

The CCMA's new dynamics of outsourcing productions in the face of digitalisation

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Abstract

The article analyses the Corporació Catalana de Mitjans Audiovisuals (CCMA) [Catalan Audiovisual Media Corporation] dynamics of content outsourcing to external production companies and its evolution in one decade. The period examined is 2013-2023, with a special focus on 2022 and 2023, when the digital strategy that has generated new production needs was promoted.

Keywords

Outsourcing, public service media, awarding of contracts, television, audiovisual production companies.

Resum

L'article analitza les dinàmiques d'externalització de continguts de la Corporació Catalana de Mitjans Audiovisuals (CCMA) a productores externes i la seva evolució en una dècada. S'examina el període 2013-2023, amb un enfocament especial en els anys 2022 i 2023, en què s'impulsa l'estratègia digital que ha generat noves necessitats de producció.

Paraules clau

Externalització, subcontractació, mitjans de servei públic, adjudicacions, televisió, productores audiovisuals.

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1. Introduction

In Catalonia, the definition of the scope of the public audiovisual communication service in Law 22/2005, of 29 December, on Audiovisual Communication of Catalonia, states that the provision of this service can enlist the support and collaboration of private entities and subjects in cases in which their availability is necessary as long as the decision is well grounded. In this regard, article 26 also states that the mission of the Audiovisual Public Service of the Catalan Government includes contributing to the development of the Catalan cultural industries, especially the audiovisual industry, and promoting audiovisual creation and new forms of expression in this field.

In this context, this research¹ analyses the Corporació Catalana de Mitjans Audiovisuals (CCMA) [Catalan Audiovisual Media Corporation] model of outsourcing the production of television content in the period between 2013 and 2023. Within this period, the focus is on March 2022 to December 2023, as a result of the appointment of the CCMA's new Governing Council by the Parliament of Catalonia, the change in the managerial positions that were previously in acting status and the promotion of a digital strategy in the public corporation. Starting with the launch of the Over The Top (OTT) platform, 3Cat, in October 2023, the analysis includes all video contents broadcast on both linear TV and the platform.

The period analysed falls within the context of an economic crisis that began in 2008, although the audiovisual sector felt it more keenly in 2012–2013, when several regional operators had to adopt austerity measures. They often included cutting public staff and increasing the outsourcing of production, which allows for more flexibility in staff size (Miguel de Bustos & Casado del Río, 2015). In 2010, the CCMA ceased having audiovisual production companies, such as those that produced local news, before making readjustments that affected the corporation's internal staff (Martori, 2017).

The overall objective of this research is to analyse the evolution in the amount of content that the CCMA outsourced in the period 2013–2023 and the dynamics of this outsourcing.

This objective can be divided into the following specific objectives:

1. To identify the process of selecting and awarding productions to external companies.
2. To determine the relationship between the outsourced production volume and the CCMA budget.
3. To study the type of content that is outsourced the most.
4. To analyse which production companies the CCMA has chosen to outsource contents.
5. To study how the promotion of the CCMA's digital strategy affects the dynamics of content outsourcing and whether the Corporation has been working with new audiovisual production companies to meet new challenges in the most recent period (2022–2023).
6. To analyse whether the CCMA's outsourcing of content guarantees the diversity of production companies'

geographical origin in order to equitably strengthen the audiovisual industry.

This study is relevant given that a gap has been detected in the analysis of the CCMA's outsourcing of productions. Previous scholarly work on this topic is not focused on Catalan public television but rather analyses the issue Spain-wide or in other autonomous communities.

2. Theoretical framework: The public media's outsourcing of production

The concept of outsourcing means contracting an audiovisual product of any kind to an audiovisual production company or another company outside the television operator. According to Cañedo (2020:19), 'the outsourced regional television model emerged in 1999 with the birth of Canary TV, the seventh regional operator to start broadcasting', after the three historical ones (Basque Country, Galicia and Catalonia) and the three subsequent ones promoted by socialist governments (Madrid, Andalusia and the Valencian Community).

This model, based on public-private collaboration, stood in opposition to the purely public model of the entities that had existed until then (Albornoz & Cañedo, 2015), which signalled a shift in the history of regional television. Later, other autonomous communities like Murcia, Aragon, Extremadura, the Balearic Islands and Asturias followed this same course, with the exception of Castilla-La Mancha (Cañedo, 2019).

The birth of this model of 'outsourced television' in the autonomous regions increased these operators' volume of contracts with audiovisual companies. This new television structure consisted of outsourcing part of the activity while maintaining a minimum staff (Fernández Alonso, 2002; Sarabia, Sánchez i Fernández Alonso, 2012; Cañedo, 2019).

Outsourcing is a model of public-private collaboration in which the provision of the service is public, as it depends on the administration, which is responsible and the guarantor through direct management, but private entities develop and produce certain services (Sarabia et al., 2012). There are two common practices in contracting by the regional radio and TV broadcaster: public tenders or direct production commissions without advertising.

This model can be analysed from different perspectives, which can afford both positive and negative interpretations. On the one hand, in contexts of economic crisis, sometimes public providers have chosen to limit the outsourcing of contents to external companies, while in others this method has been used because it allows them to lower costs and is more flexible with respect to possible staff dismissals or hires (Miguel de Bustos & Casado del Río, 2015). In this sense, workers do not become permanent civil servants but are hired by the companies (in some cases, with temporary contracts to make specific projects).

The negative side of this model is precarious work for

employees, as well as the tendency to contract the most economical offer, especially in public tender contracts, which causes large communication groups outside the region to become service providers, often the sole providers (Sarabia et al., 2012). A dynamic of growth in content outsourcing to external production companies in a public setting can lead to the assimilation of a neoliberal economic model based on 'a progressive but also violent dismantling of public property and its transfer to private hands' (Sarikakis, 2016:36).

On the other hand, Bustamante (2002:231) highlights concern about the phenomenon of 'sunflower companies', defined by Cañedo (2019:78) as those that 'are born under the aegis of regional television, with which they sign untransparent contracts and establish a situation of dependence that prevents the audiovisual sector in the region from effectively consolidating'. This is often due to the politicisation of public media management, which benefits companies due to political and personal influence and leads to some opacity in the outsourcing process (Bustamante, 2002).

