# What's New(s)?

## Scenarios for the future of journalism

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# Summary

## Introduction

This study presents four different, plausible scenarios for the future of Dutch journalism in 2025. The aim of the scenario study is to make players within and outside the branch think further about the future of journalism and their own position within it, and for people to actively prepare themselves for that future. This study is also intended to afford insight to support a public debate about the importance of journalism for society. This study has been carried out on behalf of the Dutch Journalism Fund (DJF).

The four scenarios were developed in collaboration with the sector. During 10 meetings trends were explored and clustered, the impact of these developments was assessed, two critical uncertainties were defined which form the starting point for the scenarios, and the resulting visions for the future were brainstormed. Participants included journalists, publishers, philosophers, chief editors, scientists, technology experts and managers from within and outside the sector.

## The scenario axes: confidence & technology

Technology is the principal critical uncertainty and is therefore an important driver of change in the journalism sector. Technology can be adopted reluctantly or it can be embraced radically. In other words: the future is quite clearly digital and mobile, but it is unclear how this future will unfold, at what pace and to what extent everyone will join in.

The second critical uncertainty relates to confidence within society. Throughout the world existing institutions (governments, NGOs, political parties, media) are under pressure from the changing wishes of critical citizens, assertive consumers and the new dynamic of bottom-up initiatives. Institutions have not (yet) been able to formulate a suitable answer for this. Will society give its preference to far-reaching self organisation, in which experts and peers play a prominent role, or central direction by institutions and governments, in a case of recovery of public confidence due to increased transparency?

The critical uncertainties are each set out on one axis with two poles. By combining the two axes a matrix of four quadrants is created: four worlds in 2025, positioned at the extremes of this matrix.
These worlds reflect the tension between professional and citizen journalism, the uncertain future of Dutch media concerns and titles, the role of the Internet and algorithms in the production and spreading of news, and the way in which quality journalism will be paid for in 2025.

## Four scenarios for 2025

### Wisdom of the crowd
A world in which the economy and society are dominated by start-ups and virtual cooperative relationship. A strong do-it-yourself-outlook has become the key to success. Co-creation, sharing and crowdfunding are breaking through on a large-scale. The government is pushed back into a facilitating roll. The influence of big conglomerates like Apple, Fox and Facebook has reduced considerably. New initiatives appear and disappear at a fast pace. What counts for news is no longer determined by media brands but by the crowd.

### A handful of apples
A world in which a handful of mega concerns increasingly set the economic, social and political agenda. Hardware, software, physical products, content: everything is branded and offered via integrated chains. Just like the news, which is smartly personalised and always reaches the public at just the right moment. Journalists market the news as niche products and services. Most traditional media businesses have not survived this development.

### The Shire
A world in which small scale, autonomy and caution are regarded as being important. The all-providing government has largely disappeared. The general view is

that technology should be treated with caution. The media landscape has come to look like a collection of islands comprising small titles, often with a regional or local focus. Many journalistic newspapers and magazines from the 2010s have failed. Instead of them news is exchanged on thematic community sites, which both citizen journalists and professionals contribute to.

### Darwin's Game

A world in which government institutions and media businesses are evolving. They display more transparency and extensibility; dialogue with their target groups is no longer just something they are compelled to do, and it is now bearing real fruit. A number of traditional news providers are managing to make their brands relevant again and in that way to slow down the explosive reduction in viewers and subscribers. The public expects journalism to constantly prove itself, sets high standards, and is not loyal to specific brands.

## Implications of the scenarios

The development of scenarios does not lead to any handbooks for running a business, or political choices. It does however, offer insight into the movement that is taking place around the media and the consequences that this can have. Players in journalism are invited to get to grips with the scenarios themselves and to project themselves into the various visions of the future, and in this way to test strategies and develop them (for materials, see www.journalism2025.com).

This report gives two very clear warnings. The first is that media businesses (large and small) and educators who believe that they can respond to developments in a reactive way will no longer exist in the scenarios sketched out for 2025. The second is that in three of the four scenarios the public role of journalism will be lost in the absence of the right, proactive effort. The question is whether there are sufficient options within the new information order of free news sites, bloggers, social media and community websites for providing broad layers within society with reliable and completely factual and relevant information, which maintains the most important values of our democratic society. If we are increasingly beginning to doubt this, and we believe that quality journalism is a vital part of a properly working democracy, then it is time to do something.

# 2 Scenario planning as a methodology for exploring the future

## 2.1 Background

In December 2013 the Dutch Journalism Fund (DJF) consulted with a large number of (potential) stakeholders about the possibility and desirability of a scenario analysis for the news and journalism sector. There exists – or so it appears – a need for a more focused insight into the significance of various social trends and sector specific innovations and developments on the sector itself. In addition to this, more insight is needed into what the consequences would be for independent newsgathering and dissemination, and for versatile quality journalism.

In the spring of 2014 the state secretary consented in a letter[1] to the Tweede Kamer (Dutch Paliament) to the carrying out of a number of studies into present-day developments in journalism, and the consequences of these for provision of information within society, and for the innovative strength of businesses involved in journalism. One of those studies is a practically-based investigation into future scenarios and innovation for businesses involved in journalism. The state secretary has assigned that study to the NJF.

The publication of the results of this study is taking place at a time when journalism in the Netherlands is searching for new ways to remain relevant. Daily papers have lost at least 1.5 million subscribers in the last 15 years (in terms of reach that means 3 million readers). The Public broadcasting service is under pressure – not just as a result of cost saving by the government, but certainly as a result of new entrants to the market like Netflix, YouTube and HBO, and changing viewing habits (delayed viewing).

The climate within journalism is becoming bleaker by the day. Dutch newspapers and publishers have been sold (NRC, Mediagroep Limburg, Wegener). This movement is accompanied by and preceded by far reaching reorganisations within the daily paper businesses in particular. A consequence of this is hundreds of journalists losing their jobs. Daily papers are increasingly moving towards a core of editing and an outer layer of freelancers. In the meantime more than five thousand journalists have registered with the Chamber of Commerce as small, independent buisnesses.

In spite of the evident signs that the media world is undergoing a revolutionary change, traditional parties in particular have little inclination to change course. That is also not apparent within their business models. New technology is giving rise above all to distraction and headaches, but certainly not (yet) to any new earnings models. The existing earnings model – printing and distributing a paper newspaper – still generally provides sufficient return, as long as there is room for cost savings and efficiency measures.

Nevertheless the future is no longer what it was. It makes no sense to ignore the indicators. The average age of newspaper readers continues to increase, as does the average age of the (linear) television viewer. Door to door publications and newspapers are having a hard time of it. Even small advertisers have discovered new ways of bringing their commercial message to the public. Regional broadcasters have generally failed to win the hearts of the audience in their region and local broadcasters are too frequently limited in their options, so that they too are unable to make the difference.

Regional journalism in particular is in really poor shape. It has emerged from recent research by the Stimulerings-fonds voor de Journalistiek, that residents of smaller communities (defined as communities with less than 50,000 residents) hardly ever receive any news now which is of any social significance to their own living environment. The role that journalism used to play in maintaining the balance between government and citizen has largely been lost here.

[1] See the letter from the state secretary of the Ministry of Education, Culture and Science to the lower chamber on 21 March 2014, under reference 584980

The development of scenarios does not lead to any handbooks for running a business, or political choices. It does offer insight into the movement that is taking place around the media and the consequences that this can have. Scenarios offer some support in considering the strategic choices that a business must, or is able to make. That is the aim of this scenario – study: to motivate those in the field to make use of the scenarios to look the future, (whatever form it takes), straight in the eyes.

## 2.2 Examples of recent research into news and journalism in the Netherlands

In the recent past a lot of research has been carried out and reported on in the Netherlands, concerning the future of the information and news sector. A few examples are:

- *Nieuwsvoorziening in de regio 2014* (2015), Stimuleringsfonds voor de Journalistiek, Hogeschool Windesheim and DSP-group;
- *Gescheiden Werelden?* (2014), the Sociaal en Cultureel Planbureau and the Wetenschappelijke Raad voor het Regeringsbeleid;
- *De tijd staat open, Advies voor een toekomstbestendige publieke omroep* (2014), Raad voor Cultuur;
- *Meerstemmigheid laten klinken* (2014), Raad voor Maatschappelijke Ontwikkeling;
- *Nieuws en markt, Welvaartseconomische analyse van de rol van de overheid* (2013), SEO Economisch Onderzoek;
- *Na de deadline* (2013), Bart Brouwers;
- *De Nieuwsfabriek* (2013), Rob Wijnberg;
- *De continue zoektocht naar nieuwe verdienmodellen* (2012), PwC;
- *De nie*uwe regels van het spel (2011), Raad voor Maatschappelijke Ontwikkeling;
- *Regionale Media Centra* (2011), Inge Brakman;
- *Trends in 15 jaar media- en minderhedenonderzoek* (2010), Leen D'Haenens;
- *De volgende editie* (2009), Advisory report from the Tijdelijke Commissie Innovatie en Toekomst Pers (Brinkman commission);
- *De toekomst van het nieuws* (2006), Irene Costera Meijer;
- *Wat is journalistiek?* (2005), Mark Deuze.

These and other publications have been analysed and have emerged as being valuable in developing the future scenarios for news and journalism. However, these scenarios are not merely a summary listing of previously issued studies and opinions. The significace of this study compared to previous studies is that it has been devised in intensive collaboration with the sector itself and that the resulting perspectives give an integral picture of the possible future: trends in technology, economy, media and society are combined in cohesive, understandable sketches of the future.

## 2.3 The value of scenario planning for news and journalism

Decisions are about the future, but are based on today'sinsights. Making the right investment decisions and finding new readers; it would be a lot easier if it was possible to see five or ten years into the future. However, we know that extrapolating from the present to the future almost by definition leads to incorrect predictions.

Scenario planning offers an alternative. Scenario planning is a method of looking outside and ahead in a structured way. Scenarios are different hypothetical circumstances in the future. They are based on today's certain and uncertain trends which have a large impact on the future of the sector. The sector cannot directly influence these developments, whilst they determine to a large extent how the environment in which journalism functions will look in the future. Scenarios provide parameteters to work within. Like the white lines of a playing field scenarios provide a framework, which media businesses must take into account when determining strategy and managing risks.

By definition scenario studies always give more than one possible view of the future. Scenario planning is a method to improve insight. It leads to greater predicitability and it helps you to explore other possibilities; perspectives that help you to be prepared for possible future surprises. So scenario planning can also be described as an intervention based on the study of change. This can sometimes be daunting, but above all it offers inspiration and new insights. With the use of scenarios the sector is in a better position to hold a well founded discussion on opportunities, threats, options and risks in the future. It is also an instrument to enable media companies and journalists to see changes in the environment ahead, and to change course or take appropriate measures.

The aim of this study is to get players within and outside the branch to think about the future of journalism and of their position within it in a way which promotes discussion of existing certainties and at the same time offers a framework in which new ideas, initiatives, editorial formulas and business plans can be examined. The study is intended to provide insights for a public debate about the importance of journalism for society.

The scenarios that are presented here are four different, plausible, radical pictures of the Netherlands in 2025 and of the potential position and role of journalism in this. The study is expressly not intended to devise dream scenarios for journalism. They are environmental scenarios, explorations which consider the external environment and describe its influence on the sector. What is the influence on journalism of developments in the social, technological, economic, ecological, and political spheres (referred to as STEEP)? At the time of completing this study all four scenarios are equally probable.

The scenarios were built up in an extensive, interactive process. During 10 meetings approximately a hundred and fifty participants from within and outside the sector considered the future of journalism together. The scenarios pose the question: 'what does it signify for journalism if the Netherlands looks like this in 2025?'. The search for an answer to this question in this present study is in particular focused on the future of pluriformquality journalism in the Netherlands.
A distinction is made in the scenario study between journalism as a specific professional group and journalism as a function. In the various scenarios the central focus is on the various players in the domain of information and news provision: journalists and other makers of news and background stories, news organisations, the public news providers, news consumers and advertisers

### Brief explanation of scenario methodology:

1. Make an inventory of the most important questions in relation to the future of the branch. Involve people from inside and outside the branch, young and old, in a variety of roles.
2. Explore the known and unknown relevant developments in the outside world. Inventorise dependent trends (developments which directly influence the sector) and leading trends (developments which influence the dependent trends, for example political or demographic developments). Assess the impact of the trends on the future of the branch.
3. Cluster the developments and choose the most important critical uncertainties. These are leading trends with a high level of uncertainty, but at the same time with a major impact on the future of the sector. These uncertainties are laid out on an axis between two poles. Think through what the consequences of both polls are.
4. Work out all the information in a number of scenarios (visions of the future) by combining axes. Describe fictitious, but consistent worlds based on the consequences of the polls for the chosen core uncertainties. The various scenarios comprise three elements. The actual description of the future, the plot (WHAT); the route to the future, a timeline (HOW); and the logic behind the scenario (WHY).
5. Explore the implications: what is the significance of the scenarios for the future of the sector? Identify scenario-proof strategies: strategic measures that can be implemented now and make sense in all scenarios

## 2.4 **Short introduction to the scenario methodology**

The aim of this study is to achieve consistent, plausible and radical visions of the future, covering possible futures that journalism in the Netherlands may encounter. In this project we have worked with the interactive method developed by Shell and Global Business Network (GBN).

The scenario project was carried out between September 2014 and March 2015. Around 150 people from within and outside the sector took part, of whom approximately 60% attended two or more meetings. The range of participants was very varied: freelance journalists, journalists working for national or regional newspapers, television people from both the public broadcasting sector and those with a commercial background, publishers, chief editors, scientists, technology experts and directors. In appendix 4 there is a list of the participants to the conferences. In addition to the conferences a number of experts were interviewed.

The first step in this scenario process was a conference in which a discussion was held with representatives of all echelons of journalism about the big questions relating to the future of journalism, which should determine the direction of further development of the process.
There were then five thematic trend conferences with approximately 100 participants from within and outside the sector which investigated what relevant developments in the environment of journalism are taking place. In doing so they looked at technology, social and community developments, the political and government domain, earnings models within the profession of journalism. Thousands of post-its were summarised to make up approximately 70 relevant trends. These were designated as certain or uncertain.
Certain trends were those developments in respect of which the delegates were unanimous that they will continue. Uncertain trends are thoseof which there was disagreement whether, or in what form, the developments would unfold.

The certain and uncertain trends were clustered in relation to underlying cause and were assessed by those attending the trend meetings. This resulted in four critical uncertainties. In a small creative meeting these were crossed in different matrices during which attention was paid to the extent to which the uncertainties are independent of each other and lead to stimulating visions of the world. Finally two critical uncertainties were selected as being the most relevant.
In two big creative meetings attended by journalists from both traditional print businesses, from television and from digital start-ups, the implications of the axes were thought through and the scenarios were developed.
One meeting was also dedicated to the implications of the scenarios. Finally a matrix was built up in which the most important consequences of the scenarios for journalism are explained. The questions which the sector is asking itself concerning 2025 have been used for this.

### Future of the Creative Content-scenario's under instruction by the European Union (2008)

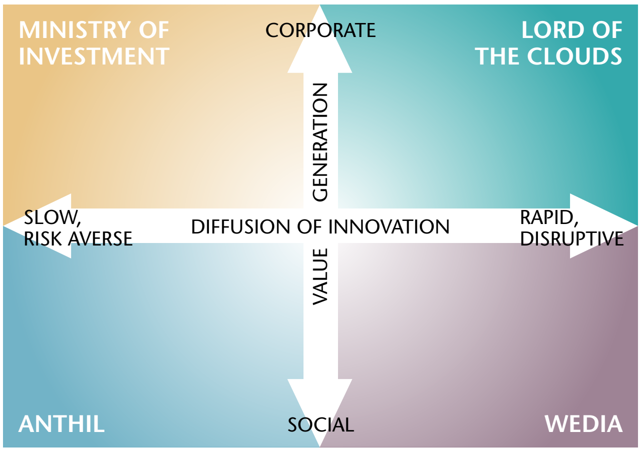
- Incumbents take it all - describes a closed and regulated market dominated by a few worldwide players
- Open innovation society - Describes a world in which all the promises of user generated content, open source development and Web 2.0, have been realised
- Society meets industry - Sketches a world somewhere between the two previous scenarios, in which the creative industry has evolved but has not drastically changed
- IT is not cool - Sketches a world in which the negative aspects of digital media production and distribution (spam-mails, privacy infringement and overkill of trivial and 'trashy' content) have resulted in drastic loss of popularity of the Internet as a means of communication

## 2.5 International scenario studies into the future of journalism

In recent years a number of scenario studies have been carried out internationally into the future of journalism, or from a broader perspective, into the future of creative media. Without wishing to be exhaustive or complete, there now follow a number of future studies which are relevant in the context of this project. It is striking that a number of central themes can be recognised in all the studies: the confidence of society, the relationship with technology and its application, and the way in which the economy is organised. Even though these studies were not discussed with participants at the various working meetings, these themes were also identified within this scenario study as important critical uncertainties for journalism.
On behalf of the European Union a study[2] was carried out in 2008 into the future of the creative content sector. This study, a so-called Future-oriented Technology Analysis (FTA) includes, besides anextensive analysis of trends, four future scenarios. These scenarios are based, among other things, on two critical uncertainties: the way in which the economic landscape will develop (a competitive, enterprising system versus an oligopoly with a limited number of powerful players) and the attitude of the public to the development of new creative content and services (positive or negative). The scenarios comprise elements which are also to be found in the scenarios constructed for this study.

A scenario study was carried out in Canada under the title *2020 Mediafutures*[3] for the books, periodicals, film, music, television and interactive digital media branches (summarised as creative content industry). The set up of This project was set up in a similar way to how this present study was carried out. In both studies use was made of the method developed by Shell and GBN to design scenarios on the basis of critical uncertainties.

