

An analysis of developments, scenarios and initiatives to increase the value of news in 2030



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Foreword

As we are passionate about the importance of news to societies, the Deloitte Impact Foundation assembled a team across Deloitte and leveraged its network to study potential initiatives that will have a positive impact on the future of news.

As explained in this paper, our Future of News study takes a holistic view of the value of news, consisting of two distinct elements: the forum function and the control function, which can be measured by value of news indicators. The forum function depends on news consumers having access to a pluriform news landscape and being able to form well-informed opinions. To enable the control function, journalists must be free to report on government and company policy- and decision-making that affect our society. As both functions are essential within Western democratic societies, we distilled a set of six indicators that measure the extent to which news is performing these functions: inclusivity, pluralism, accessibility, quality, independence, and transparency.

To identify potential future scenarios, we identified 96 developments that could impact the news ecosystem. Following extensive analysis, we clustered the developments into social, technological, economic, environmental, and political (STEEP) groups. Due to its complexity and potential impact, we also conducted a deep-dive on the EU regulatory momentum.

Among the future developments with high uncertainty, we identified two that stand out: the role of tech platforms in news and the level of trust between citizens and journalists.

From there, we identified four extreme, yet plausible scenarios on how society could develop with respect to news, namely the Multidimensional Tribes, News Utopia, Benevolent Tech Platforms, and Ignorance is Bliss.

On the basis of these predictions and scenarios, we recommend six initiatives: more (digital) media educational programs, installing a critical thinking reminder, providing transparency in news algorithms, creation of a pluriform news aggregator, installing proof of provenance, and arranging funding for news outlets.

In order to implement these industry-wide initiatives, we recommend building a coalition across various stakeholders, such as news generating and distributing companies, journalists, scientists and government institutions. This industry-wide coalition should spearhead the initiatives with a collective and consistent goal to safeguard and increase the value of news. Furthermore, we recommend that the coalition monitors market developments against the scenarios, reviews performance against the value of news indicators, and assesses what additional initiatives may be needed to safeguard the value of news.

Overall, we hope this Future of News study provides tangible and actionable initiatives to spark discussion on increasing and safeguarding the value of news. As this was only possible with the continuous involvement of many partners across the public and private domains, we would like to thank all those that worked with us and supported us.

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Introduction:

A fast-paced news industry

Motivation

While 82% of people aged 13+ in the Netherlands use news websites to consume news, they increasingly access these sites through indirect sources, such as search engines and social media.¹ Interestingly, 42% of Dutch citizens do not know that artificial intelligence determines the news they see on those news websites, according to research from the University of Amsterdam, seemingly unaware of the implications of relying on algorithms from search engines and tech platforms to access the news.²

In this study, news is broadly defined as new or noteworthy information in a range of formats, such as (online) newspapers, magazines, investigative journalism, and other forms. Therein, tech platforms aggregate news content, which includes social media and (non)-commercial players that have this capability.

Ongoing economic, technological, societal, and regulatory developments are transforming our world and the way news is created and consumed. Technology is increasingly used to automate and personalize news production. Furthermore, the decreasing cost of technology eases news reporting and distribution, allowing emerging societal and economic initiatives, such as citizen journalism, to thrive. On the consumer side, the ubiquity of smartphones and related technologies enables people to instantly share newsworthy content

that often aligns with their views and opinions, increasing the opportunity for interaction with likeminded individuals. This, in general, leads to a more pluriform and accessible news industry.

However, Dutch society (and the broader Western world) needs to consider checks and balances to safeguard the value of news, as the economic, technological, societal, and regulatory developments also pose new challenges. These challenges include concerns about mis- and disinformation, use of deepfake technology, deployment of AI systems, filter bubbles, and the vulnerability of citizens with lower digital and media literacy.

Each of these challenges contributes to the continued pressure on Dutch democracy.³ While escalating social tensions among Dutch minority groups (e.g. nitrogen crisis⁴) and growing distrust in institutions (e.g. childcare benefit scandal⁵) exemplify this pressure, the overall consensus among Dutch citizens on democratic values, morals, and actualities remains strong.¹ This consensus is supported in part by the Dutch news ecosystem, which fulfills both the forum and control functions, and is of high importance to our democratic society (see exhibit 1).

In the Netherlands, the overall proportion of citizens that trust the news they consume remains stable at 56% in 2022. However, there has been a significant decline in trust from 56% (2018) to 34% (2022) among

The value of news within democracies

Exhibit 1. News is of high importance to Western democracies, such as the Netherlands. In this study, we segmented the value of news into **forum** and **control functions**. A pluriform news landscape facilitates public debate by expressing diverse voices and opinions (the forum function). Journalism also fulfills a control role by reporting on policy- and decision-making from a critical perspective. The news sector's effectiveness in performing these functions can be measured by news indicators, such as inclusivity, pluralism, accessibility, independence, quality, and transparency. This concept is further detailed in the value of news chapter.

18-to-24 year olds.¹ This trend might be caused by a declining ability to differentiate news from entertainment content on tech platforms.⁶ In research among U.S. young adults, the volume and discordance of voices circulating online content makes it difficult for young adults to know what to believe, potentially leading to information cacophony.⁷

In a general ranking by the Media Pluralism Monitor 2022, the Dutch news industry is ranked fourth in Europe.⁸ In the RSF's 2022 World Press Freedom index, the Netherlands fell from 6th to 28th, which was caused by the violence to journalists and polarization within Dutch society.⁹

Historically, the Dutch news sector has been innovative with initiatives, such as a news edition for children in 1981.¹⁰ The Dutch non-profit organization, Beeld & Geluid, records this history in the largest media archive in the world.¹¹

Building on the historically strong Dutch news ecosystem, this study proposes a list of initiatives to safeguard and increase the value of news. To that end, we first defined a holistic view of the value of news. Secondly, we identified the underlying societal, technological, economic, environmental, and political drivers of news in order to help formulate expert predictions and identify four scenarios that could shape the future of news in 2030. These expert predictions and scenarios can inform both existing and new initiatives.

A Deloitte Impact Foundation project

In order to deliver the study, we assembled a team from across Deloitte's global consulting, legal, and risk businesses. In this way, we used a range of our capabilities under the umbrella and leadership of our Deloitte Impact Foundation.

The Deloitte Impact Foundation harnesses Deloitte's core competencies, knowledge, and network to make a positive impact in the fields of education, sustainability, and inclusivity.¹² Through pro bono work, we help to build a stable and trustworthy society and address pressing challenges, such as living conditions, health, loneliness, safety, and economic welfare.

The Deloitte Impact Foundation is conducting the Future of News study to contribute to the broader debate regarding how the evolving news landscape supports an open and diverse news perspective. Equal access to diverse sources of news, regardless of income, is vital to preserving democracy and stability (as encapsulated in Article 11 of the EU Charter¹³).

We could not have created this report without our many partners' continuous involvement, insights, and input across the public and private domains. These partners range from tech startups, research institutions, broadcasters, and not-for-profits in journalism to European Commission expert groups. We consistently and humbly used their knowledge and experience through interviews, surveys, scenario workshops, and interactive roundtables to shape our understanding and generate clear and tangible recommendations to safeguard and increase the value of news. Therefore, we would like to express our gratitude for the valuable contribution of the following organizations presented in figure 1. We also like to note that these organisations have contributed to workshops and interviews, not to writing of this report and as such, all responsibility for the content of this report is with Deloitte only.

Figure 1 – Non-exhaustive list of organizations that participated in the Future of News study:



Methodology:

A three-step approach

This report was developed using a three-step approach: (1) defining a holistic view of the value of news, (2) identifying developments that can inform predictions and scenarios, and (3) proposing new initiatives (see figure 2). During this process, we conducted more than 30 expert interviews, surveys, and five interactive digital workshops involving experts from the Deloitte network and industry professionals.