In addition to clientelism, a common practice is outsourcing companies that are created *ex profeso* to produce certain contents (Sarabia et al., 2012). With regard to the outsourcing of strictly news content, this has garnered more criticism and public debate than entertainment, because, according to Fernández Alonso (2017), a private production company is more likely to have economic interests that could influence the objectivity and editorial impartiality of its contents. Furthermore, its workers are considered to be more subject to the fluctuations and precariousness of the market.

According to Cañedo (2019), the Canary Islands, Murcia, Aragon and the Balearic Islands are notable for having awarded complete programming chunks. For example, Murcia is the only regional television that uses an indirect management system in which all the television activities are outsourced to an external company. In contrast, others such as Asturias have chosen to diversify outsourcing through multiple contracts. This diversity of approaches reflects the complexity and variability of the regional television management model in Spain.

Several studies analyse these practices in other autonomous communities such as Asturias (Cañedo, 2019) and the Valencian Community (Carbonell, 2022), and nationally (Fernández Alonso, 2017 and Miguel de Bustos, 2012). According to Bustamante (2009), Miguel de Bustos and Casado (2012), Marzal (2015), Campos-Freire (2016) and Casado and Díaz González (2017), regional television stations in Spain justify their existence by multiple legitimising factors, especially the promotion of regional employment. 'In the territories in which they operate, regional audiovisual companies often orbit around them [the regional public corporations] to secure contracts, generating a situation of economic dependence heavily criticised by those who less support the Keynesian economy' (Cañedo, 2019, 18).

This dynamic began with what are known as the historical operators, such as the Basque regional television, EITB, which 'has created a clientelism that it is finding difficult to break away

from' (Fernández Quijada, 2010:81), even though it is proactive in promoting the audiovisual industry. In the case of Andalusia, 'regional television has generally been the only destination of Andalusian production' (Fernández Quijada, 2009:201).

In order to determine the public media's good practices in content outsourcing, several factors found in these contracting processes can be examined. Source diversity is one of the fundamental components in the sphere of content diversity. According to Napoli (1999), source diversity is also subdivided into the diversity of owners of production companies, the diversity of content distributors and the diversity of the workforce hired by production companies and distributors. This means that diversity is not only related to what is seen or heard but also to who is behind the content creation and distribution.. Albornoz and García Leiva (2017) underscore the importance of assessing to what extent the production, distribution and display/broadcast capacity of audiovisual content is concentrated in a small number of socioeconomic stakeholders. This analysis includes an exploration of the ownership, size and geographical origin of these stakeholders.

Fernández Quijada (2008) points out that the market for independent production largely depends on the evolution of the television stations that are contracted by the services. Today, public media corporations are immersed in the phenomenon of platforms and are striving to become digital media adapted to a context in which platforms have immense influence (Martin, 2021; D'Arma et al., 2021). They have had to create platforms to distribute content on demand and on social media, and these dynamics have affected the production needs (and the characteristics of the contents themselves) and, therefore, the outsourcing dynamics.

3. Methodology

The methodology used in this research is mainly qualitative, based on (1) a document analysis, by checking bibliographic references, laws, contracts and sectoral agreements to analyse the conditions of public outsourcing awards, as well as documents available on the CCMA website and documentation provided by the organisation for this research; and (2) in-depth interviews. Based on the documentation analysis, we have also worked quantitatively with data tables and the amounts of each production company's contracts.

The analysis of production companies' outsourcing poses a difficulty, namely the large volume of CCMA documentation and contracts that are generated every year. In order to adequately meet the research objectives, and since the CCMA works with many very diverse production companies every year, only outsourcing contracts for audiovisual productions were chosen, while other types of contracts, such as those regarding technological developments, were omitted. The entire universe, therefore, was defined from the public procurement data that can be checked in the contract search engine, by extracting only

the contracts that reflect production commissions to established production companies, while omitting private parties and other entities and distributing the data by year. Then, the ten contracts with the highest economic amount each year were identified to include the most production companies used the most. This has yielded a list of fourteen companies: production companies with a more stable volume of outsourcing, and cases in which a company was only hired one year but had a sufficiently high volume to be among the most significant that year. There is no base figure from which to work, as the productions are very different from each other depending on the format. Finally, six new outsourced production companies with scholarly criteria and analytical relevance were included in the period 2022-2023 in order to gain a more comprehensive view and meet the research objectives. Thus, from the initial universe of 189 production companies, a sample of twenty was chosen for analysis (Figure 1). The analysis performed on the sample is the compilation of contracts related to production commissions by the CCMA over the period analysed (2013-2023), their amounts, the identification of formats and the historical evolution of the outsourcing received by each production company over the years in monetary amounts.

The analyses contained in the results of this study refer to outsourced production as a whole, except in sections 4.5 (on the evolution of outsourced production companies) and 4.7 (on their geographical diversity), where the sample of selected production companies in Figure 1 is applied.

In-depth interviews were conducted with Cristian Trepas, head of Content and Programming for TV3, on the organisational structure of internal production and types of outsourcing; Eric Dexeus, head of TV3 format entertainment, on the relationship between public service and outsourcing; and Adria Serra, head of Digital Content and Transmedia Strategy at CCMA-3, on the criteria and standards that digital outsourced content must follow. All interviews were conducted during the month of March 2024, after developing the theoretical framework and prior to the drafting of the results. These three professionals from the Corporation have responsibilities within different areas and complementary perspectives, which allow the questions raised in the objectives to be answered. In addition, inquiries were made at the CCMA's Audience Attention Service [Servei d'Atenció a l'Audiència], whose answers were used to develop the results of the study.

4. Results

This section analyses the selection and contracting procedure for companies that produce content for the Corporation, and it quantifies the evolution of outsourced production in relation to the budget and the type of outsourced content. Finally, it studies the evolution of the companies contracted in the period 2013-2023 and their geographical diversity.

