EDICIONES
COMPLUTENSE

New Strategies for Old Dilemmas: Unraveling how Spanish Regional Public Service Media Face the Platformization Process[1]

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Abstract. The current global media scenario, dominated by private transnational conglomerates that operate in a multiplatform context, brings the debate on the future of public service media (PSM) back to the fore. These operators are facing a redefinition of their operational strategy, not only in their linear broadcasting but also in the online space. Through in-depth interviews with the digitization managers, this article studied the case of Spanish regional PSM to analyze how these corporations are adapting to the new scenario through the development of their own video-on-demand (VoD) websites. The results show that these corporations are in their infancy in the platformization experience, operating without a sound strategy. In addition, this study identifies how the dilemmas historically faced by PSM have been reconverted into emerging identity, economic, and legitimacy challenges that require new strategies.
Keywords: Public service media; Platformization; Spanish television; Distribution strategies; Media policy

[es] Nuevas estrategias para viejos dilemas: Desentrañando cómo los medios de servicio público regionales españoles se enfrentan al proceso de plataformización

Resumen. El actual escenario mediático mundial, dominado por conglomerados transnacionales privados que operan en un contexto multiplataforma, posiciona en primer plano el debate sobre el futuro de los medios de comunicación de servicio público (PSM). Estos operadores se enfrentan a una redefinición de su estrategia operativa, no sólo en su difusión lineal sino también en el espacio *online*. A través de entrevistas en profundidad con los responsables de la digitalización, este artículo estudia el caso de los PSM regionales españoles para analizar cómo estas corporaciones se están adaptando al nuevo escenario a través del desarrollo de sus propios sitios web de vídeo bajo demanda (VoD). Los resultados muestran que estas corporaciones se encuentran en su fase inicial de plataformización, operando sin una estrategia sólida. Además, el estudio identifica cómo los dilemas a los que históricamente se han enfrentado los PSM se han reconvertido en nuevos retos de identidad, económicos y de legitimidad que requieren nuevas estrategias.
Palabras clave: Medios de comunicación de servicio público; Plataformización; Televisión española; Estrategias de distribución; Política de medios

Summary. 1. Introduction; 2. Literature Review; 3. Methodology; 4. Results; 5. Discussion and Conclusions; 6. References.

Cómo citar: Cañedo, A., Galletero-Campos, B., Centellas, D., & López-Cepeda, A.M. (2023). New Strategies for Old Dilemmas: Unraveling how Spanish Regional Public Service Media Face the Platformization Process. *Estudios sobre el Mensaje Periodístico, 29* (1), 67-77. https://dx.doi.org/10.5209/esmp.84534

1. Introduction

The debate about public service media (PSM) has re-emerged in the current media scenario, characterized by the hegemony of private transnational conglomerates operating in a multiplatform context (Fuchs & Unterberger, 2021; Martin, 2021; van Dijck *et al*., 2018). While not for revenue, these platforms compete directly with PSM for viewers' attention, especially regarding young audiences (Goyanes *et al*., 2021). In this context, there are recurrent debates about what services, products, benefits, or value PSM should provide and what models of funding and control are appropriate (Evens & Donders, 2018; Don-

ders, 2021; van Es & Poell, 2020). Although the debate is historic, platform capitalism (Srnicek, 2018) brings with it new challenges that have become an incipient academic line of great interest (Berry, 2020; D'Arma *et al*., 2021; Donders, 2019; Stollfuß, 2021).

Using the specific case of Spanish regional PSM, this article analyzes the strategies implemented by these operators to face the platformization process. The relevance of the study is justified by the fact that, globally, PSM are undergoing a process of updating that entails a reinvention based on their own contexts and capabilities. Thus, from a critical perspective, the aim is to identify the actions implemented, as well as the challenges faced, to characterize the process and improve its understanding in the case study at hand. As regional PSM operators are key guarantors of public service of proximity, we believe it is essential to protect and promote them in a media system dominated by transnational capital. For this purpose, we seek to provide a baseline diagnosis that sheds light for both policymakers and media practitioners to develop public policies and to encourage debate on the role of regional PSM in the global context.

2. Literature review

2.1. Public Service Media in the Platformization Process

For some time now, platforms have penetrated the heart of societies (van Dijck *et al*., 2018), affecting private companies, public institutions, and civil society (Evens & Donders, 2018; Nieborg & Poell, 2018). As noted by Couldry and Hepp (2017), platforms do not reflect the social; they produce the social structures in which we live. In this context, PSM have not escaped the process of platformization, being forced to implement gradual changes (D'Arma *et al*., 2021; Stollfuß, 2021; van Es & Poell, 2020). In Donders's (2019: 1024) words, "public broadcasters are well aware of the platformization and are working to adapt to it".

