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## Social platforms and the transformation of media landscapes in the Baltic states

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**Abstract.** The aim of this study was to examine structural transformations of the media environment and the specific features of public discourse in the Baltic states under conditions of social media dominance and algorithmic content governance. The methodological framework of the study was based on a combination of a systems approach, secondary analysis of financial reports of media holdings and disinformation monitoring data, comparative analysis of regulatory practices of national Digital Services Coordinators, and the case-illustration method to assess media literacy initiatives. The analysis of media market indicators demonstrated the adaptation of the region's leading media group (Ekspress Grupp) to the Digital First strategy, which was confirmed by the growth dynamics of digital subscriptions and the transition to direct content monetisation models aimed at ensuring financial autonomy. Within the examination of the regulatory framework governing digital markets and services, it was found that the early implementation of the European Union's Digital Services and Digital Markets Acts enabled the formation of an effective supervisory architecture that combines technical oversight with human-rights-oriented mechanisms to counter algorithmic discrimination. A systematic review of the socio-communicative consequences of platformisation revealed the multi-platform nature of information disorders, where the ecosystems of Telegram, TikTok, Facebook and X function as channels for the dissemination of unmoderated content, thereby intensifying the risks of social polarisation. The examination of editorial practices, particularly the processes of multimedia content conversion and algorithmic subscription pricing, showed that the integration of artificial intelligence tools contributes to the optimisation of operational costs and the overcoming of language barriers, while simultaneously creating risks of the "algorithmic impoverishment" of the news agenda. Furthermore, the analysis confirmed that the disintermediation of political communication requires the revision of approaches to cognitive security through the expansion of the media literacy paradigm. The conclusions substantiate that the sustainability of media systems in the Baltic states depends on the development of a model of digital sovereignty based on the synergy of technological innovation and regulatory resilience. The results of the study may be utilised by public regulators to improve oversight of digital platforms, by media managers to optimise monetisation strategies and implement artificial intelligence solutions, and by educational institutions in the development of programmes on media literacy and cognitive security

**Keywords:** media literacy; artificial intelligence; media holding; digital sovereignty; disinformation; cognitive security

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## Introduction

The relevance of research into changes in the media landscape of the Baltic states is caused by the transformation of the national information systems of Estonia, Latvia, and Lithuania toward digital models of activity in the context of integration into the common information space of the European Union (EU). In this region, social media not only serve as a medium for the dissemination of content, but also play a crucial role in the restructuring of structural relationships between producers and consumers of media content. Academic interest in this issue has intensified due to the necessity of analysing strategies for local media groups to adapt to algorithmic regulation of content, as well as considering the ways to ensure the security of information in the context of hybrid threats. The metamorphosis of the media field in the Baltic countries in the context of platformisation is characterised by a systemic transformation of the institutional structure and the search for new models of digital resilience. As A. Balčytienė *et al.* (2024) showed that the concept of Baltic resilience to destructive information influences is based on the interrelation between the institutional potential of traditional media and the activity of civil society. The authors noted that media institutions in Estonia, Latvia, and Lithuania function as stabilising agents of democratic culture, where resistance to information manipulation is implemented through strengthening the audience's sense of self-efficacy. This process corresponds to the model of public service broadcasting, which, according to the analysis by K.E. Palshkov (2020), developed under the influence of converging political and geopolitical determinants. The westernisation of the media space and the institutionalisation of bilingualism enabled state broadcasters to transform into independent actors capable of ensuring pluralism of opinion within the region's multi-ethnic environment. The problem of the sustainability of media systems in a global network society, conditioned by cyber threats and disinformation, was thoroughly analysed by M. Warren *et al.* (2022). The authors understand resilience as the ability of national media to function in conditions of resource drain and reduction of audience attention. The research results show that the current media policy of Estonia, Latvia, and Lithuania does not fully guarantee the resilience of small media systems to external influences. The authors conclude that it is necessary to work out new tools for supporting a reliable and diverse information space, since the existing regulatory tools are not enough to ensure the stable functioning of the media in the digital environment.

The digital expansion of global platforms has led to structural transformations of journalistic work and business models of the industry. The research by M. Graßl (2023) distinguishes three levels of transformation of journalism caused by social media, encompassing the transformation of the organisational structure of newsrooms, the adaptation of content to the algorithmic

logic of platforms, and the transition to direct communication with the audience. The dependence of media structures on the technological basis of digital intermediaries has, as D. O'Brien (2024) concluded, resulted in the destruction of business models and market polarisation, when large media groups accumulate resources, and small ones are moving to narrow niches, while the need for free content remains the main obstacle to the financial sustainability of online media. Another aspect of the discussion among scholars' concerns changes in information consumption and the value of media brands. The predominance of social media, as L. Saulite (2023) points out, separated national media brands from representatives of Generation Z, whose consumption practices do not presuppose direct contact with the source of information. To counter this tendency, the study substantiates the need to adopt brand experience management strategies, in which technological adaptation serves as a means of strengthening audience loyalty. This corresponds with the conclusions of J. Zamauskė (2023), who demonstrated, using the example of the Lithuanian publishing sector, that the development potential of media enterprises in small countries depends directly on the integration of innovative technologies into traditional production cycles and on the use of digital marketing tools to maintain competitiveness. Under conditions of a limited domestic market, technological flexibility and the transition to multiplatform distribution therefore become decisive factors in the financial resilience of national publishing houses. An analysis of strategies adopted by media leaders and the associated socio-communication risks, presented in the research of D. Donauskaitė (2022), identified specific methods of adapting to global actors. The author documented the introduction of counter-innovative measures aimed at reducing dependence on the algorithms of Facebook and Google, which, in some cases, includes the development of linear broadcasting formats.

