IN THE DIGITAL FUTURE?



POLICY BRIEF

<u>KÖA</u> Kingdom of the Netherlands

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POLICY BRIEF

HOW TO ENSURE QUALITY LOCAL INFORMATION IN THE DIGITAL FUTURE?



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INTRODUCTION

ocal reporting, informing the citizens about latest events and developments in their local communities has always had a special place and carried special meaning in news reporting in general, as the most basic expression of democratic development of a society. As important as it may be for citizens to know how government performs at the national level, even more important is for them to know how local administrations work and how much they care that citizens get the services they paid for through their taxes.

The citizens need to know how local communal services function and operate, if thrash is taken out on time, in what condition are their streets and how local schools work. The citizens also want to know about local cultural life, the results of the local sports teams and, in a predominantly agricultural economy like North Macedonia's, the weather forecast for the next day.

That information is rarely available on the big national media that focus on parliamentary politics and the work of the central government, and the cultural scene of the capital city. The local media, working and functioning inside the local communities are far more capable and suited to the task to serve those needs of their neighbours or, depending on the area of coverage, their municipality or a wider region.

The Republic of North Macedonia has a long history of local — or, more precisely, hyper-local — media. Thanks to high levels of decentralization in former SFRY, all municipalities operated municipal public radio stations, while a large majority had a local municipal newspaper (weekly, monthly, etc.).

That situation was carried over after the country gained independence in the early 1990s. The atmosphere of newly won freedoms, including the free-

dom of information, and the widely promoted new entrepreneurial spirit, resulted in a "boom" of new privately owned radio and television stations. The expansion was such that, at one point, there were more than 180 broadcasters functioning in the country, serving their local communities or, in the case of a handful of radio and television stations, the nation. Several local public radio stations also expanded into television, growing into local radio-television centres.

Most of the local newspapers also survived the change of political and economic systems. To the extent that their capacities allowed them, in view of the limited financial and human resources at their disposal, they managed to provide certain level of local reporting for their local communities.

We are aware of the general tone of pessimism that a realist's view into the current situation of traditional media, burdened with problems of monetizing their production, especially the news coverage they provide. That will surely earn us undeserved characterization as doomsayers who "call for the disappearance of local media and media plurality in the country". Sadly, regardless of our love and dedication to traditional media and their output, we cannot change or ignore the economic and other indicators that make this document rather disturbing reading.

This document, prepared under the auspices of the "Monitoring and Policies for Reformed Media Sector" Project, supported by the MATRA Programme of the Ministry of Foreign Affairs of the Kingdom of the Netherlands, aims to provide a brief overview of the existing situation and possible future trends and to promote and direct the discussion on possible solutions for this burning issue faced by the media scene globally.





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SITUATION IN NORTH MACEDONIA AND GLOBAL TRENDS



BROADCASTING

At the moment of writing of this document, there are 19 local and 17 regional TV broadcasters and 65 regional and local radio stations airing programmes in North Macedonia.

The number of local broadcasting media is constantly dropping, due to a number of circumstances. First, after a prolonged discussion about the fate of local public broadcasters (several of them also engaged in television broadcasts) before the adoption of the 2005 Law on the Broadcasting Activity, the decision was made that they should either privatize or shut down operations. The decision was motivated by the need, clearly expressed by the local reporters staffing their newsrooms, to relieve them from the political pressures and financial dependence on local administrations (local public broadcasting was financed from the municipal budgets).

Second, it was clear that Macedonian media will not be able to somehow avoid the crisis of financing of journalism and traditional media brought about by the digital disruption, a situation in which growing number of news media fight for a shrinking available advertising spending. In view of that—while the authors of this document wish that as many broadcast and print media survive and continue to perform their important work—it is difficult to

imagine a situation in which all currently functioning local media, especially local TV stations, will manage to survive, even short-term.

Third, policies of allocation of television broadcasting permits are based on assumption that local communities, in our case defined as municipalities, are equal to local media markets. Those policies, due to the situation on the ground at the time of the adoption of the first Law on the Broadcasting Activity in 1997, continued to this day and insist on the existence of local commercial television.2 At the same time, commercial television that would function and sustain itself on the available advertising market at any level below national is almost an unknown phenomenon in Europe (with the exception of several other countries of former Yugoslavia, although we should say that there are certain differences between individual successor states).

