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Executive Summary

This second deliverable of the *Visio2020* task contains a long term vision for the Finnish media sector, aimed at the year 2020.

The document is targeted at executives, managers, media professionals and researchers who are interested in such long term vision of the Finnish media sector. It concerns (Finnish) media industry and media research in the broadest sense.

The target is a future oriented, holistic media vision from which *long term* objectives for research can be derived. The vision is both aimed to provide industrial guidance as well as to provide clear recommendations on media related research, commencing 2011 and later, especially but not exclusively providing guidance to the Next Media programme.

The basis for this vision is the first Next Media deliverable “Media Scenarios 2020”.

The actual work was carried out in three workshops open for media industry professionals and academic researchers during the summer and autumn of 2010. In 2011, a fourth improvement workshop with media industry professionals provided the final touch. See page three for all four workshops’ participants.

In the workshops, an inspiring and bright media vision for the Finnish media sector was established. A vision which dares to anticipate technological breakthroughs combined with radically new meanings:

Media Vision 2020

By 2020 customer needs and networks are well understood and exploited. Media explores the playful society through assimilating gaming logics into a wide media spectrum.

New earning sources are identified and business logics are developed. The local media hubs are enabled to proceed to a multi-locality way of influencing. Thus media is able to produce massively customised quality content.

The whole media ecosystem meets or exceeds international excellence criteria. This means that excellence is being demanded throughout the whole media supply chain.

The overall vision above is further explained by deducting exemplary visions per media genre, thus adding clarity and vividness. Also a research vision has been formulated.

It is also described and explained how to implement this vision through exemplary but concrete industrial actions and concrete research needs. Again, also these research needs have been exemplified by media genre. They represent decision-making criteria for new research.

With the publication of this document, the task *Visio2020* will be finished. The next steps will be taken in the relevant Next Media teams when defining the yearly Next Media project plans, until 2013. This document provides guidance.

In a parallel step, the Visio 2020 task team recommends that the Finnish media industry performs an in-depth analysis of the implementation of the defined industrial actions within the various media organisations.

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1 Introduction

Worldwide, the media sector is looking for new business opportunities as its current business models are infringed by new market participants. In the Finnish media sector a new large scale media research programme named Next Media has been launched to establish a concerted research effort from 2010 to 2013. While research for the first year has been defined, a coherent research vision for the next three years is missing, in spite of earlier efforts (Finnmedia 2009 and Various Authors 2009).

The Next Media task *Visio2020* aims to define a vision from which *long term* objectives for research can be derived. Thus in a first action the *Visio2020* task team, teaming up with 38 experts and alongside with Finnish media industry professionals and academic researchers has produced and published a first deliverable Media Scenarios 2020 (Giesecke et al. 2010). As a basis for this present document, it identifies drivers with impact on the media sector in the year 2020. It also describes a holistic view of the future of media clustered into nine dimensions (see chapter 2.1). The deliverable outlines also worst and best case scenarios and a new positive media scenario, dubbed *Human Media*.

This deliverable is devoted to the next step, the media vision as such, and its implementation through industrial actions and research.

1.1 Scope

This document is targeted at executives, managers, media professionals and researchers who are interested in a long term vision of the Finnish media sector.

Its content concerns (Finnish) media industry and media research in the broadest sense.

1.2 Objectives

The target is a holistic media vision from which *long term* objectives for research can be derived. The vision is both aimed to provide industrial guidance as well as to provide clear recommendation on media related research, especially but not exclusively providing guidance to the Next Media programme.

These aims can be divided into the following objectives

- Establish a future oriented media sector vision which dares to anticipate technological breakthroughs combined with radically new meanings
- The vision should be a source of inspiration and thus describe a bright future
- The vision is to be valid rather longer than shorter
- Explain the vision by deducting exemplary visions per media genre, thus making it clear and vivid
- Formulate a research vision, including decision-making criteria for new research
- Describe and explain how to implement the media vision through exemplary but concrete industrial actions and concrete research needs, increasing vividness

1.3 Approach

This document was established through three sets of workshops, the first exclusively for media industrial professionals, the second for media academia and the third combining both groups. See page two for participants.

All workshops followed the same logic: participants were informed two weeks in advance about previous research results, a warm-up session prioritised media drivers by 2020, new results were created in working groups of 2-9 persons (partially by applying the learning café method), these were explained, and finally documented and distributed (post workshop) as meeting minutes.

