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Foreword

EPRA's growth and development over time showed a need to add more structure to its work, which resulted in the adoption of the first three-year Strategy with its accompanying workplan, covering 2017-2019. EPRA's performance against these strategic objectives [was reviewed in October 2019 in Athens](#) further to a consultation with members. The review found that setting up a three-year Strategy with a roadmap had been instrumental in the delivery of major achievements for the period.

In this context, the Executive Board drafted a new three-year Strategy document which was initially planned for adoption at the meeting in Antwerp in spring 2020. However, owing to the Covid-19 pandemic, the Board decided to defer the entry into force of a revised Strategy to 2021 and also to include some reflections on the impact of the pandemic on the media. A revised draft was circulated to EPRA members for consultation on 30 July with a deadline for responses until 30 September 2020. A final version, taking up the remarks made by EPRA members, was circulated on 23 November and its online adoption process was launched on 30 November with a deadline for vote until 7 December 2020. This final version of the Strategy was unanimously adopted by EPRA members.

The present Strategy is composed of three main parts: the introductory section provides background, context and highlights challenges, the second section sets out the Vision, Mission and Values Statement and the third part lists the Strategic Objectives for the period 2021-2023.

The content of the Strategy has been generated by the Executive Board and the Secretariat based on the understanding of the work of EPRA and knowledge of EPRA members and their current experiences and challenges. It also takes into consideration the inputs provided by the membership during the review of EPRA's past performance, the brainstorming debate on the new Strategy which took place in October 2019 in Athens and the impact of the Covid-19 crisis on the media sector, EPRA's members and work.

1. Background, context and challenges

EPRA over 25 Years

With 25 years of existence and 54 member authorities from 47 countries, EPRA is the oldest and the largest network of audiovisual regulators in the world. As a European forum, it supports common values of the Council of Europe and the European Union, such as the protection of human rights, democracy, rule of law and equality. EPRA serves both EU and non-EU members who share a common mandate, common goals and common regulatory challenges. EPRA members have the opportunity to learn from and support each other for responding to such challenges.

EPRA is a voluntary, independent network which is non-political in its approach and operations. This approach is strengthened by the fact that EPRA is a self-financing, non-policy making body and provides a high degree of transparency in its processes and procedures.

Normally, EPRA as a rule organises twice-yearly meetings bringing together all its members. In 2020, the meetings were replaced by a series of virtual events owing to the pandemic. In parallel, EPRA functions as an “always-on” source of knowledge and advice. Over its lifetime, EPRA has been guided by the belief that research is key to better understanding the issues faced by regulators and enabling appropriate responses to be developed. Consequently, EPRA has developed and compiled a significant, relevant and high-quality set of resources, which are available to the members mostly through dedicated tools on the EPRA website.

While remaining firmly focussed on serving its members, EPRA is outward-looking to the fields of industry, academia, and audiovisual expertise and to both governmental and non-governmental organisations. EPRA’s deliberations have been strengthened by regular participation by, and engagement with, the European Commission, the Council of Europe, the European Audiovisual Observatory and the Office of the OSCE Representative for Freedom of the Media (RFoM), all of whom act as permanent observers at EPRA meetings.

The Current Environment

Since EPRA’s foundation in 1995, the media sector in Europe has undergone profound changes which have been shaped by a number of political, economic, technological and social factors.

Political change has redrawn the map of Europe as well as the footprints of the EU and the Council of Europe respectively. Significant economic cycles, as well as rapid technological developments, in particular digitisation, have revolutionised the audiovisual industry challenging it to find new ways of serving audiences while preserving its core values and remaining economically viable. Traditional broadcasting has moved from the analogue world to more complex digital forms of delivery, with content being offered on both a linear and non-linear basis. Far-reaching social changes are reflected in the increasingly multi-cultural composition of communities, and the way in which both individuals and communities have access to and use media and generate content.