Afflicted for decades by a triple crisis of identity, finances, and legitimacy (Richeri, 1994; López-Olano, 2018), PSM are immersed in a complex process of redefining strategies, not only in their linear space but also in the online environment (Donders, 2019 & 2021; Goyanes *et al.,* 2021; Saurwein *et al*., 2019). Therefore, the theoretical debate on how PSM should cope with platformization is crucial, even though this process has been understood by academia as a natural evolution of PSM in their struggle for survival (Berry, 2020; Martin, 2021; van Es & Poell, 2020).

Platformization has brought with it a profound dispute over private versus public benefits in a society conducted mostly over the Internet (van Dijck *et al*., 2018). There seems to be widespread agreement that there are public values at stake, such as diversity, privacy, media literacy, and participation (D'Arma *et al*., 2021). Fuchs and Unterberger (2021) warned that the survival of PSM is in danger while pointing out some of their deficits: resistance to change, internal bureaucracy, declining funding, and the dominance of commercialization. Other authors also note the insufficient funds with which PSM operate (Saurwein *et al*., 2019), the dependence on budgets executed by public authorities (Dragomir, 2018), or the constant fall and fragmentation of their audiences (Gesto-Louro & Campos-Freire, 2020).

The new reality implies a change in the way of relating to the product, mediated by consumption through the platform. Several PSM corporations have changed their distribution strategies by signing specific distribution agreements with the dominant private platforms or even by developing coproduction strategies (D'Arma *et al*., 2021; Netflix, 03 September 2021). This action poses a risk: the possibility of diluting the PSM brand (Wayne, 2018; Martin, 2021). In this regard, some voices stress the importance of developing cooperative actions among PSM corporations (Raats, 2019; Martin, 2021). However, in this evolving scenario, Donders (2019) highlights that the usual dynamic of PSM is to pursue a trial-and-error strategy resulting from the absence of a plan.

Platformization also develops business models based on the tracking of personal information. Here, the dilemma for PSM is how to commoditize the audience without subjecting them to the control strategies derived from the data (Sørensen *et al*., 2020). Likewise, consumption based on personalized profiles built from the users' preferences bring with them the risk of limiting the media diet (van Dijck, 2014; Schwarz, 2016). Again, PSM have a further duty (Bodó, 2019; Hildén, 2021) and there are already discussions about the development of a public service algorithm (Van den Bulck & Moe, 2018; Sørensen, 2019).

Referring to the opportunities, user participation becomes a priority in PSM's platformization process (EBU, 2020; Marzal-Felici *et al*., 2021). This strategy deepens the knowledge of the public's needs and preferences, while in its creative dimension, it also involves the user in the generation of content, which stands out as an activation boom (Vaz-Álvarez *et al*., 2021). Moreover, the advantages to guarantee access for people with disabilities (i.e. subtitling and audio description) and the possibility of offering content in different languages are highlighted (Larrondo-Ureta, 2016).

2.2. The Case of Regional Public Service Media in Spain

The Spanish regional PSM system developed in the 1980s, when post-Franco dictatorship territorial decentralization was extended to television. The process set up independent public corporations in whose management the regions had a high degree of autonomy, which is comparable with the case of the German Länder (Garitaonandía, 1993). Despite its diversity, there are currently 13 PSM in the 17 existing regions in Spain (Table 1).

Table 1. Spanish Regional PSM

Corporation (name in Spanish / Abbreviation)	Region (name in Spanish)	First broadcasting
Euskal Irrati Telebista (EiTB)	País Vasco	1982
Corporació Catalana de Mitjans Audiovisuals (CCMA)	Cataluña	1983
Corporación Radio e Televisión de Galicia (CRTVG)	Galicia	1985
Radio y Televisión de Andalucía (RTVA)	Andalucía	1989
Corporació Valenciana de Mitjans de Comunicació (À Punt)	Comunidad Valenciana	2018[1]
Radio Televisión Madrid (RTVM)	Comunidad de Madrid	1989
Ente Público Radiotelevisión Canaria (RTVC)	Islas Canarias	2001
Ente Público de Radio y Televisión autonómico de Castilla-La Mancha (CMM)	Castilla-La Mancha	2001
Ens Públic de Radiotelevisió de les Illes Balears (IB3)	Islas Baleares	2005
Radiotelevisión del Principado de Asturias (RTPA)	Principado de Asturias	2005
Corporación Aragonesa de Radio y Televisión (CARTV)	Aragón	2005
Corporación Extremeña de Medios Audiovisuales (CEXMA)	Extremadura	2005
Radiotelevisión de la Región de Murcia (RTRM)	Región de Murcia	2006

[1] This corporation has its antecedent in Radiotelevisión Valenciana (RTVV), which began broadcasting in 1989 and ceased broadcasting, after various political attacks, in 2013.