Figure 1. Audiovisual production companies analysed and selection criteria

PRODUCTION COMPANY NAME	JUSTIFICATION OF THE CHOICE
ABACUS, SOCIETAT COOPERATIVA	New contract, significant volume
AGUACATE & CALABAZA, SL	New contract, significant volume
ALGUNA PREGUNTA, SL	Large volume of recurring outsourcing
BRUTAL MEDIA, SL	Large volume of recurring outsourcing
EL CORRAL DE L'HUMOR, SLU	Large volume of recurring outsourcing
EL TERRAT GESTIONES XXI, SLU	Large volume of recurring outsourcing
FEM PRODUCCIONS, SL	New contract, content for young/adolescent audiences
GESTMUSIC ENDEMOL, SA	New contract, content for young/adolescent audiences
GRUP MEDIAPRO, SLU	Large volume of recurring outsourcing
LA BOMBILLA MEDIA, SL	New contract, content for young/adolescent audiences
LA MANCHESTER RADIOFÒNICA, SL	Large volume of recurring outsourcing
MAGNOLIA TV ESPAÑA, SLU	Large volume of recurring outsourcing
MINORIA ABSOLUTA, SL	Large volume of recurring outsourcing
SHINE IBERIA SLU	New contract, significant volume
TRIACOM AUDIOVISUAL, SL	Large volume of recurring outsourcing
TRUE CRIME FACTORY, SL / GOROKA CONTENTS, SL	Large volume of recurring outsourcing
TURRUÀ LLÀCER, SLU	New contract, significant volume
VERANDA MEDIA, SLU	Large volume of recurring outsourcing
VÉRTIGO FILMS, SL	New contract, significant volume
YOUPLANET PRODUCTIONS, SL	New contract, content for young/adolescent audiences

Source: Own work based on the CCMA's contract search engine.

4.1 Categories of the CCMA's outsourced production

Any production that is outsourced either totally or partially, or in which an external production company is contracted, is called an associated production. The concept of associated production includes the following degrees of outsourcing: mixed or hybrid production for an external production assignment in which part of it is done internally, such as using the Corporations' resources or facilities; or 'turnkey', when the Corporation only provides funds and sets a delivery date for the finished product. There are also co-productions in which the CCMA participates in joint productions with other companies or operators.

4.2 Selection and outsourcing procedure at the CCMA

The audiovisual projects that will become part of the content that the CCMA offers are selected and outsourced through the processes called Calls in accordance with the 'Regulatory Standard of the procedure for selecting and outsourcing audiovisual content for the CCMA media', approved by the Governing Council agreement 31/2016, which amends agreement 14/2016.

The Regulatory Standard is a document that sets the procedure for the submission, selection, processing and outsourcing of all the projects involving the production, direction and supply of audiovisual content to be integrated in the programming line-up of CCMA media, as well as the assignment of intellectual property and operating rights (CCMA, 2016). This explains the CCMA's distribution windows, what products are offered and their themes. It also sets out provisions regarding the format for submitting the proposals, the CCMA's programming needs, the economic conditions and the maximum orientative production amounts for each content genre.

The Corporation makes a distinction by category within the contents meant for linear TV, which it does not do with the other radio and digital contents (CCMA, 2016:27). It also sets maximum orientative amounts per minute for each content category: €4,000 for large format serial fiction, €2,700 for 'situational' fiction, €1,500 for large on-set entertainment programmes, €1,200 for format entertainment programmes, €1,000 for 'spoken' entertainment programmes, €700 for serialisable entertainment and €1,000 for docuseries (CCMA, 2016: 25-26).

In contrast, it does not set categories or amounts for the contents of the other media; in the digital media category, it states that as a new category without precedents, each project will be valued based on an individual assessment and reaching an agreement. The standard also stipulates an industrial profit limit for production companies to which a production is outsourced by the Corporation: a percentage of 8%, except in the first season, in which an initial percentage of 10% is applied (Art. 2.2 of Annexe 2). Within this framework, when the Corporation requires a production need to be covered by an external audiovisual production companies, a call for the submission of audiovisual projects is announced through its public website. These calls do not have an established

publication period, nor are they published or notified specifically to the interested production companies.

In order for a project to be more likely to be chosen in a call from the Corporation, in addition to fulfilling the specifications, aspects such as gender parity, the visibility of diverse sexual identities, types of diverse bodies and production without an ecological footprint are also positively assessed, all of which make a project valuable from the standpoint of public service. Each project is intended to fulfil one of these 'points' so the Corporation's content as a whole covers all these areas (Eric Dexeus, 2024, personal interview).

However, many aspects of the Regulatory Standard are considered obsolete today, as the document dates from 2016. The audiovisual scene has changed a lot in recent years, and for this reason the Corporation is working on an updated Regulatory Standard on the selection and outsourcing procedure. However, it is not expected to set maximum production amounts per minute, because the Corporation 'must have the ability to acquire productions that can be competitive' and 'generate interest in national and international markets' (CCMA Audience Attention Service, 2024, email).

Currently, contracts with production companies do not have to set the product's distribution window (linear channel, OTT platform, etc.), since it can vary depending on the Corporation's strategies. Therefore, content is outsourced and then the CCMA can define the most suitable distribution window. An example is the case of *La travessa*, which was initially outsourced with the intention of being for linear TV (TV3). However, dovetailing with the launch strategy of the 3Cat platform, it was decided to launch the first program for the OTT on demand (Eric Dexeus, 2024, personal interview).

4.3 The evolution of outsourced production in relation to the budget

This section compares the associated production expenditure over total production expenditure to better understand the proportion of outsourced production companies within the Corporation's total content. The total production expenditure between 2013 and 2023 (Figure 2) was calculated based on all the productive costs of the programmes and was obtained directly through a request to the Corporation.

In the period analysed (2013-2023), the years in which more money was allocated to the outsourcing of productions were 2022, with a total of €44,130,000, and in 2023, with €63,988,000, as shown in Figure 2. The two years in which the highest percentage of the budget was allocated to outsourced productions within the total expenditure in production are 2013, with 29.2% of the total budget, and 2023 with 32.9% (Figure 2).