[2] Adaptive foresight in the creative content industries: anticipating value chain transformations and the need for policy action; F. Abadie, EC-JRC, IPTS, M. Friedewald, Fraunhofer Institute for Systems and Innovation Research, M. Weber, Austrian Institute of Technology
[3] http://2020mediafutures.ca




It is striking that there is a great deal of overlap between the critical uncertainties that were identified in the Canadian study and in this current project. The Canadian study describes four scenarios in whichquestions how the media in the Ontario region will look if value creation[4] is driven socially or corporately; and at the same time if the expansion of technological innovation is either slow and risk averse or extremely fast and disruptive.

In the United States a study into the future of journalism was carried out by Western Kentucky University (WKU) over nine years, the *Media Scenarios Project*. This resulted in five scenarios[5] in which the situation in 2020 was described. These scenarios describe 'what if' questions which are also frequently proposed in the current study.

**Scenario's Future of journalism WKU (2011)**

- Cloud Journalism – what if the 'cloud' becomes the place where all information and media exchange takes place?
- Social News – What if social media becomes the primary source of information and media worldwide?
- The Public Option – What if the government has to ensure that people receive all the information they need?
- Extreme Mobile – What if everything converges into one single mobile apparatus connecting you with everything?
- Smart tv – what if television develops its full potential by making optimal use of connectivity and bandwidth?

In January of this year the BBC published a study entitled *The Future of News: News vs. Noise*[6]. In this study an inventory of trends was compiled under the headings of people, technology and stories. The BBC does not venture to make any forecasts,for the following reasons:

*'You can often end up looking silly trying to forecast the future. This exercise is not about predicting the next decade, but preparing for it…. What will new devices, networks and platforms enable us to do? How will news organisations report and tell stories and, what, indeed, will count as a story? And, where and how will people live, in the UK and globally – what will they want and expect from their news?'*

The BBC describes many trends and questions which have also emerged in the present study. Another similarity is the importance that the BBC attaches to confidence.
On the first page of the report the following important question is posed: in the future, which parties will gain the confidence of the public in the provision of news?
As will be set out in chapter 4, this is also a critical uncertainty, which plays a major role in the scenarios in this study. The report is the first part of a study in preparation for the renewal of the 'Royal Charter' which establishes the constitutional basis of the BBC. Before the current charter expires (on 31 December 2016) the BBC is also going to produce a second part with detailed plans for the future.

[4] value creation: the creation of (added) value for customers, the organisation itself and other parties involved based on new insights and by means of co-creation, a reconsideration of the existing business model and sustained focus on innovation.
[5] http://www.wkujournalism.com/msp/what-if
[6] http://www.bbc.com/news/magazine-30933261

## Guide to this publication

Chapter 3 presents the outcome of the first meeting in which representatives from all echelons of journalism discussed the big questions relating to the future of journalism. Besides this the chapter includes a summary of the most important trends in journalism as expressed by participants attending the trend meetings.

In chapter 4 the axes of the scenario matrix and four concise summaries of the scenarios are presented.

The fully described sketches of the scenarios are included in appendix 1.

In chapter 5 a matrix is included in which the most important consequences of the scenarios for journalism are explained. It also includes a short indication of how to use the scenarios. More complete information can be found on www.journalism2025.com.

In chapter 6 we briefly investigate the implications arising from the scenarios.

# 3
# Big questions & trends: mapping out change

## 3.1 Looking towards 2025: what questions is the sector asking itself?

The starting point for the scenario study is the formulation of the most important questions which the sector is asking itself regarding the future. If there were a glass ball that enabled you to see into the future what would you wish to know? In an initial meeting with a mixed group of people from the sector plus scientists and journalism teachers, an inventory was drawn up of what the questions are. A selection of questions was summarised. Here follows an overview of the most important questions and a short explanation of what they entail.

### What strategies do individuals and organisations use for collecting information and forming an opinion?

These days news reaches us from many different sources. Not just the traditional channels like newspapers, magazines, radio and television, but also via internet platforms, social media and blogs. The question is how this is going to develop further. What role do the 'traditional' media play in this? What will the position of parties like Google and Facebook become? Who will the consumer trust?

### What form will 'user generated content' take and how does this influence news provision and journalism?

It is not inconceivable that the journalistic function which professionally educated journalists now fulfil will be (partly) taken over by citizens, experts, communities and interest groups. Will the statement 'everyone = journalist' become true? What types of interaction before, during and after the production of news stories are effective? What role will professional journalists continue to play?

### What is the role of journalism and how is quality journalism defined? To what extent is there still an independent journalistic product?

The question is whether people will still attach value to the traditional,professional principles of journalism in 2025 (independence, use of multiple sources, listening to both sides). To what extent will the value that the public attaches to journalism and the role that the public wishes to see for journalism change? What would need to happen in order to feed the demand for professional journalism? Is there still sufficient mass for Independent journalism? Will it remain widely available or will it only be for a small paying elite?

### What type of journalists and publishers have the best chances?

Are there still any titles? Will publishers exist in the way we still have them in 2015? Which strategies for telling the news are successful? Do journalists still need a journalistic outlet, or do they distribute their products directly via the Internet? What is the significance of unbundling?

### Which earnings models are viable?

Will the public continue to pay for content? How will the digital advertising market develop? Who is making money out of online advertising? How can you earn money if the sharing economy continues? What will the sharing of costs and benefits look like between Google and the other mass platforms on the one hand and publishers and individual news providers on the other hand?

### How will technology develop?

What are the most commonly used devices for reading/watching the news? How will robot journalism develop? Will data journalism take off in a big way?
What options do new technologies offer for telling stories? To what extent do journalists need to master new techniques?

### What are the consequences of future developments for the education of journalists?

How well will journalists need to be able to get on with technology? Will journalism become a postgraduate education on top of a particular specialism? Does the HBO (bachelor) course in journalism still have a role to play, and if so what is it?

### To what extent does the informed citizen exist and are all levels of society reached adequately?

Do independent media still have a binding role in society? To what extent will the media maintain 'feelers' in every layer of society if this further differentiates? Does journalism have an answer to the increasing multiculturalism within society?

### What is the effect on democracy?

Do independent media still have a binding role in society? To what extent do the (quality) media offer space for public debate? Will journalists contribute to political literacy in 2025? Can democracy continue to function without professional, independent journalists? How can new news platforms organise themselves in such a way that power is still held up to scrutiny both nationally and regionally/locally? How will the balance of power change between journalists and those whose job it is to provide information?

### What reasons may there be for the government to take action?

Given the concerns raised when asking these questions: to what extent does the government feel it has a responsibility to support (in whatever form) the maintenance of independent journalism which reaches all levels of the population? To what extent does society see the need for this?

## 3.2 Overview of trends

Developments were mapped out over five thematic meetings, taking the lead from the questions listed above. Participants' ideas were clustered and prioritised. This resulted in a list of 70 trends. These were classified by participants as certain or uncertain. Those developments which participants unanimously believed would increase in importance over the coming 10 years were labelled as being certain. Uncertain trends are those trends where there was disagreement whether the trend will develop further or will die out. This distinction is made because within future scenarios certain developments are extrapolated in all scenarios, whilst uncertain trends are only designated space where they fit within the logic of the scenario.

The trends are then clustered according to underlying cause and subdivided between dependent trends and leading trends. Dependent trends are developments within the branch itself. Leading trends are developments that do not directly relate to journalism but have an impact on the journalistic playing field. Dependent trends are influenced by the leading trends. Naturally, the dividing line between both categories of trends is not always clear-cut. The way that news consumers behave is partially influenced by news organisations but is also steered by technology and social developments. Nevertheless, we try to draw this distinction. Within the methodology only uncertain leading trends can form an axis within a scenario matrix.

There follows a condensed description of the trends. Where possible the trends identified are supported with figures. It is worthy of note that most developments were labelled by the participants as being certain. Where this is not the case this is explicitly stated.

## 3.3 Leading trends

### 3.3.1 *Smart devices and social media change the playing field for journalism*

10 years ago, news consumption was a passive occupation (watching and reading); that has now changed into an active occupation: clicking, liking, sharing commenting, uploading photos, twittering events, writing blogs. That is a consequence of the breakthrough of 'smart devices'.
10 years ago Nokia was the undisputed worldwide market leader in the production and sale of mobile phones. The iPhone came onto the market in 2007 and changed the whole mobile phone landscape . The iPad followed in 2010. Now 10 million Dutch residents have a smart phone, and not even five years since its introduction – 7.9 million people already have a tablet (source: GfK). Samsung and Apple dominate the market for these devices. Mobile Internet is growing at 10% per year.

You no longer need to wait for the newspaper or the news in order to know what is going on in the world. Via Twitter and Facebook news stories sometimes unfold faster than they are to be found via the channels of professional news providers. A recent study[7] reveals that 30% of Americans use Facebook as a source of news. Facebook has grown over 10 years into a worldwide platform with 1.3 billion members logging on at least

[7] Pew Research Centre. News on Facebook: how social media is changing news consumption (2013)

once each month. At least 85% of Dutch residents now make use of at least one social media platform. With 8.9 million Dutch users – of whom 6.1 million are daily users – Facebook is the biggest by a long way. Approximately 300,000 people twitter.
YouTube has 1 billion users and 300 videos are added each minute. Films of important events recorded on mobile phones are often immediately online. Twitter has 300 million users worldwide, the Chinese version of this (called Weibo) has 500 million. 80% of American journalists use Twitter to follow news and 60% use it as a source for stories, as recently established by the University of Indiana[8]. From research in the Netherlands[9] in 2013 amongst 167 journalists it appears that 8/10 journalists use social media every day in their work. Journalists prefer to use Twitter (77%), followed by Facebook (66%) and LinkedIn (54%). 6/10 respondents say that they follow opinion leaders in particular markets via Twitter. A quarter of journalists state that social media have become indispensable in their profession.

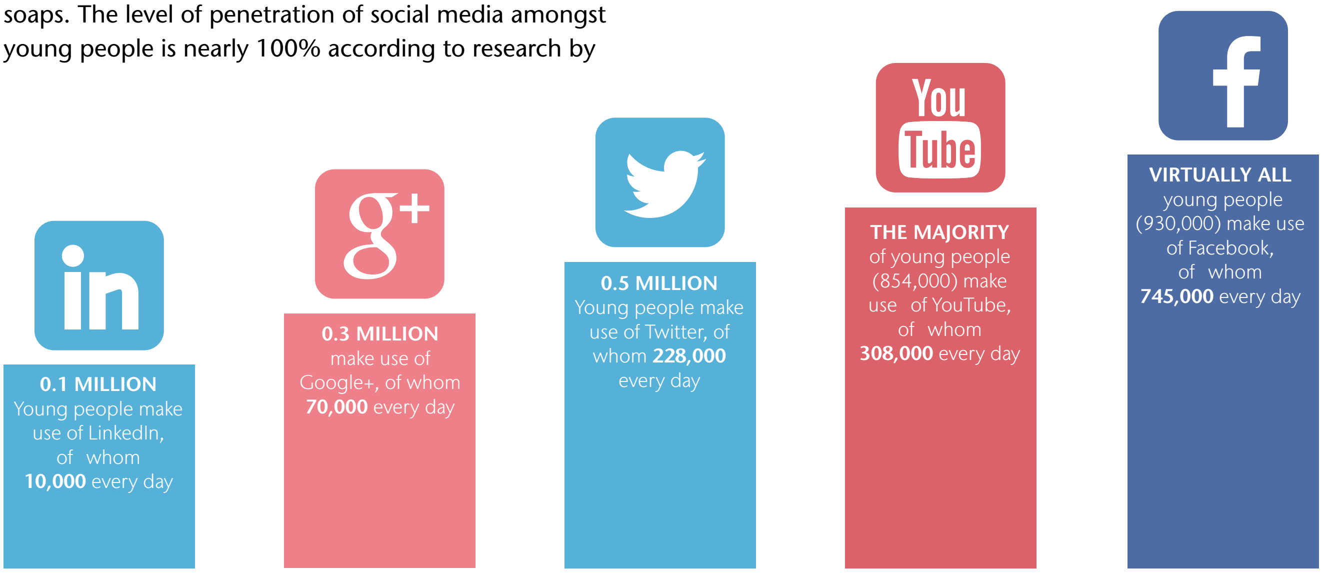
## Young people snack on news

The behaviour of young people received special attention during the trend meetings. Young people do not consume more or less news than older people, is the proposition, but they do it very differently. Reading the paper or watching the news on TV has been replaced by clicking through social media, apps and websites. This is called news 'snacking' (the term was introduced by Prof Costera Meijer). Furthermore news does not have a separate status for young people. They also learn from film, games and soaps. The level of penetration of social media amongst young people is nearly 100% according to research by Newcom (2014). On average young people are active on four social platforms. Instagram, Snapchat, WhatsApp and WeChat are becoming increasingly popular.

A relevant trend is that the definition of quality that young people apply is different from the one applied by most journalists. They regard objectivity as a naive notion; instead of that young people opt for transparency: show me your sources and explain how you came to your conclusions. A major concern amongst participants is the trend that young people do not take on any subscriptions and are therefore barely reached by newspapers and periodicals. The online news platforms that are very popular amongst young people Vice News and Buzzfeed are often described as initiatives that do strike home. Vice attracts – in its own words – 1.2 million Dutch visitors per month (in comparison: the Netherlands most popular news site nu.nl attracts – also in its own words – 6 million visitors per month). Vice targets the so-called 'millennials', young people between 14 and 34 years old.

## Consuming simultaneously

Undivided attention among young people is rare: Whilst watching TV they are also busy twittering or on Facebook. On average Dutch people spend 7 hours and 22 minutes per week on some form of media including media use during work and study (according to the Sociaal Cultureel




8 The American Journalist in the Digital Age, Lars Willnat and David Weaver, University of Indiana (2014)
9 Source: Bex*communicatie (2013)

Planbureau in recently published research[10]). However much less than half (2 hours and 55 minutes) is 'single-tasking': using one medium with undivided attention. This results in living rooms where families sit together, the television is on and all the family members have their own device on their lap.

### Reading time is declining dramatically

Even when including digital reading, 50% of the Dutch read for less than 10 minutes in an average day, in 2013. Among young people aged up to 34 that figure falls to 30% according to the Sociaal en Cultureel Planbureau (SCP). There are no directly comparable figures because the SCP is using a new, more accurate research method, in which reading from screen is also included. According to the same research from among the entire population on a random day in November 2013, 9% visited news sites or Apps, comprising surprisingly enough twice as many men as women. 5% read an online newspaper. Visitors spent approximately 30 minutes on this (on their smartphone) to one hour (on a PC or tablet). The SCP reports sustained decline in reading time since the 1970s. In 2006 86% of people read for more than 10 minutes every week.

*Table 1: How do people inform themselves?*

**News consumption:**
(in percentage of the population> 13 years)

| | Watch the news on tv | Reading newspaper | Online newspaper | siting apps news sites |
|---|---|---|---|---|
| Totaal | 42 | 30 | 5 | 9 |
| 13-19 years | 19 | 9 | 2 | 6 |
| 20-34 years | 24 | 11 | 4 | 12 |
| 35-49 years | 34 | 20 | 7 | 12 |
| 50-64 years | 55 | 43 | 5 | 7 |
| >65 year | 67 | 60 | 4 | 4 |
| Education level: | | | | |
| Below | 52 | 33 | 3 | 5 |
| Average | 42 | 26 | 5 | 8 |
| High | 35 | 33 | 7 | 13 |

Measured on a random day in November 2013
Source: NLO/NOM/SCP/SKO Media: Tijd in beeld SCP (2015)

### Consumer needs of central importance: the future is on demand

The participants at the trend meetings expect that watching linear television will significantly decline. On average Dutch people watch their favourite medium for three hours a day, a statistic that has remained constant for years. Digital television was introduced in 2006. Besides a better signal it offers new options such as delayed television watching (TV on demand). People no longer want to be tied to the time when something is broadcast apart from in the case of important live events. In 2013 approximately 10% of people watch delayed television in a typical evening, according to the SCP. TV on demand is expected to grow strongly, both on the television set and via computer or tablet. The news will also have to be offered much more according to requirement. A short update of the most important news in the morning, sharing with social contact during the afternoon, discussion late in the evening, and backgrounds given at the weekend. However the participants don't expect a great change for radio.

## 3.3.2 *Sustained technological development: pace, form & acceptance uncertain*

### The Internet of things

10 years ago there was one device with an Internet connection per 10 people. Around 2020 this will be completely reversed (source: Cisco[11]). For each person there will be 10 connected devices (in various forms). Many more people than now will be permanently connected and will follow the news on their watch, their kitchen wall, their car window, or a personalised screen on the train or bus. If these devices also make use of smart sensors, artificial senses that can communicate together, a network comes into existence which is called the Internet of Things. The fridge that writes its own shopping list, the light in the room that automatically adjusts to your preferences and the weather outside, an implanted chip that tells you to take your medicine. If this becomes reality, much more information will become available real time which currently has to be collected by research and has a relatively long processing time. For example, about your health circumstances, or the quality of drinking water, or the warning signs of an earthquake or radiation. Journalists would be able to put together stories from this type of information.

[10] Media: Tijd in beeld; daily time spent on media and communication; SCP (2015)
[11] Cisco Visual Networking Index: Global Mobile Data Traffic Forecast Update 2014 - 2019 White Paper

### Media use becomes ambient: technology is universally present, embedded and adaptive

Media use is becoming organic and intuitive. Computer screens are no longer visibly present but are being hidden away in our surroundings . The Ambient Intelligence vision (originally expressed by Philips and now spearheading the technological vision of the European Union) predicts a world in which wireless interconnected technologies continuously communicate together in order to provide information and entertainment to users in the most 'natural' and unobtrusive way possible. Technology will be hidden from our view and built into walls, furniture, cars and clothes. Both in private, work and public areas. Examples are a bus shelter with interactive panels which provide rail network information tailored to the person, or billboards which allow you to order tickets for the concert that is being advertised, at the touch of a button on your mobile phone. Or storefront windows that suddenly advertise the newest book by the favourite author of the person walking past[12]. In order to use 'ambient technology' consumers use a portable 'access key', for example a mobile phone in which the personal details and preferences of the user are stored. However in the long term this could be a chip implanted in our body. Keyboards and screens will eventually disappear. Instead of these there will be direct 'control' via speech, eye and body movement. New technologies like virtual reality and holograms will eventually breakthrough, but their growth may not be smooth. This offers unheard-of possibilities for journalism: news becomes an experience and in a manner of speaking the viewer is 'present in real time' at an event.