The development of Spanish regional PSM has been carried out in different ways, depending on the context in which each of them was founded (Marzal-Felici, 2015). Thus, different models of management (direct and indirect), structure (outsourcing of activities or not), and linguistics (in Spanish, bilingual, or broadcasting entirely in the language of the territory) can be identified. However, they all have in common that their governance is directly linked to regional parliaments and their funding is mixed (regional subsidy, commercial activity income, and advertising income). These PSM generate alternative communication systems to the national one, conceiving themselves as an important backbone of their territories (Marzal-Felici, 2015; Campos-Freire, 2016) and highlight how their satellite signals allowed them to become a showcase of the region to the world (Peñafiel *et al.*, 2008). Moreover, they offer proximity content that is not available on national television and boost the regions' economies (Campos-Freire, 2016; Cañedo, 2022). However, they operate on low budgets that hinder their activity (Campos-Freire, 2016; Casado-del-Río *et al.*, 2016; Labio-Bernal *et al.*, 2018; Cañedo, 2019) and have problems attracting young audiences (Azurmendi *et al.*, 2019).

As for their platformization strategy, little research exists, although the prior literature has noted that Spanish regional PSM is experimenting innovation with some difficulties (Fernández-Quijada *et al.*, 2015; Izquierdo-Castillo & Miguel-de-Bustos, 2021; Mendieta-Bartolomé, 2022). Thus, all corporations have their own VoD websites, mostly providing only the content previously broadcasted on linear platforms (Gómez-Domínguez, 2016; Larrondo-Ureta, 2016). Nevertheless, some corporations have also launched specific websites for the dissemination of specialized content, as in the case of CMM Play (CMM, 16 October 2018) or G24.gal (CRTVG, 17 May 2019). Only RTVA launched an OTT platform in December 2021, Canal Sur Más (RTVA, 20 December 2021). Moreover, because of the high costs required for setting up their own independent platforms and the low level of innovation, many corporations have opted to establish alliances with dominant operators (Cañedo & Segovia, 2022).

In this scenario, based on the previous theoretical foundations, we pose the following research questions:

RQ1: What characterizes the platformization strategy adopted by Spanish regional PSM?
RQ2: What challenges do Spanish regional PSM face in the current context, and how do they overcome them?

3. Methodology

Firstly, a content analysis was applied on an exploratory basis to the VoD website of each regional PSM at the time we initiated the investigation. This methodological decision was taken as a first step in defining the questionnaires for the interviews with managers given the structural and operational diversity of the 13 corporations analyzed. It was understood that to ask the right questions and extract the maximum information from the interviewee, it was necessary to know the object we were working on. Thus, this analysis took as a sample the month of December 2020 and focused only on television content, given that most corporations are not developing their audio content and podcast platforms. The criteria used to define the sample, whose unit of analysis was the program, were as follows: a) included all programs that remained active for the entire month, b) excluded news content in daily rotation (newscasts) and one-off special rebroadcasts with no continuity in programming, and c) excluded programs whose viewing links were broken. A total of 2168 programs were analyzed (Table 2).

Table 2. Content Analysis Sample

Corporation	VoD website (URL)	Number of programs
EiTB	EiTB Televisión a la carta https://www.eitb.tv/es/	774
CCMA	TV3 A la carta https://www.ccma.cat/tv3/alacarta/	540
CRTVG	TVG Á carta http://www.crtvg.es/tvg/a-carta	204
RTVA	Canal Sur a la Carta https://www.canalsur.es/programas_tv.html	69
À Punt	À Punt a la carta https://apuntmedia.es/va/a-la-carta/programes	89
RTVM	Telemadrid A la carta https://www.telemadrid.es/programas/	39
RTVC	RTVC A la carta http://www.rtvc.es/television/multimedia.aspx	67
CMM	CMM a la carta https://www.cmmedia.es/programas/tv/	55
IB3	IB3 a la carta https://ib3.org/carta	41
RTPA	TPA A la carta https://www.rtpa.es/tpa-alacarta	131
CARTV	Aragón TV A la carta http://alacarta.aragontelevision.es	79
CEXMA	Canal Extremadura A la carta https://www.canalextremadura.es/a-la-carta	30
RTRM	7TV a la carta http://7tvregiondemurcia.es/television-a-la-carta/	50

An analysis matrix was applied to each unit of analysis in which eight variables were defined (Table 3). While the qualitative coding was mostly open, two variables were coded following an already-defined value scale. In the case of the origin of the content, the scale was defined according to the principle of proximity, where the closest was the regional value and the least close was the international value. Regarding the genre of the programs, the Euromonitor typology (Prado & Delgado, 2011) was applied. Each form was coded and analyzed by hand to recognize errors more easily and to become familiar with the data.

