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Plan to Develop the Portuguese Regional and Local Press

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The present work is part of the result of an study project carried out for the Portuguese government with the following goals: i) to identify critical factors of success of the regional and local press; ii) to identify governmental politics that could stimulate a bigger competitiveness of the sector.

The study conclude that is necessary to implement a new model of the Press State Support System and to incentive the collaborators of the regional and local press to adopt new management and journalism practices.

The 10 key words that reflect the project main ideas are: Responsibility; Professionalism; Entrepreneurship; Autonomy; Technologies; Efficiency; Development; Market; Global; Local.

Introduction

Scope and aim of the work

This project results, in part, of a field work carried out throughout the country together with the existing and the potential addressees of the State supports to the regional and local press and aimed essentially at the identification of possible intervention domains that can have a structuring effect for a sustained development of the regional and local press in the next three years (2004 to 2006), preparing them for a gradual autonomy by opposition to the dependence of State supports.

The ideas for the elaboration of this project are placed upon two basic presuppositions with responsibilities distributed between the State and the regional and local journalistic companies:

- 1) to dynamize and to strengthen the role of the State as a promotional agent of the regional and local media development;

- 2) To increase the responsibilities and the commitment of the beneficiaries for the attainment of success and efficiency in the resources management.

Work organisation and contents

This work is structured in five parts that, in its whole, allows a better knowledge of the situation of the local and regional press in Portugal and which will have to be the main political options of the government to stimulate the rising of a new model of regional press in Portugal.

Point 1 (Starting Point and Methodology) essentially focus the main aspects related to the adopted work methodology to generate the basis information to conceive a support system to the regional and local media that is more adjusted to the reality and challenges of the regional and local media companies in a short and medium term.

Point 2 (Local and Regional Press in Portugal: State of the Art) presents some statistical data (audiences, circulation, sales, reading habits, etc) that in general characterize the regional and local press performance.

Point 3 (Press State Supports System: Situation and Political Options) presents a benchmarking with a comparative study concerning the way the different European governments perceive the State role towards the press. In this context some examples of models of support to the press in several European countries are presented.

Point 4 (The importance of regional and local press in Portugal) describes the relevance that regional and local press currently has and is expected to have in Portugal. Several economic and social opportunities are envisaged in the context of an increasing global and local information.

Point 5 (Conclusions and Recommendations) presents some conclusions in relation to the central ideas of the Government's projects to remodel the regional and local press in Portugal.

1. Starting Point and Adopted Methodology

The starting point for the Government to reorganise the regional and local social communication sector was essentially based on two major perceptions of the regional and local journalistic activity:

- a) Strategic importance for the regional cohesion and development.
- b) Economic and social potential of the regional and local information.

The importance attributed to the regional and local press is recognised not only by the Governments of the more developed countries but also by the specialists of the sector.

The regional press is integrated in an increasingly bigger trend of valorisation of the proximity journalism. Briefly, eight factors seem to be able to take the regional press to increase its importance as a mean of advertising and information in Portugal:

- 1) Development of the regional/local economy;
- 2) Increasing need for vectorial advertising communication;

- 3) Informative and advertising saturation of the national media;
- 4) The global phenomenon is harnessing the rising of a local one;
- 5) The Internet is helping the processes of production and distribution of information;
- 6) Knowledge decentralisation and school increase outside the great urban centres;
- 7) Development of processes of political and administrative decentralisation;
- 8) Necessity of a bigger communitarian integration and identification with the regional and local economical and social dynamics.

In accordance with a study carried out in Portugal by the Portuguese Press Association (API), we can conclude that 60% of the people inquired believe that the importance of the regional press is increasingly bigger.

To define the politics concerning the new model of support to the regional and local media we established a methodology that consisted of:

- Execution of a diagnosis of the regional social communication in Portugal;
- Definition of a new model and elaboration of a set of proposals to materialise it;
- Accomplishment of a tour throughout the country to directly inquire the owners and directors of the titles and local radios.

We also analysed studies produced on the sector and consulted some documentation that the press sent to us. As a result of this work, two major conclusions can be withdrawn:

- 1) The majority of the regional press lives in a predominantly amateur and protectionist model;
- 2) The State policies during the last 15 years have failed in the attempt to change this reality.