Although there are studies concerning the institutional robustness and transformations of journalistic practices in Baltic countries, the scientific literature is still missing holistic research that would simultaneously embrace EU policies and local strategies of platformisation in the context of hybrid threats. Existing studies have mostly focused either on the economic risks, the consumption practices of Generation Z, or management strategies. Thus, research on reconfigurations in the structures of media systems and public communication in small media markets remains fragmented. In this context, the current study aimed to investigate the influence of social platforms on the media system structure and the public communication traits in the Baltic states. The following objectives were assigned to accomplish this objective: to examine the evolution of the Estonian, Latvian, and Lithuanian media landscapes due to the platforms; to describe the institutional and regulatory environment for media

operation in the region; and to evaluate the socio-communication implications of platformisation for the public sphere and democratic processes.

## Materials and Methods

The work was analytical in nature. Within the study, a systems approach was implemented to analyse the media systems of the Baltic states – Estonia, Latvia and Lithuania – as a region characterised by a high level of digital integration and specific security challenges. The collection and processing of empirical material were carried out through a secondary analysis of statistical, financial and sectoral data for the period 2024-2025. The primary source of quantitative indicators included the financial reports of the media holding AS Ekspress Grupp annual... (2024) and the data Digital subscription results... (2026) on digital distribution for the fourth quarter of 2025. The global context of media consumption and technological trends was verified using the reports of N. Newman (2025) and C. Widener *et al.* (2025). The state of cognitive security and the spread of disinformation were examined on the basis of M. Vunš *et al.* (2025). The data analysis method was applied to investigate the transformation of media group business models in response to the economic pressure exerted by digital platforms. Through this method, quantitative market indicators were verified, particularly the growth rates of paywalls within the Delfi (n.d.) divisions, which made it possible to confirm the effectiveness of the transition to the Digital First strategy and the accumulation of first-party data. Further research required the application of comparative analysis, the object of which was the regulatory context and the activities of the Digital Services Coordinators (DSCs) – the Estonian Consumer Protection and Technical... (n.d.), the Lithuanian The Communications Regulatory Authority... (n.d.), and the Latvian Consumer Rights Protection... (n.d.). The comparison was conducted according to categories of regulatory models in line with Regulation (EU) 2022/2065 (2022) and Regulation (EU) 2022/1925 (2022), which made it possible to identify three approaches to oversight: technico-regulatory, human-rights-oriented, and infrastructure-security based. This helped establish how the implementation of the Digital Services Act (DSA) and the Digital Markets Act (DMA) formalised procedures for protecting national content from algorithmic distortions. A system-functional analysis was used to examine the socio-communicative consequences of platformisation, particularly the influence of algorithms on the spread of information disorders based on M. Vunš *et al.* (2025). Using this method, the roles of Telegram, TikTok, X, and Facebook in the dissemination of disinformation and the polarisation of society were analysed. Particular attention was given to the functional impact of artificial intelligence (AI) on editorial cycles, which made it possible to identify the nature of automation's influence on the reduction of production cycles while simultaneously creating

the risk of “algorithmic impoverishment” of content. To examine the practical aspects of resilience strengthening, a secondary analysis of the aggregated data from the report Key findings from the 2024... (2025) was applied, allowing verification of the impact of platformisation on mental health. Certain initiatives, including the forum Baltic MIL Day 2024 and the educational project Reviving Baltic resilience, were considered illustrative examples of the implementation of cognitive security strategies and the adaptation of media literacy to the conditions of a platformised environment. The approaches to interpreting the obtained results were based on the principles of technological determinism and socio-communicative functionalism, which made it possible to consider digital tools as factors in the transformation of societal patterns of information consumption. Within this framework, the publishing industry and the regulatory sphere were interpreted as strategic institutions for ensuring digital sovereignty and national resilience in the context of globalisation.

## Results

### Transformation of media landscapes in Estonia, Latvia, and Lithuania under the influence of platforms

The configuration of media systems in the Baltic states is determined by competition between national media groups and global digital ecosystems (Telegram, TikTok, X, Facebook). Within the current transformation, digital platforms have shifted from the role of intermediaries to that of core infrastructure, determining the algorithmic principles of content distribution and the mechanisms of advertising revenue redistribution (The global trends..., 2025). For the Baltic media market, this process has created the need for a systemic media morphosis – a comprehensive adaptation of business models to the conditions of platformisation through the implementation of EU regulatory standards (Naas *et al.*, 2025). This transition is supported by EU regulatory frameworks such as Regulation (EU) 2022/2065 (2022) and Regulation (EU) 2022/1925 (2022). Under the DSA, which obliges platforms such as Telegram, TikTok, X and Facebook to ensure transparency in content moderation, media holdings are better able to challenge unjustified reductions in reach or the removal of journalistic content that may occur due to automated errors in platform AI filtering systems. At the same time, the DMA has altered the economic landscape by limiting the ability of gatekeeper platforms to abuse their monopolistic positions. For Baltic publishers, this means fairer access to the digital advertising market and improved access to data on the preferences of their own users. DMA regulation encourages the development of a first-party data strategy, as the platforms are no longer allowed to dictate their own identifiers. EU regulations, thus, boost the “digital sovereignty” of national media, allowing national publishers to move from the status of tenants in the platform space to the landlords of independent digital ecosystems. In