1. Value of news

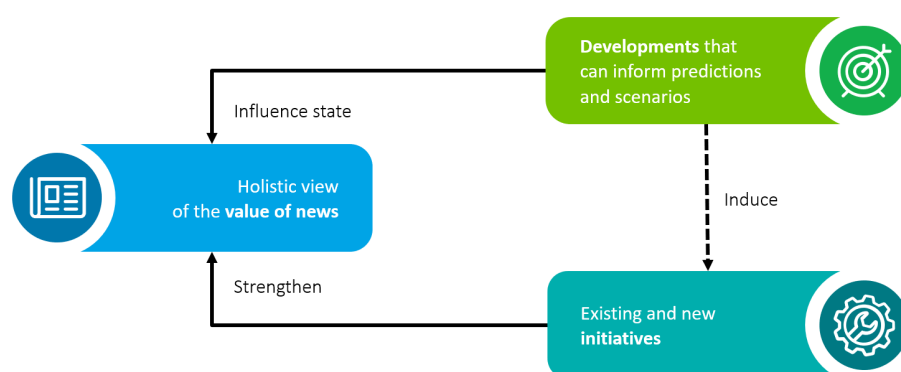
We started the research by identifying the value of news within Western democratic societies. In close collaboration with (international) news and media experts, we defined the “foundational values” and decided on “news indicators”. In short, the value of news in democratic societies revolves around two key roles: the forum function and the control function. News indicators can identify the state of the forum and control functions and thus the value of news.

2. Developments

In the second step, we applied our Monitor Deloitte scenario methodology. The approach is guided by the scientific principles of objectivity, reliability, and validity, and supported by experienced scenario practitioners from Deloitte’s Center for the Long View.

The scenario design supports strategic analysis by providing tools to look beyond the usual planning horizon of three to five years. Scenario design involves developing robust approaches to isolate risks and opportunities that apply to different potential futures. Our objective in scenario design is not to identify future events, but to identify forces moving the future in different directions, influencing the state of news.

Figure 2 – Methodology: a three step approach



The foundation of our scenarios is a comprehensive set of underlying drivers that potentially shape the future of news. Through this process, we have identified critical certainties, which we predict will have a high impact on the value of news. Furthermore, there are also critical uncertainties, which are clustered into four scenarios to describe a specific, unique, and plausible outlook.

With this in mind, please note two essential points regarding our scenario methodology:

First, the news scenarios are all plausible and possible. Our study is not about steering and shifting societies towards one scenario. Instead, the aim is to understand and highlight how society can anticipate these scenarios’ implications and safeguard the value of news in each of them.

Second, we expect individual countries to see distinct developments in their news sectors due to varying cultural

influences, political environments and moral frameworks. As a result, the impact of critical uncertainties on the news sector may differ in different countries, or different countries may face the scenarios at different points in time.

3. Initiatives

In the third step of our approach, we conducted desk research, follow-up expert interviews, and several roundtables to identify, define and evaluate initiatives to increase and safeguard the value of news. These initiatives could stimulate desired development or limit undesired developments that impact the forum and/or control functions, and thus increase the value of news.

The value of news:

A view on the value of news

To establish the holistic value of news today, we interviewed industry professionals and Deloitte experts. Grounded in those perspectives, the resulting holistic view consists of two distinct elements that provide the basis for the discussion of the value of news in this report (see figure 3):

- A) Foundational values: forum and control functions;
- B) Value of news indicators.

While both elements are further explained below, we have also applied the news indicators to the Netherlands on a high-level basis for illustrative purposes. However, keep in mind that we expect countries to have distinct starting points due to varying cultural influences, political environments and moral frameworks.

A) Foundational values

To define a well-functioning news landscape, we must first consider the foundational values instilled

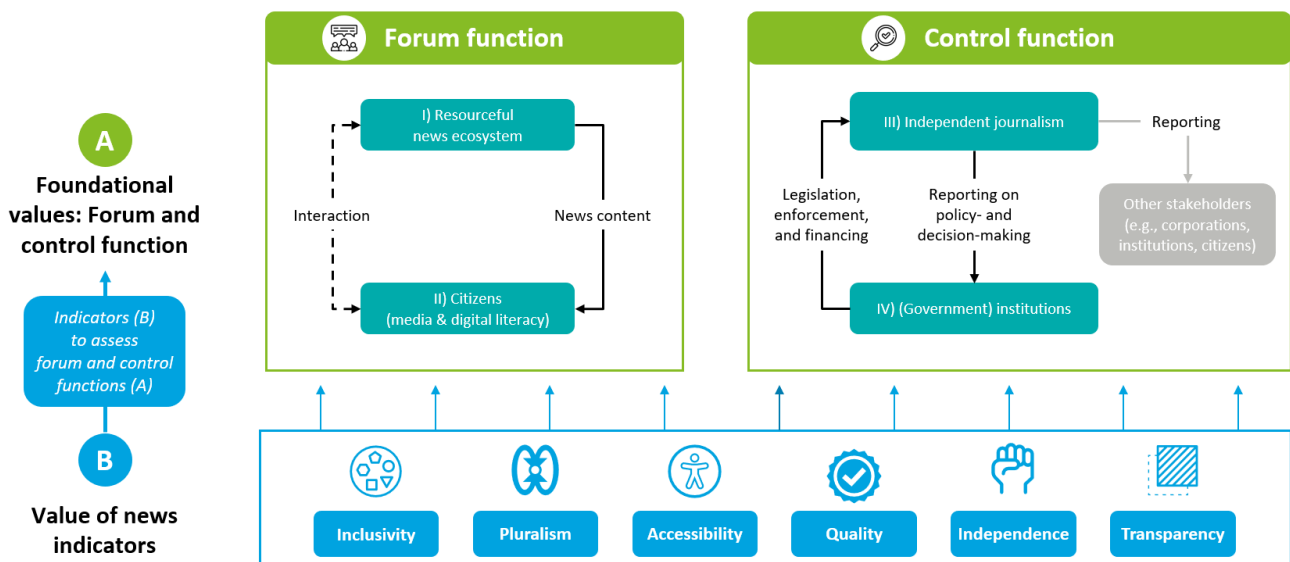
in Western democratic societies. Based on interviews with industry and Deloitte experts, we concluded that news in Western democratic societies fulfils two central roles: the forum and control functions.

First, the **forum function** of news facilitates public debate with room for diverse voices and opinions, which includes independent reporting from different perspectives on newsworthy topics. Therefore, the news ecosystem needs to be resourceful to offer the news content in the desired consumer formats. News consumers need adequate access to the pluriform and inclusive news landscape to be able to form well-informed opinions. For this, it is critical that citizens have high levels of media and digital literacy. Herein, experts highlight that digitalization enhances interaction between the reporter and consumer, creating the opportunity for interactive news consumption.

Second, the **control function** enables (citizen) journalists to act as a “watchdog” by being able to independently report on (government and company) policy- and decision-making that affects our society. Thereby, independent journalism monitors those in power and supports the transparency, accountability and independence of public administration. The control function is therefore critical for the protection of fundamental rights and freedoms, such as the freedom of expression, freedom of the press, and right to information. Furthermore, to protect these rights, (government) institutions legislate, enforce, or finance the media industry, and specifically its news sector to execute the roles of independent journalism.

Overall, the forum and control functions are central to Western democratic societies and our study. Therefore, we emphasize the importance of protecting both functions.

Figure 3 – A holistic view of the value of news



B) Value of news indicators (applied to the Netherlands)

While the foundational values provide a view of how the news landscape functions in a Western democratic society, they do not show the current state of the news landscape. Therefore, together with experts, we aggregated a long-list of indicators from international and Dutch institutions that measure the value of news. While this list of indicators is not mutually exclusive nor collectively exhaustive, it serves the purpose of establishing the current state of the Dutch news landscape as a starting point for this study.

For a more comprehensive and in-depth review of the Dutch news landscape, we refer to annual reports from the Dutch Media Authority¹⁴ and Centre for Media Pluralism and Media Freedom (EUI)⁸. Furthermore, current and upcoming regulations were considered while identifying our list of indicators (see appendix). For the purpose of this study, we distilled our long-list into a set of six news indicators that are, in our view, the most essential to measure the role and value of news in Western democratic societies (see figure 3).

