journalism and media

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Public Service Media in the Platform Era: The Cases of Britain, Denmark, and Greece

Achilleas Karadimitriou and Stylianos Papathanassopoulos *

Department of Communication and Media Studies, School of Economics and Political Sciences, National and Kapodistrian University of Athens, 10559 Athens, Greece; akaradim@media.uoa.gr
* Correspondence: spapath@media.uoa.gr

Abstract: Public service media (PSM) are grappling with structural shifts in the audio-visual sector, notably the shift of audiences towards over-the-top (OTT) or subscription video-on-demand (SVOD) services. They have also heavily invested in online platforms, adapting their policies to engage digital users on their video-on-demand (VOD) platforms. This paper assesses PSM policies in Britain, Denmark, and Greece, examining initiatives regarding adaptation to the digital era. It explores whether they implement new strategies to expand their digital reach. Data from policy documents and interviews with BBC, DR, and ERT leading executives inform the analysis. Findings showed varied responses among PSM organisations, influenced by market dynamics and the evolution of broadcasting traditions.

Keywords: platformisation of communication; public service media VOD platforms; streaming/VOD/OTT services; public service remit; non-linear television

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Citation: Karadimitriou, Achilleas, and Stylianos Papathanassopoulos. 2024. Public Service Media in the Platform Era: The Cases of Britain, Denmark, and Greece. *Journalism and Media* 5: 646–670. https://doi.org/10.3390/journalmedia5020043

Academic Editor: Andreu Casero-Ripollés

Received: 9 April 2024
Revised: 28 April 2024
Accepted: 13 May 2024
Published: 21 May 2024

1. Introduction

Public service media (PSM) have traditionally been an integral part of the media universe, particularly in Europe. Their contribution to the democratic society as a "cornerstone" (Splichal 2007, p. 255) lies in allowing people to act as informed citizens by cultivating a critical spirit and adopting a reflective attitude towards current affairs and social events (Fuchs 2021, p. 20). In 2007, the academic debate on public service broadcasters (PSBs) focused on a new idea that advocated their necessary evolution into PSM (Bardoel and Lowe 2007). Nowadays, the discussion has moved to the wider evolution of PSM into public service platforms (PSP) (Bonini and Mazzoli 2020).

This new but imperative trend encompasses a shift in perspective regarding the values that PSM should serve in an era characterised by the dominance of the digital platforms (Nieborg and Poell 2018; van Dijck et al. 2018). Therefore, PSM organisations are considered to experience a transitional phase in which their remit needs to be revised and possibly expanded so that they can evolve into public service platforms (PSP), otherwise they risk being marginalised (Bonini et al. 2021). As a result, asking whether PSM can play an important role in the online services sector has turned into a much more debatable issue (Trappel 2008, p. 321).

Public service broadcasters' (PSBs) content, since their emergence, has been governed by a series of operating conditions arising from their remit. How these conditions are reflected in the design of their online ventures (e.g., video-on-demand services or algorithmic recommendations) is a key issue having received scant scholarly attention. The question of whether this topic deserves further investigation has been answered by the market itself, in so far as the sharp rise in new media use has triggered predictions (by the BBC, Yle, and Ofcom) about the imminent demise of broadcasting as a free-to-air television service due to be replaced by IPTV, although these previsions have been questioned as to their accuracy (Ala-Fossi and Lax 2016).

Drawing on the concept of the platformisation of communication, this study delves into major challenges and policies related to the sustainability of PSM in the platform era by conducting a comparative analysis of the digital ventures and practices implemented by the PSM organisations in Britain, Denmark, and Greece. Although the focus of this study is on three countries and their respective PSBs (BBC, DR, and ERT), the conceptual application of interpreting their sustainability is designed to be applicable in other media environments as well. The specific media organisations were selected as ideal for the research sample, representing three different cases of the audio-visual landscape in Europe in terms of the evolution of public service tradition in broadcasting. The research draws upon qualitative-thematic analysis of policy documents and semi-structured interviews, conducted with key executives of the PSM organisations comprising the research sample.

2. Platformisation and TV Transformation

The global media landscape has undergone a notable transformation, manifesting in a shift towards a novel operational milieu characterised by the pervasive influence of digital platforms. This transition has exerted a profound impact on the cultivation of cultural, economic, and political spheres. At the same time, automated processes govern the operation of the media outlets by setting in force chatbots and algorithmic systems when offering content to digital users (Hutchinson and Sørensen 2021). From the consumption perspective, new digital ventures—such as catch-up or on-demand platforms—permit media users to watch audio-visual content at their own convenience (Rodríguez-Fernández et al. 2018), while social media platforms' use aims at shaping interactive communication between the public and the media organisations (van Dijck and Poell 2015).

These transformations have been framed by the progression of internet streaming technology, affecting the whole range of the entertainment and media sectors. As a result, the contemporary environment in which PSM offer their services is governed by "digital intermediary processes", the adoption of which does not negate their traditional mission focusing on innovative, diverse content of universal access. Nevertheless, the widespread rise of digital platforms, providing over-the-top (OTT) services, intensifies the fluidity of the communication field by raising a conflict of interest between traditional broadcasters, investing in new ventures, and large multinational communications groups offering their audio-visual content based on a globalised approach to audiences' preferences.

In Europe, streaming services experienced a significant surge at the start of the last decade, with media consumers in 2020 markedly increasing their online content consumption, indicating a clear demand for entertainment provided through the internet services. This resulted in continuing changes regarding the consumption habits of audiences in parallel with a reorganisation of media players' and tech giants' priorities, placing streaming services at the centre of their business strategies. This implies a context of far-reaching shifts taking place in the European audio-visual market, reflected in the relevant data: in a 10-year period, from 2010 to 2020, the OTT SVOD market saw an increase in subscriptions by over 140 million (from 300.000 in 2010 to 140.7 million in 2020) (European Audiovisual Observatory 2020/2021, p. 51). This trend entails a new pattern of fierce competition taking place between global, national, and local streaming players, resulting in the erosion of linear TV viewing due to the rising popularity of subscription video-on-demand (SVOD) services. In effect, within the EU28, since the middle of the previous decade (2015–2019), the relevant data revealed a continuous decrease of the average daily linear television viewing (by 6%). In the same period, a decline was also recorded in the audience shares (on average by 1.7%) regarding the PSB field, where the average audience share losses amounted to 3% (European Audiovisual Observatory 2020/2021, p. 28).

On the other hand, the penetration of OTT/IPTV services in European households shows a particular increase. Among the countries that stand out in the adoption of such a trend are Germany and Ireland (from the north-western region of Europe), as well as Malta, Turkey, Greece, and Italy (from the southern region of Europe). In the Nordic region, the increase is moderate but in line with the changes taking place in terms of the audio-visual content consumption dictated by the platform era (Table 1).

Table 1. OTT/IPTV (households, in thousands).

	Country	2006	2010	2015	2019	Change % (2019/2015)
North-Western Region	Austria	9	151	269	324	+20.45
	Belgium	137	839	1.414	1.630	+15.28
	Germany	3	1.233	1.720	2.659	+54.59
	Ireland	NA	NA	45	75	+66.67
	Luxembourg	NA	14	53	73	+37.74
	The Netherlands	NA	302	2.014	2.421	+20.21
	UK	NA	583	2.884	3.003	+4.17
Nordic Region	Denmark	4	218	433	548	+4.2
	Finland	70	170	380	467	+2.0
	Norway	60	225	502	650	−4.7
	Sweden	52	532	952	1.338	+4.3
Southern Region	Cyprus	21	62	81	91	+12.3
	France	4.627	12.177	17.441	19.060	+9.3
	Greece	NA	55	75	208	+177.3
	Italy	201	651	76	208	+173.6
	Malta	NA	NA	19	57	+200
	Portugal	1	648	1.518	2.098	+38.2
	Spain	398	858	2.896	4.237	+46.3
	Turkey	NA	NA	533	1.497	+180.8

Sources: Ampere Analysis, OBS in EAO 2020 Yearbook, compilation in the context of the Eumeplat programme, in Papathanassopoulos et al. (2023, p. 57).

During 2015–2019, in all European countries, SVOD services were characterised by increasing consumption trends reflected in the relevant revenues. In 2019, high revenues were observed even in small media markets, such as Denmark. The incremental flow of revenues between the years 2018 and 2019 is a feature shared by all European countries, with ten of them showing an increase of more than 50%. The media markets belonging to the Nordic region, compared to those of the other two regions (north-western region and southern region), showed moderate spending growth, whereas in the southern region, the upward trend was impressive in almost all media environments (Table 2).

Against this backdrop of a shifting audio-visual field, PSM organisations counteract by producing and distributing content that harmonises with the digital and social media field. This is exemplified by *Funk* in Germany, a video-on-demand service operated by ARD and ZDF, which has been described as a "content network" addressing young citizens aged 14–29, as well as by the multi-platform teen-drama series *Skam*, created by the public service broadcaster NRK. These are indicative innovative ventures of PSM in the online world, having provoked criticism of unfair competition by the commercial media operators (Benson et al. 2017). Such an aggressive reaction, however, does imply homogeneity of content between public and commercial television or a failure of PSM organisations to fulfil their remit (Sjøvaag et al. 2019).

This transformation of the media landscape has fostered the emergence of new content providers (Sørensen 2019; Hutchinson and Sørensen 2021, p. 62). Within this competitive environment, repositioning PSM becomes crucial and contingent upon several factors: the prioritisation of distribution models for television content, political backing for the public service broadcasting (PSB) system, and financial adequacy of PSM entities, alongside their reliance on commercial revenue, governmental support for domestic audio-visual production, market size, and linguistic considerations (D'Arma et al. 2021, p. 686).