Table 3. Content Analysis Form

	Variable	Value
1	Release Date	Year of release
2	Production company	Name
		Head office: City
3	Origin	Regional / National / International / Mixed
4	Cooperation (coproduction)	Yes / No
5	Genre	Informative / Info Show / Show / Contest / Sports / Fiction / Educational / Juveniles / Children / Religious / Various
6	Language	Audio 1
		Audio 2
		Subtitle 1
		Subtitle 2
7	Accessibility	Audio describing: Yes / No
		Subtitling: Yes / No
8	Age rating system	Yes / No

Second, 13 in-depth interviews were conducted with managers in each corporation (Table 4). The interviewees occupy different levels of hierarchical responsibility in accordance with the structural particularities of each PSM, but in all cases their work was related to the platformization process. All the interviews took place between April and September 2021 and were conducted via video call. In general, the interviews lasted between 45 and 60 minutes and were digitally recorded and transcribed verbatim.

Table 4. Managers Interviewed

Manager	Corporation	Job Title (at the time of the interview)
Iñaki Gurrutxaga	EiTB	Head of Digital Content
Jordi Salvat	CCMA	Managing Digital Editor TV and Culture
Alba Mancebo	CRTVG	Head of Audiovisual Extension
Juan Manuel Blanco	RTVA	Head of Canal Sur Media
Anna Peña	À Punt	Chief Content Officer À Punt Mèdia
Aránzazu Segura	RTVM	Multimedia Coordinator

Manager	Corporation	Job Title (at the time of the interview)
Francisco Moreno	RTVC	Chief Executive Officer
Isaías Blázquez	CMM	Digital Content Director
María José García	IB3	Communication Manager
Francisco G. Orejas	RTPA	Chief Executive Officer
Germán Sanz	CARTV	Production and Broadcasting Manager
Luis Miguel López	CEXMA	Chief Content Officer
Miguel Margineda	RTRM	Digital Manager

The guided interview comprised 24 main questions divided into five sections, in each of which prior knowledge of each corporation's VoD website allowed for maximum information to be obtained from the answers. The first part concerned the management of VoD websites: how has the process of adaptation been to the multiplatform context, and what are the advantages and disadvantages of multiplatform distribution for PSM. Special emphasis was placed on trying to answer the question of whether the new environment was an opportunity to legitimize PSM. The second part focused on programming policies to identify the criteria for the configuration of the catalogs (release and production policy, frequency of update, time of permanence, public values, and broadcast rights). The third part pivoted around funding to understand in what way it was possible to face the new reality with the existing budgets. The fourth part dealt with how the corporation ensured accessibility from a dual viewpoint, geographically, and for people with special needs. In this sense, the questions referred to audio description or subtitling and to the provision of content in several languages or for specific targets (i.e., children or juveniles). Finally, questions were asked about audiences in terms of data and consumption patterns, but also as a comparative balance with linear broadcasting.

4. Results

4.1. Configurating the catalog: lively and diverse but poor accessibility

The platformization process of the Spanish Regional PSM is still in its infancy but immersed in a key moment in which corporations are defining their digital strategy: À Punt launched a new site in March 2021 (Anna Peña); RTVC aims to implement a new on-demand content structure in 2022 (Francisco Moreno); CCMA is assessing whether the VoD website is moving toward its own brand (Jordi Salvat), and RTVA just launched its OTT platform. In Aránzazu Segura's words: "We are experiencing an internal process of the brand's digital transformation and thinking about increasing our own audiovisual production for screening on the web." An action shared with other PSM who also consider the in-house production for the digital offer a commitment to the digitization process.