2. Local and Regional press in Portugal: State of the Art

In contrast to what happens in Portugal, the regional press is, in many European countries, a segment that presents great publishing quality, financial health and commercial dynamic, regularly making part of the media plans of the national and regional advertising agencies.

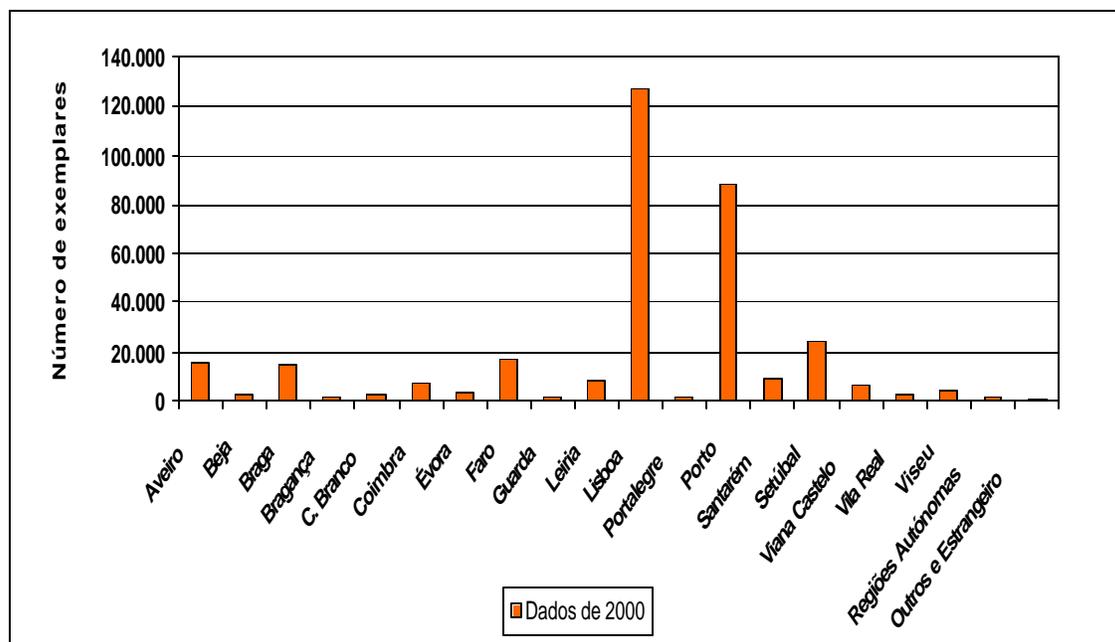
Despite the caution that one should take into account when comparing the performance of the Portuguese regional press and of the regional press in other external markets, the truth is that we cannot be indifferent to the abyssal distance between the two main comparison variables:

- a) Extreme fragility at the sales of the journalistic product level;
- b) Extreme fragility at the sales of the advertising space level.

On its turn, the “national” periodicals end up having a reduced impact on the universe of the social and economic tissue of the domestic territory, with little penetration outside the great urban centres of Lisbon and Porto. And despite this they are differently distributed, also reflecting some identity with the region where they are established, namely the Metropolitan Areas of Lisbon and Porto, respectively.

As it can be observed in Graphic 1, the minor adhesion to “national” periodicals in Portugal could be a chance to develop a more competitive regional press. However, this is not verified. The regional press has not been able to take advantage of this opportunity to strengthen its position in the respective geographical areas. The State support politics do not harness the exploitation of this opportunity.

Graphic 1: Circulation of the General Dailies by District *
(Diário de Notícias, Jornal de Notícias, Público, Correio da Manhã, 24 Horas)



Source: Author’s elaboration based on data from APCT - January to September 2000

In Table 1 some data on the Edition and Expedition are presented concerning 630 regional publications in 1999. The annual edition of the regional press from the 630 titles registered in the ICS (Media Institute) for the purpose of Paid Postage is of around 56 million issues. The expedition to foreign countries represents almost 10% of the total expedition.

Table 1: Edition and Expedition of several publications

Regional Press	Studied Publications	Annual Edition	National Expedition	International Expedition
Total	630	56.055.187	1.564.344	185.484

Source: Author’s elaboration from data of the ICS, 2000

Regional daily periodicals have a total average daily edition of 190.000 issues. Taking in account the 22 regional dailies analysed, we can establish an average of about 8.500 issues per edition, which is clearly a small figure.

