

## Public television programming in the digital age: Between mimicry, adaptation and mutation - France Télévisions and EPTV Comparative Study (2010- 2020)

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**Abstract---**The aim of this study is to provide a reflection on programming strategies in public television. The quality of the programmes broadcast by these channels is a major debate in media circles: some consider that the public channels, in order to broaden their audience rate as much as possible, put the quality of the programmes at the mercy of the "dictatorship of ratings". Others assume that it is the quality of the program that determines and attracts the audience; The content of television programmes is no longer the prerogative of a minority of television stations, let alone those of public service television, and it should also be noted that the audience is more fragmented than ever. Viewers have access to an unlimited range of satellite TV channels, in addition to internet broadcasting and social media offers. These multiple changes that the world of broadcasting is experiencing today are profoundly redefining the programming strategy, considered the keystone of all television communication, of public television in order to preserve it and increase its audience rating. Another very powerful factor also determines the quality of programs and programming. This is the question of the financing of public television, which is at the centre of all the debates on public television service. Even if public television can be commercial, it operates on a non-profit basis. The need to finance its operations and expenses is obvious. Several financing systems, according to the specifications of the companies, are chosen to ensure this function, however the mode of acquisition of these financial sources and its different rates can have influences on the quality of its programs and programming. This is why the problem that arises following such observations: what are the strategies that public service television must adopt in order to guarantee optimal quality of programming? In this article, we will try to shed light on this debate by proposing a

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1764

socio-economic reflection through a comparative study of the programming strategies of the public television company (EPTV) and that of France Télévisions over a period of 10 years, i.e. from 2010, a year when all the technological changes, the emergence of the media and social networks have led the traditional media into a decisive turning point, until the year 2017.

**Keywords**---Programmes, programming, public service, audience, funding, digital, COVID-19.

## Introduction

If we take up Alain Gerlache's point of view<sup>[1]</sup> "Television is above all a show, which the public watches out of envy". This is why the mission of television, public in particular, is to make its viewers want to watch its program, because a public television given its legal status as a "public" is a company, even if it carries out certain economic transactions in order to finance its expenses, it remains non-profit and its only return on investment is the high audience rate it can attract.

To do this, an interesting and important programme schedule that meets the needs and expectations of the essentially heterogeneous audience on the one hand and fulfils the public service missions on the other hand remains the most effective way of organising this junction and ensuring this loyalty between the public and the television programmes. It is a task and a mission entrusted mainly to a full-fledged programme and programming department that appears in the organisation chart of the television company. However, this task is not easy, the programmer finds himself managing internal and external parameters related to funding resources, the legal framework and the media system in which the company operates.

This is why the notion of television programming itself has evolved over the years and according to the evolution of television to go from a simple puzzle that consists of fitting programs into a schedule to an art in its own right.

It should be remembered that the audience is more fragmented than ever. Viewers have access to an unlimited range of satellite TV channels, in addition to internet broadcasting offers and social media. All these changes are profoundly redefining the programming strategy of public television in order to preserve and increase its audience rating. Indeed, the decade 2010-2020 was a period of major disruptions for public television. The rise of streaming platforms (Netflix, Amazon Prime, Disney+), social networks and video-on-demand services has profoundly changed television consumption habits, especially among young audiences. The Covid-19 pandemic in 2020 has, in addition, imposed unprecedented adjustments in the programming schedules. It is in this context that the comparative analysis between France Télévisions, the leading public audiovisual service operator in Europe, and EPTV, its Algerian counterpart, takes on its full meaning and reveals contrasting trajectories in the face of the same structural challenges.

The central question of this article is the following: to what extent did the two public operators, France Télévisions and EPTV, develop original programming strategies or did they settle for structural mimicry during the decade 2010-2020?

## Methodological approach

This study is part of a qualitative and quantitative approach, combining documentary analysis and semi-structured interviews. It is based on several complementary data sources.

### **Corpus of analysis**

The comparative analysis focuses on the annual programme schedules of the two operators over the period 2010-2020. For France Télévisions, we rely on data from the CSA's broadcasting monitoring database for the France 2, France 3, France 4 and France 5 channels. For EPTV, we use the annual reports of the programme management as well as the available audience data.

### **Analytical framework**

The analysis is structured around three dimensions:

- the structure of the programme schedule (distribution by genre, hours of broadcast, origin of programmes)
- funding methods and their impact on the quality of programmes
- responses to changes in the media environment, including the digital challenge.

The theoretical framework adopted is that of the media economy, complemented by the socio-institutional approach that makes it possible to articulate the economic, regulatory and editorial constraints specific to each operator.

## **I. Television programming**

### **1) *Television programming: an art***

Television programming is much more than a simple assembly of content in a timetable: it constitutes, according to Jost (2017, p. 23), the "invisible architecture" of the channel, the device by which a media institution builds its identity, builds audience loyalty and reaffirms its social legitimacy. In other words, programming is deciding what to say, to whom, at what time and in what order (all choices that are also political and cultural acts).

Programming is defined as "the art of optimising the encounter between an editorial offer and a social demand" Fonnet (2010, p. 12), thus underlining the double constraint to which all programmers are subject: to satisfy the expectations and needs of the public while remaining faithful to the public service mission. This dual responsibility (both editorial and institutional) is at the heart of the tension that public television is experiencing today in a media environment undergoing profound change.

Programming operates as a fundamental "social bond": by simultaneously offering the same content to society as a whole, public conventional television produces a shared collective experience that cannot be reduced to the market logic of individual satisfaction (Wolton (1990, p. 52). However, this social function is now under pressure from the rise of video-on-demand platforms (Netflix, Amazon Prime, YouTube), which offer a radically individualized and desynchronized consumption experience. We are witnessing an irreversible shift "from flow television to stock television" Missika (2006, p. 87), calling into question the very relevance of the linear schedule. Faced with this challenge, public television programming is faced with an existential reality: in order to last, it must reinvent itself, not by imitating platforms, but by promoting what distinguishes them: editorial curation, cultural proximity and institutional support (Jost, 2017).