The first indicator, **inclusivity**, refers to equal representation and opportunity for different societal groups, such as social and cultural (minority) groups, in functions and organizations. According to the EUI, the Netherlands scores in the most favorable social inclusiveness category, along with four other countries.⁸

The level of media **pluralism** refers to the presentation of information from different viewpoints. An example of this is Omroep Max, which targets its content at a 50-plus age group.¹⁵ Overall, Dutch citizens state that news organizations are relatively equal to each other in their perspectives of news reporting, which is also the case in other Western European countries.¹

Further, **accessibility** refers to the ability of different societal groups to access news, which might be limited due to media and/or digital literacy, finances, or other reasons. In 2022, 89% of Dutch citizens consumed news each day. In their consumption, 71% of the younger generations access the news indirectly, compared to 44% of those aged 35-plus. The majority of this latter cohort chooses to access news directly on the publisher's website or app.¹

Fourth, the level of **quality** of the overall news is reflected in the trust in news and the amount of fake and/or misleading information. In the Netherlands, 56% of the citizens have trust in the news, which is similar to Norway, and relatively high compared to France (29%) and the United States (26%).¹

The fifth indicator is the financial and relational **independence** of journalists and news organizations. In the Netherlands, citizens' level of trust in an independent news sector remained stable between 2016 and 2022. While the figure is lower among younger generations, overall, 46% trust that news is independent from government or political influences and 44% from commercial influences.¹

The last indicator is **transparency** regarding the news organization's and journalist's point of view, such as politics, ideology, and personal beliefs. For news organizations, high transparency depends on disclosing their financing and organizational structure. Furthermore, openness about the journalist's points of view and sources enables news consumers to verify and evaluate the information. While transparency is not always possible due to confidentiality of news sources, the Dutch government is transparent about its funding of media organizations.¹⁶ Furthermore, news organizations reflect critically on themselves with journalists

adhering to the journalistic code¹⁷ and Bordeaux Declaration¹⁸ to maintain their respected reputation. Occasionally, news broadcasters are open about their decision-making on (societal) news topics, such as the reporting of the FIFA World Cup 2022 in Qatar¹⁹ or Dutch political extremism²⁰. Moreover, the transparency of journalism is enhanced through documentaries and interviews with journalists, such as Derk Sauer²¹ and Christiaan Triebert²².

While each of the six news indicators gives an indication on the state of the Dutch news landscape, a more comprehensive and in-depth analysis is needed to draw any conclusions and / or implications. However, the high-level application on the current Dutch news landscape provides the reader with an indication of the health of the forum and control functions in the Netherlands, providing a starting point for this study.

With that being said, we want to emphasize the importance of comprehensive and in-depth measurement of news indicators by independent organizations, such as the Dutch Media Authority. Periodic reports can provide insight on the condition of the news landscape, and thereby provide early warning signs that can prompt action to safeguard the value of news.

Developments:

Drivers of the news landscape

As the news industry is a highly dynamic environment, conventional strategic analysis rarely suffices. Therefore, we used the Monitor Deloitte scenario methodology to highlight relevant forces that move the future in different directions. This results in four scenarios that describe alternative future environments in which today's decisions might play out: they are neither predictions nor strategies.

The foundation of our scenarios is a comprehensive set of underlying key drivers that potentially shape the future of news. These drivers were identified through 33 expert interviews, an online survey, and the application of our unique natural language learning (NLP) algorithms to analyze over seven million news articles. In figure 4, the resulting 96 drivers are clustered into social, technological, economic, environmental, and political factors (STEEP) and rated with regard to their degree of uncertainty and their impact on the news industry.

While social, technological, and economic trends are highly impactful and can rapidly change the news industry, experts from both industry and Deloitte emphasized political factors, notably the momentum within the European Union and at national level, driving an increasing density of guidelines, action plans, and initiatives that touch upon the value of news. The timely design of **regulatory frameworks** aligned to the social, technological, and economic trends is a critical factor in preserving the value of news. As the alignment of legislation across all EU member states is complex, we expect

these frameworks to evolve further. Handling of data is a key topic in new legislation and guidelines. Technological developments are enabling the use of increasing amounts of (personal) data and algorithms to personalize content and steer news consumers towards specific information. European governments, regulators, and professional (industry) bodies are gradually taking action. The introduction of the General Data Protection Regulation (GDPR), to govern data privacy, and the new Digital Services Act (DSA) and Digital Market Act (DMA) support the overall preservation of news value. The increased use of AI has highlighted the need to consider ethics around AI usage and new EU legislation is under development.

To give more context on the complex regulatory landscape, Deloitte Legal produced a **two-page in-depth review of the evolving regulatory landscape**, including regulation on

data and privacy, AI, disinformation, the rights and obligations of journalists, and perspectives for the EU and, in part, specifically for the Netherlands (see appendix).

Following an extensive analysis, we have divided the 96 drivers into two categories:

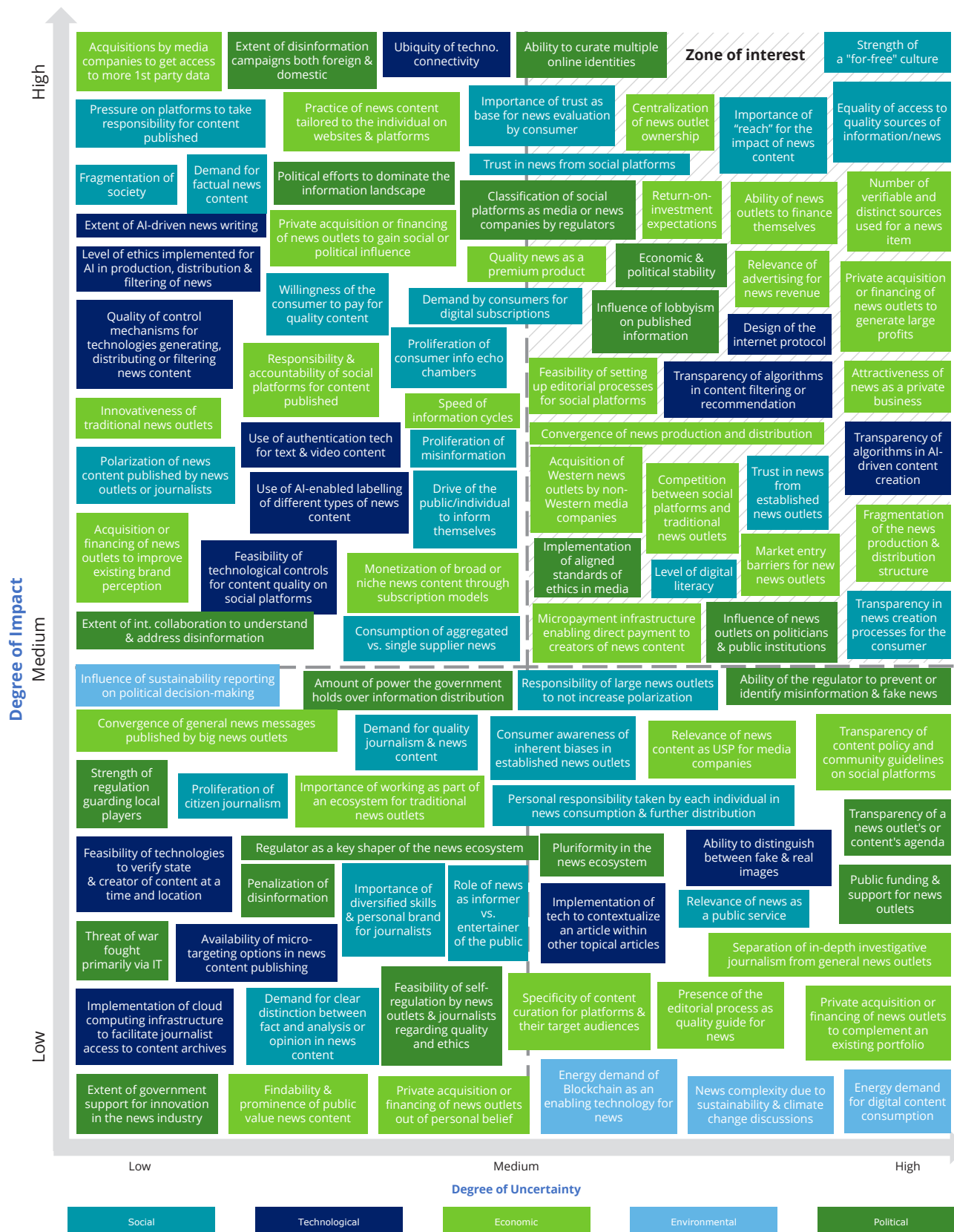
- Drivers with a high impact and with a predictable evolution
- Drivers with a high impact, but with an uncertain outcome

Those drivers with a high impact and high level of certainty are input for what we know for certain (chapter Predictions, p. 11). Furthermore, the drivers that are high impact, but are uncertain, are clustered into four plausible and possible scenarios (chapter Scenarios, p. 13).