The logical sequence of the workshops went as follows:

1. Analyse the media scenarios 2020, with a focus on the *Human Media* scenario, by applying the SWOT (Strengths, Weaknesses, Opportunities, Threats) method in workgroups consisting of industrial professionals, facilitated by *Visio2020* task members (academia). The result is presented in chapter 2.4.
2. Based on the media scenarios 2020 and the SWOT analysis, create the vision as such and exemplify it per genre, involving both groups – industrial professionals, and media academic media researchers.
3. Create a research vision per genre (academia)
4. Based on the media scenarios 2020, the SWOT analysis and the vision(s), identify exemplary but concrete industrial actions (industrial professionals) and concrete research needs for the media vision (academia)
5. Create research needs (i.e. identify research questions and highlight research areas in focus) per genre (academia).
6. Following the project internal dissemination of the vision, finalize the document content in a final improvement workshop with media industry professionals.

This logical sequence is maintained in the sequence of chapters in this document. However, the workshops as such, due to time constraints and availability of persons, were conducted in the order 1, 5, 3, 2 (the media vision as such is a merger of genre visions by voting, more details available in minutes of meeting) and finally 4 and 6.

2 Vision Preparation

This chapter outlines the foundation established before and during the development of the media vision as such.

The scenarios and the business drivers are presented in detail in the Tivit Next Media deliverable *Media Scenarios 2020* (Giesecke et al. 2010). The next three sub chapters present the findings in a condensed form.

In chapter 2.4 representatives of Finnish media companies established a SWOT analysis of the integrated scenario “Human Media”. The purpose is to exemplify the position of the Finnish media industry in relation to the scenarios and drivers.

2.1 Media Business Drivers in 2020

The table below forecasts business drivers by 2020 in nine dimensions, as described in detail in the Tivit Next Media deliverable *Media Scenarios 2020* (Giesecke et al. 2010).



The purpose of the nine dimensions is to classify possible innovation drivers and scenarios. They are meant as a framework to structure this document's content.

The first dimension, *Social Values*, addresses the *social and societal effects* of the combination of knowledge society on the one hand and the new socio-technological systems (such as Facebook, Twitter, Wikipedia etc.) on the other. Note that today's young generation uses these systems without necessarily referring to them as technology. They are just ubiquitous tools, like a pen or a watch, assisting one's needs. Note also the very strong social pressure on young people, starting in basic school, to be present in socio-technological systems. The message is: "if you are not in Facebook, you will become an outsider of society".

In the second dimension, *Social Media*, the *viewpoint is technology oriented*: How will social media look like in 2020? The empathy is on developments towards real-time use. Motto "always on, always connected".

Two further dimensions deal with *users and audiences in 2020*: at first, their *behaviour* is analysed, then the *interfaces* which they use, and through which the media industry interacts with them. Interfaces and navigation will "learn" much from gaming, whereas (3D) TV will still have a co-existence next to a ubiquity of other, mainly digital media interfaces. These dimensions should guide media companies to develop their customer relations more concrete, following the "big picture" provided by the first two dimensions.

The first two dimensions together with User and Audience Behaviour and Interfaces are re-evaluated from a *Media Content* point of view in dimension five. *Segmentation*, different levels of *quality*, and *new services* (e.g. embracing 3D technology) are core issues.

In dimension six, *Professional Journalism* is investigated, with the conclusion that today's professional quality journalists may become a rare species by 2020.

In *Gaming*, dimension seven, we strongly emphasize two converging trends: "gamification" of the real world as well as games going "real" which will lead to a Google Earth follow-up usable for immersive reality experiences on an intertwined social-real-game level. The new 2011 Next Media case *Play Society* addresses many research questions related to these trends. Note that in Gaming, radically new (or different) use of technology is often combined with radical new meanings of products (such as the Nintendo Wii motion capturing system) and services (not associated to games used as toys) to users. A current, successful application of crowd sourcing in a game format is www.digitalkoot.fi commissioned by the Finnish National Library.

Dimension eight, *Media Companies and Their Features*, clearly forecasts smaller professional units, focussed on editorial publishing and knowledge service provision, complemented by freelancers and citizen journalists. New roles for professionals will emerge, but views diverge on their nature. This dimension provides various reasons for companies to *develop their own organisations* towards the media business drivers 2020.

The last dimension, *Technology*, gathers technologies and tools not yet addressed in the first eight dimensions. Here, we highlight ubiquitous broadband wireless "real world" web access, e-devices turning from readers to informers and a whole gamut of automated tools for planning and editing. Last not least the printing press "goes magazine".