Table 2. Consumer revenues for SVOD services (2015–2019), in millions of Euros.

	Country	2010	2015	2016	2017	2018	2019	Change % 2019/2018
North-Western Region	Austria	0.00	21.86	38.74	61.88	88.12	122.45	38.97%
	Belgium	0.00	13.61	28.92	47.85	81.57	125.51	53.86%
	Germany	5.94	365.42	586.97	860.17	1195.49	1603.54	34.13%
	Ireland	0.00	9.91	14.26	19.54	29.86	44.56	49.20%
	Luxembourg	0.00	0.61	1.44	2.45	4.21	6.57	55.86%
	The Netherlands	0.00	43.25	73.49	106.76	180.50	280.19	55.23%
	UK	1.49	633.09	936.22	1191.33	1474.43	1902.86	29.06%
Nordic Region	Denmark	3.99	81.47	118.03	178.96	252.09	330.46	31.09%
	Finland	0.00	38.25	63.30	87.84	122.15	160.89	31.71%
	Norway	19.14	131.80	168.51	219.37	275.37	334.19	21.36%
	Sweden	0.00	157.55	210.42	213.76	272.82	354.67	30.00%
Southern Region	Cyprus	1.49	0.00	0.39	1.12	1.92	3.10	61.17%
	France	0.00	114.00	185.91	274.42	414.40	676.15	63.16%
	Greece	0.00	0.00	4.73	13.41	21.71	33.80	55.66%
	Italy	0.08	63.66	108.50	172.17	309.12	579.65	87.52%
	Malta	0.00	0.00	0.24	0.71	1.29	2.15	67.46%
	Portugal	0.00	0.56	8.96	18.10	30.60	53.05	73.38%
	Spain	0.00	52.95	118.65	193.14	308.92	445.54	44.22%
	Turkey	0.00	19.30	37.77	76.09	143.38	229.03	59.73%

Source: European Audiovisual Observatory (2020/2021), compilation by the Eumeplat project.

3. Public Service Remit (PSR) versus Innovation in a Competitive Setting of New Challenges

In contemporary democracies, even though PSM organisations have proved important institutions of the wider cultural field, by consolidating "a national culture", at the same time, they are affected by features of expanded politicisation and governmental interference (Połońska and Beckett 2019, pp. 4–9). In this context, justifying their legitimacy has turned into a highly difficult task within conditions of fierce competition, coming not only from commercial terrestrial or cable TV operators but also from Internet TV organisations operating web-based and over-the-top digital platforms.

By and large, in the post-broadcast era, PSM organisations are at a critical crossroads: for sustainability purposes they are enforced to prioritise innovation policies and strategies, while at the same time they should keep on fulfilling their public service remit (PSR) by offering services corresponding to values such as universality, diversity, creativity, and innovation. Their attempt to be innovation hubs is considered to have been instigated by convergence, as well as by socio-technological changes (Direito-Rebollal and Donders 2022). Nevertheless, the digitalisation of television seems to have exacerbated the precarious operating conditions of PSM, with key challenges being their ability and entitlement to respond to the production of domestic content and participate in innovative services (Rodríguez-Castro et al. 2021, p. 175).

Although innovation can range across different levels of actions—technological innovation, provision of new content, new ways of interacting with the audience, and organisational innovation—recent studies have revealed that it is mostly oriented to the technological aspect of PSM's operational advances, for example, in the digital distribution of content, but setting aside the promotion of an active audience (Direito-Rebollal and Donders 2022). This drawback has been discussed by other studies as well, arguing that the audience's activity on PSM platforms is accompanied by challenges against a background of younger internet users who are traditionally unattracted by PSBs' services (Vanhaeght and Donders 2016, pp. 296–97).

Therefore, in this constantly changing communication field, the greatest challenge for PSM is to modernise their operational strategy, according to the latest standards of the online world. In essence, it is a challenge of transnational character, instigated by the emergence of non-domestic communication organisations (such as Google, Apple, Facebook, Amazon, and Netflix) with global momentum in conquering digital audio-visual markets (Kuhn 2021).

As PSM organisations go through a new phase of digital transformation, another great challenge concerns whether and how they can employ the big data services or algorithms in such a way as to bring about a significant impact on the media field. The question raised is whether the algorithmically personalised video-on-demand (VOD) offerings distort the role of PSM. According to Sørensen (2020, p. 92), these technologies of personalisation and data analysis disrupt the marketing strategy of PSM and pose several dilemmas. Particularly, their adoption changes their organisational model, affects their corporate identity, which has been carefully built based on traditional television programming strategies, and prompts them to create new types of channels or to shape a new relationship between digital users and corporate identity.

Simultaneously, the proliferation of digital technologies has substantially altered the framework within which journalism operates. The advent of new digital formats and methodologies for information extraction and interpretation has significantly influenced the daily practices of journalists. News media professionals are compelled to acquaint themselves with these evolving modalities to maintain the competitive edge and sustainability of the journalistic profession. The contemporary journalistic field is characterised by the availability of sophisticated digital tools facilitating high-calibre computational analyses, notwithstanding the inherent susceptibility of digital information to manipulation. Against this backdrop of digital metamorphosis, the imperative for public service journalism (PSJ) to delineate its distinctive attributes becomes increasingly pronounced.

4. Diversified Dynamics: The Case of BBC, DR, and ERT Broadcasters

In Europe, PSM have responded unevenly to the development of their online presence, with the aim of preserving their market position (D'Arma et al. 2021; Donders 2019). The countries incorporated in the research sample (Britain, Denmark, and Greece) represent dissimilar media markets in which the PSB system has displayed diversified attitudes towards the media industry's transformations (Table 3). They belong to three different clusters of media systems, considering either the historical–institutional approach to the media markets in North America and Western Europe, adopted by Hallin and Mancini (2004), or taking as a benchmark the newer typologies inspired by the digital revolution (Humprecht et al. 2022). Particularly, Denmark, as part of the "democratic–corporatist model", is informed by features revealing a low degree of political parallelism, a high degree of journalistic professionalism, and a strong role of the state in supporting and regulating the media field. In contrast, Greece, which belongs to the "polarised pluralist model", differs in commanding a lower degree of journalistic professionalism, lower levels of state support, strong state interventionism, and intensified political parallelism in a context of a weaker media market in which there are more media outlets than the media ecosystem can sustain. As for Britain, which is part of the "liberal media system", the market is characterised by intense differentiation between the quality and the mass press, various newspapers reflecting the divisions of party politics, although in a context of diminishing political parallelism, notable distinctions between the print and broadcast media regimes, a journalism field more oriented to fact-centred discourse, and a state playing a considerable role in developing the broadcasting system and media field overall (for more divergences regarding the contemporary conditions of the three media markets, see Table 3). Despite these divergences, all media markets of the research sample nowadays share the extreme pressure to which they are exposed coming from global technology giants, which considerably affects the media industry and journalism, causing an unprecedented context of fierce competition.

Table 3. Comparative features of media markets in Britain, Denmark, and Greece at the beginning of the 2020s.

	Britain	Denmark	Greece
PSM vs. commercial media position in media market	Strong public service and commercial broadcasters. PSBs dominate in news delivery, with BBC1 being the most used channel for news purposes.	Strong public service broadcasters and successful commercial media outlets.	Weak public service broadcasting corporation and strong commercial broadcasters in terms of audience ratings.
Financial pressures	Newspaper groups have been affected by the financial drop.	Commercial media have been afflicted by financial pressures.	All media outlets are still going through a difficult phase as result of the COVID-19 pandemic, but it is print media that has suffered the most.
Operational changes in PSM field	BBC has merged the domestic and world-oriented TV news channels under the pressures of inflation and increasing costs.	Reallocation of funding from linear channel DR1 to the digital news platform dr.dk, the audio platform DR Lyd, and the cross-media youth platform DR Ung.	ERT launched its own news webpage: ertnews.gr (February 2021), and a new 24 h thematic channel focusing on news (since March 2022 on a pilot basis and since September 2022 on a fully operational basis).
Trust levels in PSM system	Public service broadcasters (BBC, Channel 4, and ITV) are the most trusted news organisations.	DR News and TV2 Nyhederne (including TV2 News) rank high in trust levels compared to other media brands.	Slight increase in trust levels regarding ERT public service broadcaster (2023).
Trust levels in media overall	Lower trust levels for tabloid outlets and news brands oriented towards opinionated journalism.	High trust levels in news media and particularly in public service news.	A high proportion of the population (82%) declares medium or low/no trust in media (2022). Declining trust levels in news brands overall.
News consumption patterns	Increasing use of social media as news sources.	Slight decline in the use of TV, print media, and social media as news sources. Online platforms are the most used news sources, with podcast popularity being on the rise (2022). Public service media and commercial operators invest considerably in podcasts.	High use of social media as news sources in a highly fragmented digital market.
Media market particularity	A highly politicised mass circulation commercial national press and a PSB system headed by the BBC.	Part of the "Nordic welfare model" characterised by the central role of PSM and the considerable indirect and direct subsidies for privately owned media (printed and digital newspapers). Switch from financing public service media via a licence fee to taxation.	Large number of digital news media outlets in a fragmented news media ecosystem. Small market for printed news; however, with many national daily newspapers' titles in circulation.

Sources: For all countries: Newman et al. (2023). For Britain: Ofcom (2023); Moore and Ramsay (2021). For Greece: EBU (2022); Papathanassopoulos et al. (2021). For Denmark: Newman et al. (2022); Kristensen and Blach-Ørsten (2021).