The idea that technology will ultimately be offered in 'ambient' form is a certain trend according to the participants. However, the pace of this development is uncertain. There are signals from scientists and engineers, including Philips and processor manufacturer Intel that the technological development which for decades has followed Moore's law[13] is currently slowing down. Fundamental breakthroughs are necessary in order to achieve the further acceleration and miniaturisation that would be required for the smooth operating of ambient networks. A second point is the level of acceptance. A question people often ask when they hear about ambient technology is: where is the 'off'-button[14]? How can I still influence and operate the technology myself if everything around me is arranged invisibly? And how will I know when the technology is still recording me, and what data it is storing about me?

### Algorithms are increasingly directing news consumption

Facebook, Instagram and YouTube do not themselves make any stories, videos or news. News is provided by users and news organisations. Facebook and Google use a complicated set of algorithms which determine which stories rise to the surface. Those algorithms are company secrets. Social platforms continually state that their algorithms are not editorial choices. However, in reality those algorithms determine what news their users see or do not get to see. In addition there are more and more programs that turn data into text or images, making use of templates (robot journalism). The participants regard this as a certain trend. What is uncertain here is the extent of resistance and whether there will be a requirement for a certain level of justification of the use of algorithms.

### Growth of bandwidth creates more possibilities for video

The growth of bandwidth offers new possibilities: continued improvement of the quality of streaming, uploading and downloading, video on demand and virtual reality/gaming.
Cisco[15] predicts that mobile Internet will become much faster: twice as fast in 2019 as now. Mobile data traffic will increase by a factor of 10 in the coming five years. And nearly three quarters of all that traffic will comprise video. The cost of digital information transmission will continue to fall, making the storage of data (almost) free. Livestreaming of videos will also become cheap and easy. Drones offer the potential of generating cheap and safe images.

### Smarter use of data versus infringement of privacy

Push-and pull information will grow significantly. There will be continuing improvement with regards to the link between user profiles, and for example user locations (GPS-location) and tailored information ("I want to know what there is to do and to buy at this location" or "tell me about the history of this place"). 'Big Data' affords more insight into social questions and offers frameworks to

[12] Examples stated by Bibi van den Berg, technology philosopher, Leiden University
[13] Moore's law (named after Gordon Moore, one of the founders of Intel) states that the number of transistors on a computer chip, and therefore also the calculation power, doubles every 18 to 24 months.
[14] 'The situated self: Identity in a world of Ambient Intelligence', thesis Erasmus Universiteit, B. Van den Berg (2009).
[15] Cisco Visual Networking Index: Global Mobile Data Traffic Forecast Update 2014 - 2019 White Paper

policymakers for better decisions. The quantity of data is growing exponentially resulting in more possibilities for the recognition of patterns. The options for personalising news are becoming increasingly ingenious. The options for personalising advertising as well. As a result the yield of digital advertising is growing more strongly than that of traditional advertising models.

There are differing opinions about the extent to which privacy is becoming a social issue in this context. Consumers themselves, knowingly or unknowingly, often give away their details by the using apps or other Intern platforms. The expectation amongst participants at the meetings is that there may also be an opposition movement in the Netherlands, whereby people will either become more cautious themselves or will demand better protection from the government. This trend was labelled as uncertain.

### 3.3.3 *Retreating government: cutbacks and decentralisation*

The government is currently withdrawing from all sorts of areas in society and is abandoning tasks. A consequence of this, amongst other things, is that since 2012 there have been cutbacks in public broadcasting; this will lead to a much lower budget for public broadcasting in the coming years. The participants were uncertain of the extent to which this trend will continue. Will there be further cutbacks after 2017? Participants of the trend sessions expect that the Dutch government will continue to support independent quality journalism in the future. The participants are confident that the government will continue to maintain the public system because quality and pluriformity of news and information are essential for a properly functioning democracy. But partly due to the cutbacks the public broadcasting service will in all probability have less tasks to perform. The expectation is that the government will no longer wish to pay for amusement, games and sport as they are increasingly seen as private services.

On the other hand it is conceivable that the government wishes better protection for the maintenance of quality and pluriformity of news and information on more platforms than just the broadcasting service: all platforms and distribution channels of quality journalism and news provision become eligible for financial support.
The decentralisation of government tasks to local authorities and regions will probably increase the demand for good regional news provision. That is of vital importance for well-informed citizenship. This regional news provision does not need to be performed by the established regional media, per se. According to experts from the sector there will be new initiatives at regional and local level, including citizen initiatives, which may contribute to the democratic process.
This trend was labelled as uncertain.

### 3.3.4 *Powerlessness of governments in relation to technology giants*

Veelvuldig is tijdens de trendsessies geconstateerd dat It was frequently observed during the trend sessions that governments are incapable of restraining the market power of technology giants like Google. That market power has many negative consequences for content owners on the one hand (it is often said that Google lives off the content that it selects but doesn't pay for it) and on the other hand, people offering competing commercial services. At the end of November 2014 the European Parliament accepted a motion calling on the European Commission to split Google up. The search machine activities should be separated from other commercial activities such as the sale of advertising, email and navigation services (Gmail and Google Maps) in order to give other providers a chance. According to the participants this is closing the door after the horse has bolted and it is too late to take action. Furthermore, there are not enough instruments to enforce this.

Another issue concerns the legal options for the protection of the privacy of citizens. The current European directive on the protection of personal data dates from 1995. In January 2012 the European commission made a proposal for new regulations on the protection of personal data. This is not expected to be adopted until the end of this year.

The proposal has been the subject of intense discussion amongst member states; 4000 amendments have been submitted. With this proposal the EU is striving to create a set of binding rules relating to data protection in the EU. The tighter privacy rules compel foreign companies which process the data of Europeans to observe the European rules. There will also be tougher requirements for permission for the use of personal data. Details may only be used for the reason for which they are collected. Moreover, the regulation has consequences for decentralised governments. The draft regulation makes the following compulsory: in the absence of a legal basis, permission must be obtained for the use of data; requests from citizens for the deletion of data must be honoured; systems must be designed in accordance with ‘privacy by design and default’; any loss of personal data must be reported. If companies and governments do not follow these rules, they can be given fines of up to 5% of their annual turnover.

It seems certain that there will be additional regulation in order to improve the protection of personal data. However amongst the participants there was a discussion about the extent to which it is possible to enforce this type of regulation. This trend was labelled as uncertain.

### 3.3.5 *Institutions versus individual(s)*

Confidence in institutions has declined over the last 20 years. The Edelman Trust Barometer which measures confidence worldwide, reports a low point in 2014[16]. It measures confidence in governments, media, business life and NGO’s in 27 countries, including the Netherlands. More than half of the population has confidence in those four institutions in only one in four countries. The Netherlands showed a slight increase, however it is uncertain whether confidence is recovering. The conclusion in the trend sessions was that there is increasing division in society between those who need or prefer self organisation, in which experts and peers play a prominent role, and those who (still) have confidence in the central direction of institutions and governments, where there is regained or renewed confidence amongst the public.

### 3.3.6 *Growing divide in society*

In the trend meetings it was also observed that (among a significant part of the Dutch population) there is a feeling of a reduced grasp on society, accompanied by a feeling of detachment. Large collectives are falling apart as a result, and are becoming intricate and increasingly small communities. Frequent reference was made to the report *Gescheiden Werelden?* which was published by the SCP and the Wetenschappelijke Raad voor het Regeringsbeleid (WRR) in 2014. Among other things this report looked into the question of whether the Netherlands – in comparison with the United States – also has separate media, and what differences in media consumption exist in society in the Netherlands. Summarising this briefly the answer to these questions is that there are also divisions in the Netherlands when it comes to media consumption, but that these divisions (for now) are much smaller than in the United States. However there are also clear differences in media use in the Netherlands between young people and older people, highly educated and lower educated, poor and rich and racial minorities and Dutch natives. The trend that participants see in particular is for regional and national newspapers to have smaller reach and also a less diverse audience. The television news bulletins appear to continue for now to do well, with an average number of viewers of approximately 1.2 million people (RTL Nieuws) and 2.1 (News, 20.00 hrs). The average number of viewers of the NOS News is increasing (1.8 million in 2013 compared to 2.1 million in 2014 in the first months of 2015). This does not detract from the fact that the traditional mass media is increasingly unable to contribute to social cohesion due to a declining reader and viewer base.

The participants label the deepening of divisions in the Netherlands as an uncertain trend, however they observe that at present there are already clear lines of division which can be both seen and felt.

## 3.4 **Dependent trends**

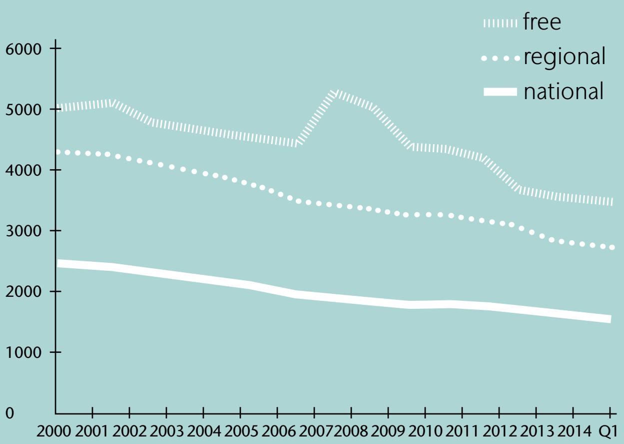
### 3.4.1 *Disruption of earnings models*

One of the most critical developments in the media sector is the fact that the bottom of existing earnings models has been erroded. In particular the print media have been under pressure for years.

[16] Edelman Trust Barometer 2015; annual global study

The average age of subscribers continues to increase and there is little if any emergence of young subscribers. In 2005 72 percent of the Dutch aged 14 and older had read a random issue of a regional or national newspaper. In 2014 the reach of printed newspapers (including the free newspapers) has dropped to around 55%. The total number of newspapers issued has shrunk by approximately a quarter over the same period, from 1460 million to 1080 million copies (source: HOI). News stand sales declined faster than subscriptions. In 2007 and 2008 the total issued volume experienced a temporary peak due to the existence of four free newspapers. The only title of these to survive was the Metro.

Issue of national and regional newspapers (paid) and free daily papers




source: HOI-online, with thanks to Piet Bakker

Between 2008 and 2015 magazines also lost approximately 30% of their issue volume. This also applies to the four[17] newsmagazines; their issue volume declined steadily from 2009 onwards, from 12 to 9 million copies per year. PriceWatehouse-Coopers (PwC) predicts that the total market footprint will shrink in the next five years by a further 22%[18].

Virtually all Dutch print and (audio) visual media also appear digitally now. The monthly reach of digital newspapers, websites and apps has grown considerably in recent years. But the reduction in print is only partially made up for by online subscriptions. Nu.nl, NOS, De Telegraaf and AD all have an average monthly reach in 2014 of more than 30%. The monthly reach of various websites and digital newspapers is set out in the table below.

*Table 2: average monthly reach per title in percentage*

| | 2006 | 2014 (April – October) |
|---|---|---|
| Telegraaf.nl | 25.3 | 34.9 |
| Nu.nl | 22.5 | 46.2 |
| RTL Nederland/RTL Nieuws | 18.9 | 22.1 |
| Planet.nl | 14.8 | No longer exists |
| NOS.nl | 12.5 | 40.1 |
| AD.nl | 10.5 | 32.3 |
| DeVolkskrant.nl | 8.0 | 12.8 |
| NRC.nl | 4.2 | 9.3 |
| Trouw.nl | 4.1 | 4.4 |

Source: Vinex

One result of these developments is that unemployment amongst journalists has shown a sharp increase since 2009. In 2009 there were approximately 1000 people looking for work in the journalism sector. Halfway through 2014 this number had grown to nearly 2,500.

## Declining advertising revenue for print

Compared to 2008 more than half the total net media spend disappeared which in absolute terms represents an amount of € 1.1 billion. Advertisers are switching to online en mass. In 2013 the net spend on the Internet grew with more than 8% thanks to search and display advertising. This growth of online display advertising is virtually all to the benefit of big international players like Google and Facebook. Dutch media operators hardly profited at all in 2013 from the growing Internet spend. Research bureau eMarketer estimates that Google touches half of all advertising spend for the mobile Internet worldwide, and Facebook approximately 20%. For all Internet spending (also ‘fixed’ internet) that amounts to 32% and 4% respectively.

Television seems safe for a little while longer; advertising revenues are stable but the sector believes that with the declining share of linear viewers it is only a matter of time before advertisers pull out.

[17] Vrij Nederland, Elsevier, De Groene Amsterdammer, HP/De Tijd
[18] Entertainment & Media Outlook for the Netherlands 2014 - 2018: PwC (2014)

*Table 3: Net media spend per medium type*

| Media spend per medium type (amounts x 1 million euro) | 2012 | 2013 | +/-% |
|---|---|---|---|
| Internet | 1,158 | 1,255 | 8.4% |
| Television | 962 | 933 | -3.0% |
| Sponsoring | 724 | 699 | -3.5% |
| Daily papers | 425 | 352 | -17.2% |
| House-to-house/news sheets | 410 | 344 | -16.1% |
| Radio | 222 | 227 | 2.2% |
| Public magazines | 223 | 194 | -12.9% |
| Leaflets | 199 | 190 | -4.4% |
| Trade and management journals | 212 | 182 | -14.2% |
| Out of home | 164 | 156 | -4.5% |
| Cinema | 5 | 6 | 7.0% |

Source: Nielsen

**New earnings models**

The sector is looking for new earnings models. Traditional media businesses have diversified: they are offering more additional services like travel, courses, congresses, and they are selling products via their web shops which have little or nothing to do with their core business; for example wine, CDs and books. There is a great deal of uncertainty over the willingness of consumers to pay for digital content. Unbundling, with payment per item of news products, for example the way that the Dutch start-up Blendle works, seems to satisfy a clear requirement of readers.

But readers of digital content clearly have different preferences from readers of traditional print edition. For example a digital reader wishes to have the ability to click through to related articles, to watch videos, to be able to react to articles, and to look through archives. The present-day digital propositions go nowhere near far enough. It appears from research by PwC (2010) that 80% of people do not intend to pay for digital content if the same content can also be found for free.

62% of respondents believe that if they have paid for digital content they should be able to share it with other people.

## 3.4.2 *Commercialisation of the media*

Participants at the meetings for this research believe that it is a certain trend that businesses will gain increasing influence on news provision. Journalists writing stories on behalf of businesses (or brands) and publishing under their own name or title. Commercial broadcasters who only produce programmes if they are sponsored. This is called branded journalism. The expectation is that newest players will make use of this. Vice Media is a frequently cited example of this. Besides this the expectation is that the marketing division will gain increasing influence on editorial choices. Also (more and more) businesses and institutions will disseminate their own news in the form of journalistically written press releases. Add to this the increasingly unequal relationship between providers of information on the one hand and journalists on the other hand. This is expected to give rise to increasing discussion about the integrity and independence of journalism. This is already indicated by research into the reasons for reducing confidence in journalism (see below).

## 3.4.3 *The importance of video continues to grow*

Video can be made quickly and cheaply. Productions are becoming multimedia. According to Cisco three quarters of traffic on mobile phones and tablets in five years will comprise video. Trans-media information provision is increasing: a story develops via various media channels and each channel makes its own contribution to the total storyline. This is made easier because a lot of text, data and video is made in small chunks and can be split up, enabling a number of stories to be generated and personalised from this basic material.

## 3.4.4 *Changing perception of the value of journalism: confidence is declining*

Traditionally journalism had the role of watchdog for democracy: critically questioning and investigating people and institutions of power. Now that the Internet also offers citizens the opportunity to consult with sources and publish, and given that the biggest scandals in recent years were not exposed by journalists but by whistle blowers – albeit often in cooperation with traditional media – that role is changing in character.

Journalism no longer determines what the news is (the role of watchdog ), but can highlight it and can investigate the truth of it. There are also signs that the public expects a different role from journalists, or maybe even attaches more value to it. For example facilitating or offering solutions to problems. Service journalism ('news you can use') as it is frequently referred to. Besides this there is talk of socially involved journalism; the traditional contrast that journalists see between involved and objective/critical journalism is becoming more subtle, in particular due to the scientists involved[19].