The founding triptych of the public audiovisual service "inform, educate, entertain" formulated by the BBC in 1927, remains the normative compass of public television throughout the world. However, this mandate cannot be interpreted or applied in a static and automatic way: it is updated according to the social, political and technological contexts in which each operator operates.

Public television must constantly negotiate between two sometimes contradictory legitimacies: cultural legitimacy (which postulates quality and high standards) and democratic legitimacy (which postulates accessibility and universality) Richeri (1994, p. 27). It is in this space of negotiation that the programming of public television is constructed, and it is in this space that this comparative study proposes to explore through the cases of France Télévisions and EPTV over the decade 2010-2020.

Nevertheless, when we consult the various specifications of the public television company (EPTV) from 1986<sup>[2]</sup> to 1991, the date of the last reform of its specifications, we note that no article mentions the specificities of the programmes (duration, quotas, distribution, genre) that must constitute the programme schedule. The specifications evolved in generalities, "the encouragement to open up and enhance the activities of the government body and in the adoption of and the application of the triptych 'inform, educate, entertain'. It is a state monopoly on audiovisual programming" (Mostefaoui, 2013) that has lasted since independence. This gives it a model of propagandistic government television.

France Télévisions, on the other hand, has seen new commitments on programmes following the reforms of Decree No. 2009-796 of 23 June 2009. All the programmes and audiovisual genres that correspond to the "inform, educate and entertain" triptych and that must be included in the programme schedule have all been the subject of several articles listed from 1 to 18 per genre in the 1st chapter of the specifications.

## 2) *Television programming techniques*

In the 1990s, a widespread policy among French and Algerian public television (necessarily by mimicry in the case of EPTV) tended to believe that television programmes were aimed at an "all-public" audience was shaken by the targeting of viewers. Today, the choice of programmes favours the rhythm of social life of its potential audience. The programmer goes from an "all-public" strategy to a "target audience" strategy. Thus, the success of a program depends on the temporary slot in which it will be programmed and therefore broadcast.

### a- Time line

European and American studies have been established with this in mind in order to divide daily schedules according to the availability of the viewer and its nature and to assign him the genre that suits him. It is clear that this model of division remains a global and general roadmap that may vary from one country to another since the habits of viewers are not always similar, the same for the regulatory systems:

**Fig1: Time line of audiovisual programming**

6:00 pm	8:30 a.m.	11:30 a.m.	2:00 p.m.	5:30 p.m.	7:30 p.m.	10:30 p.m.	00:30
Early morning	Morning	Day time	Afternoon	Prime access	Prime time	Late fringe	Night
<i>Family/ children</i>	<i>Housewives/ Pensioners</i>	<i>Family</i>	<i>Housewives/ Pensioners</i>	<i>Family/ children</i>	<i>All audiences</i>	<i>Adults</i>	<i>Adults</i>
Youth/ Cultural	Magazine	Information	Entertainment	Youth/ Cultural	Information	Divert.	Divert.

This programming strategy in terms of timing is widely adopted by FRTV and EPTV. In the case of FRTV<sup>[3]</sup>, the reform that the company underwent in 2009, in particular the abolition of advertising from screens between 8:00 p.m. and 6:00 a.m., "public television declares that it has replaced an audience obligation with an audience ambition" (Fonnet, 2010), the programmer may dare to program other types of programs, for example documentaries in prime time instead of films, in order to fill in the boxes previously intended for advertising.

For EPTV, the daily programme schedule is drawn up in a conventional way: since EPTV is a member of several international organisations (COPEAM, ASBU, EBU, etc.), it must meet the same standards of requirements as the other members of these different organisations.

### b- Television genres

According to *Dominique WOLTON*, public generalist television is above all a "social link" whose vocation is to simultaneously reach all levels of society (1990, p. 124). This representativeness can only

be achieved if the different media genres are highlighted and offered to the general public, according to their availability and needs.

With regard to the issue of programme genre, a quantitative study of the FRTV and EPTV programme schedule from 2000 to 2020 is necessary. It will be a question of studying in which measures each public television broadcasts genres that reflect the values of the public service, namely: information, education and entertainment, programmes aimed at children and young people.

#### b-1) EPTV programming techniques:

As the incumbent operator of the Algerian audiovisual landscape, the Public Television Establishment (EPTV) is structurally subject to strict public service obligations. Established by Executive Decree No. 91-100 of 20 April 1991 (this decree constitutes the founding text of EPTV), the establishment is explicitly entrusted, under the terms of its article 4, with a threefold mission of designing and broadcasting programmes for the purposes of "information, education and entertainment": "carries out a public service mission in accordance with the prescriptions of its specifications" and "assumes the design activities, development, production and broadcasting of television programmes". In addition, Article 5 details the threefold mission: to inform, to satisfy the needs of education and entertainment, to contribute to the development of intellectual works, and to "promote social communication organized by the Government." Far from being a simple editorial option, the deployment of a plural offer is a direct response to the legal obligation of general interest and pluralism. After studying the different schedules of the EPTV programs, we draw the following graph:

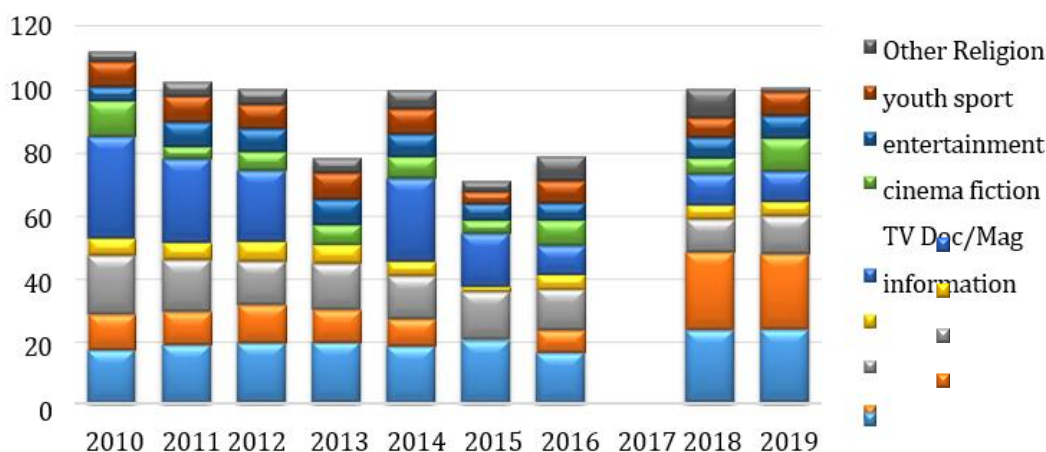


Fig: Distribution of programmes by genre (%)

Source: Annual reports of the EPTV programme management (2010-2020)

At the first observation, EPTV undertakes to broadcast the different types of programmes recommended by the principles of public service. Thus, the various genres related to entertainment and information hold the largest share in the programme schedule with almost the same proportion of broadcasts of 25% and 21% respectively, followed by the other television genres which touch on culture at an average of 10.81%, education and religion which represents a rate of 6.23 % and finally the other programmes (launches, weather, advertising pages, press releases) represent an average circulation of 6.32%.