5. BBC Broadcaster's Online Services Dynamics

Britain represents a hybrid media landscape in which the broadcasting sector is dominated by the BBC, having the role of the major content provider at the domestic level and commanding great resonance with the public (Moore and Ramsay 2021), particularly when it comes to news delivery (Ofcom 2023, p. 6). The BBC organisation's appeal is also reflected in the new platform environment since even among digital users who follow news organisations on social media, the public broadcaster's Facebook page is the most common news source (51% of UK Facebook users state that they follow the BBC's Facebook page; Ofcom 2023, p. 13). Overall, during the last years (2018–2023), TV (broadcast and VOD) in the UK remains the most used media type for citizens accessing the news (Figure 1).

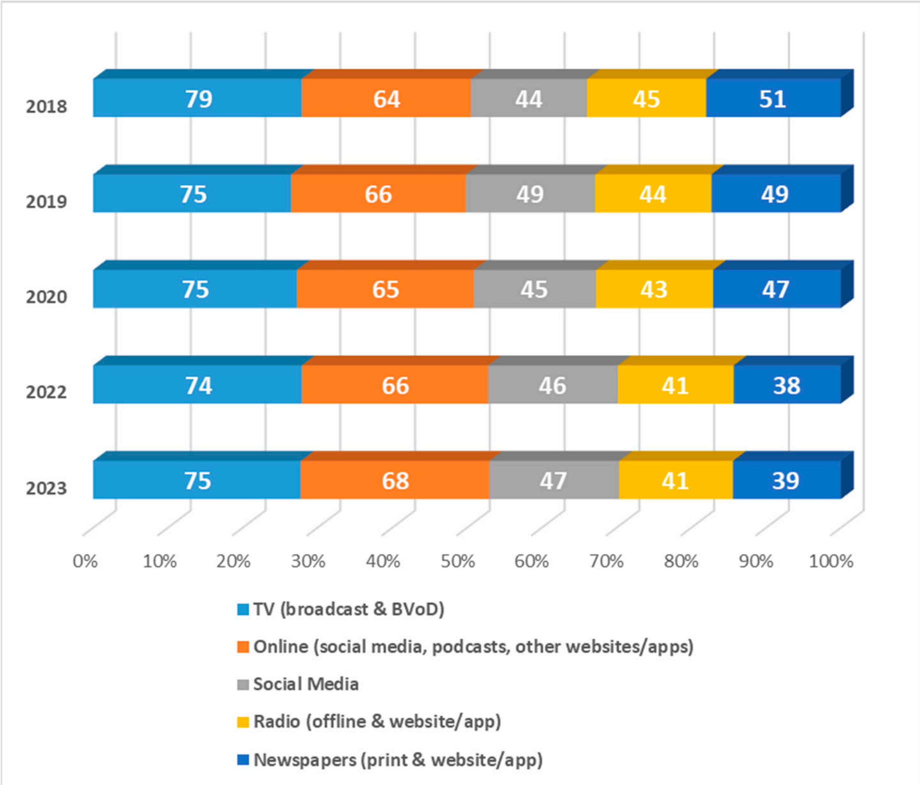

Figure 1. Use of main platforms for news in the UK (2018, 2019, 2020, 2022, and 2023, in %). Source: (Ofcom 2023).

In Britain, the internet has been adopted by the BBC management team as the broadcaster's third medium since the mid-1990s (Naylor et al. 2000). It is not a coincidence that the creation of the bbc.co.uk website in 1997 marked the broadcaster's decisive role in the transition of British society to the digital age, since this website has been hosting several innovative services, particularly in the period 1998–2006 (Moe 2008, p. 227). Starting in the mid-1990s, the BBC has since invested in many digital ventures, some of them of temporary in character (e.g., BBC Networking Club) or characterised by commercial aspects (e.g., the beeb.com website in cooperation with ICL-Fujitsu under the subsidiary BBC Worldwide, the BBC Shop website, and the online TV programme Guide Radio Times).

Along with the BBC Online News website, the BBCiPlayer platform, launched in 2007, is another typical venture demonstrating PSBs' tendency to take the lead in integrating online services into its operational status, making the internet a key means of fulfilling its mission and, actually, in a more active way compared to corresponding broadcasters in other countries, such as the Spanish RTVE (Medina-Laverón and Ojer-Goñi 2011). The BBC has been on a successful path in the field of news media, with the broadcaster's website being the fourth most popular in the country (after Google, YouTube, and Facebook) and the BBCiPlayer streaming service used by internet users more than any other another subscription-based platform (The Economist 2021). Consequently, it has been reasonably argued that since the 2000s, the BBC organisation has considerably contributed to the promotion of public policy by gaining a leading position in digital developments (Klontzas 2006, pp. 7–8).

During the second half of the previous decade (from 2015 to 2020), although annual spending of the BBC on television services was gradually decreasing, the opposite trend applied to online services, with investments reaching—at the end of the decade—the amount of 238 million British pounds (Statista 2021). This is a clear indication of the policy shift towards the digital domain at a time when overall spending dynamics on the part of the PSB were on a downward trend.

In its Annual Report and Accounts 2020/2021, the BBC executive team explained its commitment to extracting more value from online offers, achievable by making online ventures seem indispensable. The great strides being made are reflected in several operational features (Table 4): the record number of digital users visiting BBC News Online, the more than one billion plays of radio, music, and podcasts on BBC Sounds, the record-breaking programme streams on BBCiPlayer, as well as the effort of the broadcaster to improve search, recommendations, and access for audiences (BBC Group Annual Report and Accounts 2020/21, pp. 28–29, in Gov.uk 2021). In 2020/21, BBCiPlayer saw a 28% increase in streamed programs, and viewers increasingly turned to the platform for information and entertainment. Additionally, two years after its launch, BBC Sounds experienced significant growth due to creative executive measures.

Table 4. BBCiPlayer, BBC Sounds, and BBC News Online performance (2019–2021).

	2019/2020	2020/2021
BBCiPlayer accounts overall (average weekly accounts signing in to the platform)	9.1 million	10.7 million
BBCiPlayer under 35-year-olds' accounts (average weekly accounts signing in to the platform)	2.9 million	3.2 million
BBCiPlayer Streaming Time (average weekly hours played through iPlayer)	32.2 million hours	39.7 million hours
BBCiPlayer—% of the BBC TV viewing that is delivered by iPlayer (all audiences)	11%	12%
BBCiPlayer—% of the BBC TV viewing that is delivered by iPlayer (16–34 years old)	35%	37%
BBCiPlayer programme streams	-	6.1 billion programme streams
BBC Sounds—plays of radio, music, and podcasts	-	Close to 1.3 billion plays
BBC Sounds accounts overall (average weekly accounts using the service)	2.9 million	3.5 million
BBC Sounds accounts by 16–34 years old (average weekly accounts using the service)	500 thousand	572 thousand
BBC Sounds streaming time (average weekly hours played through Sounds)	8.9 million hours	10.9 million hours
BBC News online users (on average per week)	-	19 million online users

Source: BBC Group Annual Report and Accounts 2020/21, pp. 17 and 28–29 (in Gov.uk 2021).

In Britain, broadcast TV remains the type of medium mostly used by adult citizens for news consumption (70%), with on-demand news content from broadcasters having a small reach (5%). Nevertheless, British people show, at the same time, a great interest in the digital field for news purposes, with online sources proving the second most used environment for news consumption (68%), a trend that intensifies amongst members of the younger age group (83%, 16–24-year-old citizens) (Ofcom 2023, pp. 3–4). VOD services coming from the broadcasting field are gradually enhancing their popularity as news sources, reflecting a new audience habit that increases the reach of the TV news content overall (ibid., p. 6). The digital users selecting online sources for news purposes favour the BBC website over other digital platforms of leading tech companies (Ofcom 2023, p. 8).

Moreover, data regarding media use generally reveal that UK citizens are gradually investing more time in digital media at the expense of traditional media, since the average daily time spent with digital media is estimated to have increased by 99 min during the period 2016–2024 (from 273 to 372 min, Statista 2024a). Particularly among the digital users, the web content consumption habits that stand out are the overall internet use as well as TV viewing (broadcast and streaming, Statista 2024b), with digital video and digital music content (via downloading or streaming) being the most used media services, surpassing traditional TV and radio content consumption (Figure 2).

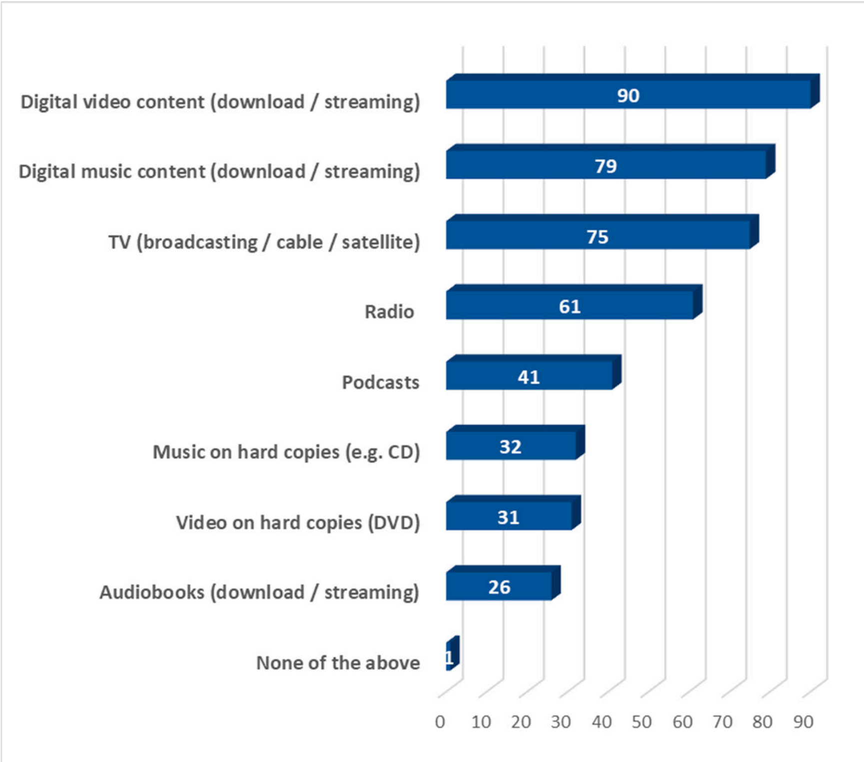

Figure 2. Most used media services in the UK as of December 2023 (in %). Source: (Statista 2024c).