As for the reading habits of the regional press, and in accordance with the Bareme Regional Press, carried out by Markttest in 2003, the habits of periodical reading, based on individuals with 15 or more years of age, residents in mainland Portugal (8.311.409) are the following: a) 65% of the population read national press; b) 51% of the population read Regional and local press. These figures are very much influenced by Lisbon and Oporto answers.

In fact, with the exception of the districts of Lisbon and Oporto, the regional press is widely preferred as opposed to the national press. The fact that in Portugal exists a slight predominance of national press readers only means that this preference reflects a predominance of the national press in Lisbon (74%) and in Oporto (76%) reaching levels of small expression in some of the other districts.

At the level of the other districts, there are five districts where the regional and local press, comparatively to the national press, possesses a great preference from the readers (superior to 66%): Coimbra (71%); Santarém (68%); Leiria (67%); Aveiro (66%); Castelo Branco (66%).

In general terms, the profile of the press readers is characterised as being in its majority men (57%) with ages between 25 and 44 years old (42%). Nearly 50% of the readers live in the central and in the north coast region. In terms of social classes, about 62% of the regional periodicals are read by people belonging to the middle and to the middle/lower classes.

Another clue that, from the point of view of the enterprise structures, can indicate a certain level of under-development of the regional press in Portugal is related to the labour situation of their collaborators. As we can observe in Table 2 more than 52% of the regional and local periodicals do not have a single full-time journalist. This confirms the amateurship that still prevails in many companies of this sector.

Table 2: Labour situation of the journalists from the regional and local press

Journalists	None	2 People	1 Person	With 3 or + People
Full-Time	52,4%	12,1%	19,8%	15,8%
Part-Time	56,3%	7,4%	15,4%	21%
Volunteers	98,2%	0,4%	1,5%	-

Source: AIND/IPOM Study, 2000

Therefore, the regional press is still in a relative state of under-development and needs to adopt modern working practises and be more market oriented. Among others, we can detach some of the main factors that have inhibited the development and affirmation of this segment in the national information market:

- Lack of studies about the regional periodicals audiences;
- Extreme “personalization” of the projects;
- Inexistence of managerial skills and of enterprise vision;
- Scarcity of resources to develop a team strategy;
- Smallness and limitation of the regional markets;
- Dispersion and fragmentation of local/regional and local titles;
- Concentration of the advertising investment on television;
- Lack of a culture of press reading habits;
- Inexistence of identity and of regional and local autonomy.

It is necessary to initiate a new cycle of change. On one hand, the State must privilege the journalistic companies that make investments and risk more in the development of its journalistic activity, and on the other hand, the journalistic companies must take better advantage of the supports to develop activities that add more value.

3. Press State Support System: situation and political options

3.1 The Portuguese Model

In Table 3, relative to the evolution of the amount of Paid Postage attributed by the Government in the last 12 years, we can verify a trend of successive decrease since 1999. The yearly average amount of support on the last 12 years was of 16.243.046 € The amount granted by the State in 2002 represents a 16% decrease when compared with the average amount and a 1% decrease when comparing with the previous year.

Table 3: Evolution of the Paid postage in the last 12 years

Years	Amounts (euro)
1991	14.133.490
199	17.456.304
1993	22.315.717
1994	19.642.161
1995	17.425.495
1996	15.358.280
1997	13.814.739
1998	14.546.040
1999	16.575.658
2000	16.154.808
2001	13.833659
2002	13.660.206
TOTAL	194.916.557

Source: ICS

The State support mechanism that is more valued by regional and local press is the Paid Postage. Despite that view there are other direct incentives besides Paid Postage. As can be seen on the next table regarding year 2001 when current measures were adopted, the total amount of direct incentives (other than Paid Postage) to regional press was €1.393.991.

Table 4: State’s direct incentives to Regional and Local Press – 2001

Domains	Imprensa	Total
Technology	€587.967	€1.393.991
Web contents	€608.563	
Innovation and Managerial development	€197.461	

Source: ICS

With the exception of the technology support measures, the two remaining incentives were created in 2001. Unfortunately, the contribution of these support measures to the development of regional and local press is questionable. The attribution criteria do not appear to have increased the development of the right projects, as they did not distinguish between professional and amateur projects.