These quantitative data do not signify an imbalance in public service missions as recommended by the BBC model, but reflect an inconsistency in editorial strategy impacted by the absence of a legal framework detailing the proportions by gender. It is worth emphasizing the lack of normative precision that characterizes the legal framework for genre programming on EPTV. Contrary to Decree

No. 2009-796 of 23 June 2009 which governs France Télévisions and which defines article by article (from Article 1 to Article 18 of Chapter I) the minimum proportions of broadcasting by genre, by time slot and by origin, the legal framework of EPTV is limited to generalities. Article 5 of Decree 91-100 refers to the missions of information, education and entertainment, but does not set any metrics. The same article limits itself to specifying that the programmes must "reach all fringes of society and tend to promote culture, education and participate in the entertainment of the citizen", without a quota or assessable performance indicator. This normative gap is the direct cause of the impossibility of assessing the compliance of EPTV's schedules with its own public service obligations, and therefore of managing the programming editorially.

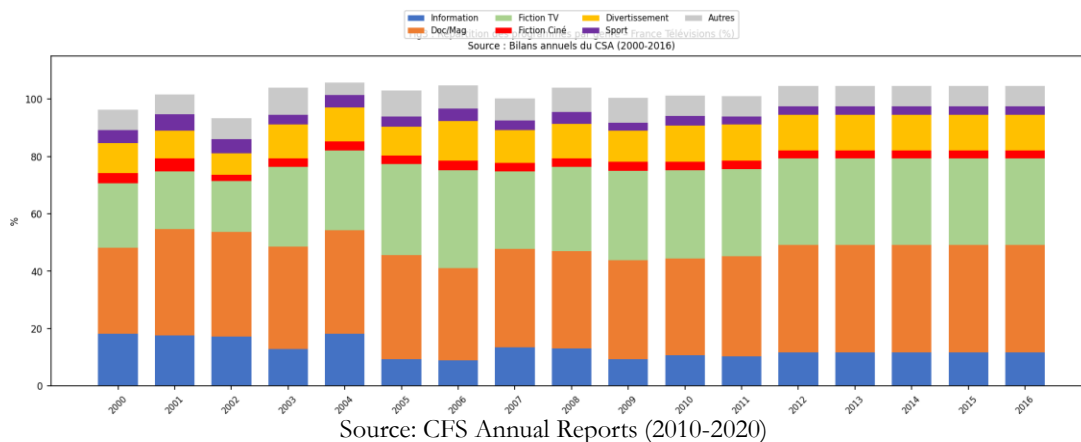
From 2016 onwards, the trends observed have been consolidated: the share of information remains high due to political events (Hirak movement 2019) and health events (Covid-19 2020), while cultural and educational genres have stagnated due to a lack of sufficient investment. The share of entertainment is tending to erode in the face of competition from private channels that are seizing this niche with greater resources.

In addition, without a reliable audience indicator, the programme management does not have a tool to meet the real needs of viewers through a refined programme schedule. Moreover, Jost (2017) reminds us that the triptych "inform, educate, entertain" does not imply an equal distribution but a balanced articulation of missions and genres that takes into account social and political contexts. From this point of view, EPTV maintains, despite its limitations, a 24-hour continuous broadcast, a considerable audiovisual heritage and a national editorial presence that private channels, focused on commercial entertainment, do not provide. These data should therefore be considered as the predictable result of chronic underfunding and a lack of strategic management (Khelifi, 2005).

### b-2) Television genres at FRTV

France Télévisions' status as a public service is based on a strict legal framework, defined by the law of 30 September 1986. The operator's concrete obligations are set out in its specifications (Decree No. 2009-796), Article 3 of which requires the design of various programmes aimed at "informing, cultivating and entertaining". Therefore, the diversification of television genres is not a simple editorial choice, but a legal obligation. By offering a plural offer, the group meets the requirements of pluralism and general interest.

For each television genre, unlike EPTV (whose specifications do not mention any details on the programmes and their proportions), the proportion in terms of broadcasting, periodicity, duration and broadcasting segment are defined in advance in its specifications.



The analysis of data relating to the distribution of genres in France Télévisions' programme schedule reveals a structured programming strategy, based on detailed specifications (Decree No. 2009-796). Like EPTV, France Télévisions is committed to broadcasting the different types of programmes recommended by the principles of public service. Generally speaking, apart from the news genre, which represents 12.19% on average with a broadcasting gap of up to 10% depending on the daily events, and the sports genre with an average circulation of 3.6%, the other programmes have more or less maintained a stability in the broadcasting rate, which reserves 32.36% on average to the cultural genre represented by documentaries and magazines. The preponderance of cultural genre reflects a real commitment to public service missions. And 13.67% to the entertainment genre represented by cinema and TV fiction and other entertainment programmes (shows, music concerts, etc.), and other genres (launches, weather, press releases, etc.) account for 7.6% of the overall circulation rate.