6. DR Broadcaster's Turn to Online Services

Denmark is characterised by a tradition of public advocacy for public service broadcasters and by mostly foundation-owned newspapers, whose media professionals strive to serve the professional values of pluralism and impartiality. The arm's-length principle that informs the relationship between news media and power holders is regarded as a shield against the interventions of the political world in the editorial practices and decisions of PSM (Moe and Mjøs 2013), although the principle has lately been questioned, with increasing governmental control of information being flagged as an issue of concern (Blach-Ørsten et al. 2021, p. 171).

In Denmark, television is a dynamic medium, with half of Danish citizens' media consumption being devoted to it (in traditional format or via streaming services) (Christensen et al. 2020, p. 5). Within 2016–2020, the consumption of audio-visual services through the streaming services increased by 7% (Figure 3). In effect, watching TV in Denmark via streaming services has become a dominant trend, particularly for younger audiences of 15–35 years old. In the same period, 60% of Danes are streaming, while 84% of the Danish population resorts to online video watching, reflecting a relatively lower number of audience members engaged in this type of media content consumption compared to Norway and Sweden (Werliin 2016).

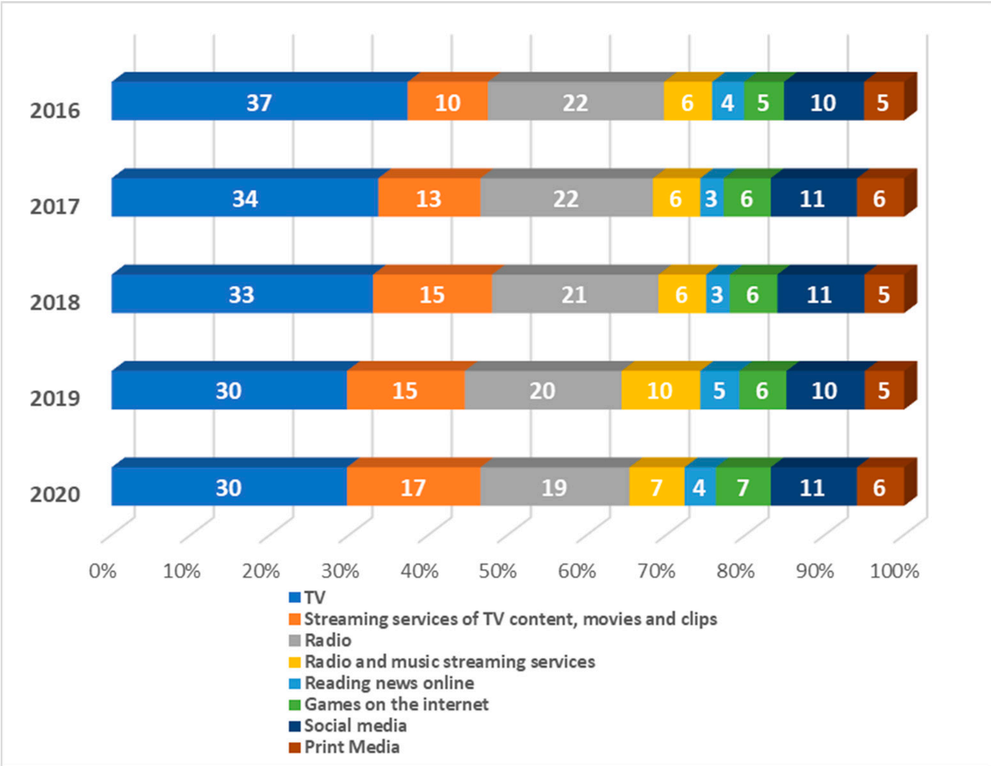

Figure 3. Distribution of media use in Denmark (2016–2020, in %). Source: Media Development (Christensen et al. 2020, p. 6).

The focus of the public service broadcasters on new media started after 2000, with the inclusion of online services in its mission and the possibility of being financed by the licence fee (Lund et al. 2010). These online services beneficially impacted the traditional public channels by strengthening their presence in the communication field. However, during the 2010s, the online presence of DR was criticised by newspaper publishers for distorting healthy competition due to the state funding received by the public broadcaster (Kammer 2017, p. 39). The DR organisation went online in news in 2007, when it launched the online news channel DR Update, whose distribution could be implemented via satellite, cable, and over-the-air as part of the digital terrestrial television. Apart from the six TV channels, in 2019, DR offered eight national and ten regional radio stations, as well as the internet platform dr.dk and several apps. To date, it is considered a dominant media operator of the broadcasting and online field (Borberg 2021, p. 6).

Since 2018, DR has rendered the VOD platform DRTV the main gate to all the available content. Its importance lies in that multimedia content is curated without putting aside the traditional values of PSB, offered to all internet users regardless of their preferences, an element ensuring its distinctiveness against commercial digital platforms. As Lassen and Sørensen (2021, p. 27) underline, the "VOD page acts more as a traditional agenda-setter than a free-choice interface for customer sovereignty 'on demand'. Users are nudged to see certain content via the positioning of content elements at the VOD page. The visual organisation of the DRTV VOD interface signals curation and editorial prioritisation". Therefore, the DR organisation is not forced to implement the process of personalised content offerings aimed at optimising each internet user's exposure to content of their liking, but the algorithms are employed to expose the audience to a larger portion of the available on-demand audio-visual content.

Trying to extend their services to the online field by adopting non-linear audio-visual content services, the PSBs in the Nordic countries are considered successful in defending their position and legitimacy. They have been adept at maintaining high levels of audience engagement with their programming, but the task of dealing with the increasing shift of audiences to the streaming services offered by several international on-demand content providers, such as Netflix and HBO, as well as attracting young audiences, remains a great challenge (Lundby et al. 2018, p. 86).

7. ERT Broadcaster and Its Streaming Services

In Greece, the hybrid TV of the Hellenic public service corporation (ERT) emerged in 2017, but initially it was hard to use and unpractical for the digital user both in terms of installation and platform navigation. In fact, ERT's entry into the field of hybrid television came with the establishment of the VOD platform ERTFLIX, created to meet the entertainment needs of audiences in the new, extraordinary "social reality" imposed by the COVID-19 pandemic. Its development was based on the model distribution architecture of Netflix and Amazon Prime, accompanied by diverse content: the typical option of on-demand movies was combined with weather news or educational issues from the Hellenic Ministries (Kamposou 2020).

The free OTT platform ERTFLIX, during the first two years of its operation, hosted more than 5000 video titles in an on-demand format allocated in more than 30 categories of content. ERTFLIX is the second most popular platform following Netflix. Its success is attributed to the original productions of the broadcaster (fiction series and other entertainment programmes) available to Greek internet users. It also places emphasis on sporting events (such as Formula 1, Super League, and the Basketball Champions League). ERTFLIX's rollout lagged behind other PSB systems in Europe. Not until May 2020 did it become universally accessible across devices after a digital platform overhaul. Traffic soared in the latter half of 2020, with over 23 million visits from June to December. While PCs, tablets, and mobiles remained popular for accessing the platform, there was a notable rise in users accessing content via television sets with the red button feature.

During our research, ERTFLIX had 90,000 registered users. Traffic on the platform fluctuated from July 2020 to April 2022 (Figures 4 and 5), boosted by the COVID-19 pandemic. Between July 2020 and January 2021, during lockdowns, user numbers steadily rose, surpassing 6.5 million by early 2021 and reaching over 7 million by May 2021. This growth is considered significant within the small media market of Greece. From June to September 2021, digital users declined, followed by fluctuating traffic from October 2021 to April 2022. Other digital initiatives include launching ertnews.gr in February 2021, a separate digital news portal, and introducing ERTNEWS, a 24 h thematic news channel, piloted in March 2022 and fully operational since September 2022.

In Greece, watching television on a TV set constitutes a dominant form of media use, mostly adopted by the audience every day or almost every day, a trend that was rising during 2022–2023 (from 78% to 83%), in accordance with the high average usage within EU27 (77% in 2022 and 74% in 2023; European Commission 2022, 2023). In contrast, watching TV on the internet is still a quite limited habit in terms of frequency of occurrence in Greece (Figure 6); however, within EU27, there are a few countries (e.g., Ireland, Sweden, and Malta) in which such media use was adopted by at least one-third of citizens on a daily or almost daily basis during 2022 (European Commission 2022, p. 13). Moreover, the relevant data revealed that when it comes to media content consumption, Greek citizens remain mostly attached to the traditional electronic media as opposed to the written press, whose reading seems to be declining. This was observed in the context of the EU27, where less than half of Europeans read the written press at least once a week (45% in 2023) and around one in four Europeans select podcasts at least once a week (26% in 2023; European Commission 2023, p. 8), tending to invest gradually more time in this media form.