Figure 4 – Driver evaluation according to degree of impact and degree of uncertainty

Note: Mathematically defined location of some text boxes may differ as overlapping data points have been rearranged to increase readability



Predictions:

What we are certain about

As discussed in the previous chapter, our scenario methodology identified a group of drivers that will have a significant impact on the Future of News and have a predictable evolution. They are relevant for all four scenarios described in the next chapter. The predictions below outline this impact:



News reporting maintains its local, cultural, and human nature

Despite globalization, the reporting of high-quality news will maintain its local, cultural, and human nature. To provide inclusive, pluriform, and transparent news stories, journalists need an in-depth understanding of the relevant community and its people. This longstanding characteristic of news reporting implies that in 2030, news outlets are likely to continue investing in human-centered journalism.



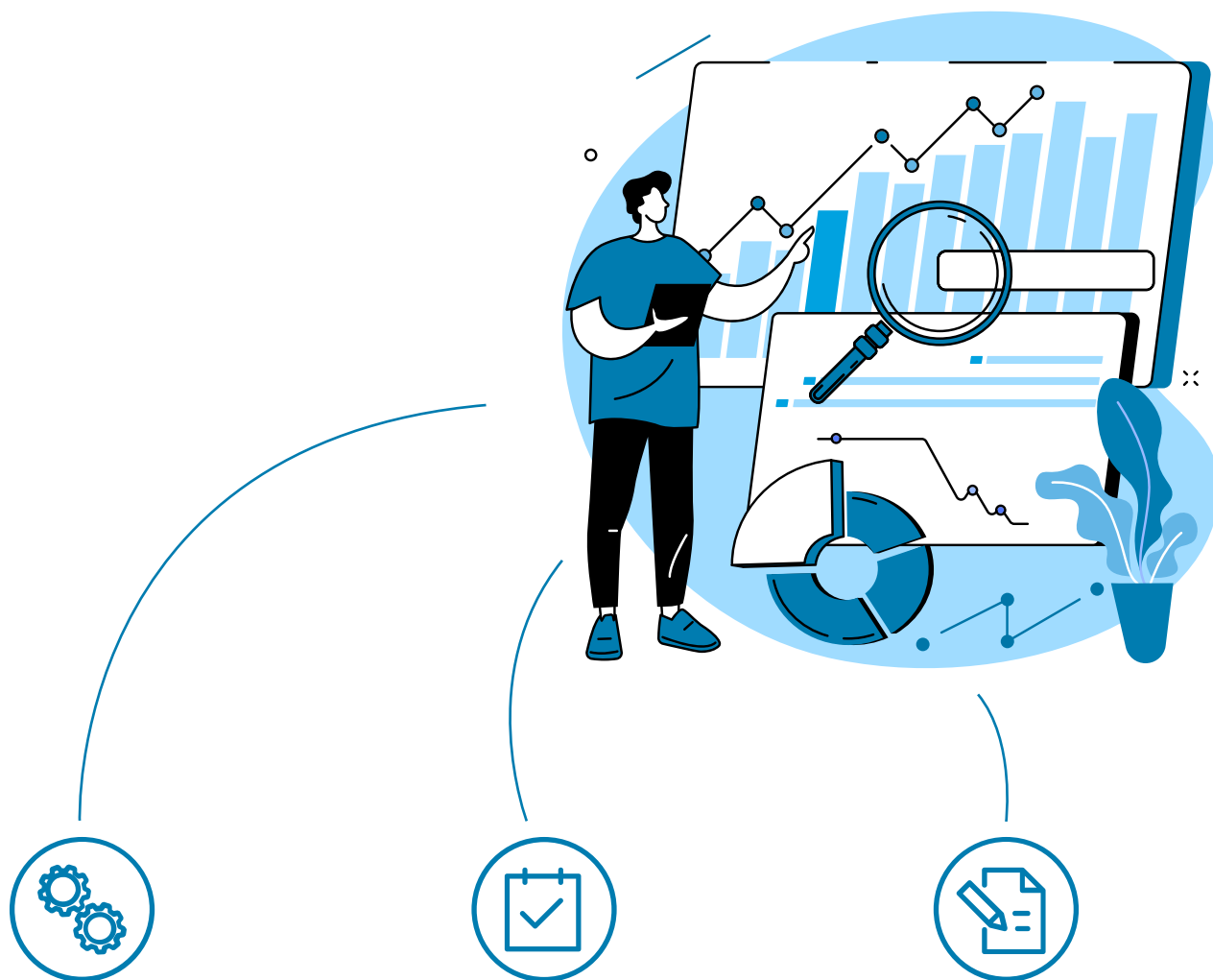
News will be consumed indirectly through multiple content formats

With the ongoing adoption of new technology, together with the network effects of tech platforms, it is likely that the majority of news is consumed indirectly in 2030. Already apparent among young people, this trend underlines how the creation of diversified formats is ensuring that news remains accessible to citizens. However, it could further disrupt conventional revenue models, increasing the need for innovative solutions to monetize news reporting.



The rise of artificial intelligence (AI) for content creation

Due to scientific progress and the omnipresence of technology, news outlets will probably need to employ AI to be competitive in 2030. AI techniques, such as natural language processing (NLP) and voice intelligence, can help meet the need for fast, high-quality, and personalized news. While the usage of these technologies is inevitable, news reporters need to consider the ethical and regulatory implications.



Continued pressure to innovate business models

With continued digitalization and increased online connectedness, the competition in the news sector is severe. Media companies are reaching the limits of their consumer growth, changing from subscription-based to hybrid models that include advertisements. Furthermore, there is growing momentum to strengthen data and consumer privacy regulation, implying further disruption of the business models of companies seeking to capture consumer data. In 2030, the pressure to gain a competitive advantage through an innovative business model will be immense.

Disinformation will increase the need for quality news

With political and economic motives shaping the information landscape, it is likely that the ongoing disinformation campaigns, both foreign and domestic, will continue. Due to the threat of disinformation, the demand for quality news in 2030 will be strong. Herein, many consumers are likely to be willing to pay a premium price for quality news content in 2030, giving news outlets and their journalists options to monetize their valuable news content.

Increased societal pressure on journalism

As society is further fragmenting, with increased polarization in politics, the societal pressure on journalism is likely to reach new heights. This underlines the importance of independent journalism to deliver high-quality, pluriform, accessible, and transparent news reporting. The ongoing threats to objective news reporting justify the heightened focus on the rights and obligations of journalists.

Scenarios:

Four plausible scenarios

In figure 4, the drivers that are uncertain and highly relevant are located in the “zone of interest”, which is the fundamental section for our scenario-based approach. The 27 driving forces in the zone of interest were subsequently tested by measuring their interdependencies and relevance to each other, and clustered according to their degree of relatedness. At the end of this process, a combination of “critical uncertainties” was chosen, which created the most challenging, divergent, and relevant scenarios. This process led to a scenario matrix, serving as the basis for our scenario analysis. The matrix, which is displayed in figure 5, is built on two axes addressing the critical uncertainties, by raising the following questions:

1. The tech platform’s role in the news:

Will the continued adoption of tech platforms in the news and media landscape lead to a diversified or uniform source of news?

2. The level of trust between citizens and journalists:

Will society show trust or distrust in news in 2030?

Via this matrix, we have identified four extreme, yet plausible, scenarios for how society could develop regarding news:

1. Multidimensional Tribes

Low trust/diverse news outlets, less dominated by tech platforms.

2. The News Utopia

High trust/diverse news outlets, less dominated by tech platforms.