2.2 Innovation Potential Mapped to Technologies and Meanings

There are several different approaches on how to display the innovation potential of possible future business drivers. We chose as a framework Verganti's (2010) *technology epiphany* diagram, replacing the design approach by the nine dimensions used to cluster the business drivers.

The location of the dimensions and thus their innovation potential, is inspired by Anderson's (2009) future business concept thinking. The resulting map, first described by Giesecke & Immonen 2010 is presented in figure 1.

The upper right hand quadrant of the map illustrates the area where Giesecke & Immonen expect most potential both for radical technological innovations and new meanings for the customers and consumers.

For instance *Gaming* is such area in which innovations based on both radical technological innovations and new meanings are likely. Whereas new technologies are often applied in gaming, in this context Giesecke & Immonen expect the radical change in meanings through a) the exploration of the real world by games and b) by introducing games logic into the real world.

The "opposite" area, *User and audience behaviour*, lacks innovation potential as users are generally unaware of new (patented) breakthrough technologies and usually do not associate radical new meanings with the existing media products or services they know. See also Verganti's (2010) comments on user centric innovation.

This map is to be used for developing more detailed business models, combining technological breakthroughs with radically new meanings in a system-based approach.

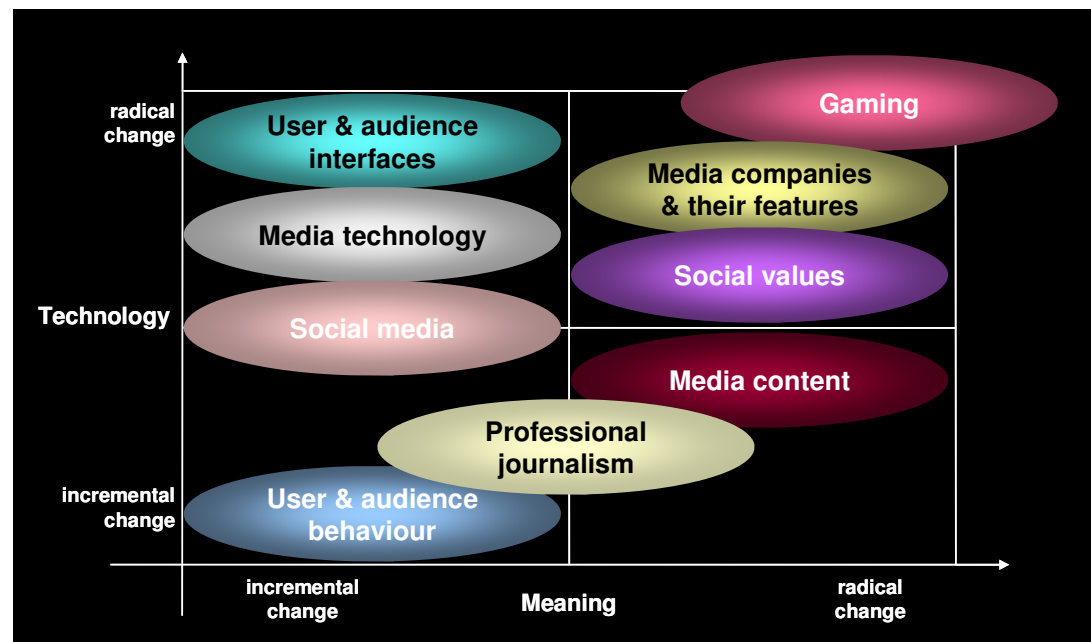


Figure 1. Innovation Potential per Dimension

2.3 Scenario “Human Media”

The following is a positive example of an integrated scenario created within a workshop involving Finnish media industry.

Human Media in this context means that media is carrying a new – human – meaning for the consumers and users. In the following the new meaning is characterized by where, when, how and why human media is used and consumed.

2.3.1 Where

For conceptual illustration, new metaphors such as “media cafeteria” or “media shopping centre” were used, meaning 1) media is consumed in places where people want to spend their time, physically or virtually and 2) it is possible to pick casually whatever one wants. Following this logic, media is present also in public places and therefore is an essential part of city and society planning. Still, personalisation and privacy of media consumption is possible in these public spaces, following the consumer’s own choice.

2.3.2 When

Media use and offering is a seamless part of everyday life, context-aware and in synchronisation with the user’s needs. A large variety of different media services, channels and media (content) offering according to the “24/7 principle” allows the consumers to be in control of their own media consumption.

