

Trends and Perspectives on Digital Platforms and Digital Television in Europe

Introduction

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Digital platforms are supporting a new universe of audiovisual production, distribution, and audience viewing, and they are now tightly integrated into many people's everyday lives. The changes in commercial and public service media business strategies demand the analysis of emerging trends and perspectives in the audiovisual landscape. The articles in this Special Section are selected from submissions to the International Association for Media and Communication Research (IAMCR) International Communication Section, and they include examinations of both the cultural and the political economy of the European audiovisual industry's operations and practices. These articles address the impacts of "platformization" and changing policies and regulation in the audiovisual industry, focusing on developments in the European Union and, nationally, in Spain and the UK. They highlight successful instances of adaptation to changing market conditions in the cases of television series production and public service media. They also call attention to how new cultural, political, and economic dynamics, regulations, and changes in the competitive environment in Europe are challenging the financial sustainability of local audiovisual content production and efforts to strengthen media plurality and diversity, as well as online public service media discoverability. This special issue signals a continuing need for research to monitor interactions between changing technologies for monetizing audience data, commercial business strategies, and the constraints and opportunities facing European commercial and public service media players.

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Much has happened in the audiovisual services industry since Manuel Castells (2009) outlined the rise of "mass self-communication" enabled by digital platforms as distinct from traditional mass

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communication (p. 55). The cultural and economic dynamics of digital platforms have brought new ways of producing and distributing audiovisual content with new economic arrangements and very speedy content distribution. They have been accompanied by new business strategies aimed at targeting audiovisual media platform users by monetizing audience data in both the commercial and public service media sectors. Audiences in the billions now distribute their viewing time between the "classic screen" and one or more digital platforms, even as traditional television remains a preferred medium for some audiences.

Our understanding of changes in the digital audiovisual industry needs to be updated, and this necessity is what motivated this Special Section. The scholars included in this issue bring a range of expertise to bear on the unfolding digital environment. The contributors are associated with the International Association of Media Communication and Research (IAMCR). In my role as head of IAMCR's International Communication Section, I selected articles authored by a cross section of scholars who study the cultural and economic operations and practices of the European audiovisual industry. This Special Section contributes insight into the impact of "platformization" and changing policies and regulations in the audiovisual industry, focusing on developments on the European Union level and at the national level in Spain and the UK.

The selected articles address how the concept of "digital" television needs to be updated in the face of "mass individualization" platform strategies and developments in both linear television and subscription video-on-demand (SVoD) services. In examining the changing roles of public and private broadcast operators in content production as well as in community television, the featured authors highlight shifts in regulation and competition policy frameworks and measures to address the financial sustainability of local or national audiovisual content production.

The first article in this section, "Denaturalizing Digital Platforms: Is Mass Individualization Here to Stay?" by Robin Mansell and Edward Steinmueller, examines how "mass individualization" or personalization strategies promoted by marketers are influencing data mining and similar practices. In the wake of "filter bubbles" and a troubling symbiosis of online extremist ideologies and antidemocratic practices, they discuss the need for radical change beyond current (Western) policy and regulatory measures if harm associated with datafication are to be mitigated and public values secured in our future digital world. They argue that current responses to asymmetrical relations between dominant platforms and their customers/citizens risk infringing on individuals' rights and freedoms, and they call attention to the need to denaturalize claims that mass-scale collection of individuals' data for commercial or public purposes is inevitable.

Karen Arriaza Ibarra and Celina Navarro's article on "The Success of Spanish Series on Traditional Television and SVoD Platforms" gives an overview of the domestic and international successes of audiovisual production in Southern Europe, especially with the rise of Spanish series. Two prominent examples, *The Ministry of Time* (Olivares & Olivares, 2015) and *Money Heist* (Pina, 2015), have proven to be international hits despite their different target audiences. Providing insight into the current state of audiovisual content production in Spain and drawing on interviews with the producers of both series, this article highlights the interplay between national and transnational contexts and how the traditional Spanish television industry has evolved and adjusted their operations in local and international markets in response to the main SVoD platforms.