3. Benevolent Tech Platforms

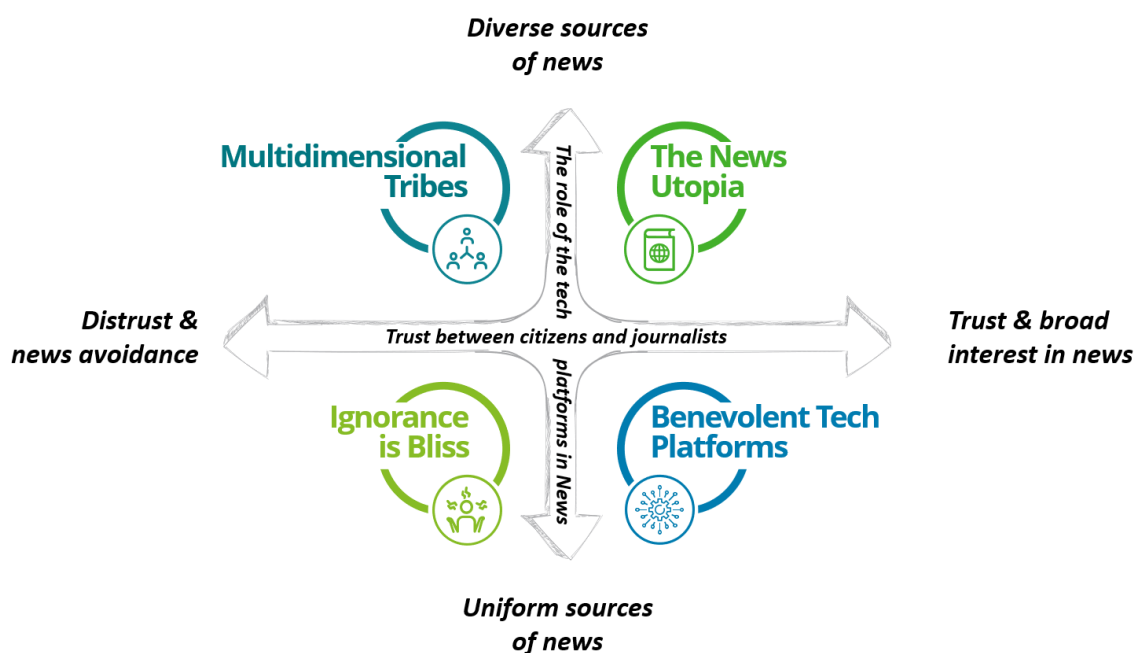
High trust/few news outlets, dominated by tech platforms.

4. Ignorance is Bliss

Low trust/few news outlets, dominated by tech platforms.

Each of these scenarios demonstrates one possible path for the future of news. The subsequent sections explore each one individually to see how they differ and what risks and opportunities might arise in the future.

Figure 5 – Scenario overview for the future of news in 2030



Scenario 1:

Multidimensional tribes



In this scenario, there is low trust towards news and journalism, but a diverse set of news outlets exist.

Although a diverse news landscape encompasses all forms of content and perspectives, in this scenario, news consumers tend to focus on familiar perspectives and sources, reflecting their distrust in news sources that highlight opinions other than their own. This leads to relatively isolationist and skeptical behavior.

News providers compete to reach a public that is increasingly disinterested in the consumption of a diverse range of news sources. These news outlets struggle to monetize their content via subscriptions and advertising.

This encourages precise targeting and content filtered directly to news consumers' interest, to keep them engaged. These filter bubbles become silos that turn into tribes, complete with "tribal-like behavior". This may result in just a small number of "trusted" sources providing each tribe or audience with what they want and news consumers retreating into the "known". At the same time, the pervasive distrust of the broader news landscape separates society even further, both on- and offline, and increases polarization. As the internet no longer appears a safe space for engagement or debate with others, some news consumers retreat even further.

Although technologies designed to increase transparency and accountability exist, a lack of funds, interest, and common ethical standards stand in their way.

In this highly isolated society, only a few news consumers have the drive or the means to travel between tribes, seeking diverse perspectives and confronting themselves with perspectives not completely aligned with their own.



Scenario 2:

The News Utopia



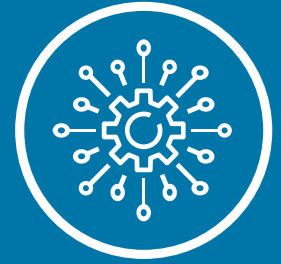
The News Utopia is a scenario where there is high trust and broad interest in news, and a diverse set of news outlets are able to compete and collaborate with tech platforms.

In this scenario, in 2030, the news landscape is a vibrantly diverse ecosystem, characterized by pluralism, inclusivity, and a high-quality news service. Engaged regulators have leveled the playing field, establishing institutional accountability and transparency. This fosters healthy competition between more traditional news outlets and tech actors and allows a multitude of new actors from both the tech and the journalistic side to enter the field. Most news consumers have easy access to a very broad range of news sources and technology provides a means to check their origin, fact base, level of interpretation, and inherent biases.

Yet, there is still a risk that some news consumers retreat into trusted filter bubbles in which they only consume news from a limited number of sources. The high level of trust in news can reduce the incentive for an individual to think critically, potentially making the news consumer overly confident in the trustworthiness of the news provider. Even though news providers are generally trusted, there is still reason for governments and control bodies to maintain and invest further in quality, transparency, and independence.



Scenario 3: Benevolent Tech Platforms



In this scenario, only a few news outlets remain, and are dominated by tech platforms. Tech companies however, do not misuse their position and behave responsibly by putting society first. Consumers therefore continue to have a high trust and broad interest in news.

In this scenario, news and media organizations would be left to self-regulate. With little scope to innovate, these news and media organizations are prime targets for acquisition by the big technology companies, which see news as a means to fulfil their goals. Many news outlets are absorbed by tech platforms that seek an equilibrium between broad news access and capitalizing on news consumers' willingness to pay.

With the technologies at their fingertips, tech platforms seek to automate news where possible. AI-driven writing of news gains popularity, especially in structured and repetitive fields, such as sports or stock markets.

To address increased demand for transparency and responsibility towards the news consumer (e.g. on personalization, editorial decisions, etc.) some investors fund "tech for good" start-ups developing technologies that look to ensure the trustworthiness of news.

The technologies that are designed to control quality and transparency could, however, also be subverted for manipulative reasons, which might be hard for news consumers to detect. The system is fundamentally based on trust and voluntary adherence to standards. Even though news outlets across nations work together to address mis- and disinformation, there is still room for manipulation.

The high level of trust and consumers' lack of interest in alternative or more diversified news sources may worsen the environment for smaller platforms and offline news outlets, potentially resulting in a spiral that increases the power of conglomerates and diminishes the opportunities for local news outlets. This dynamic may pose a risk to pluralism and inclusiveness, as the dominant players are left to decide whether they want to invest funds to serve groups in society with a "different voice" that is not represented yet.



Scenario 4:

Ignorance is Bliss



In this world, consumers have low trust in journalism and a high degree of news avoidance. As a result, there are only a few news outlets, which are dominated by tech platforms.

Increased market consolidation leaves the control in the hands of a few. With news generally distributed via “free” platforms, business models become more advertiser-focused and cost-conscious. An increasingly PR-driven approach may provide a fertile ground for manipulation and disinformation.

As tech platforms seek high returns on their investments, AI is increasingly used to auto-generate news. Tech platforms’ business models rely heavily on so-called “click-bait” – eye catching and/or entertaining content.

With automation and heavily filtered personalized content, the depth and breadth of journalism and transparency in news production and distribution are compromised.

In such a world, inclusiveness and pluralism suffer, unless tech platforms see business value in creating alternative “news brands” tailored to specific news consumer groups. Some minority news consumers will take the initiative to seek alternative sources to circumvent biases and foster quality news.

In addition, consumption of filtered news may lead to increased polarization and consumers distrusting news in general, preferring the vast amount of entertaining content offered over (quality) news.

In a world where “regular” news cannot be trusted, various initiatives will seek to promote “trustworthy” news. Although competition between tech platforms could support this movement, in a highly consolidated environment, it will be difficult for smaller initiatives to succeed.



Initiatives:

Six initiatives to strengthen the value of news

Technological, economic, and societal trends accelerate the development of the news environment. Therefore, non-regulatory initiatives can help increase and safeguard the value of news. After identifying the four scenarios, we revisited our internal and external experts through a series of roundtables to create a comprehensive understanding of potential initiatives. Thenceforth, we evaluated a list of potential initiatives arising from these discussions on safeguarding and increasing the value of news.

The six initiatives

That evaluation has led us to recommend focusing on the following initiatives: “(digital) media educational programs”, “critical thinking reminder”, “transparent algorithms”, “pluriform news aggregator”, “proof of provenance”, and “funding for news outlets” (see figure 6). In this section, we provide a brief explanation of each of these initiatives, including their relevance to the identified trends. Further, we estimate each initiative’s impact on the value of news and provide our view on who would be best positioned to implement it.

The **Industry wide coalition** provides support to the chain of initiatives by embracing a collective vision, monitoring market and scenario developments, and coordinating implementation of initiatives.

