limited to the VOD service. NRK won over a significant part of its young audience segment with productions such as *Skam* (2015–17) and *Exit* (2019–present) that were released on VOD and linear services. The launch of *Skam* was coordinated with a social media strategy that attracted over 1.2 million users to NRK TV (Southern 2017), while *Exit* became the most streamed drama series in Norway of all time (Jensen 2022). NRK's Head of Drama Ivar Kohn already confirmed in 2016 that the group put its digital service at the forefront of this strategy, which also involved commissioning programmes that people picked in direct competition with other strong players (Pham 2021).

When analysing the content diversity, it is not surprising to find that the majority of content on all portals is domestic. This differs both from global SVOD offerings and those of local commercial VOD services in the markets. However, the level of representation varies considerably. On Auvio, 65% of all titles, including video and audio, are of Belgian origin, primarily produced in Wallonia. However, when focusing on video, only 49% of titles are of Belgian origin, while almost half of the remaining content originates in its large neighbour France. NRK TV has an impressive amount of domestic titles, considering the size of its catalogue, where less than 5% of the titles in our data set were non-domestic productions. Alongside the majority of domestic titles, the services also include content from other European countries, mainly the United Kingdom, France, the Nordics and the Netherlands. The focus on domestic content is both part of the PSM remit and a clear differentiation strategy from US-owned transnational streamers (see D'Arma et al. 2021).

With regard to genre, the offerings are quite diverse, as they aim for a full-portfolio approach (Van den Bulck and Moe 2017). The catalogues include everything from films, series and documentary, to entertainment, news clips and current affairs, podcasts, as well as short format content and web series. Auvio, Yle Areena and NRK TV – the portals with the largest catalogues – contain a majority of documentary and human-interest programming. VRT.NU has fewer documentary and film titles, but a slightly more substantial offering of scripted series (both catch-up and full seasons) and children's content.

Although they are still mainly positioned as the streaming version of their respective PSM organization, the services increasingly act as platforms that connect viewers to the entire PSM symbiotic ecosystem (van Dijk et al. 2018) which includes linear channels, video archives and third-party services. The

portals provide the opportunity to watch live content on a variety of channels, even without logging into a user profile (except for Auvio). Yle Areena is a part of a network that includes thirteen applications and cross-application use is also 'trans-programmed' (cf. Bruun 2021) to flow like audio-visual content, linking from one type of content (e.g. news story) to other PSM channels/brands (e.g. children's content, games/apps). In its aim to make Auvio the local portal of reference for French-speaking Belgians, RTBF provides users with the possibility of getting a paid premium subscription to Belgian SVOD service Sooner, dedicated to independent cinema.

Finally, we also find increasing integration of audio on all PSM VOD services, and a growing emphasis on the production and online distribution of podcasts. These are generally popular (also with younger audiences), cheap to produce and quintessentially domestic content.

### ***Discoverability and prominence***

The discoverability and prominence of content online have become key concerns in recent years, both for policy-makers and services themselves, as they have significant industrial dimensions and can strongly influence an audience's cultural experiences (Hesmondhalgh and Lotz 2020). These practices are particularly relevant as they lead to exposure diversity, which focuses on the content that audiences consume, rather than what is on offer (Napoli 1999), which is in line with PSM objectives.

Content positioning and presentation are key elements of homepage design and platformization popularized by services such as Netflix, which have set the standard for the presentation of streaming video (Lotz 2022). All five PSM portals in our study highlighted either a specific title or category of content at the top of their homepage through larger tiles or banners (see Table 4). In most cases, these were popular or recently added titles, as well as prominently featured original content. Although catalogues have significant volumes of human interest and current affairs programming, news programmes are generally not given much prominence on the BVOD service. This is potentially part of a strategy which aims to connect thematic portals and helps them build individual brands. The BVOD portals do include news clips that link to separate news channels and websites.