Natascha Just focuses on the complex relationship between competition law and regulation, arguing that conceptually separating these approaches to the rise of dominant platforms is unhelpful. In her article, "Which is to Be Master? Competition Law or Regulation in Platform Markets?" she examines a shift away from an emphasis on liberalization and convergence with a bias against regulation and the enforcement of competition law in the media and communication sector, toward an increasing emphasis on competition law. She cautions against relying on these laws as the primary instrument to respond to the market dominance of platform companies, arguing that even a modernized competition policy framework is unlikely to serve as a panacea to deal with the new challenges of digitization.

A Special Section on digital platforms and digital television in Europe would be incomplete without an analysis of how the advent of SVoD services and associated market transformations are accentuating preexisting funding, political, and market pressures on public service broadcasting. In "Public Service Broadcasting in the Online Television Environment," Maria Michalis explains the impact of SVoD on the BBC's iPlayer offering, arguing that the relationship between them is not necessarily antagonistic. Considered in the broad context of national and international audiovisual market developments, she suggests that public service broadcasting VoD services ultimately may help to revive public service media. This could be achieved if personalization and the use of algorithms operate within a policy framework that encourages audiovisual platform providers to give prominence to public service media content.

Catalina Iordache, Tim Raats, and Karen Donders' article on "Audiovisual Flows and Media Policy: The Netflix Tax in EU Countries" presents a comparative analysis of the financial investment strategies of SVoD platforms in 10 European Union member states, with a focus on Netflix. They examine the revised European Union Audiovisual Media Service Directive, which applies a quota regime and enforces an obligation to invest in European works on on-demand audiovisual players. Intended as a response to dominant foreign platforms in the SVoD market with the aim of strengthening the European Union internal market, they find significant differences in member state regulations. They suggest that the audiovisual regulatory framework is consistent with market fragmentation rather than harmonization and that levies on the SVoD platform players are likely to give only partial support to intra-European audiovisual content flows.

Andrew O'Baoill and Salvatore Scifo examine challenges faced by community broadcasters in the digitalized environment. In "Fragility and Empowerment: Community Television in the Digital Era," they note a dampening of utopian rhetoric around the democratizing potential of participatory online spaces and the need to revisit the history of claims about the potential of participatory audiovisual production spaces. Focusing on Hallin and Mancini's (2004) category—the "liberal North-Atlantic" region—they trace varied histories and common themes in regulatory responses to digital audiovisual media production, highlighting the precarity of the community-based television production sector. No longer protected by spectrum scarcity arguments and faced with the rise of digital prosumers, they explain the opportunities and challenges facing community television producers.

Finally, Anna Zoellner explores television programming project development, a largely underresearched stage in television production. In her article, "Commissioning and Independent TV Production: Power, Risk and Creativity," she explores the conditions facing independent producers in the broadcaster-publisher system in the UK. An ethnographic study of a production company, complemented by statistical

industry data and a review of research over the past two decades, provides the basis for assessment changes and continuities in the industry. Zoellner's analysis highlights the impact of changing cultural and economic power relations on independent producers' and commissioning editors' practices and calls attention to the implications for program developers' creative autonomy and for program diversity.

In both the European Union and the UK, the rise of dominant non-European platforms in the online audiovisual marketplace is giving rise to uncertainties about the relationships between traditional television production and consumption patterns and new patterns characteristic of SVoD markets. This Special Section highlights successful instances of adaptation to changing market conditions in the case of series production and the provision of public service media platforms. It also calls attention to how new cultural and economic dynamics are challenging the financial sustainability of local audiovisual content production and efforts to strengthen program plurality and diversity as well as public service media online discoverability. Each of the articles highlights aspects of the cultural, political, and economic factors and changes in regulation and competition policy that are conditioning the reshaping of digital television in Europe. These articles also signal a continuing need for research and monitoring of the interactions between changing technologies for monetizing audience data, platform commercial business strategies and models, and the constraints and opportunities facing European commercial and public service media players.

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