That approach proved to be, at best, inadequate, knowing that most municipalities in the country lack both sizable population (measured as a number of individuals or as number of households) or local economy of scale sufficient to sustain a local media outlet, especially not a television broadcaster. The question is if the existing planning and development regions (which correspond to the division of broadcasting regions in the allocation of regional TV licenses) are economically powerful enough to function as local media markets, especially in television.

¹ The regional radio stations all function and cover the area of the City of Skopje, and they are classified as regional only by virtue of the fact that the City of Skopje is considered as stand-alone region in the administrative territorial division of North Macedonia into planning and development regions.

² In that context, for example, we had the decision to introduce permits for local area transmission of programmes over public electronic communication networks (local DVB-C permits), once it was clear that local TV broadcasters won't be able to afford the costs of the digital switchover, thus introducing a practice that is absolutely incompatible with the very nature of platforms such as cable or IPTV distribution.

To illustrate that, consider the available data on income and expenses of regional and local television broadcasters and how the financial results reflect on their ability to offer quality contents, including quality local reporting for the local community they serve. The total cumulative income reported by the regional TV broadcasters in 2018 amounted to about 1.25 million Euro, and the total segment of regional television reported a net loss, having in mind that regional TV broadcasters reported total cumulative expenses of about 1.5 million Euro. A simple comparison shows that the total cumulative income reported by the regional TV broadcasters are slightly bigger than the average costs of production of an episode of quality drama series in Western Europe, or the average costs of production of one season of drama series in Serbia or Croatia. An equally simple math shows that all 17 regional TV broadcasters in North Macedonia can spend, between them, about 4 Eurocents for every second of broadcast programmes (if they broadcast 24 hours per day).

The situation is far worse with the local television stations, which can cumulatively invest in programming contents an amount that is equal to about 5 episodes of quality variety show programme in Serbia or Croatia (any comparison with EU member states is simply absurd), and can't afford to spend, between all of them, more than one Eurocent per second of broadcasts. The local TV broadcasters reported total

cumulative earnings of about 373,000 Euro, at total reported expenses amounting to about 530,000 Euro, that is, reported huge losses.

The figures are quite clear. Similar to the national audiovisual media services market, there is no possible justification for the existence of local or regional television markets in their current form. The same conclusion is valid for the majority of European countries. To illustrate, there is the example of Great Britain and the introduction of local television permits by the national audiovisual regulatory body OFCOM.In two rounds, in 2012 and 2013, respectively, OFCOM defined local broadcasting areas with plans to allocate one local TV license for each of the newly defined local markets. Although most of those new local TV markets covered larger conurbations of at least 50-60,000 TV households major cities with their surroundings or whole counties in some cases - 33 of the planned 35 licenses were allocated in 2012, mostly to TV stations owned and operated by two or three major TV companies³. More than a half of the TV stations that won licenses have shut down operations long time ago, mostly because they failed to secure the necessary finances. In 2013, of the 14 licenses on offer, only 4 were allocated. Again, the three major groups dominate in terms of ownership. Those who won the licenses are a diverse group of commercial and community TV broadcasters, the latter functioning as non-profit entities, staffed primarily by volunteers.



 $3\ Local\ Television\ Ltd.,$ That's TV or STV in Scotland are the leading such companies

SITUATION IN NORTH MACEDONIA AND GLOBAL TRENDS



In the Netherlands, on the other hand, commercial television functions only on national level. The local and regional TV broadcasting are part of the system of public broadcasting, with 14 regional public broadcasters and local programmes (not whole channels) produced by so-called "broadcasting associations".

In some European countries, for example in Sweden (to certain extent also in Great Britain), there are so-called "open access TV broadcasters", functioning on non-profit principles in the major cities, as part of the "Open Channels Network ROK".

Local radio is in somewhat better situation as provider of local content, including local reporting, primarily because of much lower costs of operation compared to television. Naturally, radio is also hit hard by the new situation in the advertising market, and by the growing competition of music streaming services on the internet and the multitude of new podcasts as replacement for talk radio.