The use of search engines is a key feature for the discoverability of content. All five services have search features; however, these are limited as searches can only be conducted by title. This limits the potential to discover content by country of origin, language, actors, directors, etc. as users are constrained to seek for titles that they are already familiar with. This is connected to the type and volume of metadata and labelling provided by the service, which is rather limited. There are also no labels to indicate the country of origin or original language of the offerings in their respective descriptions.

The PSM portals make limited use of the auto-play function, which could be due to both technical limitations and the explicit aim to not push users to consume through strategies implemented by commercial players. Auvio is the only portal where a trailer plays automatically on the homepage; however, this is usually farther down the page after scrolling, and the sound is by default muted. All services except for VRT.NU have an auto-play function at the end of an episode, thus playing the next episode after a short countdown. This is a form of mimicry as it is a strategy successfully deployed by Netflix as part of promoting continued watching. However, none of them have an auto-play for

Table 4: Tools for the discoverability and prominence of content.

<b>BVOD</b>	<b>VRT.NU</b>	<b>Auvio</b>	<b>Yle Areena</b>	<b>NRK TV</b>	<b>RTÉ Player</b>
Highlighted content homepage	Most watched/ listened to and recently added	‘Our selection’	Most watched and recently added	Most watched and recently added	Original content
Description or trailer when hovering	No	No	No	No	No
Trailers	No	Yes	No	Yes	No
Search function	By title	By title	By title	By title	By title
Auto-play homepage	No	Yes	No	No	No
Auto-play end of programme	No	No	No	No	No
Auto-play new episode	No	Yes	Yes	Yes	Yes
App on other devices	Yes	Yes	Yes	Yes	Yes
Personalized recommendations	Yes	Yes	Yes	Yes	Yes
Transparency in algorithm use/ personalization	Limited	Limited	Notable	Notable	Limited

alternative titles or trailers upon finishing a programme/series, although they all make several suggestions in the form of a list.

All PSM cases provide a certain level of algorithm-driven personalization on their services. According to PSM internal documents, and our interface analysis and brief interaction with the service, content recommendations are generally based on previous consumption (e.g. continue watching, similar to), user preferences (e.g. titles marked as ‘favourites’, topics of interest indicated in the user account), recently added or ‘last chance’ titles, and content that the services actively promote, such as original or exclusive productions. More longitudinal in-depth research into the workings of the recommender systems is required in order to understand the level of algorithmic curation and its implementation, especially since the catalogues vary in size and strategy. The latter is closely connected to the PSM goals and the balance between increasing personalization and offering users more similar or popular content vs. taste-broadening objectives as in the VRT case (Van den Bulck and Moe 2017). This is meant to expose viewers to content that may not fit their usual consumption or interests, but that the organization deems relevant to reaching its public service remit by encouraging various forms of content diversity.

Yle Areena offers detailed information about the workings of the algorithm and user rights, indicating why certain content was suggested, and how the recommendations can be disabled. Auvio and VRT.NU, on the other hand, do not offer specific indications on why content is recommended to each user. In 2022, the independent media regulator in the French Community of Belgium, the Conseil Supérieur de l’Audiovisuel (CSA), raised concerns with regard to the presumed free access to the service, arguing that it was only accessible

on the condition that users consented to the use of their personal data (CSA 2022: 29). Nevertheless, PSM have the obligation to use algorithms and user data in a responsible and more transparent way than commercial services, as they are accountable to citizens and legislators (EBU 2022). To this end, the European Broadcasting Union (EBU) has launched the PEACH collaborative initiative, a personalization and recommendation ecosystem for the digital transformation with the public mission at its core, which is already used by several European broadcasters, including RTÉ.