While the early years after EPRA's establishment were charged with an optimistic pioneer spirit and resulted in the establishment of many media regulatory authorities, more recent years have seen the emergence of increasing concerns about the state of democracy in Europe. Reports from the EU and the Council of Europe have documented the deterioration of freedom of expression in Europe as well as threats to the safety of journalists. In parallel, there has been an intense focus on the role that both off-line and online media play in the distribution of disinformation, be it wittingly or unwittingly, and on the impact on democratic and electoral processes. Moreover, from the growth of global players such as video-sharing platforms and the shift in media consumption have emerged new types of harms that are generally out of the current remit of media regulatory authorities, such as cyberbullying or contact-related risks, as well as a wide range of new ways in which children can be exposed to potentially harmful content. At the national level, fears for children's online safety have given rise to increased concern from the audience and pressure from governments to introduce robust regulatory responses. In addition, the development of algorithmic-driven content curation by global digital platforms has a profound impact on the findability and the prominence of specific content – be it national, European or general interest. Overall, data-driven platforms in their role as intermediaries of information have become a dominant force in the communications sector. Linked to this are other current issues, such as the responsibility of platforms for the content they mediate automatically, the relationship between state regulation and the community standards of the platforms, or the extent to which the social function of platforms to strengthen access to information and basic communications rights is weighed against their potential to manipulate public discourse.

The Covid-19 pandemic unexpectedly added another challenge to this list of current concerns by seriously impacting content production, distribution, consumption, funding and the European audiovisual market in general. Even though it is still too early to even try to precisely identify the impact, experts are predicting long-lasting effects as well as an amplification of existing market trends, such as the move of advertising revenues to the internet, the shift of market power from traditional actors to SVOD and from European to global players, and threats to the sustainability of local media service providers and content producers. The crisis also gave a completely new dimension to the question of trust in media in the face of the unprecedented 'Infodemic', underlying – if further proof were needed – the critical importance of addressing problems of online dis- and misinformation and focusing regulators' attention even more acutely on this matter.

All of the above changes present challenges for traditional media, including public service media organisations, who must find appropriate new responses, while holding firm to their essential purpose and dealing with the worst economic recession since the 2nd World War. Consequently, finding appropriate legal and regulatory responses to developments in the changing audiovisual sphere has been a significant focus for both governments and regulators in order to achieve the goals of providing diverse, sustainable, culturally-relevant and pluralistic content with which to serve European audiences on the one hand, and in order to confront the online threats and harms it can propagate, and protect those who are vulnerable to them on the other hand. Increasingly, meanwhile, these responses are held to include the promotion of media literacy measures, which help users to gain a better understanding of the functioning, the opportunities and risks of the dynamic media sector, and which recognize that all stakeholders have a role to play in this regard (the public, educators and industry alike).

Faced with the magnitude of the changes, the EU has opted for a multifaceted approach based on a major overhaul of the European rules applicable to the media and communications sectors. Within the last three years, new legal frameworks have been put in place in the field of data protection (GDPR), telecommunications (European Electronic Communications Code), copyright (Directive on copyright in the Digital Single Market and on television and radio programmes) and audiovisual regulation with the review of the Audiovisual Media Services Directive (AVMSD).

The revised AVMSD will have far-reaching consequences for EPRA members both from the EU and beyond owing to association or bilateral agreements. Most notably, these consequences stem from:

- its scope of application, which has been extended to also cover, to a certain extent, video-sharing platforms,
- the introduction of the independence of regulators as a mandatory requirement by ensuring that they are legally distinct and functionally independent from the industry and government,
- new provisions formalising the role of the European Regulators Group for Audiovisual Media Services (ERGA) as an independent, expert adviser to the Commission, and as a forum for the exchange of experiences and best practices between EU regulators, and assigning some new responsibilities to ERGA and its members.

Building on the AVMSD, the European Commission is expected to issue several key documents that are likely to have a significant impact on the legal framework for audiovisual media services and VSPs in Europe. It is anticipated that the draft **Digital Services Act** (DSA) will address the question of intermediary liability and accountability by increasing and harmonising the responsibilities of online platforms and information service providers and will reinforce the oversight over platforms' content policies in the EU. In parallel, the **Digital Markets Act** (DMA) will tackle the economic power of large online platforms and is expected to include *ex ante* obligations (prohibiting and requiring certain behaviours before regulators have evidence of actual harm in the marketplace) for large online platforms acting as gatekeepers, as well as the New Competition Tool.

Two pending non-legislative documents are also likely to be of relevance for NRAs: **the European Democracy Action Plan**, whose aim is to ensure that citizens are able to participate in the democratic system through informed decision-making free from unlawful interference, and **the Audiovisual Media Action Plan**, which will include a list of concrete actions in order to deal with the Covid-19 crisis and become more resilient in the face of digital transformation".