**Nine roles of journalism:**

1. Watchdog
2. Witness or reporter
3. Truth finder & fact-checker
4. Meaning giver
5. Empowerer of the public
6. Forum organizer
7. Rolemodel for private journalists
8. Smart aggregator (= collector)
9. Community-builder

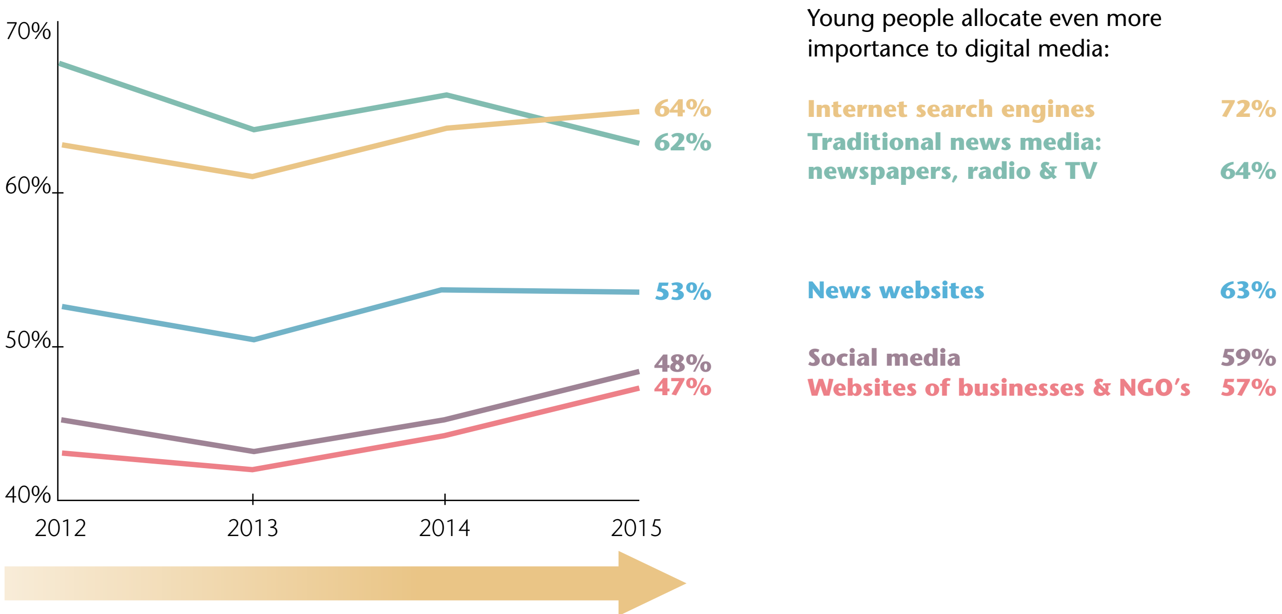
Source: '*Why Democracies Need an Unloveable Press*' from 2008 text by Michael Schudson

An important reflected trend is that confidence in journalism is waning. CBS Figures show that in 2012 only 27% of Dutch people had confidence in newspapers and news channels, compared to one third in 2006. Research undertaken by the Amsterdam University[20] into the causes of this decline, shows that the journalism profession is perceived by the public as being too autonomous. Automatically presumed confidence in expert, but usually anonymous professionals, and the news media is disappearing and being replaced by 'earned' confidence in personal, approachable and recognisable journalists'. Individual bloggers, who try to achieve credibility by actively being transparent and producing good reports, appear to be better able to do this than the traditional news media who want to be regarded as a reliable institution (in a kind of 'broad-scope trust'), even if mistakes are occasionally made. In addition, journalists seem to focus on hard hitting news, scandals and political trouble, while the public also needs insight, positive news and media coverage that helps them to make informed choices.

A similar trend is occurring worldwide. In 2015, for the first time ever, more people have confidence in search engines for providing them with reliable news than in traditional media. This percentage is even higher amid young people.

News sources: search engines now judged as more reliable than traditional media

Consumer confidence in news sources:



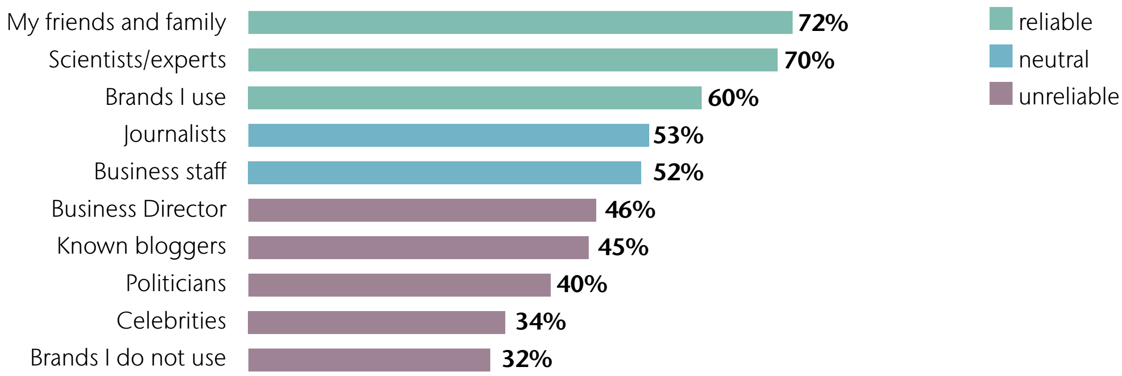

Answers to the question: If you look for general news, to what degree do you trust your source of information? (answers on a 9-point scale, 33,000 respondents; 27 countries).

Ref: Edelman Trust Barometer 2015

[19] "Het journalistieke weten. Over de objectiviteit van betrokken journalistiek". Taco Rijssemus (2014)

[20] "Publieke verwachtingen van journalistieke accountability: hoe denken Nederlanders over de verantwoordelijkheid van de journalistiek?" R. van der Wurff, K. Schönbach; Amsterdam School of Communication Research (ASCoR) (2012)

Matters obtained from friends, family and experts most reliable
Trust in information on websites and search engines is created by:




Answers to the question: when you read information on social networks and news sites how much trust do you have in the categories above in relation to its authors or creators of content? (33,000 respondents; 27 countries).

Ref: Edelman Trust Barometer 2015

The same research also shows that information from family and friends or experts gains more trust than that provided by journalists.

It is unclear to what extent traditional news media can gain more confidence. What is certain is that the public places increasing importance on transparency and accountability of journalistic organisations.

## 3.4.5 *Unbundling*

The news sector is facing the same thing that has already occurred in other sectors: products are being unbundled. Whereas in the past, newspapers were sold as a total package, new services such as Blendle are now selling separate sections. Readers selectively look for their news, in the paper one day but not the next. Readers' levels of trust are decreasing. The music industry revolution from CDs to iTunes experienced exactly the same issue. The current trend of unbundling, forces newspapers to think on even smaller scales. Articles need to be made available separately. The availability of separate articles on social media (Twitter, Facebook), more commonly makes users click on separate articles from different media titles and be less loyal to one specific title.

The expectation from study participants is that this has implications for the role of journalists. If people are less loyal to titles, journalists will need to become a brand themselves and represent themselves via social media.

## 3.4.6 *Citizens as journalist*

The way and the degree to which 'user generated content' (information that is provided by media users) can be blended with professional journalism is unclear. The danger of dilution is often mentioned but nuanced by others instead.
Interaction with the public during news-production causes potential complexity and segmentation when the public is asked to contribute knowledge but not opinions.
Interactivity after news production is often simplified and judgemental in nature. The degree to which the public really create and distribute complete news stories still falls below the expectations of some. Whether or not this will change in the future is unsure. The same applies when questioning to what extent consumers will have influence on the range of news on offer. The sector is showing interest in initiatives such as The Correspondent and Yournalism, that are exploring new approaches.

### 3.4.7 *Capacity for change for traditional journalist organisations is too limited*

It is uncertain whether or not traditional newsrooms can respond quickly enough to the changing requirements of readers and viewers, namely switching over to digital strategies and experimenting with business models. Inflexible organisational structures and ingrained editorial routines could cause many newsrooms to respond too late. On the other hand, it is said that so many savings have been made on news production over the last five to ten years, that many journalistic organisations have lost their impact and been left with little motivation to adapt. Yet others see a lot of change occurring here, ranging from exploring new approaches to inviting professors and lecturers in journalism to share their insights, and to consider different strategies. This trend is still unclear.

To conclude this chapter a brief summary is provided about described trends and the degree to which these have been rated as certain or uncertain.

*Table 4: Summary of leading and dependent trends*

| Trends | Degree of certainty | | |
|---|---|---|---|
| | high | | low |
| **Leading trends** | | | |
| Smart devices and social media are changing the journalist playing field<br>• Young people crave news<br>• Simultaneous consumerism<br>• Reading times are decreasing dramatically<br>• News consumer focus: on demand approach will have a future | X | | |
| Progress of technological development: pace and acceptance<br>• The internet of things<br>• Media use is becoming ambient: ever present established and adaptive<br>• Smarter use of data versus violation of privacy | | | X |
| • Algorithms direct the consumption of news<br>• Growing bandwith presents vision for possibilities | X | | |
| Government is stepping back: cost savings and decentralisation<br>• Future cuts on public imperative<br>• Due to decentralisation there is more demand for regional news delivery | | X | |
| Powerlessness of Governments in relation to technology giants | | X | |
| Institutions vs. individual(s) | | | X |
| Growing gap in society | X | | |
| **Dependent trends** | | | |
| Destabilisation of business models<br>• Falling advertising revenue for printed sources<br>• Search for new business models | X | | |
| Commercialisation of the media | X | | |
| Increasing importance of pictorial/images content | X | | |
| Changing perception of the value of journalism: declining trust<br>• Changing expectations by the public as to the role of journalism<br>• Decline in confidence in journalism is demonstrable<br>• Importance of transparency and accountability of journalists is growing | | X | |
| Product unbundling | X | | |
| Citizens as journalist | | X | |
| Capacity for change in traditional journalistic organisations is limited | | | X |

# 4
# Four scenarios for 2025: trust & technology

## 4.1 Choosing the critical uncertainties

The critical uncertainties are leading trends of moderate or high uncertainty, but at the same time they have great impact on the future of the sector. In the group meetings conducted, five of the six described leading trends were identified as critically uncertain:

- either people place their trust mostly in large companies, institutions and brands or specifically in peergroup and expert networks;
- there is either 'radical' or 'reluctant' acceptance of new technologies and methods;
- a national Government will either step back even further as financial supporter of the public news sector or will it maintain its role;
- either we will have a national and/or European Government that appears increasingly powerless compared to the technology giants or it will be able – to some degree – ward off the undesirable effects of this market-dominance affecting commercial opportunities for other companies, through regulation and international monitoring and by forcing the protection of personal data;
- either social dichotomy is permanent and worsens or the gap in society decreases.

In a brainstorming meeting, these critical uncertainties were drafted into different matrices with attention being paid to the extent to which they are independent of each other, their relevance to journalism and the extent to which they lead to challenging worldviews. Ultimately, two critical uncertainties were selected as most relevant; one in the field of social trust and one in the field of technology. These uncertainties form the axes of the scenario matrices. The number of scenarios that results by cross- linking the two axes is four. Fewer scenarios would do no justice to the complexity of the issue at hand. More than four scenarios would lead to confusion.

## 4.2 Critical uncertainty 1: to what degree do we embrace technology? Radically versus reluctantly

The first uncertainty describes an important driver behind change in the journalistic sector, namely technology. Technological developments will continue to forge ahead over the next decade and in many different areas. However, what is uncertain is the attitude of the public and Governments towards this new technology. Technology can be accepted reluctantly, or instead be embraced with enthusiasm. The future obviously lies in digital and mobile technology, but it is unclear how its inroads will evolve, at what pace and to what extent everyone will participate.

**Radical extreme:** If the benefits of new technologies are felt to be so great and wide reaching, if new technology is so intuitive that (almost) anyone can use it, then it is possible to imagine that technology will be comprehensively adopted and embraced across many aspects of our lives; including in journalism. In this context, the younger generation are 'digital natives'; expected acceptance of new technology by this group is unlimited.

**Reluctant extreme:** Although there is a lack of discussion about the fact that digital and mobile technology is the future, there is debate about the speed of its development, the extent to which everyone will participate in it and how this can be done safely. It is also conceivable that the cooperative links between technological developments, market power and social gaps will become more active subjects for public debate. This could have consequences for public attitudes towards technology.

Emily Bell, Director of the Tow Centre for Digital Journalism at the University of Columbia, stated in her lecture at the Reuters Institute[21] that:

[21] Silicon Valley and Journalism: Make up or break up? Reuters Memorial Lecture 2014; Emily Bell

*"Technology should be covered by journalists as a human right and political issue, just like Parliament is covered (by journalists); perhaps with even more vigour and clarity. It is equally interesting and about ten thousand times as important. Developments in data, privacy and accountability of algorithms are not tracked or editorial services are understaffed. We need to stop technology coverage that reports on how long the queues are for the latest iPhone, and switch focus towards its social meaning and power."*

In addition to this, there are also indications that acceptance is becoming more reluctant because currently existing technological solutions are still adequate or because new solutions appear to be potentially unsafe. In a study done by the ABN AMRO Bank, 30% of ICT-providers[22] enthusiastically answered 'yes' when asked if they want to offer unlimited technological innovations to their customers. 55 percent said that they only do this when there are clear benefits to the customer and 15 percent says they only do this if existing technology is no longer adequate.

## 4.3 Critical uncertainty 2: where should we place our trust? Do-it-yourself versus Do-it-for-me

The second uncertainty is trust. Worldwide existing institutions (Governments, NGOs and brands) are under pressure from changing needs of a critical public, from empowered consumers and due to new dynamics of bottom-up initiatives. Institutions have not (yet) formulated an appropriate response to this.

**Do-it-yourself extreme:** trust has shifted from institutions to peer groups. This is due to the way in which we organise business, for example: less through businesses but more in cooperation with each other. In many sectors there is a move to 'cut out the middle man', in which the internet plays an important role. This self structuring leads to mutual sharing of goods, in which you pay for their use instead of for their ownership. Self-organisation can provide several benefits: deals that more closely match needs, making cheaper alternatives available because links in the value chain are cut out, or reductions in dependence on big corporate organisations in positions of power. Think for instance about arranging income protection insurance for a group of self-employed people without the involvement of bank or insurance personnel. Self-organisation requires commitment and a great willingness to ensure mutual transparency.

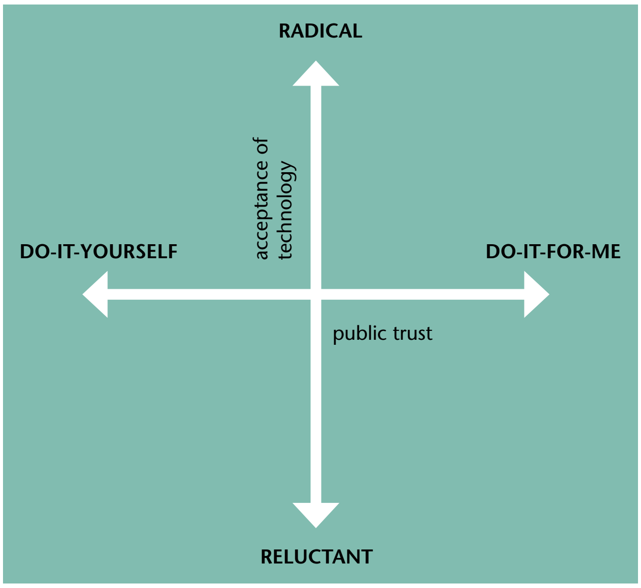
Networks and peergroups in many areas have strong positions because of their specialisation and expertise. They are well equipped to inform and serve their members and participants properly. Crowdfunding offers realistic possibilities for the generation of investment resources. Within information and news production there is also great confidence in networks of specialised experts and peergroups. These networks are potentially more knowledgeable than the big companies and brands. This could imply a fundamental change in the role of journalism and of journalists. One could for instance expect journalism to provide the building blocks and raw materials, namely facts, a wide range of analyses and resource documents to be used for information processing and management by participating members of the public.

**Do-it-for-me extreme:** it is imaginable that companies learn to handle changing public demands. By being more transparent and more active in dialogue about their operations, it is also conceivable that confidence in institutions will again increase. Institutions can also offer the advantages of clarity and efficiency. The power of expertise and corporate memory built up over time offers considerable advantages over fragmented network thinking.
The impact and resources of the big companies and organisations are difficult to match. Often, they also effortlessly beat small businesses and networks of individuals in effectiveness and efficiency. Large companies and authorities need to be completely transparent to retain this confidence and they will do anything not to damage the trust of their customers, suppliers and relationships. Journalistic organisations also play an important role in this. They point out when companies abuse their positions of strength or do not honour their agreements. For information and news delivery, such trust can also exist in large companies and brands. One trusts these parties in their version of facts and events and their interpretations. Thus, trusted players are playing a new game.

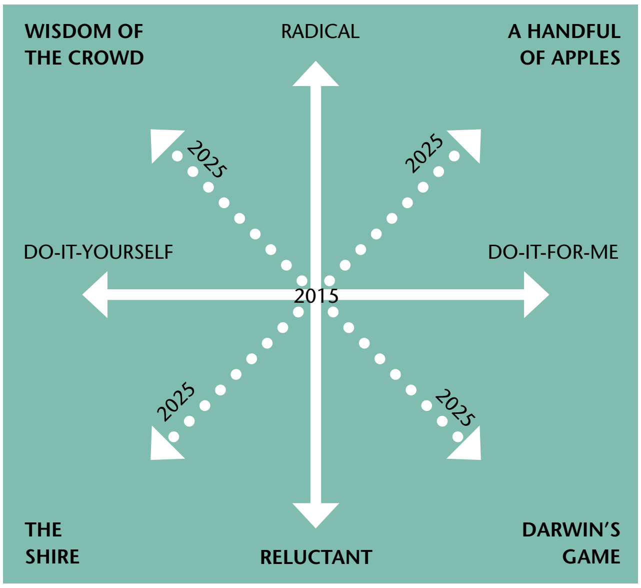
[22] Groeistuipen van Cloud-computing; Heliview (2012)

## 4.4 **The four scenarios in diagrammatic form**

Combining the two axes creates a matrix of four quadrants. The combination of critical uncertainties creates and highlights opportunities and threats that are not distinguished when the critical uncertainties are individually considered in isolation.




The combination of the two critical uncertainties creates four fictitious worlds in 2025, located at extreme points of the matrix. These worlds reflect the current hopes and fears of Dutch journalism, in particular the tension between professional and public journalism, the uncertain future of Dutch media corporations and titles, the role of hardware and software in the production and dissemination of news, and the way in which quality journalism will be funded in 2025.




The scenarios were developed in three steps.
Firstly, the consequences of the extremes of the axes were considered in a creative workshop by a group of journalists working at/for different types of media companies, complemented by a number of technology experts. This resulted in the diagrammatic scenario summaries seen in this section.

Next, in a second workshop, the scenarios were completed in more detail with input from many of the same participants. More than 700 post-it notes were reduced down to four conceivable diagrammatic representations of the state of Dutch journalism in 2025.