However, the stability of the figures masks a growing tension between commercial requirements and cultural ambitions: the abolition of advertising after 8 p.m. in 2009 forced the operator to fill in the boxes with substitute programs of uneven quality (Fonnet 2010, p. 87). In 2020, the health crisis caused profound reshuffles in the France Télévisions schedule: reinforcement of the cinema offer during the lockdowns (+16% of films broadcast), launch of the Cours Lumi on France 4 (more than 700 hours), significant increase in live shows on France 5 (+333% in the first part of the evening). Animation represents 21% of programming, magazines 19% and documentaries 18%, according to the CSA report (2021). These adaptations have no observable counterpart to EPTV. As *Richeri* (1994, p. 43) observes from a comparative European perspective, no public television system is immune to political and financial pressures; the difference between the two operators is more of degree than of nature.

### 3) "Inform, educate, entertain" VS "inform, entertain, entertain"

When we refer to the basic principles of public television recommended by the BBC, which remains the model par excellence of public service, we will see that education is at the top of the pyramid followed by entertainment and finally information. The EPTV pyramid and the FRTV pyramid, according to the quantitative studies carried out previously, show a slight distortion compared to the BBC pyramid is as follows:

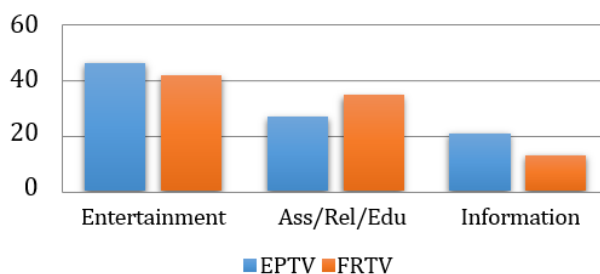


Fig 4: Comparative representation of the distribution of programmes of the television stations studied (%)

Source: CSA and EPTV annual reports (2010-2020)

For the two televisions where the BBC pyramid is slightly inverted, the entertainment genre takes over education and culture. This programming does not necessarily meet the objectives of public service television advocated by the BBC. EPTV, inspired by the French model, thus adopts the same strategy of hierarchizing television genres, by inverting the pyramid of audiovisual public service missions, and it is also the objectives of television that are reoriented: for both cases, we are moving from a policy of "informing, educating and entertaining" to a policy of "informing, to entertain and entertain".

The case is more accentuated for EPTV, which attaches a lot of interest to particularly government information (the president's outings and speeches, ministers' activities, etc.) in accordance with Article 5 of its specifications, which stipulates in one of its points "The promotion of the activities and actions of the state", this is what leads us to note "the hierarchical relations that assign a position of strong dependence on the channel's managers" (Mostefaoui, 1996).

In 2019-2020, this trend was accentuated for EPTV with intensive coverage of the popular movement (Hirak) and the presidential elections of December 2019, pushing the share of news to exceed 20% of the schedule. In times of crisis, particularly during the COVID-19 pandemic, EPTV has ensured the continuous broadcasting of public health bulletins, health prevention messages and official declarations, thus fulfilling a local information function that Algerian private channels, which are more focused on entertainment and political debates, have not always provided with the same regularity.

It should also be noted that in 2020 EPTV expanded its bouquet with the launch of three new thematic channels (TV6: youth, TV7: knowledge and TV8: history). This extension translates into a desire to go beyond the single generalist model and to respond to the growing fragmentation of audiences by offering targeted content. The COVID-19 crisis has acted as an accelerator of this strategy of diversifying and targeting content, in the face of the explosion of television consumption during the lockdown and the diversification of the public's needs

For France Télévisions, the CSA report published in 2012<sup>1</sup> notes that "newspapers, magazines, documentaries have made it possible to offer viewers abundant and quality information, giving an important place to experts and deciphering" during the Covid-19 crisis, without sacrificing the diversity of other genres.

## II. Program costs

"The economic specificity of television broadcasts, which are not only 'intangible goods' but also 'public goods', i.e. capable of being consumed without destruction or appropriation by an unlimited number of users provided that they are in the reception area of the media (Desmoulin, 2004). This is why it is essential for the programmer to find the right balance between the costs of the schedule and the optimization of the audience.

If we refer to the micro-economic model of the linear audiovisual publisher proposed by Laurent Fonnet, "the creation of a linear audiovisual programme publishing company begins with the choice of a theme for the public and an editorial line". This is done according to three parameters: audience, revenue and cost.

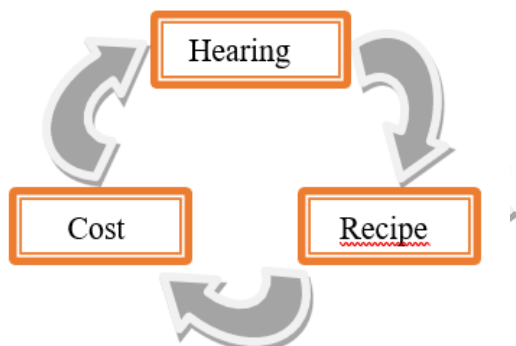


Fig 5: The Audience-Revenue-Cost micro-economic model

In order to interest and attract a significant audience share, which is the main return of a television, the television company collects financial resources in order to be able to buy or produce programs that

meet the expectations of its audience. According to the "hourglass" scheme, programmes are exchanged for time, the time of the viewers transformed into an audience for the advertisers (Kaya, n.d.):

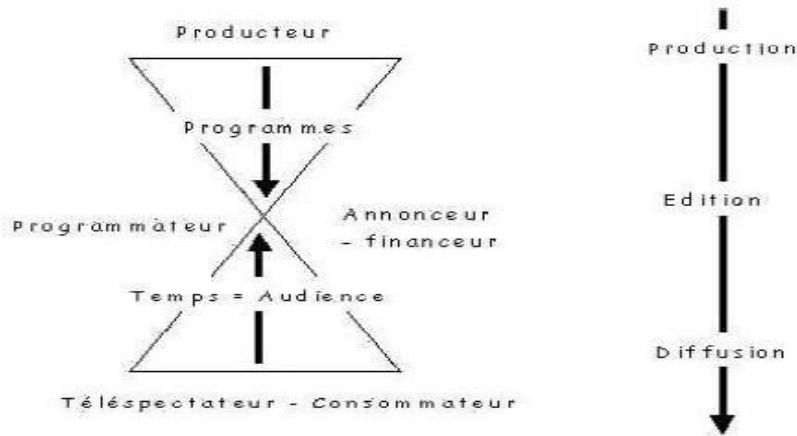


Fig6: Diagram of the programming hourglass  
Source: adapted from Kaya (n.d.) and Gabszewicz & Sonnac (2006)

This scheme models the structures of traditional mass television through the articulation of an hourglass market and a linear value chain. This model illustrates what Gabszewicz and Sonnac (2006) define as a two-sided market. The programmer acts as an intermediation platform: it invests in content to capture viewers' attention spans, and then resells this audience to advertisers. This mechanism validates Dallas Smythe's (1977) thesis on the "audience-commodity", where the public becomes the main product sold to advertising capitalists.