PRINT MEDIA

According to the registry of print media kept by the Agency for Audio and Audiovisual Media Services, four local newspapers continue to function in North Macedonia – "Bitolski vesnik" weekly newspaper in Bitola, "Stipski glas" monthly in Stip, "Zenit" weekly newspaper in Prilep, and the free weekly "Skopsko Eho" in Skopje.

The local media, and that is especially true of the local print newspapers, are especially vulnerable to the onrush of online news media – online newspapers and other news-sites – and the subsequent move of advertising budgets to the new digital, mobile and internet platforms. As Roy Greenslade comments in The Guardian, "(...) central problem has been the failure to find any viable alternative to advertising as newspapers' major source of revenue"⁴.

The judgment that local press, just like most of the national press, won't be able to survive the digital disruption (certainly in the print-on-paper form) is today considered almost axiomatic. That is equally true for the U.S. dailies that cover, for instance, the city of Los Angeles and its surroundings with a population of close to 13 million, and for the long defunct "Ovcepolski glas" local paper covering a municipality with a population of 18,000.

The additional hit by the Covid19 pandemic meant that hundreds of print media, or their editions on paper were closed in the UK⁵, Australia⁶, U.S., etc.

There was a period when local press in North Macedonia managed to survive thanks to the programme for subsidies for print media that existed in the first half of the 2000s. When that programme was terminated, they started folding one by one until we got to the current situation in which we have local papers only in Bitola, Stip, Prilep and Skopje.

⁴ Why our newspapers might not survive the contagion of coronavirus, Roy Greenslade, The Guardian, 12.04.2020,

⁵ Ibid.

⁶ News Corp announces end of more than 100 Australian print newspapers in huge shift to digital, The Guardian, 28.05.2020

The remaining local newspapers largely depend on the assistance programme that covers half of their printing and distribution costs, introduced two years ago⁷. The local papers can't rely on the forms of indirect subsidies, such as the mandatory public notices, either.

Nevertheless, in spite of their optimism and determination to go on for as long as it is possible (views expressed by the representatives of the local press in the public discussion of the draft-policy document), it is difficult to imagine a situation in which local papers, in print-on-paper form, would play a role in the local reporting in the future, unless they move for transformation into digital only publications.

INTERNET AND DIGITAL TECHNOLOGIES

The situation on the internet, compared to broadcasting and print publishing, is far more dynamic. Almost all urban centres in the country have at least one local news-site (more populous municipalities often have two or more) that were established with an ambition to provide local reporting for their respective local communities. The fact that most of them are established and managed by professional journalists does help with the realization of that ambition. Their contribution is evident today, amidst the pandemic, with the focus placed on the situation with Covid19 in their local communities. On the other hand, the need for more "clicks" forces them to publish national news,

cover foreign affairs, their sports and culture pages are dedicated more to international show-business and celebrity news and sports than to the local scenes, etc.

The local news-sites also face huge problems with sustainability and monetisation of their work. The growth of digital advertising has benefitted mostly the huge global tech giants (Google, Facebook, Apple, Amazon, etc.) while journalists doing reporting online are fighting for the meagre leftovers. Roy Greenslade's statement quoted earlier applies to online journalism, too.

The official web-sites of the local self-governments also play an important role in the area of local reporting, although we have to view them as primarily an instrument for promotion of the work of the local administrations⁸. That doesn't mean that the citizens can't find useful information on the local social, political and cultural life, on the work of municipal councils and public institutions and enterprises, but if we need somebody to control and uncover possible corruption and abuses at the local level, the work of the independent professional journalists and media is indispensable.

Still, there is the general impression that - regarding that type of hyper-local informing in the local communities, seen as the population of one municipality – the future will be almost fully digital.



7 Not all of them qualify for assistance from the programme. "Zenit" for instance, doesn't meet the required number of at least 3 persons on its payroll. 8 Formally, the obligation to inform the public about the work of the local self-governments lies with the local administrations, under a variety of transparency and accountability rules and regulations

PUBLIC DISCUSSION



he Media Development Centre has a long-established practice, before producing the final version of a policy document, to present the draft to a public discussion with the expert community and the stake-holders, in order to gather their views and opinions on the matter at hand. The ongoing Covid19 pandemic forced us to hold the discussion online, over the ZOOM platform, on July 31, 2020. About 15 representatives of different stakeholders and colleagues participated in the discussion.