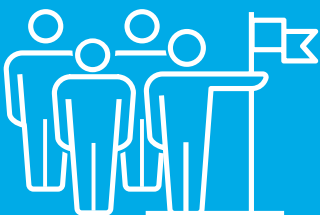
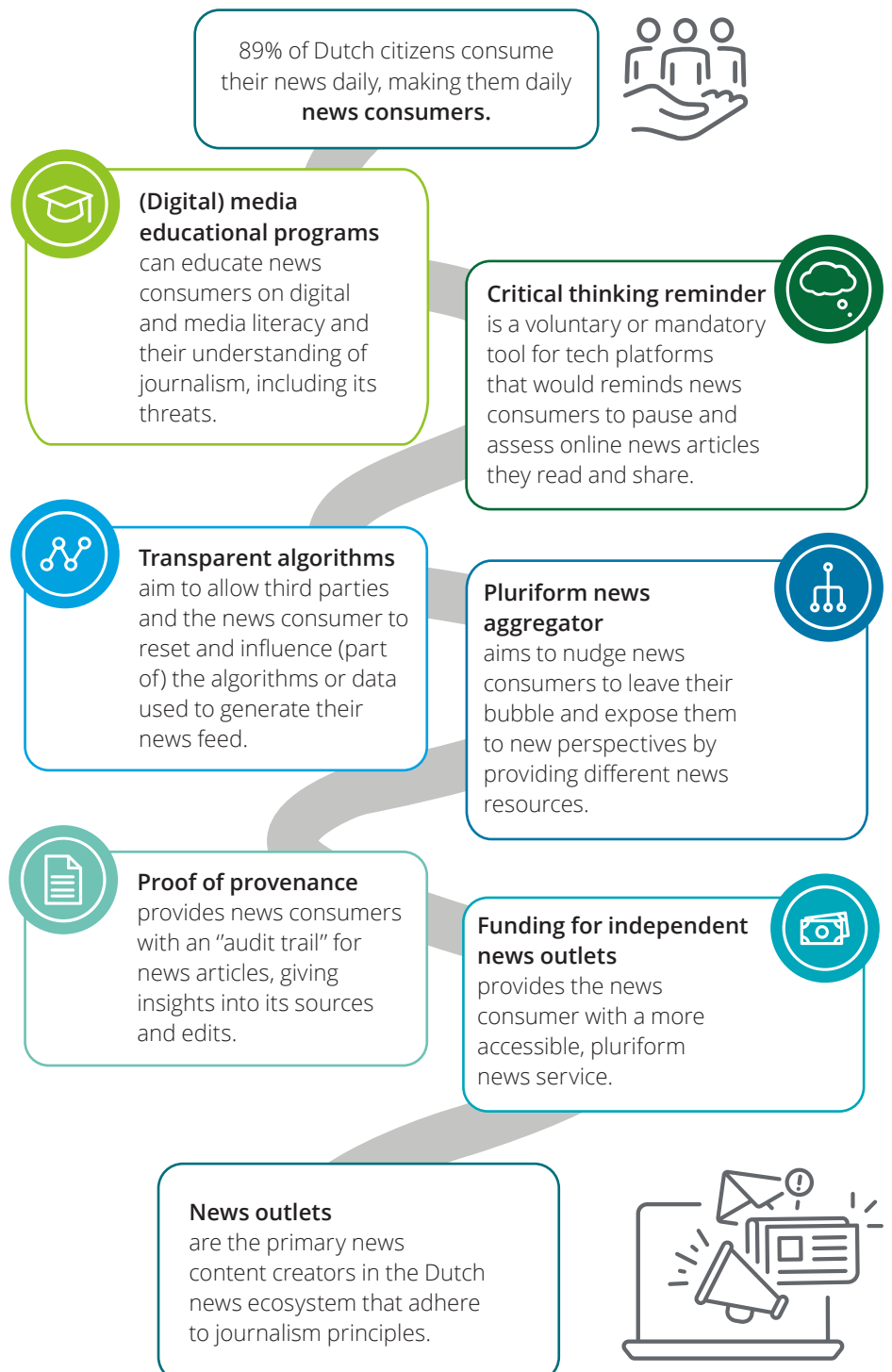


Figure 6 – Six initiatives to increase and safeguard the value of news.





(Digital) media educational programs

Description

Research has shown that a lack of digital and media literacy is a problem impacting multiple generations, including individuals with different social and cultural backgrounds.²

A practical example of this is a Dutch woman who does not understand the “troonrede” during “Prinsjesdag”, as it contains difficult words.²³ This shows that the problem is present in western democracies, where technology and access to educational programs focusing on digital and media literacy, should, in theory, be widely available. Therefore, we recommend enhancing media educational programs to improve digital and media literacy and understanding of journalism, including its threats.

While the European Commission’s Digital Europe plan²⁴ (part of its “Digital Compass strategy”) aims to improve digital skills, there are also grassroots initiatives in the Dutch ecosystem. For example, the Financieel Dagblad and BNR Nieuwsradio have developed a disinformation course for youth given by journalists.²⁵ Another example is literacy courses in community centers, while the Mediastorm program provides a weekly update on the actualities within the media industry.²⁶

Impact on the value of news

These programs and campaigns may increase digital and media literacy among generations. This could help impact the forum function by making news more accessible to a broader audience, while also fueling greater interest in more diverse news sources, driving pluralism.

At the same time, these initiatives need a careful approach. Depending on the originator of the initiative (for instance, government, groups affiliated with certain political or cultural thinking), targeted groups could be skeptical. A rise in doubt and skepticism could undermine the original intention to make journalism more approachable and understandable.

Implementation

This initiative needs to be driven collectively to ensure an inclusive and comprehensive educational program that addresses different demographic and societal groups. Governments, community houses, or news outlets are among the various entities that could drive this initiative. Moreover, schools could devote time to this subject during social or cultural studies. Overall, we recommend that this is an industry-wide joint effort.



Critical thinking reminder

Description

Individuals are much better at discerning truth from falsehood than is commonly thought. When news consumers fail to discern falsehoods, this is usually due to a lack of careful reasoning and relevant knowledge.²⁷ In addition, there is a significant disconnect between ‘individuals’ beliefs and the content they share. This disconnect is generally simply caused by inattention.²⁶ Therefore, we recommend tech platforms implement a critical thinking reminder.

Various studies show the positive impact of using reminders and pop-up messages, alerting news consumers to remain critical of consumed content.²⁷ For example, a large experiment on Twitter showed that a reminder before posting a message significantly increased the quality of the shared content.²⁸ This initiative could provide a voluntary or mandatory tool for tech platforms to remind news consumers to pause and assess online news articles they read and share.

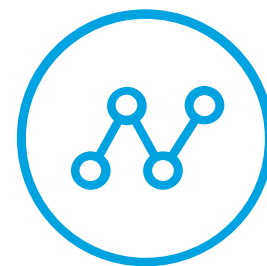
Impact on value of news

Critical thinking reminders impact the forum function of news. The technology can help readers pause and think, improving the forum’s “hygiene”. Additionally, the initiative has two merits. First, it is relatively easy to implement and easy to scale. Second, it relies on the news consumers’ decision-making and preserves the user’s autonomy.

A downside to the initiative may be that reminders may be ignored and become less effective over time. This would mean that the quality of shared content would not improve. To our knowledge, this effect has not yet been studied.

Implementation

Tech platforms, third parties or the government could implement this initiative. In a tech-oriented and high trust scenario, tech platforms would be a good initiator. However, in an environment with low trust, it could be more beneficial for the government or third parties to mandate this initiative.



Transparent algorithms

Description

Algorithms are taking a more prominent role in news delivery, yet 42% of Dutch citizens do not know that artificial intelligence is determining the news on their newsfeed.² Algorithms define what we see, where, when, and how. However, these algorithms are often inadvertently biased due to their data training sets.²⁹ As a result, it is challenging for consumers to understand how the algorithms use their (personal) data and the provenance of the subsequent “selection” of news they receive.

In the transparent algorithms initiative, the aim is to allow third parties, such as consumers, to reset and influence (parts of) the algorithms or data used to generate their news feed. Some platforms have already incorporated this, but it is not widely advertised. Emerging data and AI regulations are set to support this notion of giving consumers more control.

There are ongoing discussions in this field. For example, Facebook indicated that it would be willing to open algorithms to regulators.³⁰ Musk, who recently acquired Twitter, has advocated full transparency for algorithms to minimize interventions and content policing.³¹

Impact on the value of news

First, opening algorithms directly impacts most value of news indicators, and especially transparency. As consumers’ viewing behavior determines the prioritization of (news) content, they are likely to be stuck in a “filter bubble”, resulting in tunnel vision and interaction with likeminded peers. For example, when a consumer watches one YouTube video, they are then often recommended similar videos.³²

Second, making algorithms open-source software could help limit the risk of bias. Greater transparency would also enhance news consumers’ understanding and control over their data usage.