such an ecosystem, one of the most important measures is not only the scale of the audience but the speed of converting the users into subscribers (paywall model), which is the efficiency of transforming loyalty into paid engagement. The case of the regional media holding Ekspres Grupp (n.d.) allowed observation of the process of applying the Digital First strategy in practice. As of the end of 2024, the share of the holding's digital revenues has reached a record 86% of the total turnover, which indicates the finalisation of the transition process from a classic publishing model to a purely digital media model (AS Ekspres Grupp annual..., 2024). The latter

became possible as a result of a consistent policy of introducing paid subscriptions, which formed the basis for the financial stability of the company in the long term. The transition to a direct monetisation model of content reduced the holding's dependence on fluctuations in the advertising market, which was going through a recession in 2024 due to a decrease in consumer activity and a general economic stagnation in the Baltic states. A more detailed analysis of the dynamics of audience engagement and the stability of demand for paid content during the period 2023 to 2025 can be carried out using the statistical data provided in Table 1.

Table 1. Growth dynamics of paid digital distribution for Ekspres Grupp in the Baltic states (2023-2025)

| Regional division (media resource) | Number of subscriptions (Dec 2024) | Annual growth (2024/2023) | Number of subscriptions (Jun 2025) | Number of subscriptions (Dec 2025) | Overall growth (2025/2024) |
|------------------------------------|------------------------------------|---------------------------|------------------------------------|------------------------------------|----------------------------|
| Estonia (Delfi Meedia)             | 114,631                            | 12%                       | 119,811                            | 124,000                            | +8.1%                      |
| Latvia (Delfi AS)                  | 35,082                             | 33%                       | 33,840                             | 40,090                             | +14.3%                     |
| Lithuania (Delfi UAB)              | 44,170                             | 11%                       | 47,758                             | 49,378                             | +11.8%                     |
| Total group                        | 193,883                            | –                         | 201,409                            | 213,468                            | +10.1%                     |

Source: AS Ekspres Grupp annual... (2024), Digital subscription results... (2026)

These dynamics suggest that the positive trend in digital conversion persisted regardless of the macroeconomic fluctuations. For instance, in Latvia, after a sharp rise in the number of paid subscriptions in 2024 and a short market correction in the first half of 2025, the market saw the highest rate of recovery (+14.3% over the year). Meanwhile, in Estonia, the situation was characterised by gradual stabilisation, which is typical for mature media markets with a high penetration of paid digital services. The Lithuanian division demonstrated steady growth, with an 11.8% rise in the number of subscriptions in 2025. This suggests not only that the media resource was successfully adapted to the demand of the audience but also that the strategies to retain the paying audience were efficient. Generally, the growth of the subscriber base by 10.1% in 2025 testified to the long-term changes in consumption patterns. The audience increasingly shifts from passive consumers of open content to active consumers who are ready to pay for quality national journalism. This proves that the transition to a paywall model helps local media groups to become financially independent from global advertising algorithms. Understanding the risks related to algorithmic dependence, the media holding Ekspres Grupp (n.d.) started to expand to the adjacent segments of the digital economy. The key vectors of diversification were the development of ticketing services and the creation of networks for digital out-of-home advertising (DOOH). By the end of 2024, revenue from ticketing operations in Latvia and Estonia increased by 21%, and revenue from the operation of digital screens by 26% (AS Ekspres Grupp annual..., 2024). The implementation of this strategy enabled the company to collect first-party data after the

disappearance of third-party cookies. This created prerequisites for sustainable marketing cycles in local media ecosystems and precise targeting of advertising campaigns without direct dependence on Google's tools. Therefore, this strategy empowered the technological sovereignty of national media companies. Parallel to changes in the mediascape, the formats of content production and consumption also undergo changes, with a focus on short vertical videos. The expansion of TikTok has prompted a series of restructurings of newsrooms and the creation of special teams that adapt investigative reporting and news into the visual grammar of platforms. According to N. Newman (2025), in 2025, the share of social video in the total audience was 65%, which proves the transition to visually oriented models of communication. This visual turn means that traditional media compete with influencers for attention within the framework of algorithmic feeds. Simultaneously, another driver of this process has been the incorporation of AI in the editorial routine. Media holdings use AI for automated translation and dubbing, which solves the language barrier problem between the Baltic countries without a significant rise in costs of personnel. Apart from linguistic adjustments, AI is also employed for automated comment moderation to fight hate speech, and for the production of personal recommendations, which optimise engagement metrics and time of audience engagement with the digital platforms of publications, thus reinforcing the position of national media in the competitive environment (Widener *et al.*, 2025). Therefore, the Baltic media systems' adaptation to platformisation has gone beyond the technological level and grown into a strategy of autonomous digital ecosystems' construction. The interplay of direct

content monetisation, AI implementation, and diversification of revenue streams through the collection of first-party data creates a new model of national media sustainability, which allows media to retain their agency in the global information environment. The ability of media holdings to monetise their audiences beyond the traditional advertising market becomes a decisive factor for their informational sovereignty. As a result, the success of the media morphosis in Estonia, Latvia, and Lithuania depends on the ability to keep a balance between the infrastructural benefits of global platforms and the reinforcement of their own institutional independence.