There was an upward trend in total euros for outsourced productions from 2018 to 2023, although it is not reflected in the same way in the percentage of outsourcing compared to total production during the same period, which has fluctuated more. The lowest percentage spent on associated productions

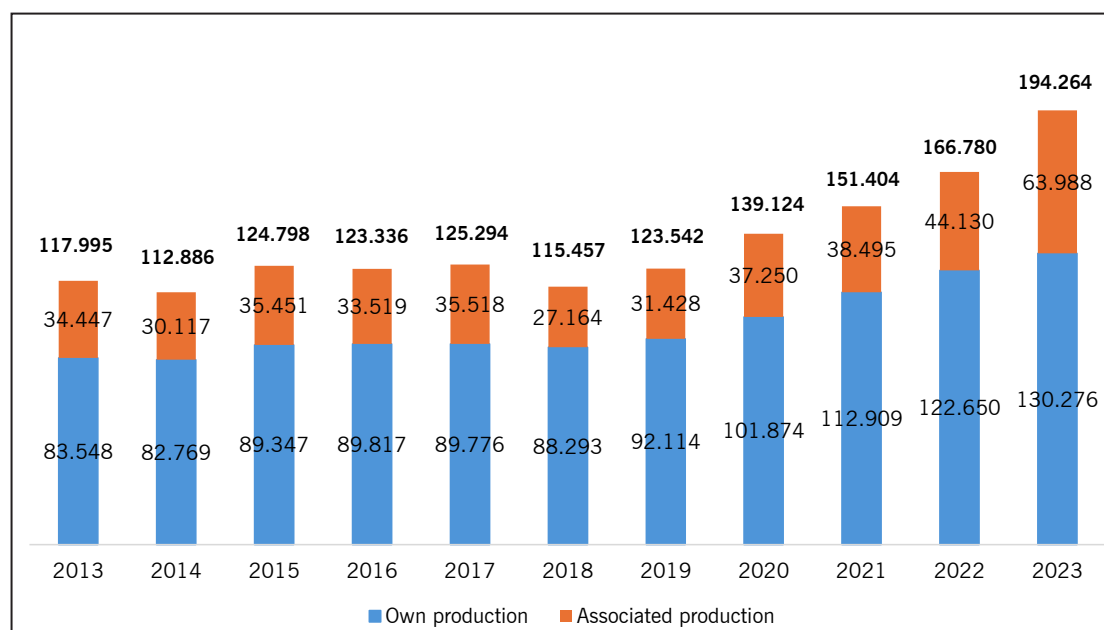
over the total in the period analysed was in 2018, with 23.5%, and subsequently 2019 and 2021, both with 25.4%. With regard to the total in euros, the year with the lowest budget for associated productions was 2018, with €27,164,000, followed by 2014, with €30,117,000.

Thus, 2023 was the year with the largest total budget for associated productions both in absolute terms and percentages. In fact, the increase was so significant (almost 20 million euros) that it led to a very significant increase in the percentage allocated to associated productions over the total public

contribution to the Corporation. The Government of Catalonia's total contribution to the CCMA's budget increased 16.8% in 2023 compared to the previous year. Associated productions went from €44,130,000 in 2022 to €63,988,000 in 2023 (Figure 2). This is a total increase in spending of 45% on associated productions, if we include co-productions in these calculations.

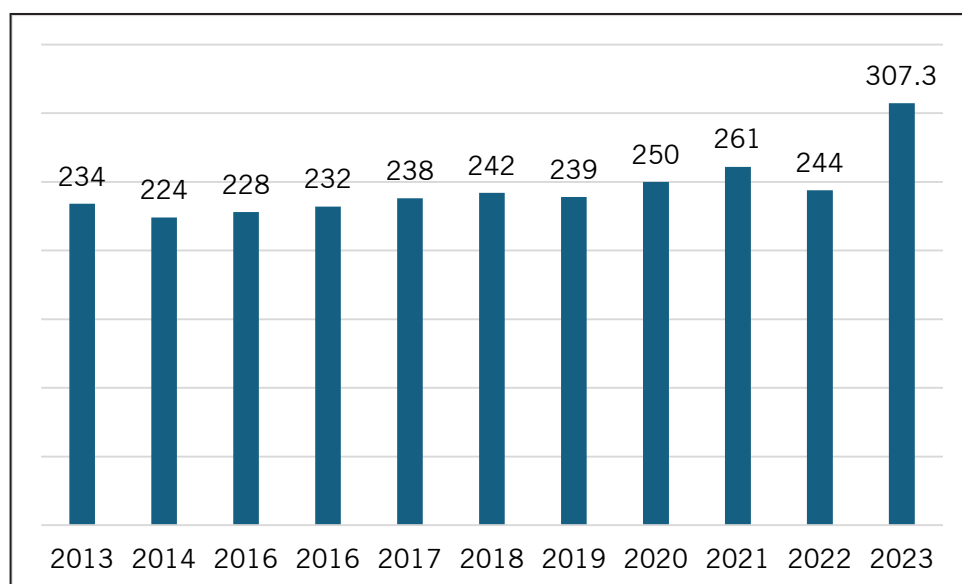
Therefore, the public contribution to the CCMA has increased, especially in 2023 (Figure 3), which has led to an increase in outsourced productions. The fact that the Corporation had

Figure 2. Evolution of the CCMA's expenditure on its own and associated productions (2013-2023)



Source. Own work based on data provided by the CCMA.

Figure 3. Evolution of the public contribution to the CCMA (2013-2023)



Source: Own work. Source of data 2013-2022: *Connectem per arribar a tothom: Pla estratègic de la nova CCMA* (CCMA, 2022:21). Source of data 2023: Annual accounts Audit Report of the CCMA (CCMA 2023:78).

a higher budget allowed it to outsource productions to feed the linear media line-up and especially furnish content for the OTT platforms as a result of promotion the digital strategy: the 3Cat platform, which was launched that same year, and the SX3 platform, which had been launched in 2022. The following section shows that the contents for digital media and for children and youth audiences have the higher proportion of outsourcing over the budget of each area (Figure 4). This is explained by the need to feed the digital platforms (the CCMA's OTT and the Corporation's social media profiles) when 100% of its own resources was already in use, which required the contents to be produced by external companies.