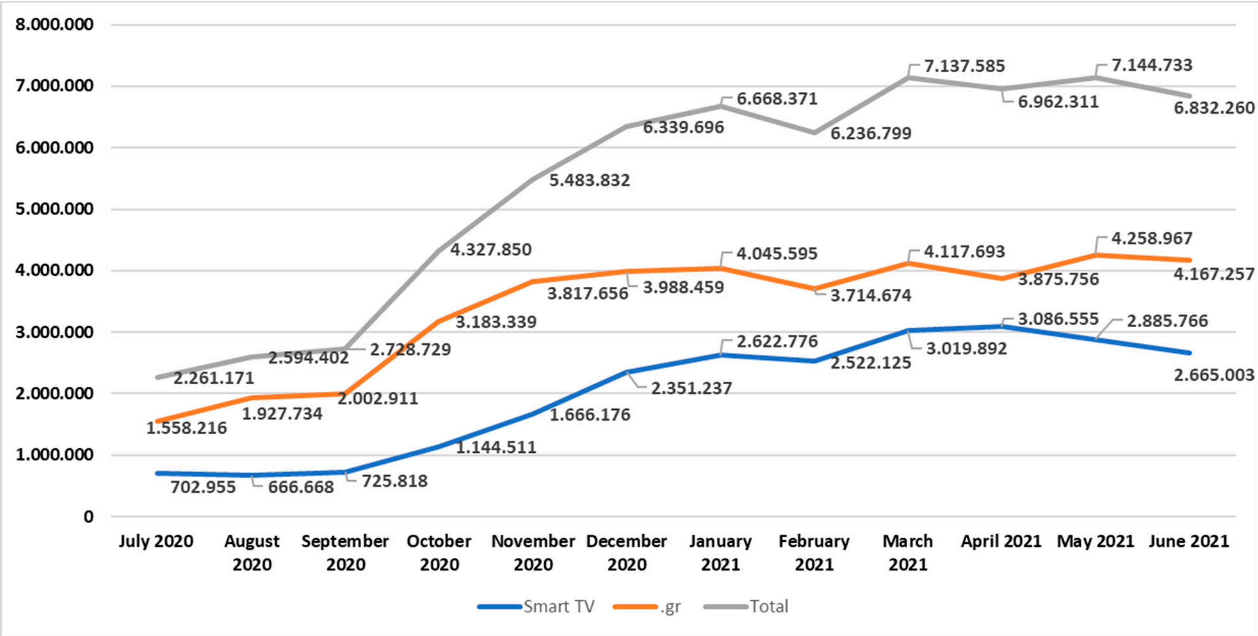

Figure 4. ERTFLIX monthly visits (July 2020–June 2021). Source: ERT public service broadcaster's internal archives.

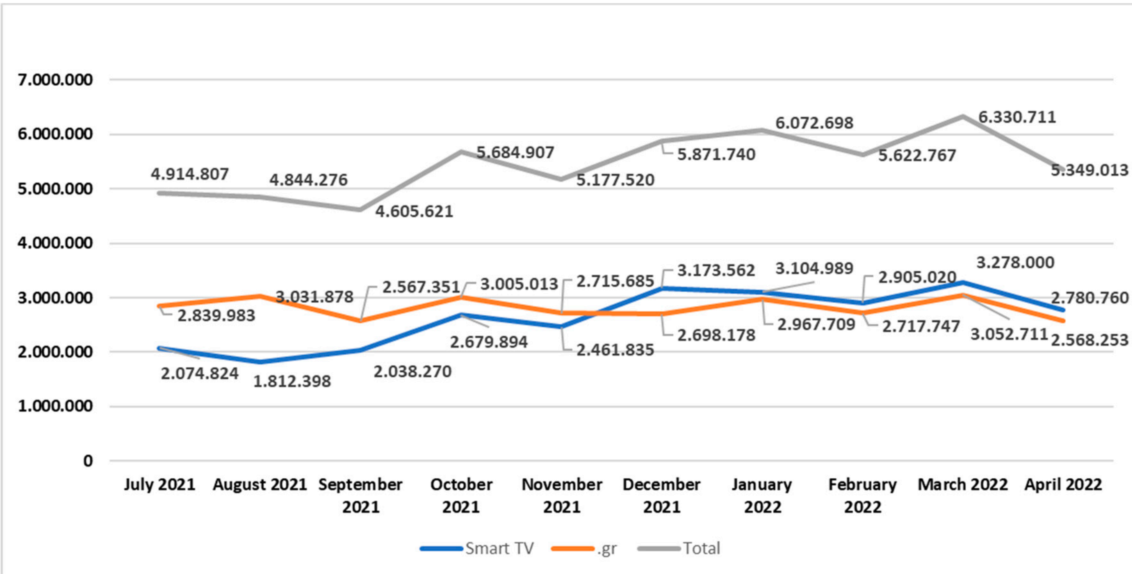

Figure 5. ERTFLIX monthly visits (July 2021–April 2022). Source: ERT public service broadcaster's internal archives.

Despite the differences mentioned above, the three media markets of the sample also share some similarities, resulting mainly from the development of information technologies that have affected the media systems (Humprecht et al. 2022). The most important lies in that news consumption habits have altered considerably since citizens are increasingly turning their attention to online platforms (including social media), rendering large technology platforms a new influential actor in news distribution (Figure 7; Newman et al. 2016, 2023). Moreover, in terms of audio-visual media use generally, traditional broadcasting output has become less important for consumption than OTT services offered through VOD platforms against a background of fragmented audiences.

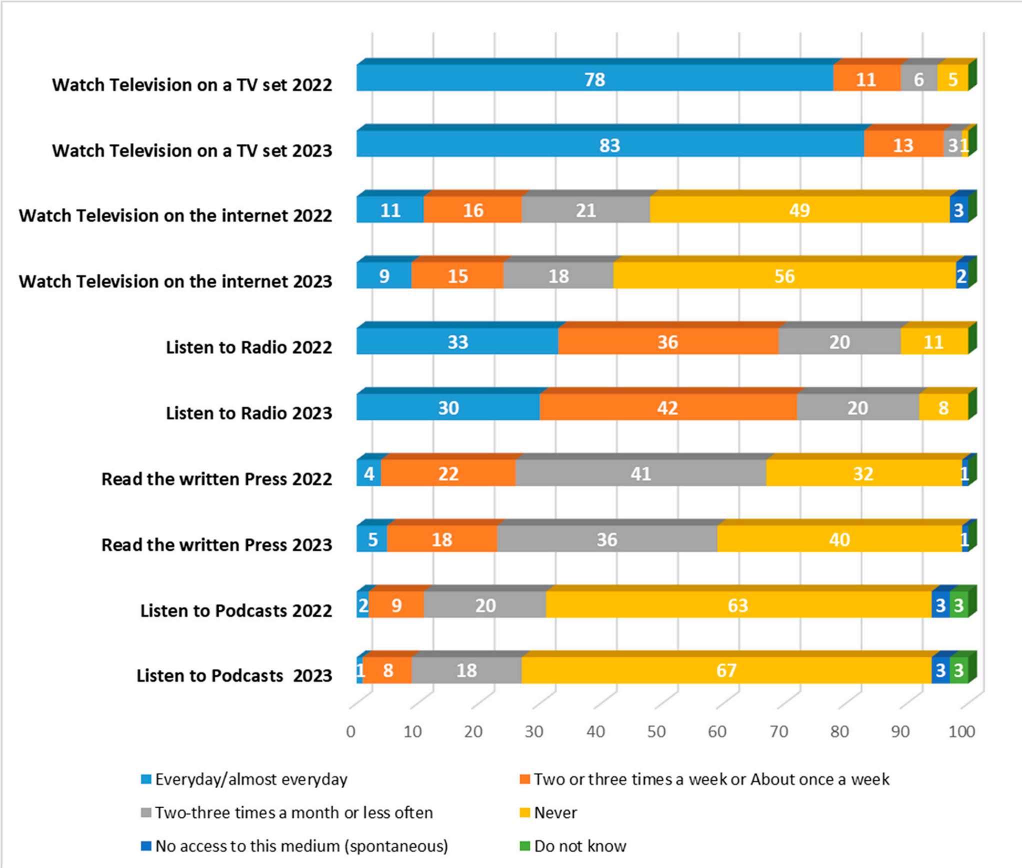

Figure 6. Media use in Greece per media type (2022 and 2023, January–February, in %). Source: Standard Eurobarometer 96—Winter 2021–2022 (European Commission 2022, January–February); Standard Eurobarometer 98—Winter 2022–2023 (European Commission 2023, January–February).