### Institutional and regulatory approaches of the Baltic states to the functioning of the media sphere

In 2024 to 2025, Estonia, Latvia, and Lithuania were among the most active in the EU in terms of transposition of the Regulation (EU) 2022/2065 (2022) provisions, reflected in the early establishment of national legal frameworks. This regulation radically changed the configuration of the interaction of state structures, users, and global technological platforms, introducing mandatory

requirements for the transparency and accountability of algorithms. A key component of the new regulatory paradigm was the functioning of national DSCs. These bodies have broad powers, ranging from certifying 'trust markers' to imposing financial sanctions of up to 6% of the global annual turnover of an organisation that has violated the rules (Digital Services Act..., 2025). In the Baltic states, the activities of DSCs are a critical step towards enhancing informational resilience by switching from the reactive practices of countering disinformation to the proactive monitoring of digital infrastructure. This model is based on the high level of interpenetration of technical supervision and protection of fundamental rights in the Baltic regulatory model. The governments of the region perceive the DSA as a tool for mitigating the information imbalance between local publishers and global media corporations. This is particularly relevant under conditions of hybrid threats, where digital platforms often serve as vehicles for the dissemination of destructive narratives. The distribution of powers and the main results of the activities of regulatory bodies in the Baltic states are presented in Table 2.

Table 2. Comparative analysis of the institutional competence and functional priorities of the DSCs of the Baltic states

| Comparison parameter           | Estonia  | Latvia   | Lithuania   |
|--------------------------------|--|--|---|
| Regulatory authority           | Consumer Protection and Technical Regulatory Authority                               | Consumer Rights Protection Centre of the Republic of Latvia                                    | Communications Regulatory Authority of the Republic of Lithuania                    |
| Regulatory model under the DSA | Technical-regulatory: oversight of intermediary service providers and media services | Rights-based: prioritising the protection of digital consumer rights and monitoring interfaces | Infrastructure-security: monitoring network resilience and algorithmic risks        |
| Key oversight instrument       | Article 22 DSA: Verification of "trusted flaggers" status                            | Articles 9-10 DSA: Issuance of administrative orders for content removal                       | Article 34 DSA: Monitoring systemic risks of VLOPs                                  |
| Functional priority            | Coordination of co-regulation mechanisms in the media sphere                         | Arbitration of complaints regarding unjustified moderation and restriction of illegal services | Ensuring network neutrality and auditing algorithmic transparency                   |
| Institutional interaction      | Consultations via the industry Media Services Council                                | Direct legal communication through the consideration of individual complaints                  | Strategic coordination with cybersecurity centres and IT infrastructure authorities |

**Note:** IT – Information Technology; VLOPs – Very large online platforms and search engines

**Source:** Regulation (EU) 2022/2065 (2022), Consumer Protection and Technical... (n.d.), Consumer Rights Protection... (n.d.), The Communications Regulatory Authority... (n.d.)

The activities of the DSCs testify to the formation of a differential approach to digital governance. The Latvian model involves the forced application of Articles 9 and 10 of the DSA, as indicated by the extensive application of legally binding orders (more than 288 were issued in 2024) to regulate the digital environment. In particular, Latvia has shown the practice of blocking illegal services and prompt reaction to users' appeals on removal of illegal information, which resulted in cleansing of the local network segment from unfair competition and unlicensed gambling. The Estonian scheme is based on Article 22 of the DSA, which admits the transfer of monitoring functions to professional media organisations and specialised non-governmental organisations (NGOs). This strengthened the institution of independent

oversight and promoted media literacy, as civil society is involved in the verification of information flows. The Lithuanian regulator is focused on the implementation of Article 34 of DSA, which regulates the activity of VLOPs. According to the analysis, the main function of Lithuanian specialists is the prevention of systemic risks, such as electoral manipulation or discriminatory settings of algorithmic recommendations. This DSC activity created a predictable legal environment for national media groups. Baltic publishers (e.g., Ekspress Grupp and Baltic News Service) possess an institutional mechanism to appeal against non-transparent decisions of global platforms. This decreases the risk of the "algorithmic disappearance" of quality content from search engine results or social media feeds. The practice of DSA