In this regard, the programming policy adopted by all PSM is to offer on-demand everything that comes from linear broadcasting and which rights they own (i.e., mainly in-house productions), primarily because "DTT continues to be our great broadcasting space" (Jordi Salvat). Accordingly, the exploratory content analysis of the catalogs evidences that these websites are showcases of regional audiovisual production around the world. The most obvious cases are the Canarias and Murcian websites, where all the VoD content is produced in the region, followed by Telemadrid, on which this type of content makes up 97.44% of the catalog. Conversely, CMM barely exceeds the 60% threshold, which shows the disparity in programming criteria between operators. It is noteworthy that only four of the catalogs show international productions, in all cases very little. This is linked to the negotiation of broadcasting rights, which has not traditionally included online space. Relevant to this, our interviewees agreed on the advantage of platformization: "There has been a giant step forward from a legal point of view. Nowadays, every contract has the issue of digital rights associated with it" (Aránzazu Segura).

Regarding the genres, the data analysis indicates a predominance of the 'Info Show' and 'Information' macro genres. Both macro genres account for more than 57% of the total offering, corroborating the importance of information in the programming policies of the Spanish regional PSM. Isaías Blázquez confirms that, linked to their public service mission, information is "the spinal cord of day-to-day life on our television". In the same vein, Alba Mancebo explains that they "are especially sensitive to public service content because that's what people come looking for in our brand". However, this content is subject to limited commercial shelf life on the VoD website due to its topical nature.

Fiction, although very distant, is the next dominant macro genre (8.46%), reaching high levels of presence in the Balearic Islands, Catalonia, and Galicia, where there is a high commitment to fiction content produced in the regional languages. According to the managers, the presence of this genre on their websites is lower because they venture on its successful distribution on transnational platforms. Such is the case of the Galician series *O sabor das Margaridas*, broadcast through Netflix and in which distribution agreement the public television only had the rights to broadcast the geolocalized content for Galicia for one month (Alba Mancebo). Jordi Salvat

points out that "even though we have the rights, we sometimes choose to restrict them as a commercial strategy: for example, we geolocate fiction series in Spain while they are being sold to other countries".

On the other hand, there is hardly any religious or juvenile content. These macro genres barely reach the 1% threshold and are absent in eight and nine of the catalogs, respectively. Likewise, with children's content, only five of the analyzed catalogs offered it. Luis Miguel López links this to a branding issue since they conceived VoD websites as showcases of regional idiosyncrasies and do not produce children's content: "It does not make much sense to place foreign productions". However, there is a clear commitment in this regard in the case of CCMA (in line with the existence of its children's broadcasting channel).

The content analysis of the catalogs also showed a programmatic disparity in terms of volume. EiTB is the operator that offers the most content, with more than 30.2% programs compared to CCMA, the next one in terms of the volume offered. However, far from being positive, the amount of content makes the user experience difficult. As Francisco G. Orejas points out, it is important to make content available to the user, but also to maintain ease of access: "Too much information produces noise." Space limitations come into play here, as many of our interviewees highlighted. In this sense, how is the permanence of content in the catalogue decided? "The guideline is to keep everything and make temporary cleanups" (Francisco G. Orejas). As Juan Manuel Blanco corroborates, "no platform has watertight content; the guideline must be consistent and sensible with the sustainability of storage and the public service that we offer." In practice, pre-recorded productions have been maintained for years, although content linked to current events is frequently replaced.

At the audience level, interviewees agreed that on-demand viewing tends to mirror linear viewing. As stated by one manager: "I would like to tell you that the audience wants to watch different things, but that is not the case (Jordi Salvat)". Germane to this, our findings emphasize that the leading programs in terrestrial broadcasting also perform best in on-demand consumption: "linear and digital are communicating vessels" (Juan Manuel Blanco). Thus, respondents considered that on-demand viewing

was temporally linked to the time of linear broadcasting. However, in this general trend, there are exceptions mediated by the social audience: when a content "moves a lot in social media, it works much better in digital because it brings together many active people" (Juan Manuel Blanco). For this reason, some corporations already consider the transmedia message when conceiving their product.

Managers are also working on accessibility, which is still a pending task. Accessibility in VoD catalogs depends on the technical and budgetary capacities of each PSM, and most of them barely offer subtitled or audio-described content. RTVM is already working to incorporate the subtitling process in an automated way, and À Punt is currently testing it through a collaborative project with the University. However, in the latter case, the process becomes complicated because this media broadcast mainly in its minority regional language. On the whole, the trend is to replicate the subtitling and audio descriptions already done for linear broadcasting, which also means the absence of second alternative audios. As Luis Miguel López acknowledges, "we have a lot of room for improvement there". Likewise, regarding audio-described content, the content analysis shows its scarce implementation; only in the case of Murcian is a section of audio-described programs located on the website, all of them recently produced.