3.2 The European Governments’ Perspectives

In contrast with the English and German perspective, relatively to the State supports to the press, the Governments of Austria, France, Holland, Norway and Sweden grant subsidies to its press, namely in order to guarantee that the citizens have access to the information and act as an active party on the political process.

In these countries the supports to daily periodicals aim the economical competitiveness of the journalistic companies with the intention of assuring diversity of titles and plurality of opinions. There are also direct selective supports to new media that enters the market in such way that minimises the entrance barriers, stimulates competition and strengthens the market system.

In Norway and in Sweden, as well as in Austria and in France, governmental direct subsidies are granted to secondary dailies that have difficulty to get advertising. In these countries, the supports are viewed as an aid to “second rate” periodicals enabling them to increase their market position.

Therefore, it does not exist in Europe a single model of supports to the press. The development of the attribution of subsidies systems is in a certain way associated with the political, social and cultural traditions of each country.

There are many variables that inspire the different models. Among others, we detach the following factors that contribute to the adoption of one determined model, more or less liberal/protectionist: i) market dimension; ii) economic development; iii) audiences behaviour; iv) general political and social environment.

In some European countries there are direct and indirect subsidies to the press, besides being national or regional. Eight European countries, namely Belgium, Finland, France, Italy,

Luxemburg, Austria and Sweden support their press in a direct form. Contrarily to what occurs in Portugal, the supports are not exclusive for the regional and local press.

As for the indirect supports to the press, the only existing common denominator in the majority of the countries, especially the European, is the attribution of a tax benefit: the VAT, equivalent to the Portuguese IVA. As it can be observed in Table 4 relative to a comparative analysis of the VAT in several European countries, the conclusion is that the discounts are focused essentially on the periodicals sales (rendering the final product more accessible to the consumer).

Table 4: Comparative analysis of VAT in Europe

Countries	Sales	Newsprint	Composition	Advertising	Plant	VAT Standard
England	0	17,5%	17,5%	17,5%	17,5%	17,5%
Spain	4%	16%	16%	16%	16%	16%
Ireland	12,5%	21%	21%	21%	21%	21%
Greece	4%	18%	4%	18%	18%	18%
France	2,1%	19,6%	5,5%	19,6%	19,6%	19,6%
Hungary	12%	25%	12%	25%	25%	12%/25%
Belgium	0	21%	21%	21%	21%	21%
Italy	4%	4%	4%	20%	20%	20%
Switzerland	2,4%	7,6%	7,6%	7,6%	7,6%	7,6%
Sweden	6%	25%	25%	25%	25%	25%
Portugal	5%	5%	19%	19%	19%	19%

Source: WAN, 2002

From the analysis of several types of existing incentives to the press in a variety of European countries, we can withdraw five major conclusions:

- 1) The countries from central Europe as, for instance, England and Germany, have a more liberal attitude and the countries from the north Europe are more protectionists;
- 2) Apart from France, the North European countries (Scandinavian) are the ones that tend to have more supports but they are, simultaneously, the ones with bigger reading habits;
- 3) There is a generalised trend, including the Scandinavian countries, to both rethink the utility of the supports and wisely grant supports to the journalistic companies;
- 4) The supports are more and more focalised and granted according to the presentation of projects by the journalistic companies, rewarding innovation and entrepreneurial success;
- 5) The projects presented that are related to the adoption of new technologies or whose journalistic products are transmitted in a multimedia frame tend to have preferential attention.

One of the main reasons that explain the reduction and more demanding requirements in the incentives' attribution to the press by Governments is related to the evaluation of its impact (at times less positive). One of the main conclusions is that the support models were conceived to answer to prompt situations and have not contributed to a sustained development of the printed news publishing companies.

In general, the journalistic companies have not used supports to reorganise themselves in terms of their working process. These supports also did not generate great positive impacts in the business expansion as well as they did not lead to the acquisition of technologies. According to Picard (1999: 2):

“ (...) most subsidies in Europe have had little effect on financial situation of newspaper and do not provide a mechanism for real long – term viability of subsidised newspaper. Subsidies can be effective if they are used to change a financial and market conditions of the marginal or failing newspaper. If subsidies are not used to restructure an operation, to expand markets or to acquire cost saving technology, they cannot solve the difficulties of failing newspaper”.