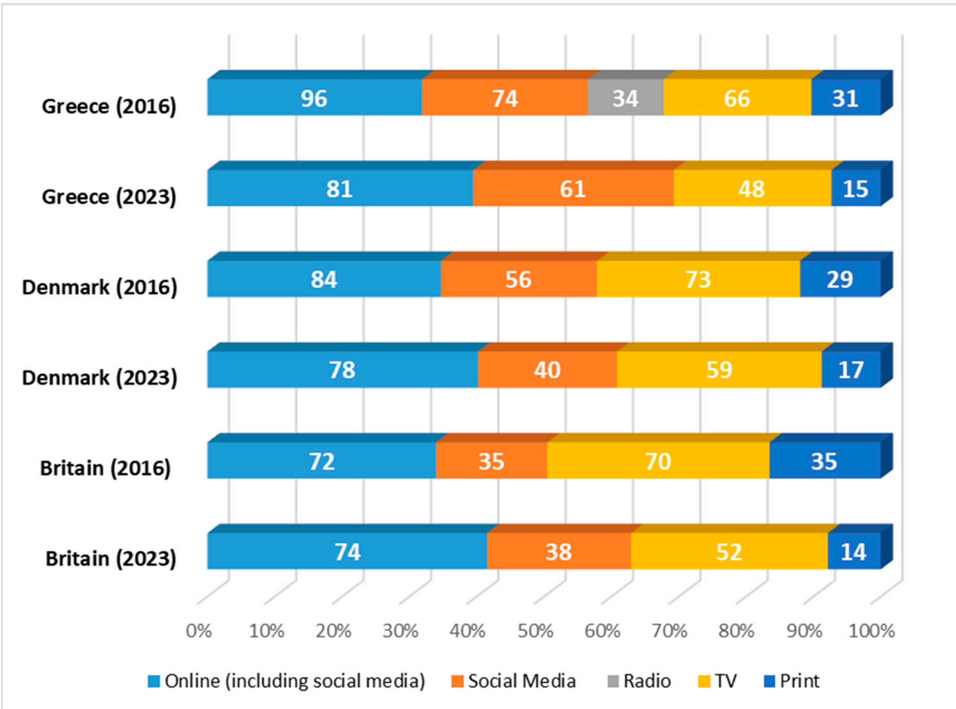

Figure 7. Source of news per media type in Greece, Denmark, and Britain (2016 and 2023, in %). Source: (Newman et al. 2016, 2023).

8. Research Questions and Methodology

Considering transformative shifts within the media landscape in the platform era, pertinent inquiries emerge. Of paramount significance is the inquiry into how PSM entities within media markets can effectively navigate the challenges posed by the contemporary digital milieu, safeguarding the vitality of public broadcasters amidst the prevailing tide of media platformisation. Within the theoretical framework, several questions arise, summarised as follows:

- What does multi-platform remit mean to each of the PSM organisations in Britain (BBC), Denmark (DR), and Greece (ERT)? Are the relevant multi-platform services part of an official management portfolio?
- Is there a long-term and effective policy defence of PSM organisations against a background of growing competition, thriving in a digital environment dominated by tech giants and OTT subscription-based models of television content distribution?
- What are the strengths and weaknesses of PSM organisations in Britain, Denmark, and Greece, perceived by their managerial executives, related to the sustainability of the PSM system?

To ascertain whether and to what extent the PSM entities have reassessed their public service mandate in the era of platformisation, we pursued a two-step approach. Initially, we scrutinised any revised policy documents from the past five years (2019–2024) delineating their current mission. Subsequently, we conducted semi-structured interviews with key managerial executives involved in shaping the policies of the PSM organisations under investigation. The questionnaire comprised fourteen inquiries designed to unveil the PSM's adaptability to an updated strategy tailored to the nuances of the platformised media landscape (see Appendix A). The responses obtained from the interviews, along with the content of the policy documents, underwent analysis employing thematic content analysis techniques (Braun and Clarke 2006). A total of six anonymised interviews were conducted with leading executives of the three public service media (PSM) organisations composing the research sample (BBC, DR, and ERT, i.e., two interviews from each media organisation), who had excellent knowledge and experience regarding the policy strategy and policy changes taking place in the PSB system of their country. After each interview, clarifications were requested to enrich the content with more precise arguments. Despite the limited number of interviews conducted, the pivotal roles held by the interviewees in crafting the organisations' policies afforded us distinct insights into how PSM entities are formulating their sustainability strategies.

9. Research Results

The research findings revealed that the leading executives engaged in the policy configuration of the PSM included in the research sample (BBC, DR, and ERT) advocate the idea of a new strategy based on the platformisation trends. Nonetheless, the approach to this shared objective differs among the three media bodies. This divergence reflects a common trend also confirmed by previous studies, underlining that the strategies developed by the PSBs in the online environment are heterogeneous in terms of maturity and target-setting (Donders 2019, p. 1012). Such a heterogenous approach may be influenced by the fact that the regulatory framework for online PSM services and the perceptions of "public value" vary between the European countries (Moe 2008).

10. The Value of Public Service Remit (PSR)

According to research findings, the value of public service remit (PSR) in the platform era is perceived based on a set of goals that are similar compared to the past, although they take an enhanced form. BBC is the only broadcaster of the sample in which the PSR is not defined in contrast to the role of the commercial counterparts but in the context of the whole media market. Trusted and quality content is at the heart of the organisation's operational status, setting as a key objective the "support of the whole media ecosystem". BBC—at an earlier stage than ERT and DR broadcasters—perceived its digital services as an essential aspect of its operational status, playing a central role in its long-term future. Its response to the highly competitive digital media field and to the shifting content consumption habits of audiences is multifaceted, establishing renewed values in its public service remit.

Among these, according to the latest BBC policy document, are the priorities of impartiality, high-impact content, extracting more from online, and building the BBC's commercial income. These values have been incorporated into its traditional mission, focusing on providing "a universal public service in the UK that informs, educates, and entertains all audiences, and that sustains the UK's creative economy, culture, and democracy", objectives framed by the "Value for All strategy" (BBC 2023, p. 4).

In contrast, in the case of DR and ERT broadcasters, the perception of PSR is quite different, with the PSM system being connected to a unique mission that cannot be served by other media organisations of a national or globalised profile. Specifically, according to ERT broadcaster's leading executive, PSM are assigned the task of providing high-quality content, counterbalancing the one-sided emphasis on entertainment content placed by the globalised platforms. As it is highlighted, against the commercial model of broadcasting, undermining any possibility of variety in the audio-visual flow, PSM are considered the ideal media operators, who can compensate for the lack of content regarding "culture, history, and society", framed by a type of "prestige, sensitivity, and objectivity" that is non-existent in commercial digital platforms.

Adopting similar arguments, the leading executive of DR broadcaster underscored a set of special ambitions pursued by PSM (support of democracy, contribution to national culture, and empowerment of communities within Denmark), whose implementation in the platform era presupposes the employment of new technological means, but at the same time these ambitions serve an important purpose: to fill the considerable gap left by the commercial media. As it was emphatically argued by the interviewee, the DR broadcaster, serving the clear remit of "bringing Danes together with concrete impact", seems to "fill in a significant gap compared to commercial broadcasting", a distinctive rationale that affects its policy configuration in the online environment.

Therefore, in the cases of Denmark and Greece, the market failure is perceived as the element that gives added value to the PSR of DR and ERT organisations, as opposed to the case of Britain, where the benefit of the whole media market is considered the essence of the BBC broadcaster's mission (Table 5).

Table 5. Key points of the strategic plan of ERT, BBC, and DR public service media in the platform era, according to the perceptions of the media organisations' leading executives.

	ERT	BBC	DR
The core of public service remit (PSR)	Informing, educating, and entertaining the citizens, ensuring pluralism and independent transmission of news, promoting audio-visual works of discourse and art, and ensuring universal access to PSM services.	To act in the public interest, serving all audiences by providing impartial, high-quality, and distinctive services, which inform, educate, and entertain. Audiences value the role that the PSBs play in connecting communities, providing trusted, independent, and entertaining news.	Bringing the Danes together with an impact.
The value of public service remit (PSR) in the platform era	PSM place emphasis on specialised content related to culture, history, and society based on their authority, sensitivity, and objectivity, as opposed to the primarily popular entertainment-oriented content of globalised platforms.	PSM connect communities and provide trusted, independent, and entertaining news, aimed at supporting the whole media ecosystem.	PSM have ambitions (supporting democracy, contributing to national culture, and strengthening national communities) that fill a considerable gap in the commercialised media market. The platform era dictates new means of ambitious implementation.