4.2. Facing the challenges: New strategies for old dilemmas

Far from solving them, our findings emphasize how PSM's platformization highlights historical challenges, providing several examples of their nature. An interpretation of the testimonials enabled us to distinguish between three categories of challenges according to the second research question we are asking: identity, economics, and legitimacy (Table 5). First, identity challenges seek to answer the question of who these PSM are in the platformization context. Second, economic challenges focus on monetizing the new platform space. Finally, legitimacy challenges allude to how these media want the public to recognize their social contribution. According to our evidence, all three challenges are equally important.

Table 5. Challenges Facing the Spanish Regional PSM in the Platformization Process

Type	Questioning	Line of Action
Identity	Who are we?	Looking for Quality and Differential Value
		(Production and Distribution Level)
		Rethinking Structures and Workers' Profiles
Economic	How do we monetize the platform environment?	Rethinking Funding System
		Balancing Visibility and Privacy
Legitimacy	What do we want to contribute to society?	Conserving Cultural Heritage
		Ensuring Social Cohesion
		Boosting Audiovisual Regional Production

4.2.A. Identity Challenges

The first challenge identified has to do with the type of VoD content offered. A first minority tendency toward the dissolution of the thin red line as suppliers of both radio or television content is detected here since only three PSM offer both types of content indistinctly on the same site, while the rest maintain a separate space for each. Thereby, Anna Peña refers to "public communication ecosystems". This new paradigm involves distinct lines of action.

First, Spanish regional PSM consider themselves to be "generators of content" (María José García), in line with their historical tradition. Germane to this, the online environment has transcended the initial function of serving just as VoD catalogs, and these PSM are developing alternative websites for streaming live content. However, there is no single model. For example, CARTV streams through thematic websites–Aragón Cultura, Aragón Noticias, Aragón Deporte–while CMM has developed CMM Play, a specific webspace where sports and cultural content that have no place in linear broadcasting are common. Isaías Blázquez refers "to a different concept that reaches young audiences through the creation of regional-specific public service content". In some cases, the opposite happens: content produced for the web is broadcast on linear TV. This is the case in the programs *Nauka* (EiTB) and *50 semeyes* (TPA). The most significant case is *69 raons* (À Punt), a program on affective sexual education that was started on the web, then broadcast on TV, and finally showed in secondary schools. This logic is also identified in the case of special commemorations, such as Science Week or Women's Day.

Second, most of the catalogs analyzed have become places of experimentation with less constrained production formats. As Jordi Salvat illustrates, "sometimes it serves to test programs or formats and other times to test production models". However, the volume of content specifically created for digital production is still low, as PSM are still very focused on linear production. In this sense, participants also pointed out as a challenge the difficulties of breaking with established work routines: "we must be able to create new workflows in a workforce that was once created for analog television" (Juan Manuel Blanco). Similarly, Alba Mancebo explains that "the high average age of the staff is a problem, not because they are not capable of doing new things but because they believe that young people are already there for that". In addition, there is agreement that platformization requires more hybrid relationships between departments and flexibility within the organizations.

4.2.B. Economic Challenges

At the economic level, the first challenge is related to the incompatibility between the slowness of management bureaucracy and the speed required by technological advances. As noted by Francisco Moreno: "the development of digital strategies requires the ability to move fast, but we are weighed down by administrative processes". Moreover, the managers identified the technological standards developed by transnational platforms as a problem because "the user gets used to very demanding standards" (Jordi Salvat). In this regard, Germán Sanz acknowledge that it is impossible to compete against the main players because "we can be only competitive at our level, which is the average level among Spanish regional PSM". Similarly, María José García complains that "our weakness is our technical and budgetary capacity. It is not possible to be competitive without money". Proof of this is that none of the media analyzed have a specific budget for developing their VoD catalogs.

There is also a challenge related to developing business models that guarantee online visibility without losing quality and respecting user privacy. In this regard, our evidence suggests that there is concern about online advertising and cautions related to the placement of the ads are identified. As an example, Miguel Margineda notes that "we have the same restrictions as any other website to place ads with the addition that, being a public media, we are affected by legislation and by public scrutiny".

Another active line of funding involves establishing co-production synergies with major transnational platforms. In this regard, our interviewees mentioned agreements with companies such as Netflix, HBO, Movistar, or Filmin. This trend, although still in the minority, entails risks that must be considered: "Platforms are playing harder when they are co-producers. They ask us to act as co-producers of a series, but they want to maintain exclusive digital distribution, as if digital were not a PSM business" (Jordi Salvat). Respondents agreed that external platforms detract from the ability to monetize content and can even dilute a brand. Nevertheless, Luis Miguel López explains that "regional producers want their product to be supported by these platforms and believe that showing their product through us makes it easier".