The purpose of these diagrams is to make it easier for those who want to work with the scenarios to be able to imagine themselves in the future. These stories, by definition contain elements about which you may disagree; after all they are fictitious. Nevertheless, experience shows that the diagrams stimulate the imagination and enhance thought processes by providing a picture of how the world could possibly end up looking. The actual scenario texts are provided in Appendix 1.

Finally, a matrix was created in which the major consequences of the scenarios (related to journalism) are explained. This matrix is included in Chapter 5.

## WISDOM OF THE CROWD: radical and do-it-yourself

A world in which the economy and society is being dominated by blinkered authors, by start-ups and by virtual partnerships.

The Government has been pushed back into a facilitating role. The influence of large conglomerates such as Apple, Fox and Facebook is greatly diminished because they were not serious enough about their user privacy.

Thanks to the technological revolution, a strong do-it-yourself mentality has become the key to success. New initiatives appear and disappear at the same extremely rapid pace. Whatever is news, is no longer paid for by the ANP or media companies, but by the public/crowd. Journalists are primarily information gatherers, overseers and community-managers.

## A HANDFUL OF APPLES: radical and do-it-for-me

A world in which a handful of mega conglomerates increasingly determines the economic, social and political agenda. CEOs at Ali Baba, Apple, Rosneft and Google are more powerful than many political leaders. Many of the smaller players have been taken over or have had to leave the sector. Hardware, software, physical products, content: everything gets branded and marketed via integrated chains. The same goes for the news, which is cleverly personalised and always seems to reach the public at exactly the right time.

The most traditional media companies have not been able to survive this development. Those that do still exist try their hardest to remain independent, but the majority of consumers just regard this as an uninteresting background issue, as long as they get exactly what they want.

## THE SHIRE: reluctant and do-it-yourself

A world in which being small-scale, self-reliant and prudent is of paramount importance. The caring Government has largely disappeared. Solidarity is an important value, one's own environment and region provide new anchor points. In addition, unbridled self-promotion of the Facebook era has given way to a continuous search for like-minded people in varying communities.

Because cybercrime, abuse of power and privacy violations became more and more prevalent, general consensus is that technology needs to be managed with the greatest of caution.

The media landscape has become an island empire made up of small scale titles, often with a regional or local focus. Many early 20th century journalistic newspapers and magazines have gone under. Instead, news is exchanged via topic based community sites, to which both citizens and professional journalists contribute. Sometimes these sites are no more than echo chambers, within which news and thoughts endlessly bounce around and where one especially searches for confirmation of their own opinion.

## DARWIN'S GAME: reluctant and do-it-for-me

A world in which once authoritative institutions reinvent themselves, and thus regain the trust of their original audiences. Government agencies and media companies surprise friend and foe with their adaptive ability. They show themselves as being more transparent and accessible; their dialogue with their target groups is no longer a compulsory numerical rating and is now actually paying off.

The journalistic landscape evolves: a number of traditional news media companies succeed in making their brands relevant again and so they manage to slow down the explosive decline in their viewers and subscribers. Others act too slowly and are annihilated. Legacy players have taken over digital start-ups and collaborate with them or compete within a relatively peaceful coexistence. And so there is a wide variation in the way in which news is presented and reported.

The traditional media companies change dramatically in their structure due to efficiency measures, wide stretching collaborations and continuous experimentation with business models. The public expects journalism to continuously prove itself, sets high standards and has no loyalty to specific brands.

5

# Implications of the scenarios

## 5.1 Answers to the questions the sector asks itself

What is the meaning of the changes that are outlined in the different scenarios; to Dutch society and to the role and of journalism within it?

In a meeting, representatives of the sector entered into a discussion about the implications of the scenarios. Appendix 2 provides a report about this meeting. The main conclusions that emerged from this meeting were major concerns about the demise of the public role of journalism in three of the four scenarios, as well as the need for the Government and the journalism profession to collectively address the issues that the scenarios have raised.

The implications of the scenarios are presented in the following table resulting from answers to the ‘big questions’ in Chapter 3.

| Question | WISDOM OF THE CROWD: radical and do-it-yourself | A HANDFUL OF APPLES: radical and do-it-for-me |
|---|---|---|
| What strategies assist individuals and organisations in gathering information and forming an opinion? | • News primarily sought and found on the internet<br>• News providers offer personalised and regionalised news using transparent algorithms<br>• Tracking of individual journalists, bloggers who are curators of news (= selectively)<br>• Active participation in platforms on the internet for information exchange | • News primarily sought and found on the internet<br>• Lots of push-information: information finds you, instead of the other way around<br>• Internet giants such as Google, Facebook and Apple control news content<br>• Information is highly personalised by non-transparent algorithms |
| Who (primarily) provides the news? | • Everyone; irrespective of who this may be | • Brands (including the big internet platforms)<br>• Branded journalism and native advertising<br>• International news agencies and press bureaus (e.g. Reuters and AP) |
| Who (primarily) pays for news? | • Shared<br>• One on one sales of publications to purchasers (micro-payments) | • Sponsors<br>• Free for consumers (but: 'if it's free, than you're the product') |
| What shape does 'user generated content' take and how will this affect news resources and journalism? | • Many specialised platforms of well informed experts and specialists in many fields<br>• Advanced forms of collaboration between professionals, the public and experts<br>• User generated content takes over part of the professional news delivery | • User generated content is limited; is brought to the attention at general platforms via non-transparent algorithms.<br>• Much search engine optimisation to stand out<br>• Little collaboration between professional journalists and the public |
| How does technology being used in the media develop? | • Technology and devices are aimed at being fast and smart in being creative<br>• There are good and transparent algorithms for e.g. personal selection of news<br>• Open source technology and transparent algorithms<br>• Technology and power are strongly intertwined: smart technology provides more power and influence | • Technology is ambient: invisible in the personal environment, intuitively operated<br>• Conglomerates anxiously safeguard their technologies and algorithms<br>• Remote control journalism: reporting is contracted out to parties at increasingly greater distances |
| What is the role of journalism in society? | • The journalistic sector itself plays no role, but talented individual journalists do<br>• The public does not see 'journalism' as playing a role: no skilled distinction between professional journalists, citizen-journalists, experts or bloggers<br>• Curation of high-quality information and interpretations in a potentially chaotic world<br>• Platform for discussion and criticism<br>• Research<br>• Improving decision making processes by citizens and consumers (service journalism) | • Dutch journalism no longer exists; no role in creating social cohesion, but some niche markets are served.<br>• Experience is added value: offer experiences<br>• Very small niche market for watchdog press<br>• Conglomerates see no need for journalistic products on the scale and size of the Netherlands |

| | DARWIN'S GAME:<br>reluctant and do-it-for-me | THE SHIRE:<br>reluctant and do-it-yourself |
|---|---|---|
| | • Strongly age related<br>• Older public uses 'traditional' journalism news sources. Daily papers, magazines, television, radio; primarily digital, with printed editions<br>• Supplemented by social media and news on internet search engines such as Google<br>• Young people particularly use social media to gather news and their own, often international news channels | • News is primarily sought and found on the internet<br>• Active participation in community-websites by which (in particular) local news is exchanged<br>• A very small section of the public uses and pays for 'traditional' media |
| | • Traditional players (newsrooms and news agencies; also using algorithms)<br>• Start-ups are specialised in news | • Spokes person media: interest groups, NGOs, local communities, companies<br>• Niche-titles at local levels |
| | • Subscribers<br>• Memberships (subscriber plus) | • Small scale advertisers<br>• Memberships<br>• Sharing |
| | • Consumers are involved in production directed by professional journalists<br>• Journalists research subjects based on consumer demand<br>• News brands manage user-generated content hubs to which the public sends videos, photos and text. News brands select, validate and publish | • Many community websites with local focus<br>• Many of these are echo chambers |
| | • Reduced pace in new product introductions<br>• Exploiting and improving existing technologies<br>• More focus on safe and transparent usage | • Reduced pace in new product introductions<br>• Exploiting and improving existing technologies<br>• More focus on safe and transparent usage<br>• Many relatively simple community-websites |
| | • Clear role<br>• In addition to traditional watchdog role also propose solutions for and investigations of social problems (constructive journalism); forum for discussion and debate, and journalism with direct relevance for everyday life (service journalism) | • Very modest role<br>• Watchdog role usually interpreted as protector of consumer interests<br>• Forum for discussion and debate |

| Question | WISDOM OF THE CROWD: radical and do-it-yourself | A HANDFUL OF APPLES: radical and do-it-for-me | |
|---|---|---|---|
| How is journalistic quality being defined? | • Narrator's uniqueness is important<br>• Transparency: openness about own vision and actions, links to references being used<br>• High quality analyses<br>• Applicability to daily life: news you can use | • Entertainment value<br>• Small counter movement in which quality is a result of investigation, activism and opinion | |
| What types of journalists and publishers show promise? | • Network driven economy that demands specialised and talented producers who are able to work in ever changing systems. The traditional organisational media business model stands no chance<br>• Only truly distinctive journalists survive: with superior analytical skills, and/or their own voice, and/or good curator skills, and/or content specialisation<br>• Technologically leading news providers who facilitate personalisation and regionalisation<br>• Developers of programs and algorithms for the above<br>• Data-specialists | • Limited number of niche-players<br>• Journalistic personalities<br>• Data-specialists<br>• Little room | |
| Which business models are viable? | • Advertising revenue for providers drops significantly<br>• Advertisers spread their budgets over many different communities | • Online advertising is enormous but is completely dominated by conglomerates<br>• Smaller Dutch parties are finding things difficult: have several modest sources of income | |
| What is being expected of education in journalism? | • Controlling technique becomes the foundation of the work of a journalist<br>• Strong analytical abilities, simple journalistic tasks are automated. 'robot journalism'<br>• Smart curation<br>• Multimedia story telling: words and pictures<br>• Promotion and entrepreneurship (journalist as brand/product)<br>• Training in fact-checking<br>• Being very selective | • Technological skills<br>• Multimedia story telling; words and pictures<br>• Specialists: film producers, programmers, data specialists etc.<br>• Being very selective | |
| To what extent is there still a broadly accessible and independent journalistic product? | • No longer exists. There are very good and independent journalistic products being created. However, there are no widely accessible media, with the exception of public networks if the Government choose to go with these. Accessibility of information is a potential problem | • None, not originated in the Netherlands, not independent<br>• Widely accessible news offered by internet platforms such as Google, is mostly superficial and focused on entertainment<br>• Widely accessible international news coverage by a number of global players specialised in news. Unlimited experience productions | |

| | DARWIN'S GAME: reluctant and do-it-for-me | THE SHIRE: reluctant and do-it-yourself |
|---|---|---|
| | • Transparency: openness about own vision and process with links to referenced resources<br>• No all-knowing narrator, but personal views<br>• Relevance to daily life<br>• Journalists acknowledge accountability for own actions | • Relevant to everyday life; news you can use<br>• Interaction with the public and co-production |
| | • Flexible organisations. Traditional publishers in very much a stripped down form<br>• Independent titles<br>• Independent journalists with a combination of high quality content specialisation and journalistic skills | • Very small, flexible organisations and collectives<br>• Community managers: organise and facilitate public discussion and connect the public to (civilian) journalists and communities<br>• Broadly functional journalists (words and pictures; journalistic productions and control; self made and co-productive)<br>• Only truly distinctive journalists survive: with superior analytical skills, and/or their own voice, and/or good curator skills, and/or content specialisation |
| | • Freemium models: parts of content is free of charge (financed from advertising); personal, specialised or local content is paid for<br>• Formation of subscriptions | • Online advertising market is sizable but fragmented due to the large number of platforms<br>• Many platforms have trouble covering costs |
| | • Apart from journalistic skills, content expertise as well<br>• Technological skills<br>• Multimedia story telling: words and pictures<br>• Entrepreneurship<br>• Moderate public discussion on the internet and engaging the public<br>• Training in fact-checking<br>• Being selective, more limited options for journalists | • Moderate public discussion on the internet and engaging the public<br>• Multimedia story telling: words and pictures<br>• Entrepreneurship<br>• Technological skills<br>• Much demand for journalistics is insignificant |
| | • Yes, a number of traditional news titles evolves into news brands with multimedia products<br>• Reaching young people is difficult | • There is a somewhat small number of independent journalistic products; easily accessible, however low numbers of readers and viewers<br>• Fragmented news offerings. Patchwork of local initiatives. Very variable quality of news coverage<br>• Many news sites purely focus on exchange and discussion |

| Question | WISDOM OF THE CROWD: radical and do-it-yourself | A HANDFUL OF APPLES: radical and do-it-for-me | |
|---|---|---|---|
| To what extent is there a case of an informed citizen and are all layers in society reached? | • Depending on the role of the Government. The market only partly achieves this<br>• Being informed requires good digital media skills: danger of digital gap development<br>• Dichotomy between those who are socially active and inactive. | • Depending on the role of the Government. Market does not achieve this<br>• News is primarily aimed at entertainment value and is often branded. No democratic purpose<br>• Filter bubbles: search engines tune into online behaviour and provide contaminated information | |
| How does this affect the democratic process? | • Interest in national politics is limited because its impact is minor<br>• Danger of having a group of people who do not participate in society<br>• Potential erosion of democracy | • Detachment and alienation of the Dutch democratic process | |
| What possible reasons could there be for the Government to act? | • Watchdog for net neutrality<br>• Monitoring the quality of the democratic process (support where necessary, regardless of medium or form)<br>• Reducing the digital gap<br>• Blind spots developed in provision of information in suburbs and subcultures | • News delivery from a Dutch perspective<br>• News delivery to facilitate citizens in possible participation in democratic processes<br>• Privacy watchdog | |

| | DARWIN'S GAME:<br>reluctant and do-it-for-me | THE SHIRE:<br>reluctant and do-it-yourself |
|---|---|---|
| | • Yes, public citizens have easily accessed options to inform themselves<br>• Not all layers are reached, there is concern about the extent to which young people and people under 35 are reached with high-quality news & backgrounds | • Depends on the role of the Government<br>• Part of the Netherlands gets lost in the chaos of images and text<br>• Concern about the so-called 'echo chambers': opinions and news bounce around and people only pursue validation of their own opinions<br>• Knowledge gap between higher and lower-skilled workers |
| | • Democratic process is under less pressure because existing institutions and titles consider there to be a reasonable chance of maintaining their position and is regarded as important by the public | • Focus is on the local area and limited internationally<br>• Waning interest in national politics. Interest is mostly issue-based, is not consistent with traditional political parties<br>• Gap between national politics and grass roots |
| | • Reaching the younger generation (<35 years old) with Government information and with what they need to participate in the democratic process<br>• Protecting the quality of the democratic process<br>• Counteracting dichotomy: public concern about minimal information levels | • Reducing the knowledge gap between higher and lower-educated workers<br>• Providing high-quality information given the changeable quality of news coverage |

## 5.2 **Using the scenarios**

The future scenarios developed together with the journalistic sector are intended to both be used by, and to benefit of the sector, so that different players with a role in journalism can better prepare themselves for the future.

This study in itself does not provide strategic options for parties involved. The principle behind the scenario planning methodology is that they allow people to 'live' the future themselves and to be able to make more informed choices because of this. The most productive approach is to do this in one or more workshop sessions in combined/mixed groups. Scenarios are a tool for collective learning. The materials can be downloaded on www.journalism2025.com in order to set up and facilitate such workshop sessions.

The starting point is always to project the individual role (for example, writer, broadcaster, journalist) into the four different scenarios. This can be done in two ways:

- **Approach 1:** the central question is which scenario is regarded as the most desirable one, which one is the most probable and which one would be the 'worst-case' scenario. This requires collective reflection during which participants discuss their preferences and the mental models or convictions behind these. Ultimately it is about the question of what actions and choices are needed to turn around developments in the most probable scenario to become the most desirable one, and also how to avoid the 'worst-case' scenario. This approach presumes that there is a most probable scenario. This study however does not pass judgement about the probability of the scenarios. This proactive approach can, nevertheless, offer a useful perspective by reflection about the future and the development of strategies. This applies particularly to policy makers.

- **Approach 2:** actors need to take into account the possibility that each one of the four scenarios could become a reality. The central question then becomes what the consequences are for each scenario on the role of the participant. Thinking about this enables the timely signalling of indicators from the public and to react to these promptly.

It is recommended that you use the second approach, because in this, individual influence on external developments is limited. Thus, tunnel vision can be prevented.

The scenarios can also be used for different purposes:

### 1. As a tool for reflection:

- As a method for organising information about the environment.
- In order to achieve changes in perspective: to exchange and question existing beliefs within a title or group of editors.

### 2. As a method to formulate and test strategies:

**a. Inside-out:** testing the existing strategy in the scenarios

- How well would the existing strategy survive in the given scenario?
- Does this strategy meet a need for which there is a market and/or a social need?
- How do we react effectively to the events that we see in this scenario?
- What are the essential skills required?
- Etc.

**b. Outside-in:** formulating new strategies based on market needs in the scenarios and/or social needs.

## 5.3 **What strategic tasks are described in the scenarios?**

Although those active in the sector and stakeholders in journalism are specifically invited to devise strategies themselves, this section briefly summarises some considerations about tasks that this scenario study has established.

Firstly there is the impression that the future of journalism in the Netherlands is only about whether or not Dutch journalistic organisations and individuals can handle the digital age. Of course, the move to going on-line is to be radical; with more commitment, creativity and conviction than it is today. But the future of Dutch journalism is also largely being determined by the extent to which journalists and journalistic organisations connect with their consumers, manage to win and retain trust and provide distinctive added value for the public.

It is about adding visible and noticeable journalistic relevance, informing people, with the aim of enabling people to form independent views and opinions about what happens locally, nationally and internationally. Journalism itself will need to present plausible rationales for being indispensable to proper functioning of democracy; be transparent and accountable. In 2013 only

27% of the Dutch population trusted journalism. In three of the four scenarios this trust will be subjected to even more pressure.