Table 5. *Cont.*

	ERT	BBC	DR
The strategy dictated by the platform era	Developing streaming platforms is required by PSM. ERT broadcaster adopted the international trends in TV technologies by developing and improving the digital platform ERTFLIX, available at no extra charge.	Collaboration between PSBs and the commercial sector based on different but distinct business/operational models aimed at benefits for the overall media industry.	Becoming fully digital is not merely an objective, but a necessary means of serving DR's public service ambitions. The strategy is heading towards the gradual abandonment of flow TV channels and linear radio services.
Principles of future PSM policy aimed at sustainability	Principles permitting complementarity of streaming platforms' services and linear TV provisions. Enhancement of quality level in audio-visual production.	Principles related to providing diversity of high-quality content, wide availability and universality of public service content, financial stability, and companies with the scale to reach audiences and negotiate with global platforms.	Principles related to strengthening legislation on how tech giants and digital platforms operate and ensuring brand attribution of content providers so that PSM content can be recognisable by the digital users. Principles ensuring full editorial independence of PSM and transparency in recommender algorithms on digital platforms.
Efficiency in extending public value to the online environment	Yes, based on the development of live-streaming content and SVOD services (ERTFLIX platform), a news portal (ertnews.gr), a sports-related news portal (ertsports.gr), and an audio-podcast platform (ertecho.gr).	Yes, based on SVOD services (BBCiPlayer platform), an audio app (BBC Sounds), and BBC news online (bbc.com/news).	Yes, based on several digital products: digital streaming platform (DRTV), digital radio and podcast platform (DRLYD), online news website and apps for children (dr.dk), and conversion of former flow channels to digital channels (DR3).
Regulation framework and sustainability of PSM	PSM have been incorporated in the priorities of the digital field's development plan.	Measures have been set out to maintain and reinforce PSM in the future (e.g., simpler, faster regulatory structure for the BBC, acknowledging the global digital marketplace and modernised regulation, ensuring prominence of PSM on all platforms).	Regulation framework is aligned with digital development and is supportive of PSM digitalisation.
Policy measures taken for a thriving PSM system	Collaboration with EBU for a digital development plan, transferring to the ERT efficient practices adopted by successful European PSM.	PSM organisations collectively fulfil statutory purposes and correspond to service-specific requirements, such as fulfilling quotas and standards in the content they deliver. In return, they receive regulatory benefits (access to spectrum, prominence on electronic progamme guides, and licence fee revenues for BBC).	A White Paper (June 2021) exposes the challenges to be addressed for a thriving PSM system. A new "tech giant office" is in progress by the Ministry of Culture, with the mission of policy development and regulation formation concerning tech giants.
Possible adaptation of PSM model of financing	In the new context of intensifying competition, new ways of increasing ERT's budget should be found, suggesting as options: (a) an increase in the advertising revenue and (b) a case-by-case fee increase in relation to the volume or type of content that the digital user wishes to have access to.	No, since stable public funding of the BBC broadcaster is essential, a system publicly supported and framed by accountability to the public for how the licence fee is spent is essential. The licence fee remains at its current price in 2023/2024, and a rise is expected in line with inflation.	Already implemented: DR cut down its budget by 12% in the period 2019–2020 based on a political decision of 2018 (the initial agreement was 20%, but it was cancelled in 2020, according to the interviewee). The media licence fee was abolished and replaced by funding from general taxation in 2018.
How the success of on-demand content from global tech giants has affected original domestic PSM programming	Since 2020, ERT has invested primarily in domestic scripted drama productions and secondarily in domestic non-scripted broadcasts after a decade of hiatus in audio-visual works.	Emergence of "super-inflation" trend in the media industry (in the form of increasing costs for productions). Against the huge expansion of the global SVOD providers, the UK market expanded by 20% in the last five years, with over-the-top media services having grown by 86%.	The rise in foreign content provided by tech giants poses a serious threat to Danish citizens' understanding of national culture, history, and language.

Source: Authors' research.

11. The Renewed Operational Strategy

The perception of the new operational strategy dictated by the platform era differs between the three PSM organisations of our sample. In the case of Britain, where the duopolistic nature of broadcasting permitted, in the past, a setting of constructive competition between the BBC and commercial television companies (Prosser 1992, p. 180), what is advocated by the management team—even in the platform era—is cooperation between PSBs and the commercial sector as a strategy conducive to the overall benefit of the media market. Likewise, the current strategy of the BBC still emphasises the existence of different but distinct business models between PSM and commercial media organisations as a key element of the strategic policy plan. Additionally, in terms of distribution, the BBC has set renewed targets in serving its mission and its public purposes, among which are universality (through content benefiting everyone), value for money (through enhancement of investment in UK content), personalisation (by offering content that is most relevant to audiences), distinctiveness (by providing high-quality, distinctive services), and reinvention (by maintaining relevance and appeal to young audiences) (BBC 2018).

The advancements observed in the utilisation of over-the-top (OTT) services by the Hellenic public service broadcaster (ERT) between 2021 and 2023 fail to offset the persistent deficiencies inherent within the media organisation. These enduring weaknesses include its entanglement with the government, dwindling audience ratings, suboptimal utilisation of human resources, and a pervasive sense of distrust among the public regarding the veracity of the information disseminated. Moreover, the delayed response of the organisation to the imperatives of technological evolution compounds these challenges, a fact acknowledged even by its senior management (ERT 2020, pp. 6–8). Despite the reaffirmation of its public service mandate, ERT endeavours to uphold essential societal values within Greece, encompassing the provision of information, education, and entertainment to citizens, the promotion of pluralism, the impartial transmission of information, and ensuring universal access to its services. However, it appears to inadequately address the evolving media landscape, particularly the proliferation of global OTT service providers crossing national boundaries.

Denmark, in contrast with Greece, presents a media system characterised by a strong public service tradition, high trust in news media, particularly in public service news media (Newman et al. 2023), and a government supportive of Danish media and cultural production (Kammer 2017; Kristensen and Blach-Ørsten 2021). These particularities constitute a beneficial context within which the DR broadcaster has cultivated the new digital strategy "Together with an Impact", framed by an upgraded public service remit that prompts the broadcaster to enhance the digitalised distribution of content and ensure that the Danes have access to online news. The result, as the leading executive highlighted, is that "the digital users of DR's content experience greater value than the flow users".

12. PSM Sustainability in the Platform Era

As in the past, PSM future sustainability seems to depend on the ability to stand out from the commercial media organisations and provide balanced responsiveness to the digital users' needs. Attaining this is dependent on several factors, not only related to adequate financial resources. As the research findings showcase, the PSM managerial executives associate the future survival of the media organisations they run both with principles related to public service content of high quality and universality and with a reinvigorated regulation, ensuring distinctiveness of PSM content vis-à-vis a transparent modus operandi of tech giants providing platform services.

The central idea in the BBC's sustainability policy seems to be transformation, with the view to remaining an up-to-date and creative organisation. This is reflected not only in digital field-related innovations but also in initiatives showing environmental crisis awareness (e.g., the BBC's plan on the goal of Net Zero by 2030, see BBC 2024). All these values and objectives are served considering the economic environment and the licence fee settlement, which dictate an operational model on a savings-based plan. The transformation strategy aims at safeguarding that the BBC is "digital-first, local and global, and a great place to work" (BBC 2023, p. 11).

Regarding the influence of the regulatory framework on the sustainability of PSM, only in the case of the DR broadcaster did the leading executive recognise the supportive role of existing regulations in digitalising PSM services. In the case of the ERT broadcaster, the media organisation was just described as an integral part of an overall ongoing development plan focusing on digitalisation, as opposed to the case of the BBC in which policy measures have been proposed by the media organisation itself, aimed at "modernising the regulatory framework to ensure PSBs are prominent and available on all major TV platforms", according to the leading executive.

As for the policy measures adopted with the view of PSM organisations' response to the digital revolution, the managerial teams of the three broadcasters described several priorities that point to divergent strategies among the three media organisations. The Hellenic public service corporation (ERT), by requesting the guidance of the EBU, transferring to ERT the best practices of successful European PSM, seems to a adopt a strategy of "isomorphism", which includes reliance on tested ventures that have borne fruit through a process of creative appropriation (Sehl and Cornia 2021).

In contrast, in the case of the BBC, policy measures are described as being in accordance with the regulatory framework applied in the PSB system, which is argued to need overhauling and adaptation, considering the audience interests of the platform era. According to the latest Consultation Report by Ofcom (2020, p. 37), "a new regulatory framework is necessary. It should continue to have audience interests at its heart, to support delivery across platforms, and be designed so it can readily adapt to market changes and be flexible enough to accommodate potentially broader reform of PSM delivery in the longer term". In the case of Britain, audience expectations are regarded as an integral part of a future framework for the PSM system, framed by certain features conducive to thriving organisations: diverse content of high quality that meets the needs and interests of diverse audiences, content that is widely available, and is easily found, companies with the scale to compete and reach audiences, and financial stability, permitting innovation (ibid., p. 35). This strategic approach for maximising audio-visual services' outcomes is closely related to the "tight coupling" strategy, in which the audience is included in product development of PSBs with a view to attaining alignment with the audience's expectations (Sehl and Cornia 2021).

As opposed to ERT and BBC broadcasters, the DR media organisation, under the pressures of the platform era and several politically decided cutbacks, seems to have diverted to a renewed public service remit, in the context of VOD services, dedicated to news, culture, and children/young people-oriented content, three programme types acknowledged as of great importance to the Danish society. This new plan comes in combination with the ambition of offering less content but under an enhanced focus on value ("value over volume" strategic response, see Lassen and Sørensen 2023). Overall, in the case of Denmark, according to the perception of the DR broadcaster's managerial executive, the policy response of PSM to the rise of a platform society is not an inward task but a generalised challenge addressing the whole society.

This was reflected in the White Paper of 2021, in which it was acknowledged that in the new digital order, characterised by the platform economy and the big tech companies' evolution, the implementation of a new regulation aimed at ensuring that "digitalisation interacts in the most positive way with democracy, economy, and culture" should be discussed and prioritised (Ministry of Industry, Business and Financial Affairs & Ministry of Culture 2021, p. 5). Denmark, compared to the other two media markets under investigation, stands out in that the new policy measures for a thriving PSM system are directly related to unprecedented initiatives (e.g., "tech giant office" in the Danish Ministry of Culture, a new Nordic think tank focusing on tech giants' influence on democracy, coordinated by the Nordic Minister for Culture), whose mission is to promote critical debates about how the challenges of the new platformised era can be effectively addressed for the benefit of democracy (Nordic Cooperation 2022).

13. The Significance of a Stable Funding Model

Platformisation has exerted pressures on the funding model of PSM primarily in the case of Denmark, where the DR broadcaster experienced cutbacks in its annual budget and the media licence fee was replaced by a tax-based funding system. In the case of the ERT, the funding model is argued to need strengthening through a process of advertising revenue increase and the public's participation in an ad-hoc basis fee increase, depending on the volume or type of content that the digital user wishes to have access to. In contrast, in the case of the BBC, the financial stability offered by the licence fee is considered, for the time being, indisputable and necessary. This argument is in accordance with previous research, arguing that the ideal answer of the PSBs to the new challenges can be presented through proven policies advocating proper funding of a PSB system that offers universally available content based on quality and original programming, coupled with impartial and trusted news (Iosifidis 2020).