Future Challenges

Turning to future challenges **facing EPRA members** over the next three years, these include:

- **Embracing the complexity of online media ecosystems:** the growing number of services and level of activity results in an increased regulatory workload and a consequent requirement for EPRA members to stay abreast of developments in the wider media environment also including emerging challenges in adjacent regulatory areas such as data protection, e-commerce and copyright.

- **Developing cross-sectoral relationships:** NRAs' work is increasingly cross-sectoral and requires the development of well-designed strategies to create structure, methods and tools for collaborating with expert organisations in relevant, adjacent regulatory areas such as data protection, e-commerce, competition etc.
- **Documenting changes in consumption patterns and audience behaviour:** changing consumption patterns, particularly amongst young people, driven by the development of global players and the continuing refinement of algorithmic and AI developments, are resulting in the fragmentation of audiences, and traditional television viewing is beginning a pattern of decline in most European countries. In order to understand the implications for the sector and support evidence-based regulation, EPRA members are increasingly expected to conduct, commission or source robust research on the changing trends. This also implies potentially expanding the scope of research to new areas such as online harms as well as developing more refined methodologies.
- **Ensuring a sustainable audiovisual sector:** because of the challenges faced by traditional players in the audiovisual field from new and wide-ranging sources of content, regulators are becoming increasingly involved in having to find policy solutions to ensure a sustainable ecosystem for the delivery of content of democratic, social and cultural relevance to national and European audiences. This of course comes even more sharply into focus in light of the Covid-19 pandemic. Local media providers, in particular, have been severely hit by the crisis. Public service media organisations also fear a loss in public income in the longer term as a consequence of potential austerity measures and the economic recession.
- **Acting independently:** building on the introduction of mandatory provisions in the AVMS Directive on the independence of NRAs, regulators will have to foster a real culture of independence – at arm's length from both political and market forces – to support the independence of media players under their jurisdiction. Given the far-reaching changes in the political climate in Europe and the market power of global players, this will not be an easy task everywhere and EPRA will continue to be an open forum for debate.
- **Implementing EU legislative changes:** further to the AVMS Directive, one of the key challenges for the Strategy period will be the establishment of a functioning (co-)regulatory system applicable to video-sharing platforms while duly preserving freedom of expression. The process could potentially result in some tension around jurisdiction and the country of origin principle and will require greater cooperation between regulatory authorities in the EU and beyond. It is also anticipated that the Digital Services Act (DSA) will have a significant impact on the legal framework for audiovisual media services and VSPs in Europe in the coming years.
- **Tracking and monitoring debates:** the legal transposition of the AVMSD is only the beginning of a long process. NRAs will be required to track and monitor the debates arising from the implementation of EU legislation.
- **Adapting in a time of flux:** as a consequence of the far-reaching sectoral changes and the likelihood of expanding missions, audiovisual regulators will need to adapt to new tasks and responsibilities and develop new approaches to regulation. This process is likely to require some strategic planning, the setting of priorities for compliance and enforcement policies, the development of new tools as well as the hiring or training of staff.
- **Wider contextual challenges:** future challenges for NRAs could also include other critical areas, such as climate change, e.g., with the participation in a discussion on how the audiovisual industry could best apply green strategies to mitigate the environmental impacts of audiovisual productions further to the UN Sustainable Development Goals framework and the EU Strategic Agenda 2019-2024.

Consequent upon the challenges facing EPRA members, the challenges for **EPRA as a network** arising over the three-year period of this strategy will be:

- **Providing support:** how can EPRA best position itself to continue to support its members in responding and adapting to change in the audiovisual sector in ways that are relevant and future-oriented?
- **Finding resources:** how can EPRA harness the ability of its members to participate in and contribute to the activities of the network (acting as content producers; presenting papers at meetings; responding to questionnaires etc.), given the different pressures on members' resources – time, personnel and finance – from other regulatory activities at the national and European levels, including participation in other regulatory networks?
- **Adding value:** through the breadth of its activities, how can EPRA add value both for its members and for other participants in the wider European audiovisual field?
- **Ensuring complementarity with ERGA:** ever since its creation in 2014, ERGA has played a key role on regulatory cooperation in Europe – and thus became an important partner for EPRA. How to optimise synergies between the EPRA and ERGA Work Programmes to avoid overloading respective members with duplicative work and achieve meaningful complementarity?
- **Fostering cooperation:** how can EPRA foster further meaningful cooperation between its members and especially between EU and non-EU members? Should EPRA develop further cooperation with external parties, stakeholders and other networks of regulators?
- **Encouraging innovative formats and outputs:** how can EPRA develop innovative formats of discussion, practical interaction and new forms of outputs for its members?
- **Adapting to the “new normal”:** as the Covid-19 pandemic has forced members to adapt and modernise communication tools, how can EPRA take advantage of this situation to deliver additional outputs for the network and unleash the potential raised by online tools?
- **Building on EPRA support structures:** how best to make use of the reinforced Secretariat to contribute to the delivery of EPRA's strategic objectives?

The overall aim of EPRA's Strategy – presented below – seeks to respond to the challenges of EPRA as a network and to the challenges facing individual members in the period 2021-2023.

2. Vision, Mission and Values

Vision

The European Platform of Regulatory Authorities (EPRA) promotes freedom of expression as well as a culturally diverse, sustainable and pluralistic media environment through its support for independent, professional and effective regulation of the audiovisual media.

Mission

EPRA provides an independent and transparent forum for audiovisual regulators to share relevant information, best practice, experience and expertise and to learn about new technical and policy developments affecting the audiovisual ecosystem. It explores innovative means of regulating and analysing the audiovisual sector and of empowering audiences through media and information literacy and sharing that with a wider audience of stakeholders.

Values

The following core values of EPRA have been developed and reinforced over many years and are central to its success to date. They remain as relevant going forward as they have been for the past 25 years.

- **Independent:** EPRA is non-political and impartial in its approach and operations and is strengthened by the fact that it is a self-financing, non-policy making body. EPRA respects the independence of the members it serves.
- **Informal:** informality characterises EPRA's deliberations and interactions and facilitates a safe, free-flowing discourse and the exchange of a frank and diverse set of views, which ultimately contributes to a sense of community amongst members. EPRA values the opportunity which informal engagement brings to its members' understanding of each other's history, culture and traditions.
- **Transparent and Accountable:** EPRA is transparent and accountable in its processes and procedures as is reflected in its open and consultative approach to developing and implementing its Work Programme and activities, and in the annual and three-year reporting to its members.
- **Expert, Informed and Agile:** EPRA stays committed to being an expert and informed voice in European audiovisual regulation. EPRA's twice-annual fora for regulators aim to demonstrate an openness to listen and a willingness to learn and share. EPRA is committed to adapt to the demands and needs of regulators in a fluctuating and mutable landscape, with responsiveness and flexibility.
- **Collaborative:** EPRA builds strong internal and external links, both formal and informal, and stays connected with its membership and other networks, the audiovisual industry, governmental and non-governmental organisations, academia, and sectoral interest groups.

3. Strategic Objectives 2021-2023

Below are set out the high-level objectives for the period of the Strategy. Once the Strategy has been adopted, a Work Plan will provide a roadmap of the envisaged key actions and concrete outputs over the three-year period.

Strategic Objective 1:

Accompanying EPRA members in the changing media paradigm

→ *Envisaged outcomes: Provision of expert and learning information to members*

Towards this objective EPRA will:

- *help EPRA members understand and respond to the changes of the media ecosystem, notably in terms of technology, markets, players and consumption and legislation*
- *help EPRA members analyse the impact of these changes on regulation and on the evolution of the role, internal structure and practices of regulators*

Envisaged key actions and concrete outputs:

- Be future-oriented in the selection of themes, topics and approaches in the yearly Work Programmes
- Reflect on the mid and long-term impact of the Covid-19 crisis on the media sector when addressing topics selected in the yearly Work Programmes
- Win inspiring and charismatic speakers and panellists
- Compile a list of external experts on specific subjects, also taking into account similar existing initiatives, for the use by EPRA members
- Develop contact points within the EPRA membership on specific topics
- Develop knowledge-building outputs

Strategic Objective 2:

Creating value for EPRA members

→ *Envisaged outcomes: Enhanced energy and knowledge within the EPRA network and increased engagement of EPRA members*

Towards this objective EPRA will:

- *provide opportunities for networking with colleagues and stakeholders, facilitate the exchange of information and produce a broad range of outputs*
- *stimulate members' involvement and interaction during meetings and between meetings with an incentive-based approach*

Envisaged key actions and concrete outputs:

- Improve the EPRA website, based on an audit
- Develop and test new ways of delivering outputs
- Develop and test incentive tools and strategies to boost members' involvement
- Develop and test incentive tools and strategies to encourage interaction during meetings and throughout the year
- Develop and test practice-oriented outputs

Strategic Objective 3:

Interacting with others

➔ *Envisaged outcomes: Strong links with a range of other networks, the audiovisual industry, governmental and non-governmental organisations, academia, and sectoral interest groups*

Towards this objective EPRA will continue to:

- ***cooperate with a wide range of stakeholders (including academia, industry, consultants and other umbrella organisations of the audiovisual sector and other related sectors)***
- ***encourage cooperation with regulators from other sectors***
- ***build on cooperation with other networks of audiovisual regulators***

Envisaged key actions and concrete outputs:

- Develop and set out a programme of engagement with other organisations and stakeholders endorsed by EPRA members
- Provide representation at external events on the basis of clear priorities and criteria consistent with EPRA's remit, strategy and annual Work Programmes
- Make EPRA's activities more transparent, by:
 - publishing a regularly updated schedule of upcoming representation at events*
 - reporting more actively on EPRA's representation at events*
 - improving the user-friendliness of the EPRA website and EPRA's social media presence*
- Concretise the relationships with ERGA and develop cooperation processes

Strategic Objective 4:

Being sustainable as an organisation

→ *Envisaged outcomes: Good governance (efficiency, transparency, accountability) and durability*

Towards this objective EPRA will continue to:

- ***ensure the stable functioning of the EPRA Secretariat and Board***
- ***secure/facilitate the hosting of future meetings***
- ***develop contingency planning/build on its capacity to adapt to external unexpected circumstances***
- ***make sure that EPRA work processes and rules are efficient, transparent and accountable***

Envisaged key actions and concrete outputs:

- Assess the available resources (financial, human and IT) of the EPRA Secretariat and reflect on their optimal use
- Continue to review the form and content of EPRA meetings
- Develop and/or improve the use of digital interactive tools
- Provide information on the role and expectations of Board members
- Identify future hosts, assess practical difficulties
- Review and update EPRA Statutes
- Review the existing Strategy and prepare and consult on the new EPRA Strategy

Annex: Strategy review and measuring performance

Commitment to Review

EPRA commits to assessing the implementation of its Strategy in the final six months of the Strategy period. A key element of this will involve consultation with members and other relevant stakeholders in order to assess EPRA's performance.

EPRA recognises that it exists in a dynamic and shifting audiovisual landscape and, therefore, commits to revisiting its current Strategy, in whole or in part, within the Strategy period, should external circumstances change and should such a review be deemed appropriate. This would be done in a way that is transparent and comprehensible to the EPRA members.

Measuring EPRA's Performance

EPRA commits to taking measures to assess its performance. In measuring its performance against the Strategy, EPRA will endeavour to answer the following questions:

- **Vision:** has EPRA's adequately pursued its Vision, as set out in the Strategy Statement?
- **Mission:** has EPRA's Mission been reflected in practice? Has it provided direction for the organisation and guided its strategic decisions?
- **Values:** have EPRA's Values been reflected in its day-to-day conduct and been a guiding light in decision-making for the organisation?
- **Achievement of Goals and Objectives:** has EPRA achieved its goals and objectives – in full, in part or not at all? In its activities, has EPRA been future-focussed and responsive to change? What was instrumental in achieving EPRA's objectives; what hindered or impeded their achievement? What have been the particular highlights over the period of the strategy? What does EPRA need to work on and what could it do better over the next strategy period?

Assessment metrics:

The assessment of EPRA's performance will notably involve satisfaction surveys and be based on a number of relevant indicators such as:

- the analysis of the content output produced during the strategy period,
- the review of EPRA's procedures and work processes during the strategy period,
- the consideration of key quantitative elements (such as the number of participants during meetings, the quantity of news items on the EPRA website, the number of representation activities etc.),
- the consideration of key qualitative elements (such as the level of interaction during meetings, cooperation and interaction between meetings etc.).