4.4 Type of outsourced content

The categories of News and Sports had a low percentage of outsourcing throughout the period 2013-2023: between 0 and 1% for Sports and 2 and 4% for News. These percentages are due to exceptional contracts, such as that of Ramon Pellicer, who works as director and presenter of *TN cap de setmana* through the production company Sticaki SL, with a contract of €133,000 per year, according to data extracted from the CCMA's contract finder. In contrast, the category with the highest percentage of outsourcing is entertainment and culture, around 50% in all the years analysed. This category shows an upward trend in spending since 2019 (Figure 5), with a budget increasing from €15,797,000 (49.6%) to €28,198,000 (52.1%) in 2023.

The most pronounced increase in outsourcing is in children's and youth programming (Children and Youth category in Figure 4), with a budget that went from €3,380,000 in 2021 to €6,943,000 in 2022 (Figure 5). This more than doubling of the budget can be explained by the restructuring project of the Super3 channel by Gestmusic Endemol, operating since 10

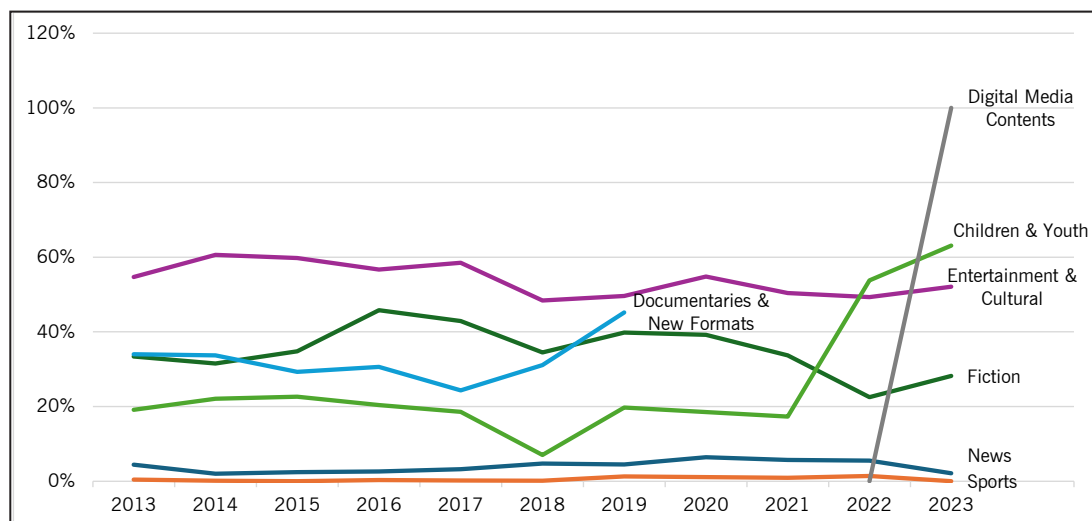
October 2022. The renovation of Super3, which became SX3, and the creation of an OTT platform with the same name for children's content involved significant changes in programming, including the return of anime series in Catalan such as *One Piece* and *El detectiu Conan* and a greater commitment to entertainment and digital content.

Regarding the Fiction category, the data show a slight decrease in the percentage of the budget allocated between 2019 and 2022 (Figure 4). In 2020, the budget for this area fell to 9 million euros, 5 million less than the previous year (Figure 5).

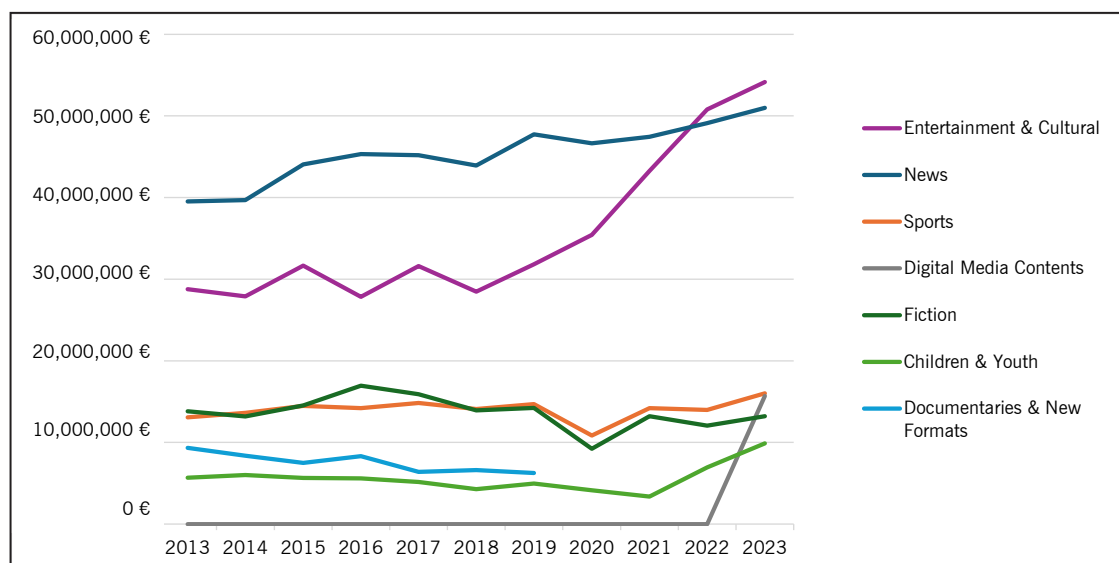
In 2023, investment in fiction went back up. This is because the series *Jo mai mai*, which premièred in 2024, was outsourced to Cooperativa Abacus for a value of €2,979,272.68. It consists of eight 45-minute chapters, with a cost of more than €8,000 per minute, doubling the maximum cost ceiling stipulated in the Regulatory Standard of €4,000 per minute for serial fiction, as mentioned in section 4.2. The Corporation believes that it has to adapt to the current dynamics of the audiovisual sector in order to compete with the productions of other stations and platforms (CCMA Audience Attention Service, 2024, email).