The second part of the diagram formalizes the classic vertical industrial sector of the media, segmented between production, publishing and distribution (Miège, 1989). The programmer occupies a position of strategic lock: he edits and plans the program schedule to rationalize listening behavior and maximize advertising revenue. Broadcasting here responds to a top-down (*broadcasting*) and synchronous logic.

Today, this flow model is being shaken up by the digital attention economy (Citton, 2014). The advent of streaming platforms (Netflix, YouTube) breaks this industrial linearity through asynchronous algorithmic logics. Audience fragmentation and data-driven advertising targeting are thus redefining the central bottleneck of the hourglass, marking the shift from mass distribution to individualized capture.

For France Télévisions, this transition was anticipated with the creation of france.tv and its digital ecosystem, which reproduces a "digital hourglass" logic: editorialized content attracts unique visitors, whose attention is valued by advertisers and partners. In 2020, 28 million unique monthly visitors were recorded, i.e. 53% of the connected population (CSA, 2021). EPTV has not developed a structured equivalent, essentially remaining in the analog hourglass model.

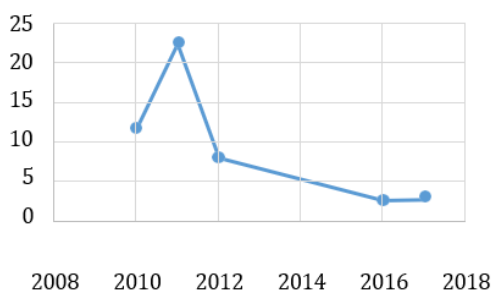
### III. Hearing

It is clear that public television is a non-profit enterprise and its primary gain is the audience. The stakes of audience measurement for the media are important since they condition their programming strategy.

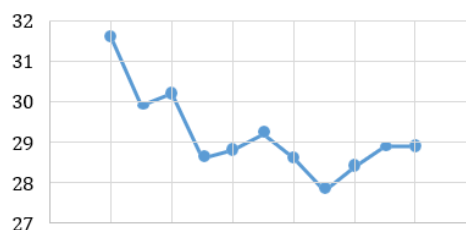
In Algeria, the absence of a legal framework means that audience studies remain in an embryonic state. "In terms of method, the object of research is poorly identified. Absence of vigils strategic information on consumer uses and habits does not make it possible to build panels that are representative of media audiences. On another level, knowledge of the audience does not arouse, at least until recent years, the interest of the various economic actors as long as the market does not generate major competitive upheavals" (Benzaoui, 2001). This situation opens up virgin ground for certain media research undertakings<sup>[4]</sup> in order to provide television with certain occasional statistics.

For EPTV, the primary observation of the programme schedule indicates a flagrant gap between the design of the schedule and the expectations of the audiences. "A symptomatic sign: the channel has never had an audience measurement service. The current model remains, in the minds of its successive leaders, that of supply in a monopoly position" (Mostefaoui, 1996).

FRTV, on the other hand, audience studies play a key role in the establishment of various programming strategies. It's all about ratings. We are witnessing shows like seasons of television series that can appear for many years on the programming schedule (*Question pour un Champion*, broadcast on France 3 from 1987 to the present day) as long as the targeted audience rate is reached. Médiamétrie is responsible for establishing audience studies in agreement with FRTV.



2008 2010 2012 2014 2016 2018  
 Fig: EPTV audience share (%)  
 Source: Media & Survey (2010-2017)



2008 2010 2012 2014 2016 2018 2020 2022  
 Fig: FRTV audience share (%)  
 Source: CSA Annual Reports (2010-2020)

Both graphs tell us about a decline in audience share. Less important for FRTV, which saw its audience drop following the fragmentation of the audience due to the multiplication of television content reception media, in particular the rapid development of digital terrestrial television (DTT), the number of which fell from 10 in 2008 to 19 in 2018.

For EPTV, a more significant decrease is recorded compared to FRTV. This erosion is due to a profound regulatory asymmetry following the opening up of the audiovisual sector from 2012. Indeed, the opening up of the Algerian audiovisual sector from 2012 onwards has brutally placed the public operator, accustomed to monopoly, in the face of unregulated competition. This transition has not been accompanied by a reform of the funding model or an upgrade of audience measurement tools, making any strategic response impossible.

Over the period 2018-2020, France Télévisions maintained a remarkably stable audience share of 28.8% in 2020 (vs. 28.9% in 2019 and 28.5% in 2018), reaching 81% of the French population each

week, i.e. nearly 49 million people (CSA, 2021). France 2's performance increased for the third year in a row, reaching 14.1% of the audience share. However, the overall stability at 28.8% in 2020 hides a worrying structural trend: according to the CSA report published in 2021, this audience is ageing, with the under-35s having largely migrated to digital platforms (Netflix, YouTube, social networks). This phenomenon, anticipated by Missika (2006, p. 34) under the concept of the "end of linear television", represents a structural challenge that is masked by the global figures.

EPTV, on the other hand, has seen its audience share erode to less than 3% over the same period, surpassed by the main Algerian private channels (Echourouk TV, Ennahar TV) which now capture most of the national audience. In addition, the absence of an audience panel measuring the Algerian diaspora abroad (Canal Algérie's main target) makes any direct comparison with French figures (systematic audience measurement is entrusted to Médiamétrie) methodologically problematic (Bouzeqaou, 2021).

#### IV. Recipes

EPTV and France Télévisions both benefit from a mixed financial system. They receive their financial resources to finance the various charges, namely the licence fee, their own revenue (mainly advertising) and state subsidies.