The complex layered architecture of VOD services is complemented by discussions on ancillary devices such as set-top boxes or smart TVs (Hesmondhalgh and Lobato 2019) and electronic programme guides (EPGs), which generated early reflections on discoverability and prominence and the positive discrimination of public service programming (Helberger et al. 2018). All five portals have apps in the major app stores, primarily for smartphones and tablets, and the possibility of casting through Chromecast. But, compared to large streaming services, some PSM portals are lagging behind in the options and quality of navigation provided. VRT.NU and Auvio have an app for Android TV, Apple TV and Samsung TV (most added in 2021–22). Yle Areena and NRK TV are available on a variety of iOS and Android devices, as well as gaming consoles. And, although not all online user reviews of the apps are positive, it is clear from their communications and distribution strategies that all five PSM organizations are dedicated to investing in their cross-platform presence and enhancing user experience.

## CONCLUSIONS AND DISCUSSION

Core PSM concepts such as diversity, universality, access and trust are integrated in the platformization process through a variety of means and approaches, ranging from embracing and expanding technological affordances and tools to different levels of transparency and caution in using algorithms and personalization. Nevertheless, the process invokes a number of challenges, stemming primarily from operational innovation, building scale, and content curation and differentiation. Digital portals undoubtedly provide PSM with novel opportunities for the interweaving of information, education and entertainment, yet these are not used at their full potential, as the implementation of digital strategies is still work-in-progress in most cases. While it is commonly argued that innovation is a core value of PSM (Donders and Van den Bulck 2016), investments in their online services, including content, design, affordances and curation strategies are only explored gradually and modestly by smaller PSM services. Moreover, despite EBU's attempts to streamline lessons learned in the process, investments in metadata labelling and recommender systems have, so far, been developed by most PSM organizations individually.

The features and characteristics of transnational streaming services are increasingly seen as the dominant mode of packaging and displaying content online. Nevertheless, the aim of the study was not to present these as a universally accepted, normative ideal. Indeed, part of PSM's repositioning strategies in the streaming-dominant media ecosystem will be to reflect on whether and why they wish to pursue the content strategies and technical affordances popularized by streaming services. It might well be that, in some cases the audiences value an offering based on quality curation more than a highly personalized one. Similarly, they may prefer a small, easy-to-navigate

catalogue where each programme delivers on its value and a strong PSM brand, rather than relying on recommender systems to distinguish relevant titles from less relevant ones. Moreover, it becomes crucial for PSM to actively search for affordances that commercial streamers do not provide, but which would be better suited to fulfilling their public remit.

Overall, the five case studies apply various combinations of the tactics discussed by D'Arma et al. (2021), which combine those popularized by transnational SVODs with more established PSM strategies. First, most of the services were launched relatively late, and features that enable user preferences or the expansion of catalogues beyond catch-up offerings were only added in recent years. This reflects attitudes of *complacency* in the late launch and development of some of the BVOD services, as well as their expansion from a catch-up service to a standalone streaming service. Path-dependence also plays a role in this, as the linear channels of most case studies still hold strong market positions. Due to this, with the exception of NRK which was the earliest VOD adopter in our sample, PSM delayed the shift to online. The Walloon regulator continues to be wary of RTBF's online expansion, seen as the service still has a much larger audience reach on linear (CSA 2022).

Second, through their emphasis on local investments, PSM clearly show *differentiation* strategies, as described by Napoli (1998). The case comparison points to a clear prioritization of producing and delivering domestic scripted and entertainment content, as well as current events, documentary and human-interest programming. The promotion of a national culture and identity is also increasingly linked to the economic objective of strengthening local or domestic audio-visual production (Bardoel and d'Haenens 2008; Wauters and Raats 2018), which serves different goals and means than those employed by foreign or commercial streaming services, who aim for transnational expansion and appeal. TV drama has always been strongly associated with local content and commissions of PSM in Europe, who remain the largest investors in domestic fiction in their respective markets (Raats and Jensen 2021).