The budgets for audiovisual productions have changed and no longer take into account only the cost of making a production, but also all the content linked to it, such as the creation of digital dissemination strategies, exclusive content to share on social media, music recorded specifically for the production (new songs or new arrangements of existing music), specific videoclips, interviews and materials with actors and on the shooting, etc. In other words, the outsourcing of current production also includes the digital dissemination strategy, which is the responsibility of the production companies. Therefore, when outsourcing, new services have to be taken into account that did not have to be considered in the past.

Figure 4. Evolution of outsourcing by productive areas, in percentage over the total budget of each category (2013-2023)



Source: Own work based on data provided by the CCMA.

Figure 5. Evolution of outsourcing by productive areas, in absolute values in € (2013-2023).

Source: Own work based on data provided by the CCMA.

In the analysis of the evolution of production at the CCMA, the specific item called Digital Media Content, created in 2023 with a budget of 15 million euros, is wholly earmarked to content produced by external companies. This item includes the productions of EVA, a CCMA digital content window, which are distributed via the social media. Some of them are produced by ELAB studio, while other contents of new exclusively digital formats (*La turra*, *Truca quan arribis*, *Spursito & Company*, *Xef Marín*, *Pisos d'estudiants*, etc.) are made by companies such as La Manchester Radiofònica, El Terrat, Monmedia Productions and Fem Produccions.

With the Corporation's own resources already stretched to the utmost, any budget increase for new productions had to be outsourced (Cristian Trepà, personal interview, 2024). Outsourcing allows it to bring in younger perspectives outside the CCMA staff with more knowledge of the digital environment (Adrià Serra, personal interview, 2024).

4.5 Evolution of the outsourced production companies

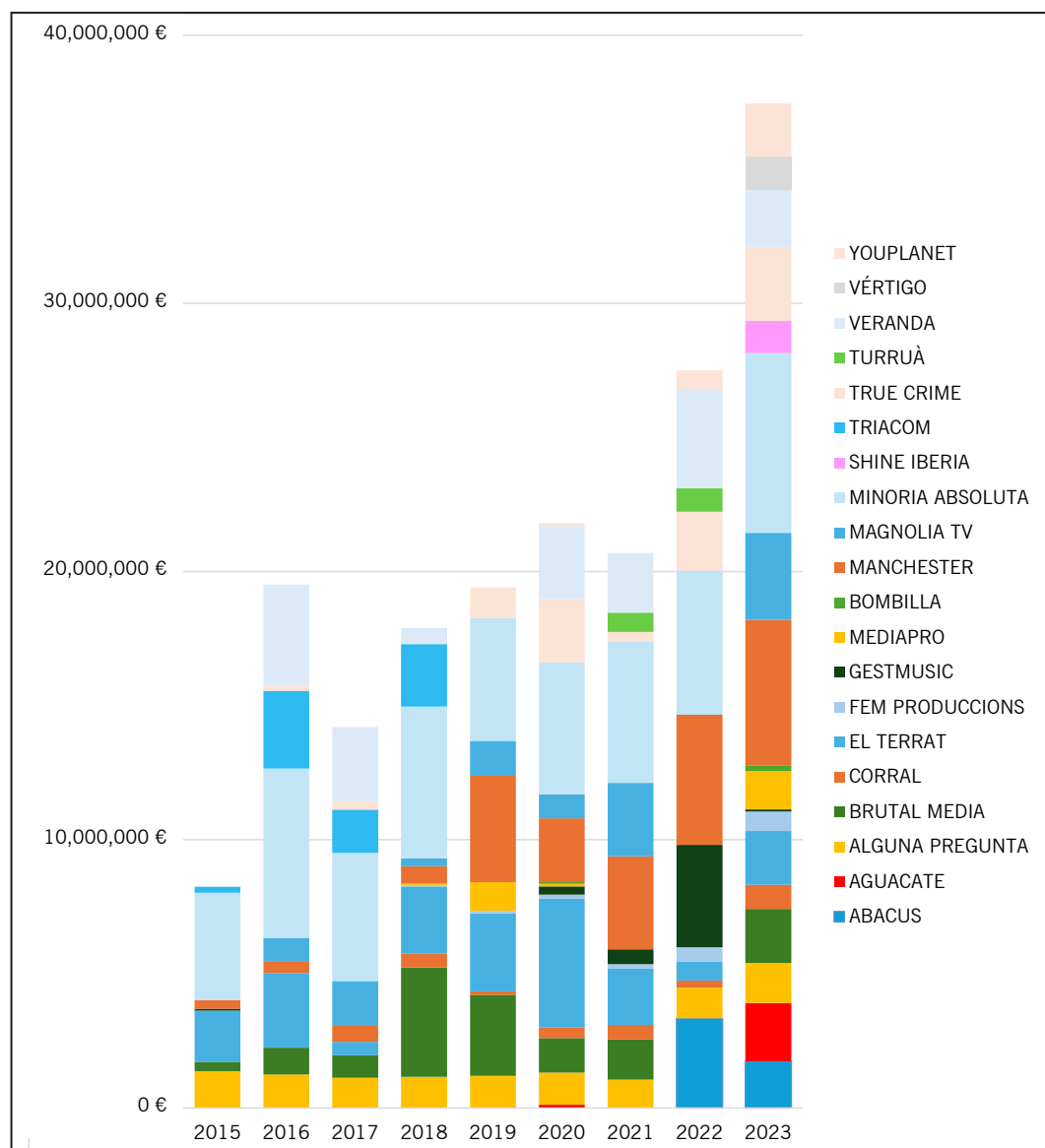
Minoria Absoluta is the company that has the largest outsourcing investment by the CCMA, with fluctuating but high amounts thanks to programmes such as *Polònia* (between 3 million and 3.5 million per season; running since 2006) or *Està passant* (1.6 million euros per season; airing since 2017). Of all the production companies, the most is spent on these two programmes. In 2023, the outsourcing of content to Minoria Absoluta rose further with the programmes targeted at the digital platforms *Love cost*, *Èpic nails* and *Fuet*, which together totalled more than 1 million euros.

Alguna Pregunta is another veteran production company that has remained steady throughout the period analysed (Figure 6) due to the annual and regular renewal of the programme *APM* (1 million euros per season) and the production of other formats

such as *GIT GUD* for SX3 or *40 pals*, which is exclusively digital content.