2.3.3 How

Media is ubiquitous in and through the consumer’s personal, mobile devices; and as design element at homes and public spaces using displays and other surfaces such as windows, tables, walls and floors or walk-through canvasses. The consumers personalise the interfaces according to their preferences including also printed media.

2.3.4 Why

Media is used for variety of reasons – learning and receiving information, entertainment and community building and participation. Media is supporting everyday life, offering relevant and context-dependent information for users’ needs. Last not least media empowers people to select the information they want to share with their network and communities.

2.4 Strengths, Weaknesses, Opportunities and Threats Analysis

For this chapter, representatives of Finnish media companies established a SWOT analysis of the integrated scenario “Human Media”. The purpose is to exemplify the position of the Finnish media industry in relation to the scenarios and drivers.

2.4.1 Strengths of the Human Media Scenario

Human media combines professional media [content] with user generated content. It is [highly] customized and tailored to a persons specific needs. It empowers people to decide whether they want to share their information – or not. It allows different levels of information, ranging from personal [interests] information to common news.

As a result, human media is considered non-intrusive, and *it makes media become your friend.*

2.4.2 Weaknesses of The Industry

User and audience behaviour

- It is not yet clear if people are willing to give information to media houses about their needs and media usage patterns

Media companies and their features

- Companies in Finland will not co-operate, they compete. Need for joint effort for Finnish companies
- Currently too much focus on internal dynamism, forgetting customer
- Organisational capabilities are not mature
- Professional organisations are too rigid for managing participation
- Business models do not exist yet
- Current push model has to change and media companies have to be more agile
- This scenario requires incomes from other products, too
- Current assets tied to fixed production.
- Copyright issues are undefined

Media technology

- Enabling technologies or business models do not exist yet
- Customised printing systems are missing
- Current media production system makes investments to platforms heavy
- Need for more metadata (locations, topics...)

2.4.3 Opportunities for The Industry

The human media scenario redefines the collaborative media and activates [users] to participate in the community.

As media houses can provide more personalized solutions they can customize their offering, and high authenticity follows.

The human media scenario provides a possibility to create holistic ('total') solutions – starting from smart and topic based services.

The business can be more simple – silos will not exist anymore.

Pricing flexibility is possible.

2.4.4 Threats to The Human Media Scenario and The Industry

Social values

- people do not want to share anything

Media companies and their features

- companies refuse to collaborate – do it your own attitude may dominate
- focus is too much on existing, national markets
- size of the market is maybe not big enough
- investments are too risky
- decrease in total revenue but still increase in profit?

Professional journalism

- the information is not considered objective any more

3 Visions

3.1 The Media Vision 2020

By 2020 customer needs and networks are well understood and exploited. Media explores the playful society through assimilating gaming logics into a wide media spectrum.

New earning sources are identified and business logics are developed. The local media hubs are enabled to proceed to a multi-locality way of influencing. Thus media is able to produce massively customised quality content.

The whole media ecosystem meets or exceeds international excellence criteria. This means that excellence is being demanded throughout the whole media supply chain.

3.2 Vision 2020 per Media Genre

The Finnish media landscape, like the world wide media landscape, is a very heterogeneous field. We exemplify the media vision 2020 for five genres, as defined in the *Next Media Strategic Research Agenda* (Various Authors 2009).

3.2.1 News and Information

By 2020 media content is mass customised and segmented, based on consumer/user needs/interests/behaviour. Enablers are citizen journalism and **co-creation** (based on UGC). Trust of crowd sourcing in local news is established.

Both the industry role as well as individual journalists roles change **from creator to sense maker**. Established media functions are crowd facilitator, moderator and platform provider.

Media importance is a function of relationship and proximity to the consumer/user versus news (needing the “big brand authority”), e.g., politics, research, medical, sports, culture. Thus brands remain and provide trust, even if smart agents are used in news production.

The media will still create joint experiences (not everything will be only on demand) and news is still part of the daily media usage (publishers will have found the right channel/way and time).

3.2.2 Learning and Education

By 2020 education is scalable: the IT infrastructure allows education to be scaled and some lectures are even streamed live to cinemas across the globe

Education is offered as a service, creating a brand of the learning system in Finland.

Educators and students are **media aware**. Self-driven personalization and e-learning replace traditional lecturing schemes, based on one-way communication, and extend the use of social and viral tools in education. Filtering and searching of materials will be massively facilitated.

3.2.3 Entertainment and Games

By 2020 media explores the playful society, by introducing game logics into professional organisational processes (e.g. journalists' articles metadata update) and work as such, media as such (e.g. by introducing "hall of fame"), education and the physical environment... ..by games offering an experience service, using gaming as a facilitator (especially in social media) and games for senior citizens.