In the financial management of EPTV, the revenue from the licence fee is not used for salaries or general operations (as they are covered by state subsidies). The texts provide that it is primarily allocated to the acquisition and production of programmes (in particular national executive production). It should be the direct driver of gender diversification.

Although set at around 22% on average, this resource is subject to direct variations linked to recovery mechanisms, which often pushes EPTV to rely on the State budget to compensate for shortfalls in the advertising market. In addition to this, the fee in Algeria has no economic logic: the rate of the fee set at "100 DA" has not increased for several years. State subsidies remain discretionary and their determination depends entirely on the political will of the government in place (Khelifi, 2005).

Over the period 2016-2020, EPTV's financial situation weakened further. The economic crisis linked to the fall in oil prices has led to a reduction in state subsidies. Advertising revenues have continued to decline due to the combined effect of audience fragmentation, competition from private channels and the increasing shift of advertising budgets to digital. Since 2016, the company has not benefited from the financial income from the fee, as this budget was devoted to covering the financial needs of the State.

For France Télévisions, the licence fee has amounted to 64% of FRTV's operating budget since 2009<sup>[5]</sup>. This resource remains the most important because it is considered a stable resource. The rate of the licence fee is revised upwards annually by the French government, from 116 euros in 2002 to 139 euros in 2017.

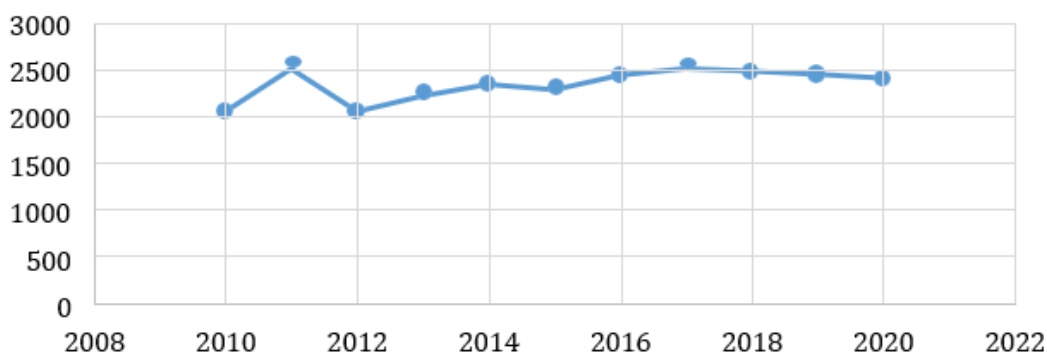


Fig: Evolution of the FRTV licence fee rate (ME)  
Source: CSA Annual Reports (2010-2020)

In 2020, despite a reduction in public funding of €60 million compared to 2019, France Télévisions maintained its commitments to audiovisual creation to the tune of €422.1 million, in accordance with the roadmap set by the Government (CSA, 2021). The fee, although abolished for some households as part of the ongoing reforms, remains the basis of financing public. This stability contrasts with the situation in Algeria and illustrates how sustainable public funding is the sine qua non condition for quality programming.

## V. The cost of the programs

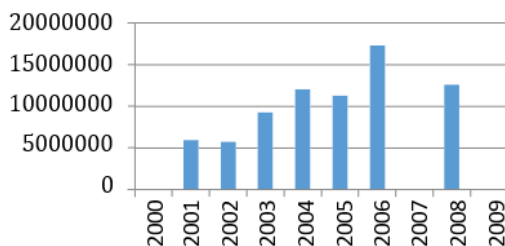
The budget management of a program schedule is complex because it is often linked to parameters that the programmer does not necessarily control. Other parameters are used to establish the costs of programmes: costs vary from one television genre to another but also from one broadcasting time slot to another.

For France Télévisions, apart from the news and the sets of major debates, the majority of programmes are produced externally (co-production or executive production). FRTV does not necessarily consider itself a production company. Unlike EPTV where everything is produced at its level, except TV movies or cinematographic films which are produced in co-production or executive production.

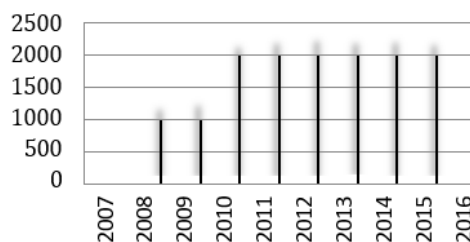
As for the share of programming in financial terms in the operating budget, FRTV devotes the largest share to this mission: 85% of the company's overall budget is invested in programmes. However, EPTV devotes only 30% of its budget to this mission, which explains the precariousness of the programmes and consequently the collapse of the audience.

This structural gap (85% vs. 30%) is anchored in the model set out in Article 23 of Decree 91-100: mixed financing composed of royalties, own revenues and state subsidies. Three decades later, the Algerian fee set at 100 DA has never been increased (Khelifi, 2005, p. 78). In addition, Law No. 14-04 of 24 February 2014 on audiovisual activity has instituted a paradoxical mechanism: the more commercially successful EPTV is, the less state subsidies it receives. It should be remembered that during this period, the volume of public advertising fell by 65% between 2015 and 2016 following the oil crisis, placing EPTV further in financial asphyxiation.

**Fig 9: EPTV programme costs**  
(million Euro)



**Fig 10: FRTV programme costs**  
(million euros)



Source: Balance sheets of the Deputy Director-General Source: CSA Annual Report from 2007 to 2016

The costs of programming for FRTV are constantly evolving, a sign of regular and significant investment from one year to the next in this mission. Investment was all the more important from 2009 onwards following the economic reforms which consisted of the abolition of advertising between 8 p.m. and 6 a.m.: a reprogramming strategy was introduced, in particular by injecting new programmes (mainly magazines and documentaries) into the programme schedule.

Investments in EPTV programmes between 2000 and 2006 were very significant. The financial affluence that the country was experiencing at that time, an embryonic competitive field characterized by the penetration of mainly foreign channels, allowed for significant state funding. From this year onwards, investments have been declining (figures from 2010 to 2017 are not available). The EPTV program department does not even report any program purchases since 2015.