The volume of outsourcing with the production company El Corral de l'Humor, associated with the humorist Peyu, has also remained steady at around 500,000 euros for formats such as *BricoHeroes* and *El búnquer*. A decline can be seen in some more veteran production companies such as El Terrat, which reached the maximum budget awarded in 2020 thanks to the outsourcing of *Última nit del karaoke* and a second season of *Tabús*, in addition to the entrenched *Preguntes freqüents*. From then until 2022, the CCMA's outsourcing to this production company fell significantly, but it rallied in 2023 with the production of the show *Vosaltres mateixos*. Veranda Media earned the maximum budget in the period 2016-2017 with the production of the fiction *Merlí*, with approximately 3.7 million euros in 2016. Magnolia TV has a considerable volume but more irregular outsourcing; with the production of the show *Joc de cartes*, it has earned around 1 to 1.5 million euros in 2016, 2017, 2019 and 2020, and about 3 million euros in 2021 and 2023.

In recent years, there has been a greater commitment to newer production companies led by younger people, such as Roger Carandell's Fem Produccions (*LOFT*, *Que no surti d'aquí*), with an investment that has grown year after year to 700,000 euros in 2023, and La Bombilla Media, incorporated from a youth association that after producing *Generació Z* in 2020, agreed to produce the dating show *Clímax* for 200,000 euros in 2023 as one of the main projects of EVA, the CCMA's digital brand targeted at young people. Aguacate & Calabaza has also entered the game with little experience in large productions; it received a peak budget of about 800,000 euros for the production of *La travessa*. As a result of the first season's success, the contract was renewed for a second season with almost twice the budget.

Figure 6. Evolution of the CCMA's expenditure by production company and year (2015-2023).

Source: Own work based on the CCMA's contract search engine.

Note: Data for the period 2013-2015 is not available because it is not publicly available.

This outsourcing of productions to newer companies led by young people can be explained by the fact that the internal staff of the CCMA and traditional production companies still lack age diversity. For this reason, the Corporation bears in mind that young professionals are hired by the production companies who can supply the digital content demands and have knowledge of dissemination on social media required in the programmes that are outsourced, and that their teams represent diversity (Adrià Serra, 2024, personal interview).

Regarding other new outsourced production companies, Turruà Llàcer, run by Àngel Llàcer, produced a format for the Corporation for the first time in 2021: *El llop*. In 2022, it did again with *La puntual*, and the two formats were worth about 800,000 euros each. Gestmusic, a longstanding Catalan

production company behind successful large formats for national stations like *Operation Triunfo* (TVE, Prime Video), *Tu cara me suena* (Antena 3) and *Tú sí que vales* (Telecinco), had occasionally worked with the Corporation with the format *Benvinguts al Poble* (2015), but it did not land an outsourcing contract for *Caigut del Cel* until 2021 and the award for the new SX3 project for more than 2.5 million euros, including the transmedia fiction project *BETA* and the development of a videogame, which explains its peak in 2022 (Figure 6). The show *Ràndom* is produced by YouPlanet, a production company and agency for faces familiar to young audiences on the Internet. In 2023, Vértigo Films was also added with a contract of more than 1 million euros for the production of the series *Nudes*.

The production companies that grew the most in outsourcing

are True Crime Factory, Goroka Contents and La Manchester Radiofònica. Goroka Contents has experienced an increase since 2019, with around 2 million euros per year spent on the production of *Crims*; and La Manchester Radiofònica experienced the highest growth in outsourcing in terms of amounts, number of contracts and speed of growth: from the approximate 600,000 euros that was allocated to it annually until 2018, to more than 3.5 million euros in 2019, to almost 5.5 million in 2023, for productions like *Quatre gats*, *Planta baixa* and *Col·lapse*, as well as the morning radio show *El matí de Catalunya Ràdio*, all four hosted by the journalist Ricard Ustrell.

One striking case is Abacus Societat Cooperativa. The company, which has a long history linked to the educational community, has been working on the audiovisual scene since 2022 by producing content in Catalan for the public corporation. In total, more than 5 million euros have been allocated for nine formats in its first two years working with the CCMA (2022 and 2023).

4.6 Outsourcing and digital platforms

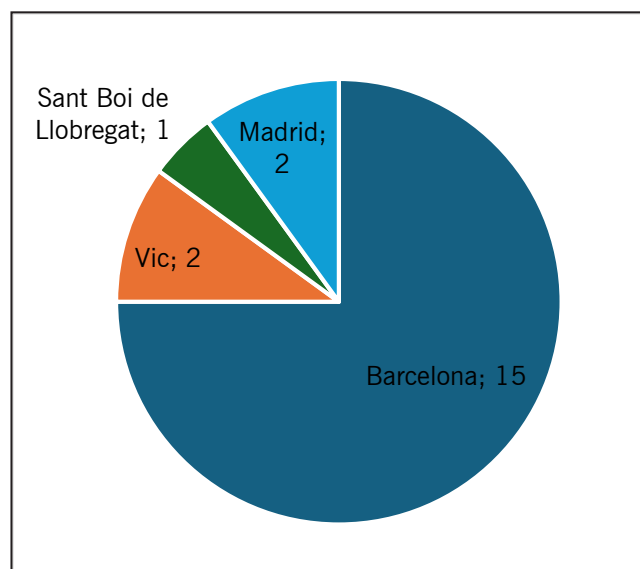
The launch of the 3Cat platform, which has been operating since October 2023, has impacted the outsourcing dynamics of the CCMA, which has needed content to feed it. The CCMA's adaptation to the platform context has also materialised with the launch of SX3 – the platform for the children's audience – and the digital brand EVA targeted at young people – which distributes content mainly via the social media – both of which are available in 3Cat. The promotion of digital content has affected outsourcing with an increase in both content outsourcing (as shown by the data presented) and the productions' requirements, whose formats have to be adapted to digital dynamics and which have to include the digital and transmedia strategy for the contents.