The participants in the discussion reaffirmed the importance of the local reporting to the local communities and their own commitment to continue to offer news and information to the local communities they serve.

As in most debates and discussions of media-related issues, the participants noted the need for a systemic and strategic approach to this matter, too.On the other hand, as we shall see, there is a certain inertia, a wish to preserve or, even restore a past situation in completed changed circumstances.

Participants in the discussion presented the results of the latest polls and audience surveys that demonstrate that citizens increasingly feel let down by the traditional media, and the number of citizens that get their news and information from the internet is growing, a trend that is not likely to omit the local media. That is

especially true of the younger audiences, with traditional media increasingly being consumed only by the older population, that is, persons over 55 years of age.

Representatives of regional and local media noted that they would like to see opportunities for stronger ties between smaller newsrooms and creation of networks that would help them secure access to more contents and improved news and information programmes. They did note that they were largely ignored by the advertisers9, but also left out by the new approach adopted by local self-governments which, faced with the obligation to inform the public about their work, invest in whole production departments with journalists, directors and camera crews, bypassing the traditional media in their communication with the public. At the same time, they commented that their capacity to invest in technology upgrades or new personnel that would strengthen their newsrooms is very limited.

Almost all representatives of the local and regional media made it clear that they face huge difficulties in their work, primarily in terms of financing the work of their media which are, therefore, constantly on the verge of shutting down completely. The participants evidently are determined to go on for as long as they possible can, but that they have already been pushed to the limits of their capacities.

⁹ We should note here that the behavior of advertisers is largely conditioned by the fact that the local and regional media usually command very small audiences, combined with the fact that the total potential audience in a region or a municipality is further shared with the online media and the social networks

In that context, we should praise the enthusiasm with which they approach their task to provide local reporting, best expressed by one representative of the handful of remaining local print media, who said that "newspapers will exist for as long as people exist".

All representatives of the local media hold the opinion that the problem of their survival will have to be resolved with intervention from the state, with public funding that should be distributed in line with clear, strict and unambiguous criteria. The issue of public funding and subsidies, according to some participants, should be considered only after we answer another question - should public funds be used to support improved local reporting and information or to support the survival of existing traditional media platforms - the press, radio and television?

Regarding the so-called "local patrons" (sponsors and supporters) and the agreements some local media have with the local administrations, representatives of local media admit that it often pushes them to self-censorship and taking care not to publish something that would irritate or anger the sponsors or the local administrations.

Representatives of the still active local print media said that they function with the help of local "patrons", that is, several major companies headquartered in their respective municipalities that practically purchase the whole circulation that is then offered to their employees. Several participants noted the importance of available foreign funds for support to the local media, but also the danger that the media that use such funding may last only until such access to donor money is available. The participants also mentioned the possibility to move to non-profit functioning, with the possibility for the local "patrons" to help create foundations that would then take over the publishing of the local media, which would, in turn, help them maintain their independence and autonomy.

While all of them operate online extensions of their media, they tend to be sceptical about new technologies and digitalization. Although one of the participants presented the findings of a recently published survey that showed that local media don't see the new online media as competition for their online extensions, especially not in terms of quality of reporting and contents they offer to the public, the impression from the discussion was that local press in particular didn't plan complete switchover to digital publishing. It is also quite clear that they view giving up the paper versions and move to digital publishing is considered by the publishers of the existing local papers as giving up on their sole tangible product that they can offer, as well as the fact that they hold serious reservations about the possibility to compete with the numerous new media for the limited available advertising spending on the local level. To some extent, the reservations are due to the fear that they would be forced to compromise their editorial policies and move towards tabloid-style contents in order to attract as many clicks as possible.



PROPOSED SOLUTIONS



he importance of local reporting, the satisfying of the need of the citizens to know how local government functions and how public money is spent on the local level, what are the problems faced by their friends and neighbours in the local community, the events and developments of local political, social and cultural lives, for the overall democratic development in North Macedonia is indisputable. Therefore, and in view of the identified problems of sustainability of the existing system of local/regional media within the national media system, we need to approach this matter carefully.

At the same time, in the effort to provide adequate solutions, we need to be aware of the current global and national trends, as well as that the existing unsustainable situation will demand, almost by necessity, rather radical solutions.