In 2020, France Télévisions remained the leading funder of audiovisual creation in France, with €422 million invested in heritage production and €60.2 million in cinematographic creation, for a total contribution of €482.2 million (CSA, 2021). Fiction accounts for 56% of these investments (€267 million), documentaries 22% (€106 million), cinema 12% (€60.2 million), animation 6% (€29.8 million) and live performance 4% (€17.1 million). For EPTV, the total absence of foreign programme purchases over the period 2015-2020.

## VI. The Challenges of Programming in the Digital Age

### 1) Audience fragmentation and the challenge of platforms

The decade 2010-2020 saw the rise of SVOD platforms (Netflix in 2014, Amazon Prime Video, Disney+) and free platforms (YouTube, social networks), causing an unprecedented fragmentation of the audience, particularly among the under 35s. This phenomenon is forcing public operators to rethink not only their content but their distribution models.

For France Télévisions, the answer has taken the form of a structured digital transformation: moving from a hyper-distribution strategy to a logic of its own platforms (france.tv, Lumni, Okoo, Franceinfo:, Culture Prime). In 2020, this offer attracted 28 million unique monthly visitors, or 53% of the connected population (CSA, 2021). Franceinfo: has become the leading news platform consulted daily, with a growth of +30% compared to 2019, driven by demand related to the health crisis.

For EPTV, the digital transformation remains embryonic. In the absence of a clearly defined digital strategy and a legal framework governing the digital distribution of Algerian public audiovisual content, the company finds itself, on the one hand, marginalized on the classic linear market in favor of national private channels (Ennahar TV, Echorouk TV and Dzair TV, whose audience shares cumulated, according to Media Survey in 2017, nearly 45% of the national audience against less than 20% for EPTV). On the other hand, there is an almost total absence on international digital platforms

where Algerian content remains undervalued and undercapitalized. Organic Law 14-04 of 24 February 2014 on audiovisual activity in Algeria does not include any specific provisions relating to digital distribution, streaming platforms or obligations to make public audiovisual archives available online, a major legislative gap that further weakens the position of EPTV in the digital ecosystem.

ARPCE data illustrate the scale of the digital challenge: following the launch of 4G in October 2016, the number of mobile internet subscribers jumped from 16.5 million to 28.5 million in one year, reaching 38.8 million in 2020 (i.e. 88% of the population). In 2019, YouTube and Facebook captured more than 60% of national internet traffic, and Algeria had 25 million active social media users (We Are Social & Meltwater, 2020). Linear TV viewing time among 15-25 year olds decreased by 30% between 2016 and 2020 (IMMAR, 2016-2020). The lack of a robust catch-up platform and a digital strategy deprives EPTV of the levers to reach these young audiences.

## **2) Audience measurement in the digital age: from ratings to data**

The issue of audience measurement, already identified in this study as a major point of vulnerability in EPTV's programming strategy, takes on a new dimension in the digital age. While linear TV is based on panels, digital platforms have real-time and comprehensive behavioral measurement of their audiences. Netflix collects data on viewing time, browsing habits, pauses or abandonments, which is a considerable informational advantage that allows it to optimize its commissioning and scheduling decisions. "The digital platform doesn't just distribute content, it generates data on consumer behaviour that itself becomes a strategic and economic resource of the first order" (Van Dijck, Poell & De Waal, 2018, p. 32).

This informational asymmetry between digital platforms and public television constitutes an epistemological challenge for public service programming: how to define a content strategy adapted to the real and evolving needs of audiences in an environment where behavioral data is monopolized by private actors? For EPTV, which did not have its own audience measurement service even for linear television, this delay in mastering digital data represents a structural competitive handicap in EPTV's programming strategy.

## **2) The 2020 health crisis: revealing the ability to adapt**

The Covid-19 pandemic has been a full-scale test of the resilience of the two operators. France Télévisions has demonstrated a remarkable ability to adapt: reconfiguration of France 4 into an educational channel (up to 6 hours of Cours Lumni daily), 11.2 million people reached by the educational system from March to June 2020, strengthening of the cinema offer and development of support systems for the performing arts. In 2020, 803 cultural programmes were broadcast in the first part of the evening, an increase of 8% compared to 2019 (CSA, 2021).

For EPTV, the COVID-19 crisis has functioned as a real "digital accelerator" for EPTV, forcing the institution to invest in social networks well beyond its previous practices (Hammadi, 2021). For example, the 2020 period shows that the Algerian public operator has made real efforts to adapt digitally: up to 40 publications per day at the peak of the crisis, a +14% increase in the number of Algerian social media users between January 2020 and January 2021 (Data Reportal, 2021). In addition, EPTV has maintained uninterrupted 24-hour broadcasting throughout the pandemic, intelligently mobilizing its rich archive heritage (cult films, plays, musical evenings, historical matches) testifying to a real editorial capacity for adaptation in extremely constrained conditions (Bouzegaou, 2021).

## **3) Reshaping the Funding Model in the Digital Age 3**

The Audience-Revenue-Cost balance, as described by *FONNET* in the micro-economic model of the linear audiovisual publisher analysed earlier in this study, is profoundly destabilized by digitization. The fragmentation of audiences automatically leads to a devaluation of traditional television advertising

spaces in favor of digital platforms. The massive transfer of advertising investments to digital platforms is reducing the own resources of public broadcasters, which are already under pressure due to the abolition or limitation of advertising imposed by their specifications.

Faced with this challenge, several alternative financing models have been tested or theorized in the academic field: a "universal digital fee" extended to all connected devices, arguing that "the legitimizing basis of the audiovisual fee is not the television receiver but access to the public service of information and culture, regardless of the technological medium used" (Tambini, 2015, p. 210). France made this extension in 2011 by including tablets and computers in the basis of the contribution to public broadcasting (CAP).

In Algeria, the issue of financing EPTV in the digital age takes on an even more critical dimension. The absence of any legislative reflection on a digital tax or levy intended to finance public television represents a considerable delay in relation to the trends in audiovisual regulation observed in Europe and.

### Discussion of the results

The results of this comparative study call for an in-depth discussion along three main axes:

- convergence and divergence of programming models,
- the effects of the Covid-19 crisis as an indicator of structural fragilities,
- and lessons for the future of public service broadcasting.