4.2.C. Legitimacy Challenges

The public value of PSM falls squarely within this third line of challenges. Our respondents share concerns about this, while they agree that the commitment to the building of regional communication spaces must be maintained in the platform space. As stated by Germán Sanz, "we totally fulfill our duty to make a thematic channel of Aragón". These thematic channels are intended to contribute to social cohesion and become part of the cultural heritage of the territory. In Iñaki Gurrutxaga's words:

> *When we launched EiTB a la carta, we thought that the video treasure that was our archive had to be made available to society. It is more than a simple consumption platform; it is a way of giving back to society what has been produced thanks to its funding.*

Thus, a few of the analyzed websites already offer an archive section while most are in the process of digitalizing their historical files: "We would like to recover and offer to the citizens all that documentary collection, which is the history of our region" (Aránzazu Segura). The challenge is space limitation, since "transcoding costs will force content purging policies" (Anna Peña). Another dimension comes into play here since this will require sound programming policies for these catalogs.

On the other hand, our respondents highlighted the already-mentioned promotion of the regional audiovisual industry and the configuration of cultural identity showcases to the world, two of the historical legitimizing elements of these PSM. Thereon, VoD websites replace, in a more economical way, the satellite channels as an international broadcaster of the regional character: "A humble television like ours does not even consider having an international channel, but we have it through the web" (Miguel Margineda). This idea is repeated among all the interviewees with operational VoD websites and goes even further in the case of RTVA with the launch of Canal Sur Más. As Juan Manuel Blanco states, "we conceive it as a digital repository of the regional audiovisual industry to visualize in a clearer way what RTVA does for the Andalusian audiovisual". In addition, the aforementioned agreements with transnational platforms also make this possible, not only making regional production visible but also the territory's own language. As exemplified by EITB: "one of our strategies is to guarantee the presence of content in Basque in external catalogs" (Iñaki Gurrutxaga).

5. Discussion and Conclusions

This article aimed to investigate how Spanish regional PSM face the current process of platformization affecting media corporations. Prior research has primarily focused on state-level PSM (Berry, 2020; D'Arma *et al*., 2021; Donders, 2019; Goyanes *et al*., 2021; Martin, 2021; Stollfuß, 2021; Schwarz; 2016; van Es & Poell, 2020), extensively delving into the practical changes undertaken by these media, understood as a natural evolution to survive. However, less attention has been paid to regional realities in which smaller corporations, with small budgets and their own regional characteristics, operate in the same market. Accordingly, the primary contribution of this study was to focus on these substate realities from a specific case study of the Spanish regional PSM. Based on a content analysis of their VoD websites and in-depth interviews with managers of these corporations, we provided two illustrative theoretical insights to this line of inquiry.

First, we characterized the platformization strategy adopted by the Spanish regional PSM as being in its infancy, where managers lack sound guidelines and operate by going with the flow on the premise that DTT remains its core business. However, our

findings illustrate that these corporations are at a crossroads where they must adapt within the limits of their possibilities. This result is consistent with existing research that understands PSM's platformization as a natural evolution in which performance pivots on a trial-and-error strategy (Berry, 2020; Donders, 2019; van Es & Poell, 2020). Moreover, our evidence also points out that there is a clear commitment to the platformization process, from a conception mainly linked to digital transformation. Thus, our findings emphasize how all PSM have integrated their VoD websites into their commercial activity, and some are already developing their own OTT platforms. However, the economic difficulties they are going through prevent the development of this action, which we consider key to position the proximity public service content in the global audiovisual offer. The first demand arises here: the commitment on the part of political decision-makers to guarantee sustainable budgets for Spanish regional PSM that allow the development of competitive actions based on long-term strategies. Investment is needed both for technological development and for the generation of human teams focused on innovation. As long as the dynamics are the result of working solely focused on the day-to-day, it will be highly complex for these corporations to occupy prominent positions in the current multiplatform context.

Meanwhile, our results first indicate that, following the European tendency (Donders, 2019), the VoD websites of Spanish regional PSM are mostly containers of content broadcast through linear television, with a high presence of in-house content focused on regional realities, especially in terms of information. Thus, we can confirm that these websites are configured as showcases of the regional reality to the world, fulfilling in a more economical way the functions previously assigned to satellite channels (Peñafiel *et al*., 2008). However, the presence of archival content is still scarce, and this should be one of the main lines of action to be undertaken in the future. Similarly, there is no attention paid to young audiences and children in the offering of these VoD catalogs, in line with an already existing concern in the literature (Azurmendi *et al*., 2019; EBU, 2020; Goyanes *et al*., 2021). Application accessibility is also a pending task, due to the little regulation in this area and the added difficulty of broadcasting in minority languages, which increases the costs of subtitling and audio description.