14. Discussion and Conclusions

The present audio-visual landscape is shaped by the evolution of multi-platform content distribution networks, significantly impacting the television domain, and altering the traditional nexus between television content and fixed distribution channels through specific media entities. This paradigm shift has not only influenced broadcasters but also affected content creators and media regulators, navigating within what Boyle (2019) aptly describes as "a more fluid and intricate digital environment", prompting a reassessment of television's perception. The research findings underscored the acknowledgment by leading executives of public service media (PSM) of their capability to adeptly navigate the new platform-centric milieu, considering the burgeoning appeal of over-the-top (OTT) services in conjunction with the seamless operation of a 24 h digital news cycle.

The transition of PSM towards disseminating content across various digital platforms has unfolded amidst a backdrop of new challenges, foremost among them being the dominance of algorithms, profoundly influencing citizens' daily lives and choices, alongside the migration of young audiences to prevalent digital platforms, where content consumption occurs at their convenience (Fuchs 2021). For the managerial cadre of the BBC, the paramount challenge underlying the success of on-demand audio-visual content distributed by global SVOD providers resides in the shifting power dynamics concerning television operating systems. This sentiment is underscored by projections suggesting that by 2023, a significant proportion of new TV sets could feature operating systems controlled by global tech conglomerates, potentially impeding the availability or prominence of public service broadcasting (PSB) services unless legislative interventions are enacted.

The research findings revealed that the leading executives of the PSM, comprising the sample, are aware of the reshaping of broadcasting caused by the emergence of online TV and particularly of subscription video-on-demand (SVOD) platforms; however, they do not regard the new trends as completely threatening the sustainability of public service broadcasters (PSBs).

Despite its venerable legacy in the media landscape, the BBC appears committed to upholding the cooperative ethos historically characterising the relationship between public service and commercial broadcasters in the UK. While recognised as the primary purveyor of universal public-value content, the BBC is also viewed as an institution open to collaborations with diverse stakeholders in the communication industry, fostering a symbiotic relationship deemed beneficial for both the broadcaster and its audience.

In the case of DR, the imperative for the organisation to furnish content accessible to all, fostering active citizenship and reinforcing national culture and language, underscores the urgent need for advocacy aimed at enhancing the broadcaster's digital footprint. Emphasis is placed on fortifying the regulatory framework vis-à-vis technological behemoths and digital platforms, alongside other exigent measures safeguarding the visibility of public-value content originating from public service TV. These measures encompass the preservation of full editorial independence in content creation, mitigation of censorship by technological platforms, transparency in algorithms recommending content on digital platforms, provision of access to data pertaining to the usage of public-value content, and assurance of clear brand attribution for content originating from the PSB.

Despite discernible discrepancies in policy priorities, the representatives of the three PSBs espoused a shared conviction regarding the enduring operational purpose of the PSB system, albeit recognising the imperative for meticulous reconsideration and radical overhaul of the means to achieve it. This critical pursuit, while embracing a novel vision pertinent to the online milieu, does not entail an abrupt termination of the linear broadcasting model but advocates for a gradual alignment with the evolving landscape of non-linear television experiences.

The perennial issue of PSB sustainability, besieged by successive challenges ranging from commercialisation and digitalisation of communications to the enduring predicament of excessive politicisation and the recent phenomenon of communication platformisation, necessitates concerted measures to fortify the presence of PSM in the future media sphere. Proposed measures encompass ensuring the financial stability of media organisations through a universally funded BBC model, streamlining regulatory frameworks to acknowledge the global digital marketplace, and enacting legislation geared towards modernising regulatory frameworks to ensure the prominence and accessibility of PSBs across all major TV platforms.

In today's convergent media landscape, PSM entities must expeditiously embark on a digital transformation journey, wherein online non-linear services assume not only primacy in their mission but also mature into the cornerstone of their strategic action plans. However, this transformative endeavour, while strategically imperative, encounters challenges in smaller markets characterised by diminished trust in PSM entities. Consequently, the European Union is urged to facilitate market adaptation by addressing potential obstacles—legal, organisational, and financial—that impede the full-fledged establishment of PSM entities in the digital communication domain. A revision of the 'Protocol of Amsterdam' annexed to the EU Treaty of Amsterdam could serve as a dynamic catalyst for renewed support to PSBs.

In effect, the viability of PSM seems to hinge on adept adaptation to evolving market dynamics underpinned by judicious regulatory intervention—an imperative emphasised both by PSM executives and media policy scholars. Notably, the response of PSBs to burgeoning media industry challenges is envisaged through time-tested policies advocating for the proper funding of PSB systems, offering universally accessible content characterised by quality, original programming, and impartial, trusted news sources.

PSBs must undertake decisive measures to align production processes with the cultural ethos of digital platforms. From news dissemination to fictional narratives and educational programming, a concerted effort is warranted to revamp audience engagement strategies by crafting specialised content tailored for digital platforms, augmenting conventional production paradigms. The seminal role of PSM in society mandates the fusion of traditional values with innovative initiatives, facilitating their rejuvenation within the digital milieu. This necessitates a process of regeneration, predicated on agile responses to pressing communication needs underscored by contemporary events, such as the COVID-19 pandemic, which underscored the pivotal role of PSM as reliable information and entertainment conduits, concurrently fostering innovative digital initiatives to engage the public and deliver public-value services.

Recent scholarly discourse underscores the assertion that reinforcing "public service" ethos pivots not solely on technological innovation but prioritises innovation geared towards augmenting audience engagement (Direito-Rebollal and Donders 2022, p. 9). While extensive deliberations have examined the transition from PSB to PSM, future scholarly endeavours should pivot towards offering policy recommendations aimed at extending the public service remit of PSM entities to encompass online innovations, deeming them not just optional but indispensable components of their operational framework.

Author Contributions: Conceptualization, A.K.; methodology, A.K.; formal analysis, A.K.; investigation, A.K.; resources, S.P.; data curation, A.K.; writing—original draft preparation, A.K. and S.P.; writing—review and editing, A.K. and S.P.; visualization, A.K.; supervision, S.P.; project administration, S.P.; funding acquisition, S.P. All authors have read and agreed to the published version of the manuscript.

Funding: European Union's Horizon 2020: 101004488. This paper is part of a project that has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement No. 101004488. The information and views in this publication are those of the authors and do not necessarily reflect the official opinion of the European Union. Neither the European Union institutions nor bodies, nor any person acting on their behalf, may be held responsible for the use that may be made of the information contained herein.

Institutional Review Board Statement: The study was conducted in accordance with the obligations arising from the "Data Processing Agreement" among the partners and the regulation (EU) 2016/679, as well as the provisions of applicable law with regard to the processing of personal data, as defined by art. 4.1 GDPR, within all phases of the Eumeplat project.

Informed Consent Statement: Informed consent was obtained from all subjects involved in the study.

Data Availability Statement: The original contributions presented in the study are included in the article, further inquiries can be directed to the corresponding author/s. The EUMEPLAT project participates to the Open Research Data Pilot, implemented by the European Commission within the H2020 Framework; therefore, it commits to implementing the principles of Open science, and in particular the Open access, not only to publications but also to the data collected and/or created during the research process. Data availability also at: www.eumeplat.eu.

Conflicts of Interest: The authors declare no conflicts of interest.

Appendix A

Questionnaire use for the purposes of the research

- In your opinion, what is the value of public service media (PSM) in the digital age framed by an explosion of choice in terms of platforms and devices over which the audience members can watch television (e.g., VOD services offered by Netflix, Google, You Tube, Apple, Amazon, and Facebook)? Has the concept of PSM been rendered outdated?
- Do you think that the streaming platforms will eventually force the public service media (PSM) to adopt a type of platformisation strategy? If so, where does the difference lie between the public service broadcasters and the commercial broadcasters?
- Do you think that the future of broadcasting is related to the platformisation of communication and the abandonment of public service broadcasting (PSB) values? What are the main principles that should frame future policy reform in the field of public service media (PSM) to guarantee sustainability and prominence for the public service broadcasting (PSB) system?
- What are the main ventures of the national public service broadcaster within the digital field? How do you evaluate the response of the audience in your country? Overall, do you think that the national public service broadcaster has proved efficient in extending the creation of public value outside its designated space to the online environment at large?
- Does the regulatory framework in your country favour the evolution and sustainability of public service broadcasting (PSB) in the digital field, at the same time enabling the PSB system to meet its obligations?
- What are the policy measures already taken for a thriving PSB system in your country against a background of digital revolution?
- To what extent does the national public service broadcaster face pressures regarding its funding model and why? Does the funding system of the national public service broadcaster need to be adjusted and, if so, in what direction?

- To what extent has the success of on-demand audio-visual content providers affected the production of original domestic programming on the part of the public service broadcaster in your country?
- To what extent do you think that the public service broadcasters in your country adopt investigative journalism practices?
- Has data journalism been integrated into the newsroom of public service media (PSM) in your country and, if so, in what ways? How has data journalism adoption affected the work of national journalists?
- Given the technological and financial challenges and pressures faced by newsroom members, do you think that the decline in human resources of the public service broadcaster in your country resembles that of the commercial broadcasters?
- How is the public service broadcaster in your country coping with the challenges of social media? Has public service television profited from the possibilities of social media to engage new audiences without compromising public values?
- To what extent have the public service media (PSM) organisations in your country turned to big data with the aim of providing personalised services? Is there an emphasis on young audiences?
- In the aftermath of all the major changes instigated by the digital revolution, has the national public service broadcasting (PSB) remit developed and, if so, in what ways?

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