That view is charred by Cavalin (1995: 29) “(...) subsidy systems and other economic stimulating measures tend both to become less effective and to become gradually more criticised for causing market distortion effects. Selective systems have demonstrated the highest effectiveness, but are often looked upon with suspicion, both from a formal-legal point of view and from the point of view involving risks of abuse. “

Therefore, nowadays there are two main reasons used in the political speech that aim at a greater caution when granting supports to the press: 1) reasons of political nature: the democracies are solid; 2) reasons of economical nature: bad support exploitation.

According to Murschetz (2001) besides the countries mentioned in this document, there are still some European countries that have already had press supports and others that had meaningless supports, namely:

- a) Italy: the general supports were cancelled in 1987;
- b) Spain: there were, during the eighties, direct supports to specific investments;
- c) Greece: the supports are granted according each case but the small periodicals benefit from preferential treatment;
- d) Denmark: the supports are granted to specific projects;
- e) Belgium: the periodicals in French language receive more supports.

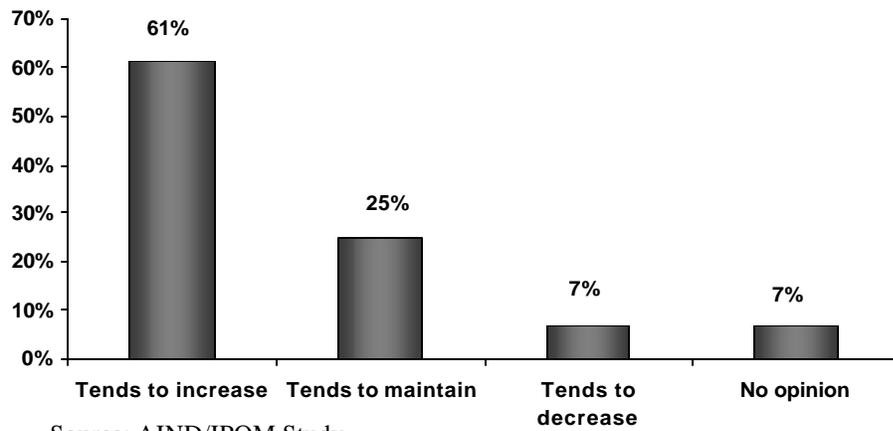
4. The importance of the regional and local press in Portugal

This segment of the journalistic activity is of vital importance for Portugal since we believe in its potential in the promotion of regional/local development and also to instigate the knowledge decentralisation, as well as on its importance as an entrepreneurial activity capable of being a strong motor for the creation of employment in the sector.

In the graphics that follow, resulting from a study carried out in 2000, we can evaluate the potential that the regional press seems to be suggesting in Portugal. The potential of the regional

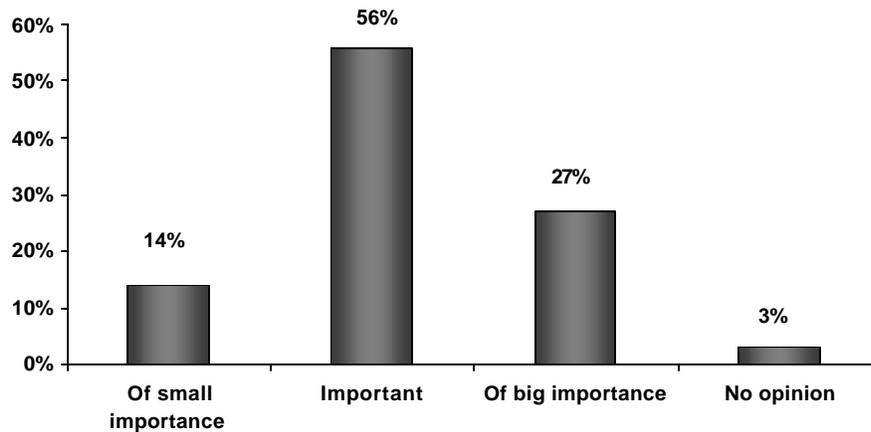
and local press in Portugal can be evaluated through the current perception of its public, as well as by the increasing importance attributed to this sector in the future. As it can be observed in graphic 2, about 61% of the people interviewed consider that the regional press in Portugal is going to be increasingly important in the medium and long terms.