implementation became the regulatory basis for the transformation of the legal status of users through the introduction of protection from algorithmic determinism. One of the innovations is the option to switch off the personalised profiling, with the possibility for users to choose a chronological principle of organising their information feeds (Digital Services Act..., 2025). On the one hand, this prevents the manipulation of attention and decreases the creation of informational bubbles, which previously served as one of the most widespread tools for the polarisation of society. Simultaneously, the "right to explanation" has been established: platforms can no longer pre-emptively restrict content without a detailed legal explanation (Johnson & Roy, 2025). In the case of a conflict, users are able to use simplified out-of-court procedures to settle disputes, thereby increasing legal protection for individual recipients and professional media actors alike. This right sets a precedent for the responsibility of platforms for their content policies, which previously were subject to the internal regulations of the corporation. Against the backdrop of the popularity of TikTok among the younger population of the region, a total ban on targeted advertising to minors based on the processing of their personal data has been declared necessary (Johnson & Roy, 2025). This restriction not only protects children from commercial exploitation but also reduces young people's vulnerability to psychological profiling. Such an approach correlates with the strengthening of ethical standards in digital communication, including The 2022 Code of Practice on Disinformation (n.d.), Regulation (EU) 2022/2065 (2022) and Regulation (EU) 2022/1925 (2022), and reinforces

the overall information sovereignty of the Baltic states. Thus, the implementation of DSA standards in the Baltic countries has transformed the regulatory environment from passive observation into proactive oversight of digital infrastructure, providing national media holdings with effective instruments to protect themselves from the algorithmic dominance of global platforms. The synergy between state institutional preparedness and the expansion of users' rights has laid the foundation for the development of a resilient model of regional digital sovereignty, in which the prioritisation of high-quality local content and audience safety is governed by transparent norms of European law.

### Socio-communicative consequences of platformisation and challenges to cognitive security

The platformisation of the media landscape has changed the very structure of public communication and mechanisms of social interaction in the Baltic states. The digital development dichotomy of the 21<sup>st</sup> century lies in the simultaneous expansion of inclusivity in the information space and the emergence of vulnerabilities for democratic institutions. While platforms started as technical intermediaries, they became agenda-setters, which resulted in audience polarisation and undermining of traditional fact-checking. The risk of disinformation and information disorders is still present. According to M. Vunš *et al.* (2025), digital ecosystems have become key conduits for narratives aimed at discrediting state institutions and defence alliances (North Atlantic Treaty Organization). The specific influence of leading digital platforms on the region's information environment is systematised in Table 3.

**Table 3.** The role of digital platforms in the dissemination of disinformation in the Baltic states (2022-2025)

| Platform | Characteristics of disinformation dissemination  | Determinants of vulnerability and moderation challenges   |
|----------|--|---|
| Telegram | Acts as a hub for unmoderated channels with radicalised content                            | High level of anonymity and absence of transparent mechanisms for tracing original sources      |
| TikTok   | High intensity of visual manipulation targeting young audiences                            | Algorithmic virality enables a wide reach without prior fact-checking                           |
| Facebook | Contributes to social polarisation through closed interest-based groups and microtargeting | Exploitation of personal data for precise audience segmentation and creation of "echo chambers" |
| X        | Transformed into a primary channel for spreading political rumours and speculation         | Significant reduction in moderation standards and outflow of verified advertisers after 2022    |

Source: M. Vunš *et al.* (2025)

The analysis of the data in Table 3 demonstrates the technical specialisation of digital platforms to spread unverified information. Each of the ecosystems exploited its own architectural affordances, anonymity, algorithmic virality or microtargeting to reach out to different groups of audiences in the Baltic states. The institutional challenge was posed by Telegram with its low level of transparency in content moderation and low level of dependence on national DSCs. The high level of anonymity of Telegram channels served as an instrument for spreading information among target groups. Contrary to this, TikTok exploited mechanisms of algorithmic

virality, which allowed for scaling up visual content throughout the region. This created a time lag between the moment of publication and the moment when it was possible to fact-check the content, which was especially relevant for youth. The evolution of Facebook and X showed a different dynamic of information-space polarisation. Facebook remained a fertile ground for the creation of so-called "echo chambers", which are fostered by personalisation algorithms that reinforce the biases and views of the users and, therefore, increase the likelihood of social polarisation. In contrast, on X, the change of moderation policies led to an emphasis on

the fast circulation of unsubstantiated political rumours, which had a detrimental effect on the overall factuality of public communications. Consequently, M. Vunš *et al.* (2025) confirmed the multi-platform nature of information disorders in the region. This testified to the necessity not only of enhancing oversight within the Digital Services Act... (2025) but also of creating differentiated monitoring policies, taking into account the architectural features of each digital ecosystem. The success of the measures depended on the ability of the regulatory bodies to counteract the impact of algorithmic manipulation while maintaining freedom of expression in digital spaces. The acceleration of information flows and algorithmic dependency has taken a toll on the mental health of the population in the Baltic states. The report Key findings from the 2024... (2025) recorded an increase in indicators of problematic social media use among adolescents, with a particularly pronounced trend observed within the male segment of the sample. This led to the introduction of media and information literacy (MIL) programmes and the introduction of the concept of digital hygiene as part of public health and cognitive security policies. The efficiency of this policy is illustrated by the results of the Baltic MIL Day 2024 forum in Riga, at which the expert community discussed the need for an expansion of the traditional media literacy concept (Ēke-Cēsniece, 2025). The MIL model was complemented with modules dedicated to the work of AI and algorithmic recommenders. This transition testified to a move from reactive debunking to the building of cognitive immunity through an understanding of digital influence architecture. Another illustrative example of an institutional response to these challenges was the implementation of the project Reviving Baltic resilience (2014), which focused on engagement with local communities. In particular, the initiative within the Jewish community of Estonia demonstrated the effectiveness of resilience-building methodologies through specialised youth modules (prebunking or "cognitive inoculation", gamified simulation of fake news creation, deconstruction of ethnic stereotypes, technical verification of visual content, and algorithmic hygiene). Such measures enabled the integration of media literacy principles into the social structures of ethnic and cultural groups, ensuring comprehensive protection against external information manipulation. Thus, during the period 2024-2025, media literacy in the Baltic region transformed into a systemic instrument of psychological and social protection. The integration of knowledge about artificial intelligence and algorithmic risks also provided a higher level of societal adaptation to the conditions of a platformised media landscape. The platformisation of the media landscape led to cardinal transformations in the mechanisms of political communications in the Baltic states. One of the dominant trends became disintermediation, a communications strategy when political actors address voters directly through live broadcasting and short video formats, circumventing the editorial