Third, although some require the use of a user account, all services are freely available to their audiences. Universal access is considered a priority and, albeit limited, mechanisms of accessibility are increasingly present on the BVOD platforms, especially for news content and current affairs programming. In the case of some public broadcasters, users can decide on whether to create an account. If they refrain, this limits personalization and suggested content, as user data is not processed or stored. The Belgian services were the only ones that required the creation of a user account to access catalogue content. The introduction of user profiles is a means to tailor production, distribution and design to user data and practices. On the one hand, this can allow for better experiences for users, but, on the other hand, it can also limit the universality principle, especially when required to access content. Moreover, their use of algorithmic curation is not only focused on personalization but also aims to provide users with more diversity and public interest content. And, although we do not have detailed insights into their workings and implementation, these considerations, as well as concerns for data management and transparency clearly set these PSM organizations apart from commercial streamers who target users as consumers rather than citizens.

Fourth, despite PSM's focus on news and current affairs programming, all of the analysed services clearly prioritize popular, entertainment content, thereby presumably getting the lowest threshold possible to attract and



engage with viewers. As such, PSM players tend to mimic SVOD strategies by prominently featuring their most attractive titles. The strategic focus on high-budget drama with global appeal can also be seen as a form of *mimicry*, as producers and broadcasters acknowledge that Netflix has raised viewers' expectations about domestic content, calling for 'bolder' and 'edgier' themes and storytelling.

Finally, other *mimicry* strategies used are identified at the technological level, through design and interfaces, user log-in, the use of algorithms and personalized recommendations. PSM are also encouraging audiences to binge-watch by offering box sets and specific labels/categories (e.g. binge-worthy), as well as making use of discoverability and prominence tools such as the auto-play function, particularly for the 'play next episode' option. At content level, short-form content and web series are also used as a form of mimicry and competition with video-sharing platforms such as YouTube and TikTok, meant to appeal to young audiences.

The key dilemma of cross-platform distribution of PSM content is ongoing. Some PSM are working towards turning their VOD portals into a single entry-point for all PSM content and services, while others continue to use third-party services to reach larger audiences. Podcasts are a good way to bring audiences to the service by attracting users through external apps (e.g. Apple podcasts, Spotify) with limited offerings followed by episodes that are available exclusively on the BVOD. At the same time, children and youth are more likely to discover and consume PSM content on services such as YouTube and TikTok.

The focus on the five Western and Northern European small markets limits the scope of the study, as the findings are not necessarily applicable to the transition to online portals in significantly different markets. Discussions of PSM's legitimacy as well as its financial stability are instrumental in shaping their development, including their digital innovation and transition online. This is one of the key differentiators with Southern and Eastern European markets where PSM's lower audience reach, path-dependence and financial pressures (Donders 2021; Goyanes et al. 2021) are bound to further delay the development of BVODs or continue using them simply as catch-up services.

A bias might also lie in these VOD services' lack of scale, as we have seen market scale is crucial for the sizes of catalogues. What differentiates public broadcasters from many other new players is their access to extensive archives of (mostly domestic) content, which contribute to the bulk of online back catalogues. Due to their extensive practices of commissioning and in-house production, this is content they already have at their disposal, which is now being revived in the VOD catalogue. Nevertheless, studies have shown that PSM organizations, in particular, are applying the same curation strategies online as they have on linear, thus shaping content prominence along the same lines (Bruun 2021).

As this study only briefly considered general positioning strategies, future work could focus on analysing personalization and curation strategies through catalogue analysis. Examining online portals also sheds light on the commissioning strategies of PSM, and how they aim to differentiate their services in an increasingly competitive media market, as well as identify contextual differences and priorities of PSM across markets. Differences between players are most visible in the catalogue sizes and the positioning of specific public service or content aimed at younger audiences. The evidence supports the argument that a shift from a linear to on-demand logic entails more than



simply providing an additional outlet for linear content and existing PSM services. Instead, the shift towards BVOD can be considered a crucial step in the transition to an online-first public media logic, and a strategic shift in the platformization of PSM. This has repercussions for the entire production, commissioning, distribution and organization of PSM, and entails a gradual but fundamental rethinking of ways to fulfil the core values and public remit.

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