An important related task lies in preventing a two-tiered society: a small group of people who are well informed about what is happening in the world and a large group that is inadequately informed. A development that can be enhanced even further as high-quality, independent journalism is likely to become more costly and/or elitist in nature. Such impending dichotomy can occur via levels of education, incomes, age or a combination of these. In three of the four scenarios, there is a risk of significant parts of the population no longer being sufficiently informed and no longer being connected to important developments, debates and decisions.

Another important subject is privacy. Consumers need personalised information without (extensive) violations being committed of their privacy. At the same time they are being hoodwinked constantly by information providers into providing all kinds of personal data. Herein exists an important mission: How can information be offered as personalised as possible without jeopardising privacy?

Ethan Zuckerman, of the Civic Media Lab at MIT, in his lecture last year on 'Journalism After Snowden' proposed that journalism has a role to play in creating free and safe sites. He then gave a demonstration of the Guardian website which showed that fifty companies recorded their business on this site. Through this, he showed that even this most well-meaning of news organisations still uses a model of covert consumer tracking to maximise advertising revenue.

At the same time, new forms of journalism will emerge. There will be room for journalists who are able to shape community sites, and also for journalists who are able to give shape to discussion and debate on digital platforms as well as space and for data-specialists. There will also always be room for journalists who continue to link technical and journalistic skills with a particular specialisation.

This presents journalistic education with a challenge. There will need to be (even) more attention paid to entrepreneurship in technique and other forms of journalism. Thought and effort will need to be spent on taking other than a traditional story approach.

# 6
# Reflections

The value we attach to this research is largely determined by the extent to which we find it important that a healthy democracy can and needs to be corrected, questioned, challenged, inspired and checked. Traditionally, the press played an important role in this respect. The press keeps its finger on the pulse, suggests research topics, stimulates discussion and provides room for public debate. In a society that is potentially becoming more transparent as a result of technological advances, other ways to fulfil this role will evolve.

The question associated with this fact is whether or not there are sufficient opportunities within this new information structure for so many large sections of society to be provided with factual and relevant information in order to keep the most important values in our democratic society intact. What can journalism and the Government do to ensure that its citizens are well informed about everything that is or may be relevant to them? If we as a society consider this as important, if we believe that that this is a cornerstone of healthy democracy, then there is much work to be done, because the transformation to a different kind of society is in full swing and happening fast. When you challenge more than one hundred and fifty people from the world of journalism and media several times to think about the future together, there is the potential that clashing discussions degenerate into arguments that are largely based on wanting to be right. After all, you're asking people who usually have strong opinions –relating to their own careers- to think about how the world of media will develop over the coming ten years.

Even more remarkable – as seen in the sessions – is that there appears to be a consensus about likely future scenarios. This may well be associated with the methods and design used in this research: the mutual identification of societal developments and thinking about the consequences of those trends, exploring possible consequences of these developments and determining their certainties and uncertainties.

All those involved in this methodology – journalists, programme developers, Editors-in-Chief, publishers, bloggers, people behind media start-ups, University professors and representatives of organisations within the media-transferred themselves into the scenarios that could be the result of trends, and thought about how journalism could develop in the scenarios.

Based on all of the discussions, two critical uncertainties were selected to create the two axes. One axis reflects social attitude towards technology. The other axis relates to trust: does society trust institutions or is this waning? By cross-linking both axes four scenarios are created. These are quite different from one another. However, a picture also emerges of issues that run more or less parallel through all of the four scenarios. This highlights that the sector itself, but also people who are involved in it for other professional reasons, agree that the world of media and journalism will look fundamentally different in ten years time.

## Turning point

In three scenarios the change is said to be radical, in the least disruptive scenario the changes are less drastic but still dramatic... And then it is as if the fog slowly lifts. It starts to become quite obvious that the situation that we have almost become accustomed to over the past few years; a media sector that is under pressure, but leans on familiarity and tentatively explores new paths will not be able to be sustained much longer. Those people who have been involved in the development of these scenarios actually state that a crucial turning point will be reached over the next ten years. The 'scary business' (end of linear television, and paper newspapers) that is now reluctantly discussed at daily newspapers and broadcasters during out of the box-sessions, will in about ten years if not already be a reality, then at least have come very much closer.

In all scenarios – to a greater or lesser extent- linear TV viewing in 2025 will be passé, with probable exceptions for live broadcasts around sports and entertainment. In 2025, in all scenarios, traditional daily newspapers will be either under pressure, or they will be gone (with the least confidence in the future of regional newspapers).

In all of the scenarios surviving parties have already replaced their news/redactions as a structural form (perhaps with the exception of television channels) with skeleton newsrooms surrounded by freelancers who provide the major content of news productions.

## Dichotomy

And then there are the trends that demand attention in all of the scenarios. There will be a dichotomy between young and old. The oldest generation will – it is expected

– largely remain loyal to the trusted brands, the newspaper, and news broadcasting. Young people know how to extract their news from free sites and social media, and will probably make other demands on journalistic principles such as reliability and objectivity.
Another predicted gap is most likely more serious in nature: the gap between people who develop the skills to keep up with progressive technological trends and those people who cannot or don't want keep up. This will not be a gap that will separate young from old on a one to one basis, but this will also relate to economic status/ wealth and education levels.

Another issue that is expressed specifically in all of the scenarios is privacy. It is fascinating to see from the sessions that there is a perceived need for more personalised information-flow, but that at the same time the possibility is mentioned that the public will turn away from disclosing their private details. It is precisely in this area that the potential protective role the Government can or wants to play is of great importantance. One of the scenarios raises the possibility that CEOs of companies like Google, Face-book and Twitter will have more influential impact on our society than the Government. This potential fact is worrying.

Journalism will be experiencing a true revolution over the coming years in the scenarios. The transformation process, which has already started some fifteen years ago, will continue in all of the scenarios or even experience significant acceleration. For most journalists this will mean that they will no longer form part of traditional organisational structures, but rather they will have to operate cleverly as an independent on the edge of journalism, commerce, and entrepreneurship.
New forms of journalism will emerge. There will be room for journalists who are able to shape community sites, and space for journalists who are able to manage discussion and debate on digital plat-forms; as there will always be room for journalists who will continue to link technical and journalistic skills to specific areas of expertise.

All of this will also have a major impact on the way in which journalists are educated. There will need to be much emphasis on training in entrepreneurship, technique and on other types of journalism that will emerge.

This report includes a very clear warning. Media companies and journalistic training courses who think that they will be able act reactively to developments, will in most of the scenarios outlined for 2025 no longer exist.

## Raison d'etre

All in all, the level of trust in journalism is under pressure. This situation is based not so much on a presumed distrust but rather on the fact that more and more people (especially young people) do not really need 'journalism' to be informed of the world around them. Or at least assume that they do not need this. Many news posts that are usually consulted free of charge, can be traced back to journalistic sources, but the visibility this origin is decreasing and with it also the relevance of journalism.

In the midst of theme sites, free news sites, bloggers and social media, it is becoming increasingly difficult for journalism to profile itself. Social moves to make journalism more visible by means of a brand or otherwise, mostly lead to discussion among those who have commonly grown up with the concept of journalism. They believe that 'adversarialism', consultation of multiple sources and the urge to finding the truth in a world without journalism are not guaranteed. Young people believe much more in the self-correcting ability of the network that connects everyone and everything.

Journalism can regain relevance as long as the public resists the overwhelming quantity of information offered by the digital world. What is real what is propaganda? What is fantasy, what is inspired by hate, fanaticism and commercialism? It is quite possible that within this situation a guiding role emerges for journalism, as it is also quite possible that it becomes a job that will shortly be performed by individuals only, because there is sufficient confidence in algorithms and transparency provided by the web.

Journalism can also gain relevance by clarifying what its indispensable role is within a society that does not want to depend on floods of information; where subjective parties with other interests than independent searches for the truth, lead the way through technology. This primarily implies a task for journalism itself. The sector is not used to having to fight for its right to exist. This moment now keeps getting closer.

## Role of the Government

There is possibly also a role for a Government that attaches importance to well informed citizens. What that role should or could be is – as always – subject for discussion. It is certain that this discussion is to be conducted – in view of its urgency – with a decreasing level of choice in the matter.

The alternative is that the government takes on a facilitating role, convinced that there are now market forces involved; or that a Government, given its nature, is not able to respond, let alone anticipate the rate at which new players can mess with trusted business models in a short time. The time needed to adapt legislation and regulations, organise supervision and enforcement, bears no relation to the speed at which disruptive processes can manifest themselves. This applies not only to the media: outdated laws in the field of aviation do not meet those needed for drones; will the Government decide what is and is not to be copied or manufactured by a 3D printer? Or will the Government continue to be repeatedly caught off guard, as they were previously caught by surprise by operators such as Uber and Airbnb?

It is quite conceivable that the government chooses a role in which it mainly acts as the party who seeks to facilitate the introduction and handling of new technology as well as this is possible. For instance by acting as public guardian by – whether or not in a European context – taking on a position of strength by acting as advocate in the protection of privacy and internet neutrality and by defending themselves against such issues as the formation of cartels. This would seem to be a more natural role than to try to regulate through legislation against developments that sometimes appear to have a high degree of inevitability.

In the field of journalism, a similar question arises. Will the public of the future have enough opportunity to inform itself about what is relevant to them, what is happening in his or her environment, in the country, in the world? Will the absence (or decimation) of journalism lead to information flows that provide space for (and take) forms of unwanted manipulation? Or will a form of self-cleansing process in fact develop within the web where all lies, manipulation or evil is naturally filtered out through a counter movement that wants to keep the web – that is regarded almost as oxygen in the new world – as free from contamination as possible?

This is actually the question that the Government should ask itself first. Not from the (traditional) premise that it is possible to take measures that determine or at least have a major impact on the course of things. But rather from the realisation that influence by the Government on this kind of development is very limited and it is therefore better off to think about actions that it, as Government can take, that do have an effect. In any case it is a good thing – and yes even urgent – that the Government engages in dialogue with the sector. After all, well-informed citizens should be of mutual interest.

# Appendix 1: Scenario-stories

Note: The purpose of the written scenarios is to make it easier for those who want to work with the scenarios, to be able to imagine themselves in the future. These stories by definition contain elements about which you may disagree; after all they are fictitious. Nevertheless, experience shows that the diagrams stimulate the imagination and speed up thought process by providing a rough picture of how the world could possibly end up looking.

# Scenario
# A HANDFUL OF APPLES: radical and do-it-for-me

## Introduction: the world in 2025

The world in 2025 is a place in which a handful of mega-corporations increasingly determine the economic, social-scientific and political agenda. The CEOs of Ali Baba, Apple, Baidu, Facebook and Google are now more powerful than many a head of State. Supply chain integration is the key to their success. They produce both hardware and software and supply both physical products as well as (branded) content. In doing so, they continue to constantly develop new products and services to continue to strengthen the bond to their consumers. Much smaller market-parties have been taken over or have had to leave the sector all together. The success of the large conglomerates has led to huge budgets for research and development, with successful technological innovations as a result. The new generation of devices is so intuitive to operate and so unobtrusively integrated into daily life, that they are hardly perceived as something extra or indeed external.

The worldwide journalistic landscape remains mostly unchanged by the arrival of large, State-funded organisations such as Al Jazeera, China Central Television and Russia Today. Digital platforms such as Facebook, Google and Twitter have expanded and only consolidated their positions. With free high quality content and services internet Giants have been able to make themselves indispensable – at breakneck speed – in the lives of news consumers.
News is cleverly personalised and is available at the right time, including via 'push-messaging'. News productions are multimedia, grand and captivating, often with an international perspective. Potential opportunities for platform discussion are uncluttered and easily personalised. Images and entertainment play an important role. In exchange for free of charge services and content (such as Google, Facebook and Twitter, Whatsapp) consumers offer personal information, often without being aware of it. Slogans used by the media giants such as: 'We are the people' 'we democratise the world' and 'we do it for you', are accepted as true by the majority of the Dutch population.
Most of the traditional Dutch news organisations are unable to maintain themselves against this onslaught. A small section of people and special interest groups are concerned about the independence of journalism, the quality of news coverage and pluralism. According to them, the media giants see the public of the Netherlands more as a collection of consumers who need to be catered for, then as citizens who should be informed for the sake of a democratic process.
The small but very competitive professional group of Dutch journalists undertakes meticulous reporting of privacy violations made by the big conglomerates.
The Government does not see many opportunities to intervene, but conscientiously addresses the concerns in international consultations.

There is a minority of anarchists, 'neopunkers' and privacy activists who passionately react against privacy violations both covertly as well as overtly. They try to rally the public and place great question marks next to the intentions of the dominant market players. Will the internet remain freely accessible? To what extent are small parties treated fairly? What exactly happens to consumer data? A lot of Dutch citizens find this an uninteresting rearguard action, but there is a considerable group of people who are already doing everything possible to leave no digital shadow by, for example, using pseudonyms. The deep or invisible web (the information layer on the internet that is not indexed by popular search engines and therefore not directly visible to those not looking for it) is getting more and more requests for access.

## The creative sector: an oligopoly

The worldwide distribution of films, video, music, apps and games is in the hands of a number of large internet platforms for more than 90 percent, including players from China, India and Russia. On the other hand, there is an almost infinite series of small producers of content. The operational method of Apple is a good example of how chain integration can lead to market power. The company produces hardware, develops software (operating systems for various devices) distributes all of that through its own virtual shops (App Store and iTunes) and in this way also exploits the products made by others, namely content (games, films, series, apps and music) according to its own set of requisites. Small parties, without a distribution network of hundreds of millions of users, cannot compete with this. They try to exploit their home-made content via alternative channels, but with relatively little success.

The position of the major distributors of digital content is further reinforced by the introduction of a free trade agreement between the United States and the European Union. This means that copyrights and patents have a lifespan of decades and will be maintained internationally. Creators and small business owners are at a disadvantage because they cannot make use of previous innovations and work of others. A second consequence of this is that all content developed on platforms such as Facebook, instagram, Twitter and Google is the intellectual property of these companies.

Excellent translation programs allow content to be used in all language areas. The large conglomerates see no need for a private journalism product or journalistic service for the Netherlands. In their opinion, the translated pan-European product satisfies commercial needs. This threatens to cause a journalism deficit in the Netherlands.

### Technology

The technological revolution is occurring fast and its acceptation is great. Ever smaller, more powerful devices ensure that people can make and watch videos, virtual reality, and 3D-animations more easily. News organisations have great opportunities to further develop digital content, in which images play a leading role.

Technology has become 'ambient'. Smart, invisible technology is completely intuitive, operated by movement or voices, or even able to direct itself. Think of a refrigerator that creates its own shopping list, an implanted chip that tells you that it is time for you to take medicine, a video playback that seamlessly transfers to different screens as you move through the house. Very small, intelligent and energy saving sensors and sensor systems are essential for this. Ambient technology also uses trans-materials: materials with a dual function allowing you to build walls and at the same time use them as a two-dimensional or three dimensional display screen.

### News companies

The journalistic landscape has changed dramatically. News is provided on the one hand by worldwide digital distributors who distribute games, music and movies and on the other hand, by specialised news and globally operating market participants from the United States, China, the Middle East, Brazil and South Africa. Purely Dutch journalism has been decimated.

The internet giants provide image rich and experience-oriented, international productions and many opportunities to interact with other users. News is provided in a personalised format, tuned into your current location, current interests and social network. In addition to more traditional multimedia productions, big virtual reality experience productions are made, by which viewers themselves can roam around in any topical news story with continuous updates. This kind of immersive experience contributes to the goodwill of the public towards the internet giants, despite the sacrifice of privacy, despite the transfer of intellectual property, despite the loss of Dutch titles.

On a global scale, huge cartels have been formed. This has resulted in a pan-European quality newspaper with a Dutch Edition and a small, but loyal crowd of followers, for both print (on weekends) and digital information. In addition, there is still a limited number of independent news-companies in the Netherlands, including a number of digital start-ups, some companies originating in print and commercial TV and a few independent activist niche titles that are kept in the air by wealthy individuals with idealistic motives.

Some Dutch titles have specialised in investigative journalism. They try to distinguish themselves by painstakingly analysing data, trends in social media and business information. If necessary, they will work with hackers.

The digital start-ups focus on regional and local news. To cut costs, they often work together with other European journalists and Dutch journalists to just keep their heads above water.

### Public broadcasting

Dutchness or the Dutch identity is considered cultural heritage. As such, reliable news about the Netherlands, which is state-funded in order to safeguard impartiality, is a key political issue. In order to safeguard pluriformity and to disseminate domestic Dutch news (regional and national), there are one or two national, publicly funded television broadcasting stations. The public broadcasters exclusively broadcast the news, key background programmes, debates and government communication to the public, with entertainment being left to the commercial broadcasters. The remaining media outlets in the Netherlands have too small a reach to function as a public broadcasting channel.

In addition, the independence of public broadcasting should be above reproach and should be a model of objectivity in a world dominated by branded content. For this reason commercial advertising and sponsoring is strictly prohibited. The websites of the public news broadcaster contain a broad variety of source material: primary sources, interview transcripts, etc. Those who wish to make programmes for the public broadcaster subsequently must meet the requirements of total transparency. The public news service combines linear television and digital media (websites and on-demand). The choice of this seemingly old-fashioned medium is due to issues such as availability and reach. Given that nearly all information is disseminated digitally and search engines like Google also provide a news service, the public broadcaster runs too high a risk of its sites falling by the wayside.

### Journalists and stories

Large media corporations (both internet platforms, such as Google, Facebook, Apple and Amazon, and global news providers, such as Al Jazeera and China Central Television and a pan-European consortium) produce a large amount of experience-based productions, even for the news domain. Stories are diverse, interactive and non-linear, and make use of image and audio material, graphics, chat and 3D resources in a virtual reality environment. This allows consumers to experience news events seemingly first hand and from a variety of perspectives. Media companies have also begun experimenting with olfactory and tactile user experiences. Robots have taken over the simple work previously done by journalists, with the writing or copying of press releases, entertainment news and emergency services news being entirely automated. The limited number of journalists that do manage to rise above the digital cacophony subsequently do gain substantial fame in the public eye. And although higher quality journalistic endeavours, in many cases, are the result of the work of an extensive, interdisciplinary and highly professional team of journalists, programmers, data analysts, marketing specialists, actors, historians, citizens, graphic designers, editors and producers: the public's eye tends to focus on one single journalist.