filtering of professional media (Newman, 2025). Although this created the illusion of inclusiveness and accessibility of political leaders, at the same time, the discourse became simplified: complex issues of public administration were reduced to sensational posts adapted to the algorithmic requirements of digital ecosystems. The impact of platformisation on electoral processes was observed in Lithuania. In the course of the 2024 electoral cycle, a differentiation and growth of digital revenues of media groups was observed. Specifically, in the fourth quarter of 2024, an increase of advertising revenues by 9% was registered, indicating a massive transfer of political budgets to the digital domain (Widener *et al.*, 2025). This illustrates the argument that digital platforms have emerged as a core tool of political campaigning, and the success of a political project depends not only on the quality of its political programme but also on the ability to master the mechanisms of algorithmic promotion.

The period of 2024-2025 saw the rise of artificial intelligence as an integral part of the operational management of the Baltic media systems. The use of large language models helped media groups to cut their operational costs, which, in the small Estonian, Latvian and Lithuanian media markets, with their persistently growing labour costs, became of key importance. The media holding Ekspress Grupp included AI as one of the priorities of its vertical, with AI used not only for content creation, but also for the deep optimisation of business processes (AS Ekspress Grupp annual..., 2024). In particular, multimedia conversion, dynamic pricing and customer service automation were on the agenda. Automated image processing and audio synthesis from textual materials significantly shortened the time for production of podcasts and illustration materials. Dynamic pricing algorithms made it possible to adjust the price of subscriptions to the consumption habits of the users, which helped to increase the subscription revenue in 2024 by 8% (AS Ekspress Grupp annual..., 2024). At the same time, chatbots deployed for handling subscription requests decreased the operational pressure on the administrative call centres (Widener *et al.*, 2025). However, the widespread use of AI brought into the spotlight the problem of "algorithmic impoverishment" of content. Excessive orientation of the editorial policy to clickbait may lead to the lack of socially important, but low-rated topics, such as ecology or culture. Platforms, primarily YouTube, became firmly established as the leading entertainment content providers, while linear television was demoted to the "second screen" (Widener *et al.*, 2025). In line with the Digital Services Act (2025), the Baltic authorities were charged with monitoring the marking of AI-generated content in order to curb the spread of deepfakes and disinformation. In the regional security context, the issue became salient as an important component of counteraction of hybrid threats. The Baltic MIL Day 2024 (2025) forum stressed the need to include the practice of interacting with AI technologies in national

educational standards. Therefore, increasing the cognitive immunity of citizens to generated content became a task for the national DSCs, which in turn, increased the information sovereignty of the Baltic states in the conditions of high technological uncertainty. To sum up, the resilience of the Baltic media systems from 2024 to 2025 was provided by the synergy of technological modernisation and institutional protection of information sovereignty. This is evidenced by the monetisation of digital content as a result of the introduction of AI, the improvement of the regulatory control in the framework of the Digital Services Act, and the implementation of the models of cognitive immunity in media literacy. This made it possible to adapt to the processes of platformisation by combining the financial independence of media holdings with a high level of socio-communicational security of the society.

## Discussion

The results of the present study on transformational processes in the media industry demonstrated a shift in the paradigm of modern mass media functioning, characterised by a transition from a model of mass reach to a strategy focused on the formation of closed, loyal communities. The analysis of the obtained data confirmed that under conditions of digital saturation the financial sustainability of media outlets no longer correlated exclusively with traffic volumes, but increasingly depended on the depth of emotional and value-based connections with audiences. A comparison of the obtained results with the work of G. Peña-Ascaibar & M. Álvarez-Peralta (2021), who examined the Spanish media market (Eldiario.es, InfoLibre), revealed a convergence in prioritising relationship-building over technical metrics. The present study confirmed that the successful consolidation of new digital media was driven by specific business structures in which journalist ownership models and the involvement of readers as partners played a decisive role. This resonated with the conclusions of the aforementioned authors that engagement management policies had limited predictive value for subscriber numbers compared with substantive and reputational factors. The pattern identified by the researchers suggests that audience loyalty has evolved into a key financial asset, diminishing the significance of incidental traffic from social media platforms. The analysis of technological support for media activity in the present study revealed that digital transformation has become an unavoidable survival strategy for traditional market actors in the context of globalisation. The findings showed that adapting to new audience demands required not only changes in content formats but also the deep integration of innovative tools into editorial processes. These results fully correspond with the theoretical propositions of L. Chen (2024), who demonstrated, using the examples of The New York Times and The British Broadcasting Corporation, the effectiveness of employing artificial intelligence, big data