Entertainment is to satisfy all our senses, and also meters them, independent of time and place and providing (paid) possibilities of peaceful retreat, while user data is identified, analysed and grouped.

3.2.4 Community Media

By 2020, locality is the main way of influencing. In this context, locality can be physical, mental or even interest group related.

User-reliance "my other people" is established also in community media. Media is an everyday tool to get information – harnessing the trust in communities.

Social TV includes content generation, social context adding and filtering.

Media adapts to the different roles of people and supports self presentation (private and open), influencing decisions or changes and cohesiveness. Senior citizens communities and communication are supported.

The perspective of a "personalised data locker" has been investigated.

3.2.5 Future Media

By 2020, local media is [most] important, including both cultural and emotional contents.

User related information and relations management is in the core focus.

Paid content is vital, with **business models based on [real-time] analytics and tools**.

Full scale context-related experiences have been introduced.

An authority ranking and rating system is introduced. People choose their personal authorities and follow them as news and information sources (bloggers 2.0).

3.3 Research Vision 2020 per Media Genre

Whereas chapter 3.2 provides the overall vision, this chapter emphasises solely the related research vision per media genre.

3.3.1 News and Information

By 2020 we have achieved deeper understanding about user and consumer needs and interests and on how to create new needs (for business) when audience groups are very fragmented. In parallel, the contents are to be contextualised and technological enablers must be in efficient use.

News and information business need also to convey the meaning of the information to the user. This emphasises the importance of natural, context and content based interfaces, including emotions and user experience as content elements in news reporting and consumption.

The news and information business uses means (multimodality, demos, illustrations, narratives) that makes it easier for the recipient to comprehend and understand possible implications and feel empathy even for geographically and culturally remote news events.

New business models and company capabilities based on conveying meaning instead of communicating information must be developed

3.3.2 Education and learning

The educational and learning media ecosystem by 2020 will consist of evolving, lifelong learning-based communities which will constantly evaluate and rank learning resources provided by media content experts, learning resources providers and infrastructure holders.

Critical development touch adoption of technology-driven contents, lifecycle of learning communities and collaboration for "learning industry" players.

The media business is enabled to face the challenge of playing between "crowd media" and "customized media", as the life of standard media will be increasingly difficult there "in between".

3.3.3 Entertainment and games

By 2020 we understand and explore "play-society" through research on service experience design, industrial and social processes, and emerging technologies.

Lessons learned from gaming and media entertainment are extended to 1) other media fields and 2) other industries ranging from software and education all the way to energy and real estate.

3.3.4 Community Media

By understanding the daily dynamics of people's changing roles, environments, contexts & communities by 2020, user needs are met by means of adaptive media consumption and creation.

Empowering the user communities forms a basis for dedicated use. Communities and community media extend existing media and unmediated communications and include also the physical world.

The value sensitive design process is applied in technology development processes in order to create services and devices which positively enhance our lives.

Understanding ethics and peer appreciation are at the basis of designing community media services.

3.3.5 Future media

By 2020 people add real value in media services: positive crowd sourcing prevents terrorism. A new democracy tool for people who think alike will be available.

Thus the role of social media will grow in news production, gradually replacing the traditional media share.

Media is a mirror and story teller: who is the story teller? Brand will be an issue; brand will be the story teller.

Culture based media or local media? By 2020 we have researched, which will be the most important. We also have studied which will dominate: US or European media.

Research has been done on free (i.e. participative) versus more conventional ways of developing services.

4 Implementation of The Media Vision 2020

This chapter illustrates the initial steps to implement the media vision 2020. The goal is to implement the vision through exemplifying concrete industrial actions and, concurrently, define the concrete research needs per genre.

A second goal is to outline the most promising levers (mechanisms) to achieve the positive scenario, and how to avoid the worst scenario as described in Giesecke et al. 2010.

4.1 Industrial Actions to Reach The Media Vision 2020

The following table lists a first exemplary set of industrial actions, of which some need to be supported by deeper research. They are detailed in chapter 5.3.