### Revenue models

The few remaining, smaller Dutch publishing companies and TV broadcasters have yet to find the holy grail of revenue models. A variety of methods have been and are being used to generate turnover: gifts, subscriptions, webshops and events, etc. – all of which requiring a high level of flexibility and tolerance of uncertainty. Consequently, the companies that do manage to hang on are small and agile; most publishers were unable to make the necessary changes. A number of independent titles are funded by philanthropists. The seriously eroded number of newspapers and weeklies available only reach the 60+ demographic, which, although sizeable, is a shrinking demographic. Paper newspapers are only delivered on Saturdays.

The online advertising market is vast, with the internet giants constantly seeking out the limits of their reach, striving to gain as much personal information as possible without irreparably damaging consumer trust. People who don't want to see any ads, needn't – but will have to pay a fee for that service. Others make use of freemium models, in which news is free, but where readers wishing to access advanced content are charged a fee.

# Scenario
# THE SHIRE: reticent and do-it-yourself

### Introduction: the world of 2025

We find ourselves in a world gradually abandoning the paradigms of the past, but in which new, convincing paradigms are as yet absent. The welfare state has largely been dismantled, yet the tide has also turned on the unfettered self-promotion of the Facebook era. Critical citizens set the agenda, consumers act as watchdogs; privacy, solidarity and care are key themes of the day. Public discourse has taken on a crude and somewhat bitter tone. There is a deep-rooted sense of estrangement in society, in part due to an increase in legislation from Brussels, which is frequently misunderstood or alienating to ordinary people. Consequently, citizens have found new anchors in their own neighbourhoods and their own geographical region.

The Netherlands has a strongly developed networking and sharing economy. In part the result a substantial increase in civic initiatives and grass-roots self-organisation, on the one hand, and far-reaching government cuts, on the other, shifting ever more responsibilities to citizens themselves. Effective platforms have been created for the exchange of products and services. In the field of transportation, for example, there are a variety of functioning networks in addition to Uber, the taxi platform. Insurance is organised on a mutual and interdependent basis between the parties themselves, energy is generated and distributed decentrally and neighbours provide mutual informal care. A number of peer-to-peer networks even have their own payment system, such as bitcoin. In the more traditionally organised sectors of the economy, consumers continually monitor the situation using ratings.

People's trust in the government and in other major institutions has been severely eroded, with many citizens feeling they lack in transparency, do not engage in a dialogue with the public and offer inadequate services. This is compounded by the government's inability to protect citizens from breaches of privacy by large corporations such as Facebook and Google. Many Dutch consumers are cautious in their use of internet services for fear of becoming a victim of cyber crime – a fear justified by a series of previous incidents. Consumer lobbying groups and NGOs lobby for caution where the introduction of new technology is concerned and create barriers for the use of personal details. The government in turn responds to such calls with new legislation.

Increasingly citizens are less and less interested in 'traditional' politics, which has been supplanted by personally motivated political action, with people feeling very passionate about highly specific issues and ignoring the rest. The issues people care about are usually local or internationally oriented, as opposed to national. Increasingly the global norm is to provide or aggregate news stories from a specific worldview, whether Islamist, nationalist, orthodox Christian, feminist, etc.

People organise themselves in communities with other like-minded citizens where they discuss and tackle issues of common interest. There are many successful community sites on which people share their images, stories and opinions with one another: shared values are seen and felt as a new form of consumer loyalty. At worst, such communities are merely echoing chambers where news stories and opinions are endlessly ping ponged around for the sake of seeking confirmation of the validity of people's own opinions.

The landscape of journalism in the Netherlands has also changed drastically. Decline in readership and income from advertising has resulted in the collapse of the traditional revenue models of newspapers and magazines. The television industry is also struggling to keep its head above water; many stations, TV programmes and journalists are seen as belonging to the Establishment. Hardly a positive epithet in this society. The numerous free community sites, however, have seen their visitor numbers grow each year. This has resulted in a high level of direct involvement with the news on the part citizens, on the one hand, and to a fragmentation of news provision and a highly variable quality of journalism, on the other. Many of these community websites have a very short lifespan, as either their founders lose interest or they run out of funds. This has led to a fragmentation of the dissemination of news, with as section of Dutch society getting lost in the overcrowded and chaotic cacophony of information and images. Large sections of society find it very difficult to decide what is true about certain issues and whose opinion to trust. Among some, this leads to a sense of having lost their grip on society; and as such results in people clinging to simple messages and, by extension, to populism. In this case, fragmentation results in the polarisation of society. An additional problem seems to be that various strategies to collect information seem to only make the knowledge gap within Dutch society larger. The gap largely corresponds to the difference between highly skilled and low-skilled people, with the former group collecting news from multiple sources, and the latter only consulting one or two sources. The process is reinforced by filter bubbles. A filter bubble is a phenomenon that occurs as websites and search engines tailor their results to someone's (previous) online searching behaviour, leaving out other information, which colours the information the person receives.

### Creative industry

In international terms, the Dutch creative content sector (in which music, films, video content, apps, games and journalistic products are produced) plays no significant role. Labour costs in the Netherlands, by comparison, are high and it is primarily in low-wage countries, such as India, China, Malaysia and Brazil that the creative content industry has grown considerably. Text translation and video subtitling is no longer an issue due to the availability of advanced translation applications. This has resulted in a highly diverse globalised environment in terms of media, as the global world dominated by the English language has become a thing of the past.

### Technology

Those who control public opinion, determine the issues on the political and social agenda. As such civic journalism has substantially gained in popularity. Many journalistic titles of the early twenty-first century have gone under and the number of subscribers of newspapers and magazines, as well as the viewership of linear television has seen a sharp decline. Advertisers spend their money on online advertising, on community websites in particular, as they can easily identify who visits the sites.

De enkele kranten en tijdschriften die overeind zijn gebleven, hebben een heel herkenbaar profiel en zijn erin geslaagd een specifieke groep lezers aan zich te binden. Hun lezers doen nadrukkelijk mee met het maken van journalistieke producties. Een steeds belangrijker genre is servicejournalistiek: de lezer kan de informatie direct gebruiken, ook wel news you can use genoemd. Het onderscheid tussen tijdschrift en dagblad is vervaagd.

The few newspapers and magazines that have managed to stay in business have a very distinct identity and have succeeded in securing a very select core readership. Their readers also expressly participate in the development of journalistic productions. Service journalism is a genre increasingly gaining in importance. It allows readers to use information directly, and is also referred to as news you can use. The distinction between magazines and newspapers has become blurred.

Video and live streaming resources have become cheap and are good quality and as such are used widely on community sites and on the sites of the remaining newspapers and magazines. The commercial television broadcasters now operate primarily on the internet, offering content via their own websites, but also through channels such as YouTube. The internet offers a broad variety of regional and local video channels. Linear television has severely fallen by the wayside and only attracts viewers and advertisers for important events.

### Public broadcasting

Public broadcasting has undergone a radical change. Government funding has been decoupled from form or medium, with the state expressly allocating public funds to facilitate two-way traffic system by way of providing adequate information to citizens for participation in the democratic process, on the one hand, and getting a sense of the concerns of those citizens on the other. A number of influential community websites receive funding in the form of a professionally trained community manager who moderates, supplements and summarises the debate. In addition, any medium with an editorial statute may apply for funding on a project basis if it is able to convincingly demonstrate that their project relates to an urgent democratic deficit.

The government frequently chooses to place information it wishes to share directly on a number of platforms and community websites. There is one remaining public broadcasting station, which almost continually broadcasts international and domestic news. TV broadcasters no longer broadcast on linear cable television, but broadcast digitally.

### Journalists and stories

The public is distrustful of those in power and simultaneously of those in the field of journalism. Any commentary is more often than not given by experts than by journalists. Nevertheless, a number of titles and independent journalists do manage to build up a strong reputation in the field of investigative journalism, financing their work through crowd-funding channels.

A platform has been created by concerned citizens who can afford to fund the work of investigative journalists. This mechanism has evoked some sympathy from users (spending their own money on a good cause), yet has also resulted in controversy, given that these so-called defenders of freedom of speech in reality determine which issues are investigated and which are not. As such the debate on the independence of journalism has flared up again, in light of funding and investors being key pillars of the industry.

There has been a sharp decline in the number of working, professionally trained journalists, with the employment offered within web titles, who have small editorial staffs and little original content, being disproportionate to the number of jobs lost. Editorial teams at the remaining traditional news corporations (rooted in print media, radio and television) are small and frequently outsource work to freelancers, content and data experts. There is a great deal of smart collaboration between editorial teams, even on an international level, facilitated by the production of text, data and video in small chunks, which allows several stories to be generated from the same basic material. Good quality machine translation applications have all but removed language barriers.

Burgeoning community sites and branded platforms have resulted in the creation of new journalistic routines and roles. A section of professionally trained journalists focus on moderating and holding debates and securing an audience for community sites and platforms, resulting in the creation of a new position in journalism, that of the community manager. There are a limited number of independent professional journalists that are able to make a living by offering text and images through their own websites or via paid contributions to platform discussions. There are a number of initiatives propagating the establishment of a quality standard for journalists (comparable to the Magnum Photos for photographers): an elite collective that offers its stories via one portal. Most of these initiatives die a quick, premature death as a result of the interminable debate on who should grant such a quality certification.

### Revenue models

Consumers appear to be difficult to seduce when it comes to paying for news: a lot of important news is available for free to those who know how to get it. Digital platforms and community sites primarily make money through (personalised) advertising, sponsoring, donations from members and events. Community members have the option of an advertising-free environment if they pay a subscription fee. Many sites appear to have difficulties keeping their heads above water and a lot of sites have a relatively short lifespan. It is important to note that sites that focus on local and regional politics in earnest seem to go under first.

Digital news providers with their own content (newspapers, magazines, radio and television) have more options available to them and also make use of a freemium model, where a section of the content is free and advanced and/or personalised content is only available at a fee. They also are able to sell their own content via other platforms. Most titles also have a web shop with a range that matches their audience.

Freelance journalists juggle a variety of revenue models, ranging from micro-payments (with consumers paying per article), to crowdfunding and donations, to producing branded content and offering paid lectures and courses.

# Scenario
## WISDOM OF THE CROWD: radical and do-it-yourself

### Introduction: the world of 2025

The world of 2025 is dynamic, enterprising and tech minded. The economy runs on a vast amount of start-ups and independent entrepreneurs, pop-up internet businesses and ingenious inventors, who collaborate via ever-changing (virtual) networks. The internet with its myriad potential has facilitated a continuing shift toward a sharing and co-operative economy, with participation, proactive citizenship, collaboration and sharing forming core values of society. There are many effective platforms linking supply and demand, partially consisting of community sites, commercially driven platforms (like Marktplaats, Airbnb and Uber in 2015) and peer-to-peer networks on which products and services are created collectively, e.g. mobile phones, open source software and decentrally generated energy that is distributed via smart grids.

Large sections of society are now convinced that technology and power are closely intertwined, which is why technology is approached more and more from a political and human rights perspective in debates on community websites and traditional and social media. Issues such as use of personal details and the accountability of algorithms have become matters of national importance. The influence of large conglomerates such as Google, Amazon and Facebook has decreased due to the growing frustration about privacy violations and insufficiently transparent algorithms. They have all been sidelined in favour of effective bottom-up and open source alternatives, primarily set up by social entrepreneurs with idealistic objectives. A solid infrastructure now exists for crowdfunding and crowdsourcing.

Journalism and the crafting of stories, in this burgeoning age, is increasingly moving toward an industry of individual artisanship. News is provided from every nook and cranny: by professional journalists, via social media and via community websites. As such there is a great demand for people to filter through this flood of information to determine what is important and what is not.

The state has withdrawn from its facilitating role and is no longer a key player in the field of journalism, rather it is the net neutrality watchdog: internet providers may not delay or block the services or applications of their competitors without cause. This has benefited innovation in the field, with more competition between internet providers and an increase in opportunities for small content and application developers.

The government is the guarantor of privacy on the web. Organisations must explicitly apply for permission online to be able to use people's personal details and must 'forget' that person if requested, meaning that all stored details must be deleted. Meanwhile, consumers have begun collectively organising themselves far better and their interests have come to bear more weight than those of the developers and distributors.

The division in society, between the socially engaged and inactive groups, however, represents the darker side of this world. The division, more specifically, is between the people who have a social network (real or virtual) at their disposal and those who do not; between those who are able to participate in a highly digitised society and those who find it too complex. The knowledge gap is reinforced all the more by highly divergent information acquisition strategies. Due to the overwhelming supply of text and images, large sections of society find it very difficult to decide what is true or important and whose opinion to trust. It is this group that falls by the wayside more and more.

### Creative industry

The creative sector in the field of music, apps, games and film is highly dynamic: there seems to be no end to the number of small enterprises and self-employed entrepreneurs collaborating and churning out creative content in ever-changing configurations. Parties are able to collaborate in a smart and transparent way, using modular and open source development platforms (like Github in 2015), resulting in films, games and journalistic productions. The results of these collective development endeavours often seem to have far more applications than previously conceived, making collaboration a challenging, efficient and beneficial undertaking.
Many devices, apps and programmes are geared toward individual and smart production of images, audio and

virtual realities. And this take place en masse, with people distributing their work on sharing platforms, generally without a commercial purpose, although the development of a popular app or viral video may always result in five minutes of fame, attract advertisers, and allow someone to earn a year's salary in just a few days.

A number of Dutch publishers have succeeded in claiming a position at the distribution end by buying up small, innovative enterprises. Most large publishing companies, however, have become obsolete due to their archaic, sluggish and top-heavy constructions.

### Technology

Devices are increasingly becoming smaller and more powerful, so too are connections becoming faster and better, with screens and control panels becoming easier and more intuitive to use. As a result, consumers have increasingly easier access to high-grade content.

A lot of technology is geared toward facilitating the quick and smart creation of content by users themselves. For example, Smartphones that can be modularly constructed by users and handy virtual reality sets that allow users to create productions, or games that collectively allow users to build things (e.g. Minecraft). 3D printing has become more popular than ever due to the easy availability of user-friendly patterns for every product under the sun: from Lego and Playmobil to summer raincoats. The 3D printers in the local print shops never stop running.

News organisations and journalists, including non-professionals, have ever more tools to create digital content, such as virtual reality and 3D simulations. Basic news is covered by 'robot journalism', meaning stories that are written by specially programmed software.

### News corporations

The landscape of journalism has become severely fragmented. There is a highly extensive range of on-demand video content available as well as a large supply of live streams. News, both text and image by both professional and civic journalists, is largely disseminated on the internet: on Twitter, on independent, civic community sites and commercial internet platforms. The latter group is partially owned by traditional publishing companies, start-ups and partially by larger players like Google, who no longer dominate the scene. Successful news organisations have become companies that are able to offer tailored and localised news via smart algorithms, in which content is clearly more then a monotone message and consists of various components: video, text, audio, images and/or data that can be read or viewed on a multitude of platforms or devices. Journalism seems to be organised along the lines of the global production network of the gaming industry in 2014. An international journalism network has been created, populated by participants including traditional publishers, bloggers, independent journalists, providers of user-generated content and news consumers.

The limited number of magazines and newspapers still in circulation are primarily read by people over the age of 60. The unbundled supply of stories, whereby users no longer buy a whole newspaper or magazine or watch an entire TV show, seems to be reasonably successful and in any case demonstrates that a story truly must offer added value for a consumer to pay for it. Press agencies over the last ten years have focused their activities on checking and selecting and filtering information from staggering amounts of image material shot by civilians at the right place and time. This role, however, is becoming increasingly more automated, as machine learning has resulted in computers being able to do the job cheaper, quicker and with fewer errors.

### Public broadcasting

The public broadcasting landscape has changed considerably. Government funding has been decoupled from form or medium, with every medium with an editorial statute or professionally trained producer becoming eligible to apply for project-based funding if they can convincingly prove the existence of an imminent democratic deficit. White spot surveys are regularly carried out determine which groups of people where are insufficiently informed to take part in the democratic process. Such locations then host government-sponsored news projects that are carried out in collaboration with local parties. On community sites, meanwhile, the debate on the extent to which this is sufficient in providing every citizen in the Netherlands with a basic supply of news rages on.

Only one public broadcasting station still remains, which is used by the state to distribute general information. The station broadcasts several editions of the news daily, provides information on (domestic) disasters and teaches the elderly how to use digital media. TV broadcasters no longer broadcast on linear cable television, but broadcast digitally. They also operate large community sites of which some are more successful than others.

### Journalists and stories

A large section of the news is automatically generated by robots. There is a staggering number of civic journalists that film or write content. The number of professional journalists, by contrast, is diminishing and their role shifting. Instead of being a source of news and reporters they have become curators, fact-checkers, researchers and forum organisers and have an exemplary function with regard to non-professional news makers.

Journalists on the payroll have become a rarity, which means that only those with a truly original voice and with superior analytical skills remain and manage to distinguish themselves. New professions, however, have emerged, such as that of the information intermediary – freelance professionals who help others distinguish the wood from the trees.

Within journalism, the role of curator is gaining importance. The public is in danger of becoming overwhelmed by tweets, data, blogs, and discussions on community platforms. A number of journalists and journalistic platforms, however, have been able to push back the internet to bite-size proportions, categorising the world and sifting out the gold nuggets of news from the streams of information. Some journalists even manage to become a brand name, securing a loyal audience with both original production and quality content curation. In addition, the field of journalism constitutes a key platform for debate and social criticism, where discussions are moderated by professional journalists. There is a great deal of service journalism, aimed at improving the decision-making processes of consumers.