and virtual reality. The author confirmed that content diversification and the implementation of personalised recommendation systems enabled media organisations to retain users' attention. At the same time, the results of the present study indicate the vulnerabilities of this process, particularly risks to the authenticity of information. The convergence of findings from both studies emphasises that the future viability of the media ecosystem will depend on the industry's ability to balance technological innovations (for example, blockchain) with the resolution of security challenges and the preservation of trust, which remains the fundamental cornerstone of journalism. An in-depth assessment of the economic effectiveness of subscription models within the present study revealed a direct correlation between the implementation of paywall mechanisms and the growth of customer lifetime value indicators. The obtained results demonstrated clear parallels with the findings of J. Du et al. (2024), who emphasised that the subscription business model contributes to the stabilisation of recurring revenue under conditions of intense market competition. Their study highlighted the importance of adapting to changing customer preferences, which explains the necessity we identified for the continuous digitalisation of service provision processes.

The present research confirmed that the successful scaling of revenue was impossible without the use of digital tools for analysing user behaviour and forecasting audience needs. Both studies substantiated the importance of transitioning from a transactional model (selling individual copies) to a relational one (selling access and services), where customer retention becomes a priority over one-time acquisition. During the examination of micro-level user activity, the influence of the architecture and design of digital paywalls on audience conversion rates was identified. These results resonate with the study by S. Aral & P.S. Dhillon (2020), who, based on data from The New York Times, demonstrated the economic significance of paywall configurations for publishers' financial sustainability. The present study confirmed the causal relationship identified by these authors between the specific characteristics of access models and the demand for content. Consequently, managing a freemium model requires careful balancing by management, since excessively strict restrictions reduce user interest, whereas overly lenient ones fail to stimulate payment. This finding is consistent with the earlier conclusion of the present study that paywall design functions not merely as a technical element but as a key instrument for monetising audience loyalty, directly influencing a company's net revenue. The analysis of audience behavioural patterns in the present research revealed a differentiation in user interaction with content depending on their access status. This result aligns with the conclusions of I. Wadbring & L. Bergström (2021), who emphasised that audiences behave significantly differently "behind the paywall" compared with open-access

pages of media outlets. Both studies highlighted a substantial gap between academic theory, where this field remains relatively underexplored, and media practice, where editorial teams actively rely on internal traffic metrics. The convergence of these findings suggests that subscriber retention strategies should be based on behavioural models distinct from those used to attract new readers. A secondary analysis of the social consequences of the transition to paid models within the present study revealed a concerning tendency towards informational stratification within society. This conclusion received additional confirmation when compared with the work of R. Benson (2019), who argued that the subscription model risks excluding readers with lower levels of income and education. The author noted that although financial dependence on readers may stimulate higher journalistic quality (as in the case of Media-part), it simultaneously restricts access to such content to a relatively narrow elite audience. This finding correlates with the argument of the present study that the commercialisation of access to high-quality analytical journalism may undermine the civic responsibility of the media to inform society as a whole. The comparison thus revealed the dual nature of this transformation: on the one hand, greater independence from advertisers and political power; on the other, the risk of creating "information ghettos" for less affluent groups of the population, potentially deepening the knowledge gap.

The further development of the regulatory dimension in the present study made it possible to identify the DSA and DMA as the foundation of the European Union's Digital Strategy aimed at addressing the imbalance of power within the digital environment. This conclusion is supported by the work of A. Kern (2025), who emphasised that these legislative acts fundamentally transformed the rules of doing business for all actors, including international corporations. The results of the analysis in that study regarding the dual effect of regulation – the protection of user data and the stimulation of competitive pressure – fully correspond with the findings of the present research. The current study confirmed that the implementation of these acts contributed to increasing algorithmic transparency and strengthening user control over personal data. A critical analysis of the impact of digital legislation on traditional legal institutions within the present research revealed a tendency towards the fragmentation of consumer law. This finding receives theoretical support in the work of F. de Elizalde (2025), who argued that new regulatory instruments prioritise issues of competition and market structure while often overlooking the nuances of the category of the "consumer". The researcher noted that the regulation of private relations is no longer based exclusively on consumption, signalling the displacement of traditional consumer law by a new paradigm of EU digital private law. This interpretation corresponds with the conclusions of the present study, which indicate a shift in regulatory focus from

the protection of the individual towards safeguarding the architecture of the market as a whole. A comparison of global approaches to platform regulation within the present research revealed a significant divergence in international standards. These results resonate with the study by I. Lovrenčić Držanič & S. Žilić Fišer (2025), who compared European frameworks (General Data Protection Regulation, DSA) with American legislation (Communications Decency Act) and the Brazilian framework (Marco Civil da Internet). The authors identified tensions between the stimulation of innovation and the enforcement of algorithmic accountability, confirming the present study's findings regarding the existence of critical regulatory gaps at the international level. Both the present research and the cited study indicate that the inconsistency of standards creates obstacles to effective global content governance. The convergence of these conclusions highlights the urgent need to harmonise ethical obligations and standardise compliance mechanisms in order to prevent legal fragmentation in the cross-border digital environment. A critical examination of the collected data and its comparison with leading scholarly works allows us to conclude that the media industry and the legal framework are undergoing a profound synergistic transformation. The present study not only confirms existing theoretical models but also expands the understanding of the interaction mechanisms between subscription-based economic strategies, audience behavioural psychology and stringent regulatory pressure, all of which shape the emerging ecosystem of the digital society.