Dimension	Exemplary Industrial Action
Social Values	<ul style="list-style-type: none"> • Focus on privacy and IPR legislation • Clarify VAT related issues
Social Media	<ul style="list-style-type: none"> • Keep the current customer relationship, networking, co-operation and integration
User & Audience Behaviour	<ul style="list-style-type: none"> • Develop analytics and measuring methods • Prepare for transfer of household to user based subscriptions (like land line phone to mobile phone)
User & Audience Interfaces	<ul style="list-style-type: none"> • Design the user experience to a new level
Media Content	<ul style="list-style-type: none"> • Support co-creation and reward UGC (investigate possible reward mechanisms)
Professional Journalism	<ul style="list-style-type: none"> • Embed citizen journalism, depending on the success of paid content and cross subsidizing
Gaming	<ul style="list-style-type: none"> • Apply gaming logics in media services and products (like the Finnish National Library does at www.digitalkoot.fi)
Media Companies & Their Features	<ul style="list-style-type: none"> • Increasing flexibility and agility • Advance from silos to more customer need oriented organizations, focus jointly on R&D
Media Technology	<ul style="list-style-type: none"> • Take company advantage of media technology (not necessary internally developed but also outsourced)
Business Concepts	<ul style="list-style-type: none"> • Develop paid content models • Enhance customer data and refine new services/products from customer data • Create ID-broker for both users and advertisers

4.2 Research Needs to Reach The Media Vision 2020

The following table lists a first exemplary set of research needs, mostly related to specific focus areas per dimension, as identified by academic media researchers.

Dimension	Exemplary Research Need
Social Values	<ul style="list-style-type: none"> • Research the value changes • Understand media rituals and habits • Research on privacy, sharing, interactivity, community forming, P2P, DRM, opinions and routines
Social Media	<ul style="list-style-type: none"> • <i>See “Social Values”</i>
User & Audience Behaviour	<ul style="list-style-type: none"> • Understand daily media consumption and experience, privacy and trust, motivation for UGC, sharing, ecosystems and life-cycles
User & Audience Interfaces	<ul style="list-style-type: none"> • Research next level interfaces also in services • Investigate how to create a seamless experience, e.g. through integrated infrastructure
Media Content	<ul style="list-style-type: none"> • Optimise production processes by use of metadata, profiling, cross-media and content aggregation • Research digital/print media interaction
Professional Journalism	<ul style="list-style-type: none"> • Define new roles needed for co-creation, harnessing UGC
Gaming	<ul style="list-style-type: none"> • How to exploit best elements of current technology?
Media Companies & Their Features	<ul style="list-style-type: none"> • Identify new roles, who is a professional? • Describe flexible production processes, harnessing participation and possible reward models
Media Technology	<ul style="list-style-type: none"> • Focus research on ubi-media – piloting and prototyping – intelligent agents and bio-media • Investigate in technology as enabler and “empowerer” • Research the “home surrounded by media”
Business Concepts	<ul style="list-style-type: none"> • Identifying what people are willing to pay, from content to services, hybrid content services (test lab required) • Define globally important platforms

4.3 Research Needs per Media Genre

Whereas the first two sub chapters 4.1 and 4.2 are dedicated to the implementation of the – genre independent – media vision 2020, this chapter is categorized per media genre, addressing both exemplary research questions and, in general, research areas to be taken into focus.

4.3.1 News and Information

Dimension	Exemplary Research Questions and Areas
Social Values	<ul style="list-style-type: none"> • Deeper understanding about user and consumer needs and interests and how to create new needs • Meaning and dynamics of information sharing, personalisation of information, privacy and collective intelligence for different audiences/user groups
Social Media	<ul style="list-style-type: none"> • What is the role of public media e.g. public viewing as a space or way of interacting? • Interaction and commenting as an expression of social activity • What are methods and tools for intelligent filtering?
User & Audience Behaviour	<ul style="list-style-type: none"> • User experience and motivation in different user and audience groups
User & Audience Interfaces	<ul style="list-style-type: none"> • What are the natural interfaces in what contexts – bio, touch sensors, camera, etc.? • What are news experiences when using space as display, e.g., walk through canvasses or 3D-spaces – augmented reality?
Media Content	<ul style="list-style-type: none"> • How to make it easier for the recipient to comprehend and understand possible implications and feel empathy even for geographically and culturally remote news events? Here multimodality, demos, illustrations and narratives can be used • What is the everyday life relevant information for different user groups? • How should fragmented audiences be taken into account?
Professional Journalism	<ul style="list-style-type: none"> • What are the new roles of journalists in networked content production? • How to integrate crowd sourcing to content production?
Gaming	<ul style="list-style-type: none"> • What are the game type interfaces for news and information?
	<i>...continued on next page</i>