The analysis of the outsourcing of productions to external companies shows that although the Corporation has worked with consolidated production companies in recent years, it has also opened the door to new companies led by younger professionals, dovetailing with the need to have more content to feed digital platforms and the available budget at a time when the CCMA was internally working with its resources stretched to the utmost. The introduction of new and more diverse production companies within its workforce has enabled it to bring in a more current take on the productions, with a digital approach to the contents (either initially broadcast on digital channels, or because they have a digital dissemination strategy that complements the linear broadcasts).

4.7 Geographical diversity of production companies

Regarding the domicile of the production companies working for the CCMA, 18 of the 20 companies analysed are domiciled in Catalonia. This indicates effective invigoration of the Catalan audiovisual business community. The two exceptions are Shine Iberia and Vértigo Films, which are based in Madrid. Shine

Figure 7. Domicile of the production companies analysed



Source: Own work.

Iberia produced *El tros* in 2023 for almost 1 million euros and co-produced the documentary series *Generació porno* for more than 200,000 euros the same year. Vértigo Films received 1.2 million euros for the series *Nudes* in 2023. Some of the Catalan production companies are domiciled outside the city of Barcelona, such as Crisàlde Studio in Vic and La Bombilla Media in Sant Boi de Llobregat, while the other 15 are in the Catalan capital and all are in the province of Barcelona.

Therefore, shortcomings in the geographical diversity of Catalan productions can be detected, given that none of the 18 Catalonia-based production companies analysed is located outside the Barcelona province.

5. Conclusions

The outsourcing of some of the productions of the Corporació Catalana de Mitjans Audiovisuals (CCMA) [Catalan Audiovisual Media Corporation], as a public service, reflects the fulfilment of the CCMA's functions entrusted by law of serving as an engine and promoter of the regional industry. This research concludes that the Regulatory Standard of the procedure for selecting and outsourcing audiovisual content for the CCMA's media needs to be updated so it takes into account the Corporation's current digital dynamics and the context of platformisation (specific objective 1).

In addition, the momentum of the digital strategy and the launch of 3Cat have increased investment in outsourced productions in both absolute figures and percentage of the budget, which grew in 2023 and reached 33% of the total (specific objective 2). In 2023, there was a notable increase in the CCMA's public funding in order to reverse its declining production capacity, boost digital content and create and nurture the OTT platform

with its own exclusive content. Given that the use of the Corporation's own resources, such as sets and personnel, was maxed out, as seen from the interviews conducted, the new contents produced as a result of this budgetary increase had to be outsourced to external production companies, as they could not be handled internally.

In relation to the objective of studying the type of content that is outsourced the most (specific objective 3), the contents that have been outsourced the most in the period analysed are entertainment and culture, with about half of the productions outsourced to private companies in the period 2013-2023. In 2022, with the creation of the SX3 platform and its new programming, the outsourcing of children's and youth content exceeded entertainment, with 60% of the volume produced by external companies. Finally, since 2023, the category of digital media content was included, with 100% outsourced production. On the other hand, the programmes with lower outsourcing rates are in the categories of sports, with an average of 0.5%, and news, with an average of 3% of the budget allocated to external production companies.

In the analysis of which production companies the CCMA uses for content outsourcing (specific objective 4), the company that has received the highest contracting by the CCMA during the entire period analysed is Minoria Absoluta, followed by La Manchester Radiofònica, which experienced the highest growth in programming orders. Other production companies that have received a notable level of outsourced programming are Brutal Media, Magnolia TV and Veranda TV. Abacus Cooperativa, Aguacate & Calabaza and Vértigo Films, among others, were added as new production companies in recent years.

Regarding how the drive for digital strategy affects the dynamics of outsourcing (specific objective 5), it currently includes new services that did not need to be considered before, such as the digital dissemination strategy and the creation of digital and transmedia content, which production companies have to cover. Outsourcing production allows public corporations to be flexible and adapt to market demands in content, so they can meet new consumption models and audiovisual languages.

In this sense, the CCMA is focusing on youth-led companies that produce content for this target audience, such as La Bombilla Media, Fem Produccions and YouPlanet. In this way, the public media can have content targeted at young audiences and adapted to the new digital consumption dynamics and thus offset the lack of age diversity and younger profiles in the Corporation's internal staff. In addition, when selecting a project, the CCMA takes into account aspects such as gender parity, sexual and bodily diversity and sustainable production, in addition to fulfilling the established specifications, in order to reinforce its value as a public service.

With regard to the study of the geographical diversity of the production companies (specific objective 6), we can conclude that the domicile of the production companies commissioned to produce content for the CCMA are mainly Catalan, so the resources earmarked for external productions serve to promote

the regional audiovisual industry. However, there is a lack of geographical diversity in the domicile of the companies, with a clear concentration in the province of Barcelona; therefore, the audiovisual sector is not promoted equitably throughout the territory.

This article provides information on the outsourcing of production by the public media, which must be adapted to the context of digitalisation and platforms, and with new content creation dynamics that affect the contracting and outsourcing of programming to external companies.

The platform scenario requires competitive productions, a higher volume of content and innovative formats to reach a diversity of audiences, beyond the time slots allowed by linear TV. Therefore, the production companies working for the CCMA have to adapt to digital languages and produce content for digital channels. This has led to the emergence of a series of new production companies led by young people and is forcing the traditional ones to adapt to the new context. In addition, there is innovation in the contents to feed the 3Cat platform, the EVA youth channel and the SX3 children's platform. Thus, the CCMA's digital drive and the launch of the new platform have invigorated the Catalan audiovisual industry by giving rise to new production companies led by young professionals, in addition to promoting innovation.

Future research on this subject can seek to compare the outsourcing dynamics in different international case studies, as well as to detect the future professionals required by public corporations and audiovisual production companies as a result of adaptation to consumer trends that also affect changes in the way content is produced.

Endnote

This research was awarded with a special mention in the 36th CAC Awards for research in audiovisual communication.

Notes

1. This article is a part of the first author's final degree project (TFG) and was submitted to the Universitat Autònoma de Barcelona in June 2024.
2. Public procurement data only include contracts since 2015.
3. The legal name with which the production company is established and as it appears in the contracts is 'FEM Produccions, SL', although in its communication, website and social media it presents itself under the brand 'Crisàlide Studio', which is its commercial name.

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