## Conclusions

The analysis of materials and reports from 2024-2025 indicates that the media systems of the Baltic states have undergone a phase of profound structural transformation, driven by the complete transition from traditional broadcasting models to autonomous digital ecosystems. The examination of the experience of the leading regional holding Ekspress Grupp demonstrated the high effectiveness of the Digital First model in small-language markets. Document analysis revealed that the systematic implementation of direct content monetisation and the active accumulation of first-party data allowed media groups in Estonia, Latvia, and Lithuania to significantly reduce dependence on the volatility of global gatekeepers' advertising algorithms. The review of media consumption indicators confirmed the dominance of smartphones as primary distribution channels, prompting the restructuring of editorial cycles to meet the demands of visually-centred formats and algorithmic feeds. This supports the conclusion that Baltic publishers have successfully undergone media morphosis in response to the challenges of the attention-based digital economy. The examination of the institutional and regulatory context showed that the early implementation of DSA and DMA standards provided the Baltic region with tools to

formalise the algorithmic accountability of technology corporations. Analysis of the activities of national DSCs revealed the development of a differentiated oversight approach that effectively combines technical control with human-rights mechanisms and infrastructural resilience. A systematic review of regulatory practices indicated that EU regulatory instruments acted as a catalyst for strengthening digital sovereignty, providing local media with legal mechanisms to protect against unjustified moderation and limiting opportunities for manipulative user profiling. This helped mitigate the risks of informational bubbles previously exploited for social polarisation. A synthesis of the socio-communicative consequences of platformisation highlighted the multi-platform nature of information disorders in the region, where the ecosystems of Telegram, TikTok, Facebook, and X serve as primary channels for the dissemination of unmoderated content. The analysis of AI integration into editorial processes demonstrated gains in operational efficiency, while simultaneously revealing the risks of “algorithmic impoverishment” of content due to a focus on click-based metrics. The experiences of initiatives

such as Baltic MIL Day 2024 and Reviving Baltic resilience demonstrated the prioritisation of strengthening community cognitive security as a foundational condition for maintaining democratic dialogue under conditions of complete political communication disintermediation and rising hybrid threats. A promising direction also includes the development of updated ethical protocols for media interaction with AI systems and the study of mechanisms for adapting local advertising markets to a full transition away from third-party cookies. Further research into these areas will contribute to enhancing the informational resilience of small media systems within the globalised digital environment.

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## Соціальні платформи і трансформація медіаландшафтів у країнах Балтії

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**Анотація.** Метою дослідження було вивчення структурних змін медіасередовища та специфіки публічного дискурсу країн Балтії в умовах домінування соціальних мереж та алгоритмічного управління контентом. Методологічна основа роботи базувалась на поєднанні системного підходу, вторинного аналізу фінансових звітів медіахолдингів та даних моніторингу дезінформації, компаративного аналізу регуляторних практик національних координаторів цифрових послуг та методу кейс-ілюстрацій для оцінки ініціатив медіаграмотності. Аналіз показників медіаринку засвідчив адаптацію провідної медіагрупи регіону (Ekspress Grupp) до стратегії Digital First, що підтвердилося динамікою зростання цифрових підписок та переходом до моделей прямої монетизації контенту задля забезпечення фінансової автономії. У межах опрацювання нормативної бази щодо регулювання цифрових ринків та сервісів було виявлено, що завчасна імплементація актів Європейського Союзу про цифрові послуги та цифрові ринки дозволила сформувати дієву архітектуру нагляду, яка поєднує технічний контроль та правозахисні механізми протидії алгоритмічній дискримінації. Системний огляд соціально-комунікаційних наслідків платформізації виявив мультиплатформенний характер інформаційних розладів, де екосистеми Telegram, TikTok, Facebook та X виступають каналами поширення немодерованого контенту, посилюючи ризики соціальної поляризації. Розгляд редакційних практик, зокрема процесів мультимедійної конверсії контенту та алгоритмічного ціноутворення підписок, показав, що інтеграція інструментів штучного інтелекту сприяє оптимізації операційних витрат та подоланню мовних бар'єрів, водночас створюючи загрози «алгоритмічного збіднення» новинного порядку денного. Окрім того, аналіз підтвердив, що дезінтермедіація політичної комунікації вимагає оновлення підходів до когнітивної безпеки через розширення парадигми медіаграмотності. У висновках аргументовано, що існування медіасистем країн Балтії залежить від формування моделі цифрового суверенітету, яка базується на синергії технологічної інноваційності та регуляторної стійкості. Результати дослідження можуть бути використані державними регуляторами для вдосконалення нагляду за цифровими платформами, медіаменеджерами – для оптимізації стратегій монетизації та впровадження штучного інтелекту, а також освітніми інституціями – при розробці програм із медіаграмотності та когнітивної безпеки

**Ключові слова:** медіаграмотність; штучний інтелект; медіахолдинг; цифровий суверенітет; дезінформація; когнітивна безпека