Graphic 2: Future and current importance of the regional press



As for the role played by the regional press in keeping the people informed, the values presented in graphic 3 allow the conclusion that nearly 56% of the interviewed admit that this press segment has widely contributed to keep people informed about the regional/local events. On its turn, only 14% of the people interviewed think that the regional publications have a diminished contribution in this area.

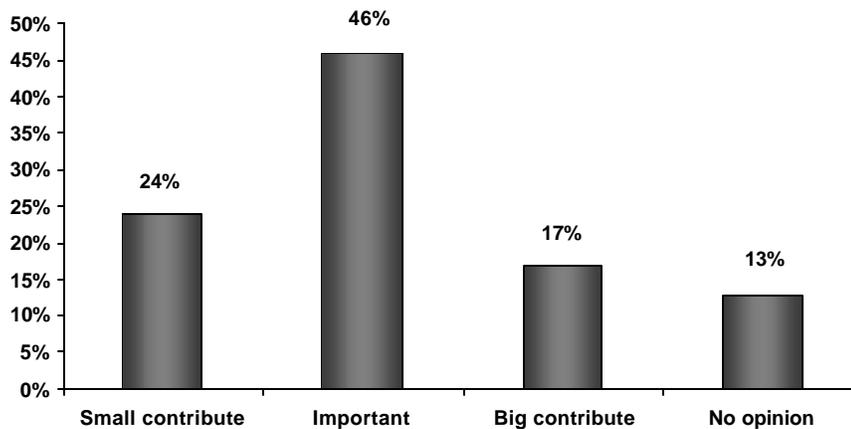
Graphic 3: Keeping people informed



Source: AIND/IPOM study

As for the contribution of the regional press to the regional cohesion, we can observe in graphic 4 that nearly 46% of the interviewed readers consider that this mean of communication contributes positively to the regional cohesion, which means that they recognise that it as an important role as a promotional agent of the local and regional identities.

Graphic 4: Contribution to regional cohesion



Source: AIND/IPOM study

As for the perception and image of the regional press in the national advertising market, it seems not to exist a positive attitude towards the product as an advertising frame, mostly in the advertising agencies and in the media purchase offices. This attitude is justified by several factors, among which we detach the following:

- Weak quality image conveyed for a long period;
- Lack of initiatives at the communication and product marketing levels;
- Inexistence of audiences data and of product's characterisation;
- High dispersion of the regional and local periodicals supply;
- Market smallness and concentration of the advertising investment.

However, it seems that this less positive perception of the regional press from the national advertising market is changing, mainly in the last two years. We can expect that this publishing segment will play a bigger role both in the advertising market and in the readers market. Among the factors that may contribute to this reinforcement trend of the regional press we can detach the following:

- From an economical and social point of view, the global is enabling the rising of the local;
- The advertising communication tends to be even more segmented according to life styles and geographical areas;
- Some regional journalistic companies are becoming more professional and are improving their product's quality;

- The increasing debate about the regionalization will influence the creation of an even greater regional/local awareness;
- Accomplishment of studies containing information that allows the support of the investment in advertising in the regional press.

In Table 5 we can observe some aspects that can become development aspects of the regional and local journalistic activity.

Table 5: Main factors of business leverage

Economical	Social	Technological	Educacional	Political
Development of the Local Economy	The global is harnessing the rising of the local	Internet: enables the increase of the product's market	Knowledge decentralization: creation of local schools and institutes	Political and Administrative Decentralization processes
Increasing need for focalised advertising communication	Greater need for information related with the daily practices and daily life	Internet: allows information / knowledge access and lower costs communication	Necessity for knowledge communication at national and regional level	Claims for power by public figures and local institutions
Saturation of the national markets	Need for belonging, participation and interaction in near-by projects	Internet: helps managing processes and information distribution	Increase of the scholar level and potential creation of future reader's generations	Greater inflexibility and selectiveness in the criteria of the State supports to the regional press

Source: Faustino, P.J, in "Obercom magazine", nº 5, 2003

5. Conclusions and Recommendations

5.1. Conclusions

As a result of this work we have concluded that a great part of the regional press lives in a predominantly amateur and protectionist model and that the measures implemented over the last years were an insufficient attempt to change this reality.