Dimension	Exemplary Research Questions and Areas
Media Companies & Their Features	<ul style="list-style-type: none"> • How to convey the meaning of the information to the user and what business models can be build based on this? This emphasises the importance of natural, context and content based interfaces, including emotions and user experience as content elements in news reporting and consumption. • How to develop products between "crowd media" and "customized media"? • What are the competences needed in multimodal content production? • How will organisations integrate multimodal content production in the work processes?
Media Technology	<ul style="list-style-type: none"> • What technologies are needed for intelligent re-use of produced content? • What is required from the human - system integration? • What is the difference between individual/personal and 'crowd-use'/public devices? • What are the possibilities of 'public viewing'? • How to guarantee access to information over a variety of mobile, personalised 'reading' devices?
Business Concepts	<ul style="list-style-type: none"> • What is the role of news and information in B2B2C services; what are these services where news business is in the centre? • What are the new models of geo-local and contextual advertising?

4.3.2 Education and learning

Dimension	Exemplary Research Questions and Areas
Social Values	<ul style="list-style-type: none"> • What are collaborative learning skills and how to support co-learning and development of curriculum? • How to build professional networks beyond school borders?
Social Media	<ul style="list-style-type: none"> • How to support lifelong learning practices and what is the business logic behind it? • How to support co-learning? • Community tools • Knowledge nuggets vs. comprehensive learning
User & Audience Behaviour	<ul style="list-style-type: none"> • Adoption capabilities and new tools for development
User & Audience Interfaces	
Media Content	<ul style="list-style-type: none"> • How to create attractive and meaningful digital educational services? • Digital media vs. print media (which will win?) • Open source evolution • Global sharing of contents
Professional Journalism	<ul style="list-style-type: none"> • What is the role of wikis and blogs in professional journalism?
Gaming	<ul style="list-style-type: none"> • Multiuser learning in gaming
Media Companies & Their Features	<ul style="list-style-type: none"> • New business clusters across the borders
Media Technology	<ul style="list-style-type: none"> • Lifecycle of contents in different platforms
Business Concepts	<ul style="list-style-type: none"> • How to design a media ecosystem that consists of evolving, lifelong learning-based communities which will constantly evaluate and rank learning resources provided by media content experts, learning resources providers and infrastructure holders? • Ranking and certification business

4.3.3 Entertainment and games

Dimension	Exemplary Research Questions and Areas
Social Values	<ul style="list-style-type: none"> • Develop understanding about “play-society” through research on service experience design, industrial and social processes, and emerging technologies • Understand game-like features in social interaction
Social Media	<ul style="list-style-type: none"> • Theory construction (what is game, play, playfulness?)
User & Audience Behaviour	<ul style="list-style-type: none"> • How to establish a user & audience behaviour research toolkit and how it can be integrated to company practices? • Better understanding of digital natives
User & Audience Interfaces	<ul style="list-style-type: none"> • Pervasive/natural/AR/VR/S3D case-based constructive research; multiple methods
Media Content	<ul style="list-style-type: none"> • Theory construction (what means game content regarding playfulness?) • What is not entertaining media? And why not?
Professional Journalism	<ul style="list-style-type: none"> • Co-creation, crowd sourcing & play/game design emerging as new competence area requirement • Understand the transition of professional journalism
Gaming	<ul style="list-style-type: none"> • How to extend lessons learned from gaming and media entertainment to 1) other media fields and 2) other industries ranging from software and education all the way to energy and real estate?
Media Companies & Their Features	<ul style="list-style-type: none"> • Changes in development cycle • Cash-flow management and multi-path revenue streams
Media Technology	<ul style="list-style-type: none"> • How to integrate emerging technologies to existing platforms (S3D/HD, AR, sensor networks, IP-platform...)?
Business Concepts	<ul style="list-style-type: none"> • Project-based development to service creation • Micropayments, virtual assets