Journalists frequently operate in collectives of professionals, consisting of programmers, data specialists and scientists in the applied sciences. Journalistic routines have become considerably more advanced, involving the frequent use of data analysis and pattern recognition techniques. One of the journalist's jobs is to accurately analyse the data, which inevitably comes down to asking the right question. Journalistic products increasingly are made up of discrete components, e.g. text, video and a number of data analyses (visualised in interactive info graphics) that can be adapted to suit user specifications. These clumps of information can then be recombined into new stories, which on one hand results in improved gains, but on the other hand leads to the journalist having no control over the final product.

Professional journalists are required to be adept at using the technology that makes their work distinctive. The higher vocational (HBO) journalism programmes have been transformed into far more technically oriented, data journalism, image and fact-checking courses.
Some universities offer very selective creative journalism programmes.

### Revenue models

The most successful journalism entrepreneurs in this world are able to make money in a variety of ways and by using a range of revenue models. Income from micro-payments for (occasionally commercial) content is supplemented by donations, paid lectures, with larger projects that are financed through crowdfunding. Journalism enterprises also use a blend of revenue models: micro-payments for specific content and subscriptions to personalised content.

Consumers' willingness to pay for news tailored to their personal situation and location seems to be significantly greater than for general news. This is equally true about their willingness to pay for high quality financial news. Consequently, most successful businesses work with good algorithms to personalise and regionalise news. The use of various revenue models demands a high measure of flexibility of these organisations as well as a high level of risk tolerance.
New digital players are better equipped in this regard than publishing companies rooted in print media.

# Scenario
# DARWIN'S GAME: reticent and do-it-for-me

## Introduction: the world of 2025

We find ourselves in a world where the traditional institutions have identified scope to remain relevant players in a complex society. A large section of the Dutch population experiences everyday life as being overcomplicated and unsafe; the internet has unlocked a treasure trove of information, but has also resulted in a great deal of chaos. How do we know who to trust? How can we know whether something is true or not? How can we make sense of this wealth of information? This information stress has resulted in a need on the part of the general public for transparency, direction and clarity. A large section of society (in general the older demographic) has fallen back on institutions they know.

The government and its institutions have learned from the crisis of trust of the early twenty-first century and have presented themselves as being more transparent and accessible. The heralded 'participation society', meanwhile, has never truly gotten off the ground. In general, people seem to be less concerned with the wellbeing of their fellow citizens. This, however, is paired with growing realisation – in response to radical public service cuts – that many services and tasks are better and more efficiently run by the state. Nevertheless, citizens do want more of a say and more transparency in the way the government and other powerful institutions run things. The general public also want a state that is able to protect them. Following a spate of cyber crime and privacy violations online, there is general call for caution, which the government has responded to accordingly.

The general public, in effect, has succeeded in compelling the creation of new types of journalism, sending a clear message of having little regard for the way in which the field of journalism was fixated upon itself or the way the profession defined quality or its own task perception. Nor did the general public seem impressed by journalists' self-ascribed role of democracy watchdog. By contrast, they do value the fact that journalists care about society, proffer solutions to issues and provide a forum for public discourse. The realisation that absence of trust among the general public would make journalists irrelevant, coupled with declining readership, has resulted in editorial boards showing a greater willingness to change. A number of traditional news companies have succeeded in making their brand relevant again by listening to and collaborating with readers and viewers, resulting in different editorial choices and new forms of narrative. A number of publishers are too slow to follow suit and go under.

Consumers of news seem to have enough faith in the media and perhaps also sufficiently recognise their own lack of interest and knowledge to leave the provision of news largely to expert journalists. The profession, however, does still have to justify the trust it has been granted by being transparent and accountable where necessary. News companies originally rooted in 'traditional' media and digital start-ups operate side by side and co-exist relatively peacefully. Nevertheless, media companies have been forced to become leaner, due to cutbacks, far-reaching collaborative efforts and on goingl experimentation with revenue models.

Despite every effort, the traditional media supply barely seems to reach people under the age of thirty. Finding the right tone and form seem to difficult aspects, in addition to the fact that the 'traditional' titles seem to have little or no resonance among young people. The people of Generation Z are all about creating their own world through virtual meeting points and seem to trust new players on the market more. Consequently, the traditional media offering is primarily aimed at people over 50, due to their brand loyalty and willingness to pay for news.

## Creative industry

The creative industry, as it was in 2015, is still organised according to the hour glass model, with a few large companies at the top, specialising in copyright and distribution, little or no mid-range companies, and a multitude of small to very small enterprises that produce content, games, apps, music and films. Big players like Facebook, Google, Apple, Twitter and Instagram do still play a large role in the distribution of content and creative products, but have not been able to secure a monopoly position. There are a number of pan-European media companies that have been able to hold on to their position at the distribution end. Most news makers have opted for a mixed distribution model, using their own channels supplemented with distribution via global internet platforms with a solid position, such as Facebook and YouTube.

## Technology

TVs, Smartphones, tablets, laptops and wearables are all still around. The industry's attention has shifted from the development of new devices to optimising existing technology and making it safer to use. The rate of new product launches has decreased due to market saturation. Parties with a strong market position will only launch new products once old ones have commercially run dry. In addition, they have ventured onto the African and South American markets where huge gains can still be made with existing products. The role of smart TV has become far more significant, if only because of the general public's tendency to shun the complex outside world. Smart television has become the largest tablet in the home, primarily used to stream internet videos. Cable television is simply one of the many apps available on smart TV.

## News corporations

Although general and social media platforms are used to exchange and share news stories, they are not regarded as a reliable primary source; and certainly among the older generation, there is a palpable sense of tech fatigue. There is a growing frustration, for example, concerning the overwhelming number of online ads that pop up unsolicited when opening websites, and dissatisfaction about the quality and crudeness of news stories on social media. As soon people want to know what is really going on, in the case of a disaster or national event, they turn to a limited number of trusted Dutch news brands.
These news brands offer a multimedia range of news, including a number of print titles. There is a national early morning newspaper and a national evening paper, with both available in print and digital form daily. The paying readership largely consists of highly skilled people over 50 – a shrinking, yet solid market. Regional newspapers have all but disappeared and have been replaced by a myriad of websites with a regional or local service focus. News is offered both in bundled (within one title) or unbundled form, where readers may purchase just one specific journalistic product.

Journalistic organisations have become smaller and more flexible and take a cross-media approach. Editorial teams have been pared down to core actors and frequently employ freelancers. There is a great deal of collaboration between titles, even on an international level.
This is also true for a number of quality newspapers, who collaborate internationally. In addition to organisations rooted in print media, there are also many start-ups that offer news, frequently targeting a specific niche. In general, there is an increase in the use of video, live streaming, data analysis and tools to personalise and localise news. News is differentiated according to consumers needs and offered in a variety of forms. Based on the time available, or previously indicated or presumed interest, consumers can choose from an array of text, live blogs, interactive charts and timelines, source material and (transcripts of) interviews and videos, or a combination of all of the above.

## Public broadcasting

The public broadcaster as an institution has been able to secure its position due to the rise of smart TV as a platform, the general public's need for familiar, trusted figures and its guiding role in a world that has been overwhelmed by technology. Despite severe budget cuts, the public broadcaster has managed to keep advertising income stable thanks to the popularity of its household names. There have also been far-reaching reforms of the institution's mandate over the last ten years. Although the three public broadcasting stations and the broadcasting associations still remain, the production companies and general public have far more clout than before.

## Journalists and stories

Journalism has become a multi-facetted profession. In addition to traditional journalists who seek out injustices and report on issues, a new role has been created for journalists who care about their community, offer solutions to issues and provide a forum for debate. The gap between journalists and citizens has narrowed, with many examples of participative journalism taking place, for instance, with the general public contributing to productions while directed by journalists or editorial teams. There have also been instances where the audience has suggested topics and questions to be investigated by professional investigative journalists, resulting in collaborative productions. Finally, there is a great deal of service journalism, which provides consumers with information that is directly useable, primarily in the form of apps, data journalistic applications, allowing the reader or user to put together the desired composition of information. The age of the all-knowing bard has ended. Thanks to the internet, everyone has free access to the source material. Within the field of journalism, objectivity has been supplanted by transparency, meaning openness about one's own views and methods and providing as much transparency as possible about the sources used.

### Revenue models

For the overwhelming majority of people, the range of news available is more than adequate to meet their daily needs. High quality news and investigative journalism by professional journalists has gone from mass production to niche production, with a small, select and loyal readership paying for content.

Many news providers with individual content (e.g. newspapers, magazines, radio and television) use a freemium model online, offering a section of the content for free and charging a fee for advanced/personalised content. Most titles also have a web shop with a range that matches their audience. News websites that specifically target young people make extensive use of commercial sponsoring, something which young people are prepared to regard as trustworthy, provided the website is transparent about its arrangements.

# Appendix 2: **Meeting report scenario implications**

At the initiative of the Dutch Journalism Fund representatives from the field of journalism convened on 24 March 2015 to discuss the results of the scenario review. A selection of editors-in-chief, publishers, sector and union representatives and journalists from public and private parties were asked to closely consider one of the four scenarios and subsequently to discuss the implications of that specific set of circumstances for their own organisations, for journalism in the Netherlands and society in general.

The participants remarked that the scenarios provided a good basis to continue the discourse within their organisation and upon which to develop innovation initatives. Each and every player in the industry has felt the pressure to change and has indicated that this has become more acute following the analysis of these scenarios.

It is the opinion of the participants that the journalism industry will contain elements of each of the scenarios in 2025. They feel a scenario is imaginable in which multiple scenarios are 'true' simultaneously, where one is preponderant and in which others represent counter trends or sub-cultures.

Although several scenarios forecast dark days for the profession, the participants recognise a great many opportunities for journalists down each potential avenue. The assembled participants conducted lively and varied discussions within the four-scenario groups. Yet there is clearly one shared common concern: the vulnerability of the public role of journalism. A healthy, functioning democracy requires journalists to keep the powers that be in check and investigates issues. As yet there is no clear answer as to how this function may be safeguarded. Everyone, however, concurs that inaction on the part of politicians is not an option.

Hereafter is a short summary of the discussion conducted on each of the individual scenarios.

### A HANDFUL OF APPLES (radical and do-it-for-me)

The participants of this group regard this as the most realistic scenario. This assertion seemed to be supported by a substantial section of the participants in a general discussion. Large, international conglomerates like Facebook and Google have the potential to take over the market, resulting in a decimation of Dutch journalism, both in numbers and relevance. The participants state that dominance of one or several parties per definition is undesirable.

There is, however, cause for optimism given the opportunities presented. This scenario has further emphasised the urgent need for change by editorial teams and media companies. The group called attention to the fact that by clarifying the need for practical change to media professionals and subsequent implementation of small changes, organisations will be able to avoid being pushed off the market.

Several participants also feel it is key that, given all the new opportunities in journalism from a variety of disciplines (e.g. data mining, image technology), educational programmes adapt to these realities and have students work in multidisciplinary teams.

### WISDOM OF THE CROWD (radical and do-it-yourself)

There was great enthusiasm surrounding the large measure of diversity in this scenario: a large number of small-scale initiatives, resulting in many different individual voices. This would allow citizens to be informed more extensively, as well as reinvigorate the regional provision of news. Editorial teams with fixed contractual employment would, however, be untenable in this scenario. A subsequent question being how newsmakers would congregate otherwise. Loners would potentially be hard to find among the infinite supply of information on the web. Participants found it plausible that news companies would offer newsmakers the facilities to make news in varying and interdisciplinary configurations. This yet again highlights the importance of journalists being trained to learn to work with data specialists and programmers. Every internet user coulc potentially be a journalist, blurring the line between opinion and fact. The participants suggest that as large news brands have dropped off the board, public debate will no longer be formed. This means it will be crucial for journalists to find new ways to demonstrate their reliability and relevance. Journalists will have to take the general public more seriously and collaborate more with readers/viewers.

### THE SHIRE
### (reticent and do-it-yourself)

According to the participants that dealt with this scenario, this is a probable prospect for the future. In any case, close to current practices. The authority held by news brands is decreasing and the existence of professional regional media is another question entirely. Although a variety of new (regional) initiatives have sprung up, there is uncertainty about the professionalism of their news provision.

The loss of so many news media outlets in this scenario is detrimental to journalists themselves, says one participant, but not per definition detrimental to the profession's position as a watchdog. That position could be taken over by smaller (frequently civic) initiatives. Whether or not these small-scale initiatives, such as community websites, hold the necessary clout is another question. As the issues become more complex, for example, more expertise will be required to analyse or research them. For example, it will be difficult for volunteers to initiate WOB, or Public Access, proceedings. At present the actual contributions of small-scale initiatives are still relatively few. In this regard participants still see a role for professional journalists.

### DARWIN'S GAME
### (reticent and do-it-for-me)

This scenario requires more transparency in the field of journalism and of journalists themselves, in order to regain the trust of the general public. This will require a considerable effort on the part of journalistic organisations. This should be coupled with efforts on the part of educational institutions to improve the quality of the journalism produced by their students. Educators have indicated that, contrary to claims, journalism courses have at present made their curricula more flexible, which may allow the industry to anticipate new developments more quickly.

In this scenario all parties will have to co-operate more across the board to strengthen their position. Among the participants the question was then raised what shape this collaboration between private and public parties should take and what the state's role should be.

Human resources policies in the industry would also have to change, yet opinions on how and what remain divided. The representatives of the various media organisations indicate that they would like more flexibility and progression within their workforce so more young people can be recruited and the organisation does not get stuck in out-dated traditions. Union representatives meanwhile call for employers to take a different attitude with regard to news makers. They feel that when individual journalists become more important, as an organisation, one should strive to keep them on board. One participant warns that if employers keep treating freelancers in the same way they will lose them.

### Conclusion:

The discussions from all the scenario groups yielded that the primary concern lies in the threatened and vulnerable position of the public function of journalism. All participants agree that, given the vital importance of journalism to the healthy functioning of a democratic society, inaction on the part of politicians in these turbulent times cannot be permitted. If we want a society that includes high quality journalism, then now is the time to take a stand and we will have to stimulate demand for it, elucidate its importance and create conditions in which it can be maintained and prosper.

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# Appendix 4:
# **List of participants of scenario review**

The authors of this report would like to thank the advisory group and the participants of these conferences for their constructive and inspiring contribution.

## Steering group

| | |
|---|---|
| Thomas Bruning | Secretary of NVJ |
| Tom Nauta | Director of NDP Nieuwsmedia |
| Marcel Gelauff | Editor-in-chief NOS Nieuws |
| Harm Taselaar | Editor-in-chief RTL Nieuws |
| Vincent Kouwenhoven | Chairman of the Board Dutch Journalism Fund |
| René van Zanten | Director Dutch Journalism Fund |

## Participated in one or more conferences:

| | |
|---|---|
| Lars Anderson | Publisher at Uitgeverij Fosfor |
| Lara Ankersmit | Head of Digital Media NOS |
| Martijn Arts | Managing Director Total Active Media |
| Femke Awater | Correlations; journalist for Financieel Dagblad |
| Caroline Badoux | Project manager Dutch Journalism Fund |
| Piet Bakker | Mass media and Digitisation Lecturer at Hogeschool Utrecht |
| Toos Bastiaansen | Management OLON (Organisatie van Lokale Omroepen in Nederland) |
| Erik van Beek | Freelancer/expert Aiwos; webdesign and builder |
| Allard Berends | Director/editor-in-chief Omroep Flevoland |
| Jeroen van Bergeijk | Founder Uitgeverij Fosfor |
| Richel Bernsen | Senior Policy Officer Stichting ROOS (Regionale Omroep Overleg en Samenwerking) |
| Tim Beudel | Head of digital development Tuvalu Media |
| Henri Beunders | Professor of The History of Society; Media and Culture Erasmus University |
| Jan Bierhoff | Owner MediaLynx; European Journalism Center |
| Hildebrand Bijleveld | Free Press Unlimited; programme maker Eefje Blankenvoort Prospektor; The Sochi Project |
| Marten Blankesteijn | Co-founder Blendle |
| Heiko Bleeker | Strategy & Business development partner Station10 |
| Erwin Blom | The Crowds |
| Joost Bon | Publisher nu.nl |
| Samira Bouchibti | Programme maker; former Member of Parliament for the PvdA |
| Tonie Broekhuijsen | Former Creative Director Digital Content Sanoma |
| Bart Brouwers | Head of Business Development TMG |
| Arnold van Bruggen | Prospektor; The Sochi Project |
| Hans de Clercq | Director Instituut voor Media, Hogeschool Utrecht |
| Mark Deuze | Professor of Media Studies UvA |
| Anna van Dijk | Freelance journalist |
| Rick van Dijk | Operational director Dutch Journalism Fund |
| Miranda van Dijk-Kedde | Hogeschool Windesheim, journalism programme |
| Evert van Dijk | Editor-in-chief NDC Mediagroep |
| Hans Disch | Interim-director OLON (Organisatie van Lokale Omroepen in Nederland) |

| | |
|---|---|
| Marieke van der Donk | Strategy & Operations Director Deloitte |
| Annelou van Egmond | Interim Communications Advisor; D'66 executive |
| Kim Einder | Editor-in-chief online 7Days |
| Erik van Erp | Member of the Board Dutch Journalism Fund |
| Martijn Franssen | Owner of Floodlights; member of Amnesty International board |
| Teun Gautier | Member of the board Vereniging Veronica; 04NT; Stichting Publeaks |
| Louis van de Geijn | Board NVJ |
| Marcel Gelauff | Editor-in-chief NOS Journaal |
| Onne Gerritsen | Science + Strategy Director |
| Jacqueline van Ginneken | Journalist De Gelderlander; former board member NVJ |
| Rob Goossens | Editor Das Kapital |
| Robert van de Griend | Deputy Editor-in-chief Vrij Nederland |
| Erik Grimm | Research Manager NDP Nieuwsmedia |
| Leen d'Haenens | Professor of Communication Sciences KU Leuven; Deputy Chairman Flemish Media Regulator; Committee on Impartiality and Protection of Minors |
| Chris van Hall | Manager Nieuws in de klas |
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