On the first axis, our data confirm a formal convergence of the two operators around the triptych of public service: the two grids cover the same major categories of genres (news, culture, entertainment, education). However, this formal convergence conceals a profound divergence in the logics underlying these choices. France Télévisions programmes according to a logic of constant negotiation between audience, regulatory constraints and cultural ambition, based on daily audience measurement (entrusted to Médiamétrie) and a budget devoting 85% to programming. EPTV, on the other hand, programs according to a logic of distribution of available resources within a vague regulatory framework and without systematic audience feedback. This asymmetry is not a question of will but of resources and governance: the 55-point gap in the share of the budget devoted to programmes (85% vs. 30%) is in itself a decisive structural indicator of the differential quality of the two grids.

On the second axis, the Covid-19 crisis has operated as an institutional "stress-test" revealing the strengths and limitations of each operator. For France Télévisions, the rapid reconfiguration of France 4 in the educational chain and the strengthening of the digital offer have demonstrated the organisational flexibility of an operator with solid resources and institutional partnerships (in particular with the National Education Department (CSA, 2021)). For EPTV, the crisis has revealed both its limits (lack of a structured digital platform) and its hidden resources: an exceptionally rich archive heritage and a capacity for creative improvisation.

On the third axis, our results highlight a decisive parameter often absent from international comparisons: the fragility of public funding is not a specificity of developing media systems. This convergence of fragilities (one structural and long-standing for EPTV, the other cyclical and recent for FRTV) suggests that the question of the independent financing of public television is a global democratic issue, which requires structural solutions rather than one-off budgetary adjustments (Richeri, 1994). In this sense, the Algerian experience, far from being a marginal case, offers an instructive mirror of the risks run by any public audiovisual service that is poorly protected from political and economic hazards.

Finally, it is worth highlighting an important methodological limitation of this study: the lack of reliable audience data for EPTV (especially for the diaspora, Canal Algérie's main target) makes any

direct comparison with Médiamétrie's figures for FRTV methodologically problematic. This limitation is itself a result: the absence of measurement tools is the clearest sign of a governance deficit that weighs directly on the quality of programming. Filling this gap is the first condition for any sustainable improvement in EPTV's editorial strategy.

## Conclusion

Programming is the backbone of a television channel, while the programme schedule is the pivot of all programming work: it alone concludes the selection and the orientations undertaken by the programming team, which over time constitutes the identity of the channel. Indeed, the grid is the result of a number of complex and complicated processes.

The comparative analysis of the programming strategies of EPTV and France Télévisions over the period 2000-2017 has highlighted the deep structural tensions between the requirements of the public service programming and the economic and competitive constraints of a changing audiovisual market. These tensions, already perceptible in the context of the fragmentation of terrestrial and satellite audiences, are now radically exacerbated by the irruption of streaming platforms and the generalization of the digitization of media uses.

A studied programming strategy, based essentially on knowledge of its audience, its expectations and needs, while taking into account its heterogeneity is the first essential step to undertake. Companies in mixed regulation systems such as the case of FRTV are demanding companies in terms of knowledge of the nature of their audiences: "Audience changes are scrutinized on a daily basis, the popularity barometers of star presenters and journalists, the channel's image are relentlessly monitored: a failure immediately raises the alarm, a program whose audience crumbles during broadcasting is immediately scrutinized." (Dagnaud, 1990). Less so for EPTV, which operates in a different regime with an authoritarian tendency: knowledge of the audience is not a priority, Algerian public television continues to evolve in a monopoly programming.

Also, the question of financing, particularly in a tough competitive market, means that financial resources have a direct influence on the quality of the channel. FRTV has understood that advertising as a financial resource confronts its schedule and its programmes with a market economy that obeys the law of supply and demand, a delicate situation that could call into question its identity, quality and credibility, a situation that EPTV is currently experiencing, which is almost devoid of substantial financial resources to feed its programme schedule.

It would then be urgent, for EPTV in particular, to review its financing strategy, which remains the most important parameter and the link between the audience and the programmes. A better knowledge of your audience is also necessary in order to determine their needs and expectations and plan accordingly. This task can only be carried out if its specifications are updated in order to determine precisely the public service missions that it must grant itself.

The comparative analysis over the decade 2010-2020 confirms and deepens these findings. In the face of the 2020 health crisis, France Télévisions demonstrated a remarkable ability to adapt editorial and digitally, maintaining its audience share at 28.8% and its investments in creation at €422 million. EPTV, constrained by constantly eroding resources, a lack of audience measurement tools and specifications unsuited to the digital age, is struggling to find a stable editorial identity in the face of competition from private channels and foreign platforms. The gap between the two operators, far from narrowing, has widened under the effect of digital mutations. The issue of stable and predictable public funding remains the primary condition for any credible reform of EPTV's programming.

The Algerian paradox is that of an institution with an ambitious legal framework (formally guaranteeing the independence of information (Law No. 90-07, Art. 12), pluralism (Decree 91-100, Art. 5), and the continuity and adaptation of the public service (Decree 91-101, Art. 2)) but deprived of the resources and management tools necessary to honour its own legal commitments.

Any serious reform must therefore articulate three levels simultaneously: the revision of the specifications to integrate detailed broadcasting obligations by genre, the reform of the financing regime to reassess the licence fee and put an end to the tax asymmetry with private offshore channels, and the investment in an integrated digital strategy including a catch-up TV platform, A structured presence on social media and digital formats.

## Notes

- [1] Alain Gerlache is a political journalist and former director general of television at RTBF (Belgian public television).
- [2] Date of creation of the National Television Company (ENTV) after the break-up of the Algerian Radio and Television (RTA), following Decree 86-147 of 1 July 1986.
- [3] The programming strategy of the channels affiliated to France Télévisions is totally different from each other, wanting to make this company a holding company; Each channel has its own strategy that obeys its editorial line and constitutes its identity. But they apply all the public service missions.
- [4] There are three media research agencies in Algeria: Media & Survey, IMMAR and MMR.
- [5] Following the economic reforms that France Télévisions has undergone, in particular with the abolition of advertising and the increase in the licence fee, the licence fee rate has risen from an average of 40% to an average of 65% from 2009.

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