The Portuguese State spent during the last 11 years nearly 215 million Euro with the regional press, of which almost 195 million were spent in Paid Postage. Among several support models thought to bring dynamic to the regional and local media, we must chose a model that stimulates a more entrepreneurial attitude. To reward the risk takers and the entrepreneurial initiative seems to be a more adjusted form of intervention in this sector and more appropriate to the goals of turning the regional press into a more active instrument to the economical and social development of the country.

There is not a single country that grants exclusive supports to the regional press, although media product with lower dimension deserve special attention. The excessive pulverisation of headings leaves the majority of the regional and local periodicals in a situation of economic fragility, which does not benefit the editorial independence. It is the general opinion of the sector representatives that Portugal as too many regional periodicals, either in demographically terms as in terms of the economical dynamic, as well as when comparing with the European countries in general.

It is necessary to initiate a new cycle of change. On one hand, the State should privilege the journalistic companies that invest and risk more in the development of their journalistic activity and, on the other hand, the companies should learn to better exploit the supports in order to develop activities that add more value.

5.2. Recommendations

From several of the recommended measures to implement a new incentive system to the regional and local press, we detach:

- 1) creation of a single incentive (to the enterprise initiative and multimedia development) that will allow strategic partnerships, modernisation, workers qualification, through the establishment of new rules that imply professionalism and shared responsibilities;
- 2) reformulation of the Paid postage subsidies, establishing a gradual reduction of the State participation margins until it reaches an average participation of 50%.

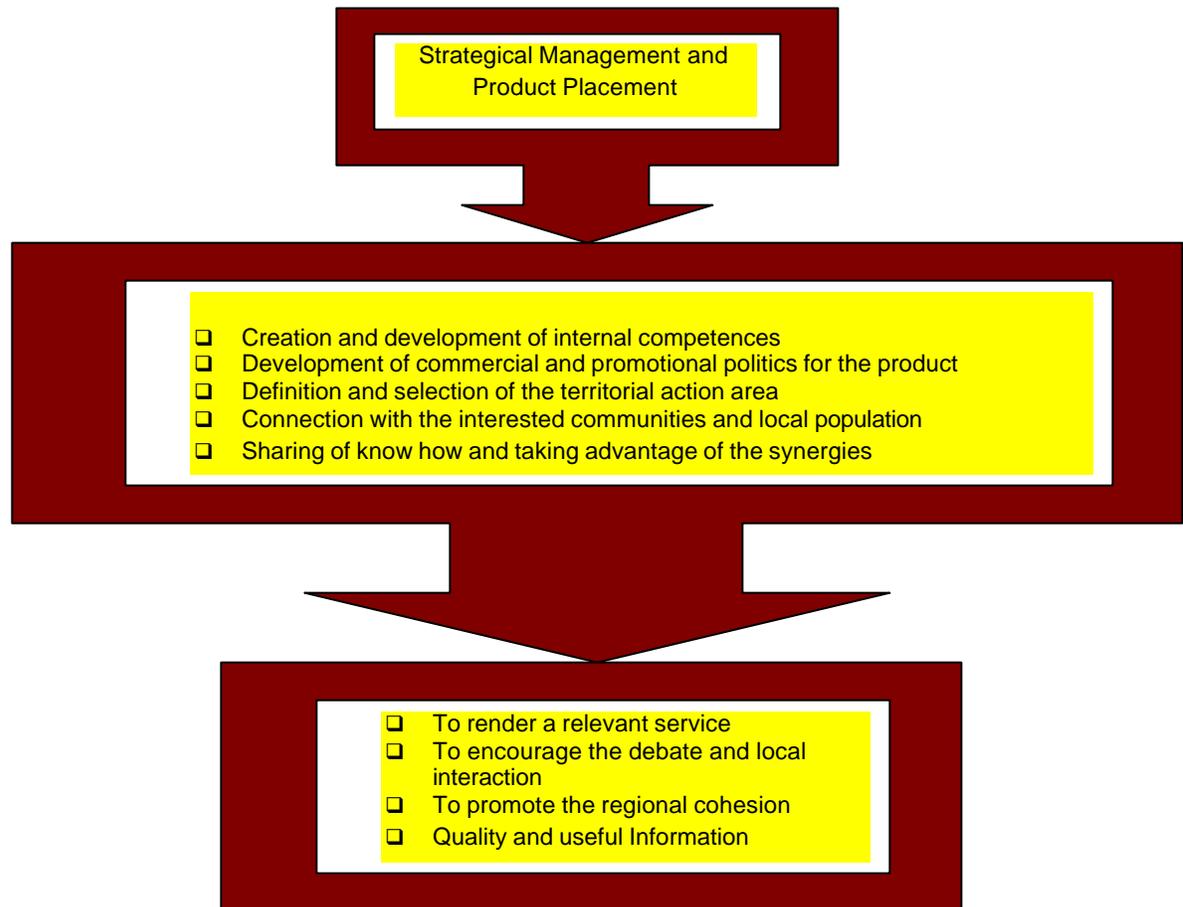
These support measures are looked like a State's obligation to protect a more fragile media sector, revealing a governmental protectionist attitude instead of an incentive to a more professional industry.