Finally, transparent algorithms could create a new developer ecosystem that leverages these algorithms and the platforms they run on. Third parties could use and further develop these algorithms to create a more pluriform and inclusive news service, as well as enabling their usage in broader applications.

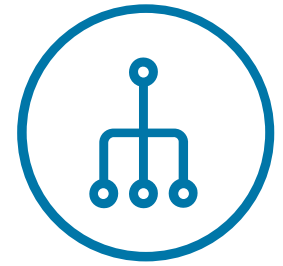
However, proprietary algorithms tend to be guarded by their owners (i.e. intellectual property rightsholders). Therefore, any open source sharing of the details of algorithms would also need to protect the owners’ interests,

should they (be forced to) share internal workings of business processes or methodologies (to automate and filter news articles). Patent law and regulations on trade secrets can provide a framework for sharing of AI details, while at the same time protecting the owner’s interests.

Implementation

Initially, tech companies have the power to open algorithms to third parties. This can be done through self-regulation, or pre-determined industry standards. An example of this is the self-regulatory Code-of-Practice-on-Disinformation. These self-regulations and industry standards are often faster and more effective than the regulatory process.

However, it is unlikely that tech companies will execute this initiative voluntarily, as the algorithms can be crucial to their competitive advantage. Therefore, both the public and the regulator may need to intervene. Changing consumer preferences could pressurize tech companies to release the algorithms. Regulators can propose regulations, such as a risk classification of AI systems with related rules regarding responsibilities and consequences. Other data and privacy regulations could also support industry-driven initiatives.



Pluriform news aggregator

Description

In all the aforementioned scenarios, news consumers tend to stay within their bubble to some extent. This initiative aims to nudge individuals to leave their bubble and expose themselves to new perspectives. This is where the pluriform news aggregator comes into play, as it provides a pluriform set of news by aggregating a diverse offering of news content on the backend of the service. This can be done in the form of a dashboard or through links.

Examples in the Dutch market are Blendle and Groundnews, which are platforms that aggregate news from different sources and provide insights into the readers' (likely) unconscious bias³³.

Naturally, there are many prerequisites and impediments, including digital and media literacy, access to technology, language barriers, and funding. It is, however, an inspiring idea that today's technology already enables.

Impact on the value of news

The initiative would not only support the forum function of news by increasing accessibility and inclusiveness, but it also provides smaller, niche outlets with the opportunity to reach a wider audience, increasing the pluriform and quality of news.

As a result, it is likely that the consumer's trust in news will increase. By exposing the consumer to various perspectives (such as local and cultural news articles, as well as diverse formats), it makes them

more aware of their own (unconscious) biases. Furthermore, it has the potential to highlight the threat of disinformation, as it provides a high-quality in-depth overview of various perspectives.

Although the pluriform system could help diversify consumers' perspectives, we should be careful that consumers do not bypass the aggregating system by solely selecting news content that aligns with their perspectives.

Implementation

As there aren't economic incentives to establish this kind of initiative, we recommend governments drive the implementation of such a service. An EU-wide consortium, initiated centrally, with key stakeholders from the technology, societal, and legal side, can help set standards and drive the process. Funding should come from local governments or EU-wide funds, such as the European Media and Information Fund³⁴.



Proof of provenance

Description

Blockchain technology can be used to create a decentralized “audit trail” for news articles. A blockchain could record who and when articles were edited/modified to simplify verification and authenticity, which is often called proof of provenance. The resulting transparency increases the consumer’s trust in news.

Further, decentralized proof of provenance provides much-needed integrity and authenticity for news, enables automated content- and rights management, and limits censorship by publishing platforms.³⁵

However, experts highlighted that this initiative is in its infancy, and its user base is still limited to more tech-savvy individuals. In order for such a service to become appealing to the general public, it has to become more intuitive and user-friendly.

Wordproof, a Dutch start-up, is building proof of provenance products and solutions on a blockchain. Employing open coding, Wordproof is hoping that the publicly available information will build consumers’ trust.³³

Impact on the value of news

In our opinion, these blockchain-based services primarily impact the control function, supporting transparency, accessibility, and independence.

At the same time, such technologies also increase the risks for journalists, especially where there is little trust

in journalists and institutions.

Proof of provenance mechanisms could give rise to threats to personal safety, freedom to write independently, and sources (due to tagging). More specifically, journalists are not always able to declare their (confidential) sources, which, for example, might be the case with sources in investigative articles on criminal activities.

Implementation

Proof of provenance delivers the best societal value to news when it is implemented throughout the value chain. An industry-wide coalition could drive the successful implementation of proof of provenance, as it would engage different stakeholders, including the public, the government, and news editors.

However, governments and regulators must be vigilant and step in if the speed or quality is insufficient and provide (binding) frameworks to ensure implementation. Alternatively, as for the previous initiative, a consortium could help set standards and frameworks to enable the broad use of such services.



Funding for independent news outlets

Description

Overall, in Western democracies, smaller-scale, independent (local) outlets can struggle to secure sufficient funding to produce quality journalism and retain their independence. However, within the Dutch news landscape, there are several news organizations that are financially supported by Dutch (governmental) institutions or public donations.¹⁶

For example, the national broadcasting corporation (NPO) is supported with subsidies from the Dutch government. Furthermore, there are investment funds, such as the “Stimuleringsfonds voor de Journalistiek (SVDJ)”, that accelerate higher risk news initiatives, creating a more diverse and inclusiveness ecosystem.³⁶ Finally, the Dutch Vereniging Veronica supports independent outlets and journalists that otherwise would not survive.³⁷

Impact on value of news

The existence of funding organizations has a positive impact on the forum and control functions, as they support a diverse and inclusive news ecosystem. Furthermore, the provided funds create the needed resources, enabling news outlets to continue to create independent content.

In addition, funding can be used to support local and cultural news reporting, enabling news outlets to diversify their news content, and makes their content accessible through multiple channels. For example, newspapers are offering free memberships within development areas.³⁸

Finally, as the news sector is increasingly driven by technological advances, independent funding can support the development of technical applications, which enable the Dutch ecosystem to secure its tech sovereignty.

Implementation

Overall, the governmental institutions, and public donations need to continue to provide funding, as it is a prerequisite to safeguard the independence of news, and thereby the control and forum functions of the value of news.

Receivers of funds have a responsibility to clearly communicate the funding to the public. Efficient employment and correct usage of funds maximizes the positive impact on the news industry.

An industry-wide coalition

The six initiatives described above have various points of focus across consumer interactions with news (see figure 6) and will have an impact across the value chain. We, therefore, believe the implementation of these initiatives would benefit from the support of an industry-wide coalition. This coalition of news generating companies could:

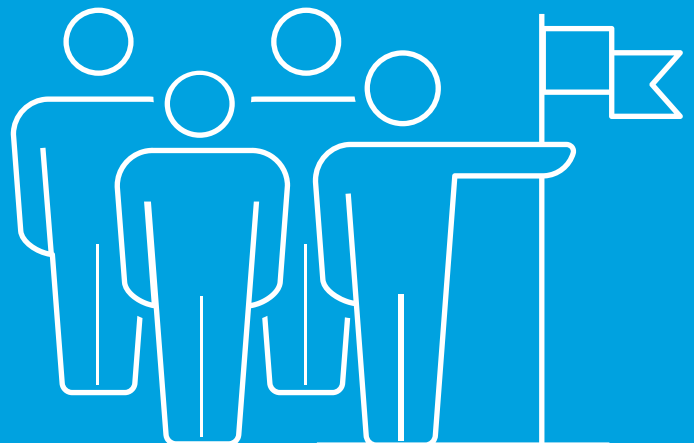
- embrace a collective vision of the future value of news,
- monitor market developments that influence the value of news,
- identify which elements of which scenarios become reality,
- and coordinate implementation of initiatives to safeguard the value of news.

For example, the proof of provenance implementation requires coordination across news outlets and tech platforms. Furthermore, resources will be used more efficiently and effectively if parties coordinate their digital and media educational programs, which have often been built bottom-up.