REDEFINITION OF THE LOCAL MEDIA MARKETS

So far, Macedonian legislation and regulatory practice defined "local market" as the geographic territory of one municipality. In our opinion, that definition never considered several important aspects used in the definition of markets - the population (for media markets represented as number of households) and the economic power and advertising needs of the local economy. Knowing that, majority of municipalities in North Macedonia (compared to developed media markets) lack either the population or the economy, with enterprises that are marketing dependent, to be able to qualify as proper local markets¹⁰.

We should also consider the definition and the boundaries of the so-called broadcasting regions, which follow the boundaries of the planning and development regions, often based on illogical solutions¹¹.

Therefore, we propose a redefinition of television markets by defining the existing "broadcasting regions" as local markets, of course, after we redefine their geographic boundaries to ensure that they cover natural groupings of settlements (it would also have to take into consideration the linguistic component, including a shared local dialect) and not copy some arbitrary administrative territorial division.

¹⁰ We already mentioned that in Great Britain, local TV broadcasting licenses are issued for larger conurbations and regions. In addition, if we compare to the situation in the US, the whole of North Macedonia with its nominal about 550,000 households, would be ranked at 54th largest TV market, behind Fort Meyers/Naples, Florida, and ahead of Richmond/Petersburg, Virginia.

¹¹ Consider the fact, for example, of Stip and Sveti Nikole, two towns that are situated so close that there is optical visibility between them – you can literally see Stip from Sveti Nikole and vice versa. For some reason, they belong to different planning and development regions and, therefore, in different broadcasting regions.

AUDIO AND AUDIOVISUAL MEDIA SERVICES

In the area of the audio and audiovisual media services, the existing distinctions between public and commercial broadcasting, as well as radio and television broadcasting¹², warrant adoption of different approaches to the considerations how to involve different types of audiovisual media services in the efforts to secure local news and reporting.

TELEVISION BROADCASTING

In view of the economic indicators and financial results reported by the television broadcasters, compared to growing costs of production of quality television, it doesn't seem opportune to predict, even in the short run, that the existing local and regional television stations will be able to survive only on the income generated from sales of advertising time. Therefore, we believe that the organisation of local reporting in the area of audiovisual media services, i.e. linear television is a task that will have to be fulfilled by the public broadcasting service.

At the moment, MRT fulfils obligations to cover the local communities through a network of correspondents in all major urban centres and seats of municipal administrations in the country. We propose thatsuch task will be more efficiently performed through a system of regional centres (that could follow the existing division into broadcasting regions) that will be charged with the production of news and information in their respective regions - coverage of the local political, social and cultural life. Those centres should be fully equipped with portable and studio equipment, and staffed with sufficient personnel to allow for adequate coverage of individual broadcasting regions.

Additionally, and in view of the available free transmission capacities of the two digital multiplexes at disposal to the public broadcasting service, we propose that it should establish a new programming service (alternatively, a combination with one of the existing programming services) that will be dedicated to the planning and development region - whether they remain in their current form and shape or are redefined - which will gather and broadcast the production of the regional centres.

We could also consider the Dutch system of public broadcasting that allows for non-profit and civil associations, duly registered as so-called "broadcasting associations", to engage in production of local or thematic content which are then broadcast over the programming services of the public broadcasting system.



¹² For the purposes of this document, the term "television" refers to so-called "linear television" which broadcasts programmes for scheduled viewing, according to predefined daily or weekly schedule.

PROPOSED SOLUTIONS



As far as commercial television is concerned, we should consider the introduction of the American system of *affiliate stations* in which the regional television broadcasters would work in partnerships with the major national networks. Such partnerships would allow the regional television broadcasters access to more content of higher quality and, of course, exchange of news and information that would go both ways - from national to regional and from regional to national broadcasters.

Regarding the existing local television stations that cover an area limited to the geographical territory of a single municipality, we don't see how they can survive the ongoing financial crisis, augmented by the Covid19 pandemic and its negative effects on the economy.

We could, perhaps, also consider the possibility to allow for establishment of non-profit local television, although it is difficult to imagine that there would be sufficient sources of donor funds (from charities, foundations, etc.) to finance such ventures.