4.3.4 Community media

Dimension	Exemplary Research Questions and Areas
Social Values	<ul style="list-style-type: none"> • Develop understanding about the daily dynamics of people's changing roles, environments, contexts & communities and user needs, ethics and peer appreciation • Self-presentation versus intimacy • Role of non-users in community dynamics/social exclusion
Social Media	<ul style="list-style-type: none"> • What tools and methods are needed to empower user communities and create services and devices which positively enhance our lives? • Research on culture based media and local media • How to allow people who think alike to create new democracy tools? • Enabling automatic social network structure transfer from offline/services to other services
User & Audience Behaviour	<ul style="list-style-type: none"> • Changing dynamics of everyday media consumption & production (incl. e.g. info sharing)
User & Audience Interfaces	<ul style="list-style-type: none"> • Non-intrusive user interfaces, notifications & alarms • Location-awareness & proximity-based networks & content creation • Ambient media: intimacy, awareness, contacts
Media Content	<ul style="list-style-type: none"> • Co-creation (incl. reward mechanisms) • Information sharing – new mechanisms • Moods as content filtering • Web of things – combining physical & virtual, as well as physical objects as content
Professional Journalism	<ul style="list-style-type: none"> • Changing role of journalists in social media 'dominant' services and as 'producers' of UGC
Gaming	<ul style="list-style-type: none"> • Reward/appreciation mechanisms (learning from gaming)
Media Companies & Their Features	<ul style="list-style-type: none"> • Research on free (i.e. participative) versus more conventional ways of developing services
Media Technology	<ul style="list-style-type: none"> • Positive technology – values are in the code; software development processes! Value sensitive design. • Future devices – do we want, e.g., interactive glasses?
Business Concepts	<ul style="list-style-type: none"> • Social capital created by UGC • New concepts of micropayments, new ad-based models • New bundling mechanisms

4.3.5 Future media

Dimension	Exemplary Research Questions and Areas
Social Values	<ul style="list-style-type: none"> • Security in social media • Personalised information assistant
Social Media	<ul style="list-style-type: none"> • What could happen in worst case scenario and how to get on if the worst case scenarios would come through?
User & Audience Behaviour	<ul style="list-style-type: none"> • Community based content recommendation engine/service • User and audience type research, different technical skills and needs
User & Audience Interfaces	<ul style="list-style-type: none"> • Displays, face recognition • Combining information from multiple sources
Media Content	<ul style="list-style-type: none"> • Professional applications for social media (web X.0) • Segmentation, multichannel services
Professional Journalism	<ul style="list-style-type: none"> • How to combine professional journalists and expert knowledge in explicit and new ways?
Gaming	<ul style="list-style-type: none"> • How to exploit best elements of current technology?
Media Companies & Their Features	<ul style="list-style-type: none"> • Identify new roles, who is a professional? • Describe flexible production processes, harnessing participation and possible reward models
Media Technology	<ul style="list-style-type: none"> • Focus research on ubi-media – piloting and prototyping – intelligent agents and bio-media • Investigate in technology as enabler and “empowerer” • Research the “home surrounded by media”
Business Concepts	<ul style="list-style-type: none"> • Identifying what people are willing to pay, from content to services, hybrid content services (test lab required) • Define globally important platforms

5 Discussion

The scope of this document is extremely large. It aims to cover the whole Finnish media landscape. Thus editor and author of this document emphasise that all workshops were announced at least two weeks in advance, visible and open for all Next Media participants.

The applied methodology is in itself logical and consistent, however the timely sequence was not optimal. A lesson learnt for future vision work is that the time schedule must accommodate the needed workshops rather *sequentially* than *in parallel*.

One basic assumption – to adopt the five media genres as defined in the Next Media Strategic Research Agenda, might need a revision in hindsight. Yet most professionals within the Finnish media industry are clearly associated with one specific genre.

5.1 Findings

The findings of the research work are presented in chapters 3 and 4. The most important finding of the document is the research vision 2020 as stated in chapter 3.3. The consequential, subsequent finding is the implementation, described in chapter 4.

The media vision 2020 is future oriented, especially concerning the adaptation of gaming logics and addressing local media hubs, areas which are hardly explored yet.

The vision is valid for a certain time frame, as the full exploitation of customer needs and networks is a mid to long term venture. Also, the development of business logics and identification of new earning sources is an ongoing process at least until 2020.

The vision is bright and inspiring as it defines a broad and positive “big picture” of a whole sector without forcing the reader into details. While companies can focus on the business, academia are inspired to explore, e.g., the playful society, human influence within multi-localities and the meaning of massively customised quality content.

In the context of the Next Media programme, a Tivit research programme, a special emphasis has been put in the implementation section on recommendations (acting as decision-making criteria for planning) for media related research, especially but not exclusively providing guidance to the Next Media programme.

5.2 Next Steps

With the publication of this document, the task *Visio2020* will be finished. The next steps will be taken in the relevant Next Media teams when defining the yearly Next Media project plans, until 2013. This document provides guidance.

In a parallel step, the Visio 2020 task team recommends that the Finnish media industry performs an in-depth analysis how to implement the defined industrial actions within the various media organisations.

Finally, the Visio 2020 task team recommends that in the year 2012 this document will be updated and refined, with the target of a media vision 2025.

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