The incentive towards Entrepreneurship Incentive and Multimedia Development must privilege companies with higher determination to develop professional management initiatives as well as to assume higher risks in business development. State must assume itself as a partner that is willing to share investment risks with regional and press media companies, in the following domains:

- Strategic partnerships and business reorganization;
- Improvement of working conditions;
- Technology development and multimedia
- Management improvement and professional qualification;
- Diffusion, sales and marketing of press products;
- Cultural expansion outside the country.

As for the role and strategies to be adopted by the companies, Picture 1 describes, an hypothetical model of the main politics and enterprise practices necessary for the strategic management of the regional and local journalistic companies.

Picture 1: Management practices for the business development



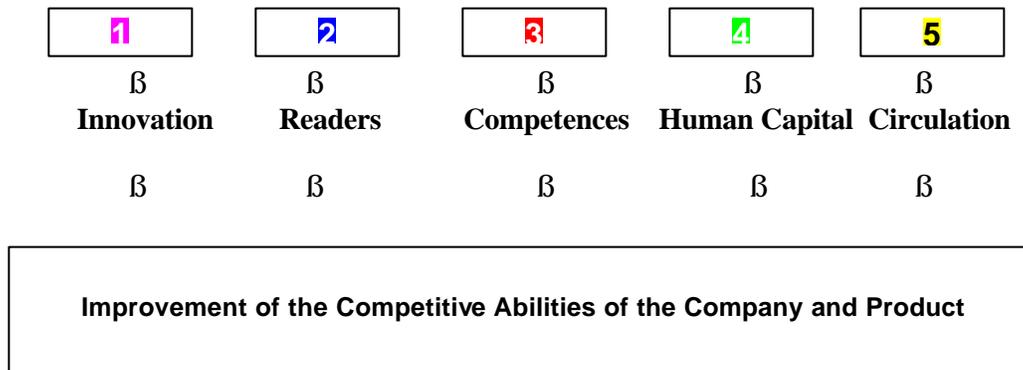
Source: Author's elaboration, 2002

Among some politics that the State can define to intervene in the dynamics and to contribute to a general improvement of the competitive abilities of the regional journalistic companies, we detach five forms of intervention. The implementation of these five measures will encourage the increase of the journalistic product demand, management focus, companies modernisation, professionals qualification and mobility and regional media reading:

1. Entrepreneurial Initiative and Multimedia Development
2. Program to Promote the Regional Editions Reading
3. National Initiative for the Professionals Qualification and Training
4. Program of Employment in Regional and Local Journalism Activity
5. New model of Paid Postage supported by Portuguese Government

The settlement of these measures will cover five of the main success critical factors, as suggested by Picture 2 presented below:

Picture 2: Integrated perspective of the Government's initiatives



Source: Author's elaboration

In synthesis, the ideas presented through this paper aim to gather clues to help the definition of a State intervention plan in order to establish a more dynamic regional and local press in Portugal. Although the State's responsibility in supporting this sector is recognised, it is also demanded from journalistic companies a more professional and market oriented management strategy. The proposed action plan derives from an integrated analysis of the main success factors that contribute to the regional and local press development and envisages the way the State should endorse the press supports. Thus, this project reflects an attitude that aims to erase the current amateur and protectionist model which domains the Portuguese regional and local press – and to help the creation of a Business Model with Social Responsibilities.

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