RADIO BROADCASTING

Local commercial radio, unlike local television, has much better chance to continue functioning and serving local communities. The reserved optimism is based on the fact that the functioning of local radio is really inexpensive, especially compared to costs of running a television station. In addition to rent and utilities and salaries of the very limited staff (local radios that have substantial newsroom that works on hard news are few and apart in North Macedonia), the only other programming cost is the annual compensation local radios pay to the collective copyright and related rights management associations. The question is, how to stimulate local radio stations to get more actively involved in local reporting?

One option is to secure that they are relieved of a certain percentage of the annual compensation for the broadcasting license for radios with news and information production.

Second, similar to commercial regional television, we should allow for entry into af-

filiation agreements with national radios or other local radio broadcasters, especially in the area of production and exchange of news and information. This would require changes to the provisions of Article 95 of the Law on Audio and Audiovisual Media Services which currently allows for creation of networks of local broadcasters only.

One form of radio broadcasting that is probably best suited to the needs to provide local reporting is *non-profit, community broadcasting institutions,* which, according the Law on Audiovisual Media Services (Article 65) can be established only for radio broadcasting. The option to create local community radio is little used in the country, and we consider it a fine solution because most local broadcasters list as the main reason why they continue to function in such unfavourable conditions, and the main reason why they ventured into

broadcasting, was to provide local reporting for their local communities. MDC would suggest to them, and the state should promote and stimulate the move of local broadcasters from commercial to non-profit functioning, especially knowing that non-profit status is increasingly seen as one of the few options to ensure the survival of local journalism and news reporting.

In the promotion of this option, we should make an effort to eliminate the greatest weakness of non-profit radio - its total dependence on donor funds. One option would be to establish a national fund that would be accessible only to non-profit broadcasting institutions that work specifically in some form of local news reporting. Alternatively, a fund that covers only production of local news and reporting, in both commercial and non-profit radio, could be established.



PRINT MEDIA



he ongoing crisis of financing of the media has hit the hardest, both globally and on national level, on the print media. The prolonged crisis caused by the loss of earnings from sales of advertising space has hit especially hard on the local press, with local newspapers increasingly opting to publish only online and shutting down their paper editions.

In spite of the optimism and determination to "continue printing for as long as it is possible", which is the position of the representatives of the remaining local newspapers in the country, unless there is some dramatic and unforeseen turn of events that could take back

advertising revenues to their pre-internet levels, we don't see any future for printed newspapers as providers of local reporting.

In that context, we need to stop with the practice to use public subsidies to preserve individual platforms for transmission and presentation of contents, and we should focus on using public funds on provision of adequate reporting and production of news - both locally and on the national level. The focus of programmes of direct public subsidies, which are absolutely necessary at this time, should be directed, in line with the dominant European trends, to new digital initiatives and the switch from traditional newsrooms to digital formats.

INTERNET AND MOBILE TECHNOLOGIES

t is evident at this moment that best chances to secure proper quality local reporting in the future lie with the digital, online domain

For the local reporting, the digital domain allows, as noted above, for local administrations and civil sector to get involved, actively and without mediators, in the activity of public information and communication. We are fully aware of the possible abuse of such new channels by the local administrations and institutions (which actually happens constantly) primarily as instruments for positive promotion and political propaganda.

For journalistic reporting, the digital domain is a favourable option because it is relatively inexpensive and allows for elimination of the relatively high (for our media outlets) costs of transmission, broadcasting permits for broadcasting media, as well as printing and distribution costs for the newspapers. Second, it is by nature a multimedia platform – reports on local politics, local issues and problems can be carried as video report, traditional text article, or audio podcasts.

At the same time, it is equally open to commercial and to non-profit functioning. Of course, some open questions related to the financing of journalism and news reporting (understood primarily as activity of collection and publication of "hard news") will persist and we should constantly seek the answers.

Finally, public broadcasting services are expected to transform into *public media services*, fully embracing the new opportunities offered by the digital technologies and platforms to provide better media services and higher quality contents to the citizens and the public.

As mentioned above, we should use the available public funds for assistance to the media to promote a change of focus on the switch over to the new digital technologies for all types of media, especially the print newspapers, and to push for a focus of programmes of subsidies on provision of quality news reporting (and other contents) and not on the preservation of the existing oversaturated and unsustainable media system.



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