Moreover, the implementation of two strategic lines of action stands out as particularly positive in the Spanish regional PSM, both confirming that when it comes to managing production or distribution rights, platformization is already integrated into the negotiation. On the one hand, as previously identified in the theory (D'Arma *et al*., 2021), partnerships with hegemonic transnational platforms to co-produce or distribute their own fiction content are being normalized. This genre, less present on their own websites, finds a new form of exhibition in the catalogs of ex-

ternal platforms, which become another showcase for regional production, fulfilling the PSM's principle of guaranteeing diversity. The case of linguistically differentiated regions and its commitment to boosting the minority language are highlighted. For this reason, we believe that it is essential to update the regulation governing these PSM to contemplate these new avenues of collaboration that alter the classic role of PSM as exhibitors of external fiction to become producers of fiction externally exhibited. Undoubtedly, a relevant change in the paradigm. On the other hand, our empirical findings revealed that what succeeds in linear is what succeeds online. This result, counterintuitive to the idea that both audience composition and its mechanics differ in linear and digital spaces (Schwarz, 2016), brings with it a new emerging content development policy that includes the transmedia conception from the origin.

Our second contribution lies in the examination of the challenges currently faced by the Spanish regional PSM. Our findings identified three categories depending on their nature: (1) identity challenges, (2) economic challenges, and (3) legitimacy challenges. First, identity challenges are linked to the PSM's self-construction in the platformization process in terms of content offered and professional adaptation. These PSM see platformization as an option for developing production and distribution strategies in which their differential value (mostly related to proximity) and quality should permeate their programming with the main goal of becoming public communication ecosystems anchored in the territory. The trend, moreover, is to ensure double-track feedback between linear and digital content and to support a culture of experimentation. However, this would imply the organizational reconversion of PSM corporations, which is a complex task in highly bureaucratized and change-resistant work structures (Fuchs & Unterberger, 2021).

Second, economic challenges hinge not only on limited budgets and capacity for action but also on the uncertainty about emerging forms of monetization. The main line of action required is to look for alternative forms of funding that allow competing in the transnational platform market from a balanced position. This is a convoluted challenge as PSM corporations must face an online environment in which monetization through programmatic advertising has become normalized. In this regard, if the free offer is maintained, it is key to ensure visibility without violating the right to privacy of citizens that underlies the

PSM's mission duties (Bodó, 2019; Hildén, 2021). Thereon, the search for a PSM algorithm (Sørensen, 2019; Van den Bulck & Moe, 2018) becomes unavoidable. Another option is to implement payment systems in the online environment (subscription or pay-per-view). However, this solution could present resistance in its implementation since there is no tradition of direct payment for public service content in Spain.

Finally, legitimacy challenges relate to PSM's contribution to society. In this vein, the main action revolves around maintaining the structure of differentiated communication spaces in the global context. The aim is to guarantee social cohesion, both within and outside the region, to boost the regional audiovisual industries, and to convert its platforms into audiovisual archives conceived of as historical heritage. While the first two strategies are inherited from linear broadcasting (Campos-Freire, 2016; Cañedo, 2022; Marzal-Felici, 2015), the last line of action, exclusively linked to platformization, stands out as the main strategy to be developed. In this way, regional PSM open a new way of legitimizing their activity, which we believe will be essential in the not-too-distant future. The possibility for audiences to have access to the audiovisual heritage of a social community just one click away is a golden opportunity for PSM to vindicate its value as agents of territorial cohesion and builders of historical memory. Nonetheless, the cost of digitizing the archives and ensuring their proper online storage makes it difficult to do so with current performance budgets. Besides, as previously noted, it would also be necessary to rethink the labor structure. In this case, the documentalist's job position should expand its functions to be included in the process of designing and preparing the VoD catalogs.

In conclusion, our empirical findings reveal that there is still work to be done in the platformization process of Spanish regional PSM. Although the challenges identified were inherited from old dilemmas and are partially shared with those of the state-level PSM, the particularities of these corporations require new strategies, especially their promotion of regional characteristic-proximity information, commitment to the regional AV industry, defense of cultural and linguistic diversity, and heritage conservation. As a suggestion, future research may consider further exploring each of the lines of action identified as already initiated to elucidate the action strategy of regional PSM worldwide.

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