We recommend forming an industry-wide coalition of various stakeholders, such as news generating and distributing companies, journalists, scientists, and government. This ensures that the industry is not only driven by economic and technological advances, but also environmental, social, and governmental perspectives.

With the rich history of the “polder model” in the Netherlands³⁹, there are already multiple organizations that touch upon an industry-wide agenda. For example, Media Perspectives facilitates the “Industrietafel”, which consist of most media CEOs and CTOs, who periodically discuss trending topics.⁴⁰ Furthermore, the Dutch Media Authority has identified five central themes of a future-proof media.⁴¹ Another example is the recent study of “Stimuleringsfonds voor de Journalistiek (SvdJ)” on the future of journalism in 2035, a similar study to this Future of News study, which also suggests the formation of such a coalition.⁴²

Overall, an industry-wide coalition is important to our democratic society. The coalition will be best positioned if it has a single purpose to safeguard and increase the value of news, making it truly independent from any other interests, and any single stakeholder’s interest.



Appendix:

Regulation

Regulatory developments

This appendix outlines existing, proposed, and work-in-progress regulatory frameworks, mainly focused on the EU and with a closer perspective on the Netherlands.

It is important that regulatory frameworks are designed at a speed that is aligned with technological, economic and societal trends. In that regard, there is an increasing density of guidelines, action plans, and initiatives in the EU that touch on the value of news. Aligning legislation across all member states is complex, and we expect these frameworks to continue evolving and harmonization to increase.

The European Commission drafted the “Digital Compass” to stress the importance of having digitally empowered citizens. The compass calls for access to education in digital skills to be a right for all EU citizens.⁴³ The aim is that 80% of adults should have basic digital skills (up from 56% in 2019).⁴⁴ The proposed measures include the provision of common guidelines for teachers to foster digital literacy and address the topics of mis- and disinformation⁴⁵, and the creation of a European Digital Skills Certificate.⁴⁶

Technological developments allow for the use of increasing amounts of (personal) data and algorithms to personalize content and steer news consumers towards specific information. European governments, regulators, and professional (industry) bodies are gradually taking action. They are focused on a range of relevant topics including data and privacy, AI, disinformation, transparency of ownership of news media, and the rights and obligations of journalists.

Data and privacy

In the past decade, we have seen an increase in data and privacy regulations. Basic regulation, such as the **General Data Protection Regulation** (GDPR), that protects personal data has been implemented and we see more specific regulations, such as the pending **ePrivacy Directive** for electronic communications, coming up. Moreover, the European Commission approved the **Data Governance Act** on May 16th, 2022, which aims to increase trust in data intermediaries who provide data-sharing services.⁴⁷

Furthermore, the **Digital Services Act** (DSA) will require online intermediaries to be transparent about their content moderation practices. For instance, users can question moderation practices and contest decisions when removing specific content.⁴⁸

Emerging legal framework for AI

Both the EU and national governments have recently proposed legislation on the use of AI, such as the **AI Act**. These initiatives aim to create transparency on how AI is used and also aim to remove bias from AI tools.

In addition, we see increased attention for ethics around the application of AI.⁴⁹ Many players in the media ecosystem are aware of the importance of transparency and non-bias whenever AI systems are used to select news items to present to individuals.

Disinformation is high on the agenda

Disinformation and fake news are increasingly discussed and awareness is rising among the general public that (online) news should be checked for authenticity. The Digital Services

Act proposal sets out requirements regarding transparency for content moderation practices. It also requires a risk assessment and a remediation plan in case of systematic risks stemming from potential intentional manipulation of the platform (i.e., spreading disinformation).⁵⁰ The European Commission makes an explicit reference to the use of bots or fake accounts for the creation of fake or misleading information, taking into account current events, namely pandemics, war and acts of terrorism⁵¹ or for election manipulation⁵².

Influential parties in digital sharing of news also have their own initiatives to self-regulate the digital news domain. Meta, Google, Twitter, Microsoft and TikTok signed a voluntary, self-regulatory **Code of Practice on Disinformation**.⁵³ This standard fights the spread of disinformation and aims to make trustworthy content easy to find and ease access to data for fact-checking. A 2020 assessment shows that the Code has proven a valuable instrument for a structured dialogue between relevant stakeholders to ensure greater transparency and accountability of platforms’ policies on disinformation. In addition, the European Commission and Reporters Without Borders started the **Journalism Trust Initiative**, which was also added to the Code in May 2022. This initiative aims to foster qualitative journalism by creating an online tool that allows media outlets to assess whether their content complies with specific indicators of trustworthiness. That will help citizens make an informed choice on their media consumption.

Increasing transparency on ownership of news media

The plurality of the news landscape and transparency of ownership will be addressed through legislation, such as the **European Digital Market Act (DMA)**, which will lay down rules for gatekeepers,⁵⁵ such as Facebook, Twitter and Google, ensuring a level playing field in offering digital (platform) services. Furthermore, the DMA builds on the principles of EU competition law to stimulate competition in the news sector.⁵⁶

The accessibility of news and the promotion of diverse news outlets is supported by the revised **European Audiovisual Media Services Directive (AVMSD)** and the **European Media and Audiovisual Action Plan**. The European Commission is funding initiatives that enhance the forum function of news, such as “Creative Europe”, a €75 million fund for media pluralism, journalism, and media literacy.⁵⁷

Increased attention for rights and obligations of journalists

Globally, the independence and safety of journalists is a regularly addressed topic in the news. There are universally recognized guidelines for professional conduct for journalists.

The **Global Charter of Ethics for Journalists**, endorsed by representatives of more than 500,000 journalists worldwide, was implemented in 2019. This charter is based on the Universal Declaration of Human Rights and the “Bordeaux Declaration” of 1945 that sets a standard for professional conduct for journalists.⁵⁸ This charter lays out journalists’ responsibility to value independence over their responsibility to their employers and public authorities¹⁸ and urges journalists to distinguish factual information from commentary and criticism clearly. Also, journalists may not use the freedom

of the press to serve any other interest (e.g., advertising for organizations or disseminating propaganda). They need to steer clear of distortion of facts (mis- and disinformation), slander, defamation, and unfounded accusations.⁴⁵

The European Commission started the **Anti-SLAPP Initiative (Strategic Lawsuit Against Public Participation)** with a draft proposal for a Directive in April 2022 to safeguard the independence and freedom to report on current events and policy-making with an honest and critical tone of voice. The directive calls upon courts to act on early dismissal of these SLAPP lawsuits as well as arrange for compensation of damages for journalists.⁵⁹

In addition, the European Commission has called on Member States to improve the safety of journalists by creating independent national support services with helplines, legal advice, psychological support and shelter in its **Recommendation to strengthen the safety of journalists and other media professionals**.⁶⁰

Perspectives on the Netherlands

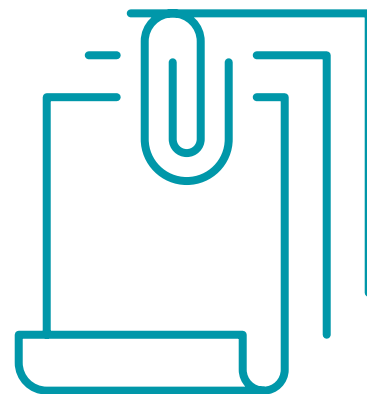
The Netherlands regulates the media in different ways. In a general sense, the “Mediawet” governs media active in the Netherlands and has a specific focus on the Dutch public broadcasting organization. The media law is enforced by the national authority for media (CvdM).

However, the Netherlands currently has no specific anti-fake news legislation forthcoming, as the government awaits EU legislation. The Dutch government did, however, establish the **Dutch Code on Transparency of Political Advertisements**,⁶¹ which political parties and online platforms can undersign.⁶²

The EU Media Pluralism Monitor assessment indicated that in the Netherlands, the key indicators - (i) freedom of expression, (ii) the protection of the right to information, and (iii) the protection of journalists (linked to press freedom) - have been under pressure.⁶³

Additionally, we see a trend in violent behavior towards journalists (both physical and online). The Dutch government started the “**PersVeilig**” Initiative in November 2019 to protect journalists in response to the Rule of Law report that noted the deteriorating circumstances.

The EU has made available EUR 3.75 million to support journalism through a “European-wide response mechanism for violations of press and media freedom” and an “emergency support fund for investigative journalists and media organizations”.



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We also like to note that these organisations have contributed to workshops and interviews, not to writing of this report and as such, all responsibility for the content of this report is with Deloitte only.

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