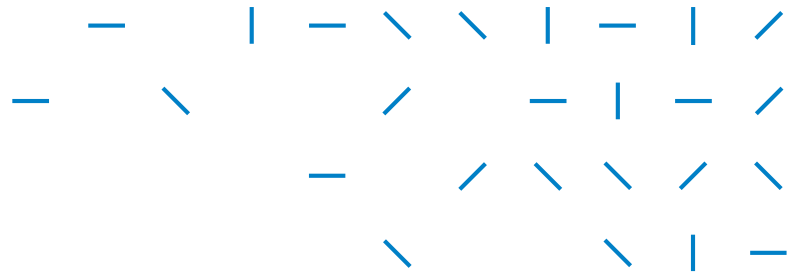**Baltic Centre for
Media Excellence**

Gap Analysis
of the Independent Media
Skills and Needs in the Eastern
Partnership 2023

Regional Overview, Analysis and Recommendations

by MAGDA WALTER
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Contents

Background

For seven years, the Baltic Centre for Media Excellence (BCME) has tracked media skills gaps in the Eastern Partnership (EaP) countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine) as a tool for the design of future projects supporting independent media, to inform donor policy choices and to provide a baseline (the initial study of 2016) for future assessment of progress. A study in 2021 measured progress in skill improvement and mapped new gaps in the independent media skill set in the five years since that baseline.

Now, in 2023, BCME and the team of national media experts producing this research decided there is a need for a new baseline study by which to track changes for the next five years. Sweeping changes in technology revolutionising the delivery of information, the explosion of disinformation, the Covid-19 pandemic and Russia's aggression against Ukraine have dramatically changed the political, economic, social and, consequently, media landscapes of the six EaP countries.

Methodology

A new baseline research template eliminated certain dated research questions and added new ones (such as new skills needed). **Digital skills** are no longer seen as a discrete category but **are cross cutting across all aspects of media work:** content production, distribution, promotion, revenue generation, and editorial and business strategic planning.

Because this study represents a new baseline, not a progress report, direct comparisons with past findings are not the goal. Nevertheless, observations related to dynamic changes in the landscape over recent years are unavoidable and should be of value to donors, especially if they illustrate a positive evolution of donor approaches.

Unlike in previous BCME Gap Analysis studies, a decision was made to provide only a brief overview of the political and economic context, assuming it is known to donors in sufficient detail. **Greater attention is paid to the most practical information of value to donors. That is: the status of the media industry, the country's media enabling environment, media economics, and most importantly the beneficiaries' direct input about their skills, and financial and other support needs.**

This document is a **summary of six country reports produced by national media experts**, based on desk research and semi-structured interviews with journalists, media managers and experts, and national media non-governmental organisations (NGOs). It also draws on the interventions by media and media NGOs at the Donors' Group meeting which took place early October 2023. Recommendations, where they are relevant to all or the majority of countries in this study reflect the recommendations of national experts, the authors of country reports. A separate research template was designed for the Belarus country report to allow for the specific needs and challenges of exile media.

Most of the data in this summary is referenced in the respective country reports.

What have we learned?

Despite their countries' differences in size, history, political and economic climate, independent media in the EaP face serious, and often similar, challenges. Economic barriers to building resilient media business remain severe. Their very survival, and thus their ability to bring impartial information and analysis of public interest to their audiences, will be dependent on donor support for the foreseeable future.

They are hampered by varying levels of political obstacles, some dictated primarily by external factors such as the war in Ukraine, others by their own repressive governments such as those in Azerbaijan or Belarus. The hostile environment of the last three years in Belarus has forced an estimated 90% of independent media into exile.

Polarisation and media capture by political and commercial interests continue plaguing Armenia, Georgia and Moldova, while in Ukraine, at least on a national level, political differences have given gave way to national unity in response to the war.

There are several new trends that have emerged in this study and the donor meeting. These trends may have germinated in past years, but are quite distinct now:

- Staffing difficulties. We have heard in the past about issues with **staff mental health** and burnout, pandemic and war related. Those problems persist. But now **we also hear from several countries about shortages of qualified staff**.

- Changing audience consumption habits. There has been a clear trend over the years of **audiences migrating online and especially to social media for accessing news**. In some countries this year, online sources are the top choice for audiences.

- Requests for greater donor involvement not just in providing financial and technical support for independent media, but also **greater pressure on national governments** to adhere to existing commitments and international standards for an enabling legal and regulatory media environment.

- Greater emphasis **on the needs of local and hyperlocal media**, a substantial proportion of which many respondents feel have been overlooked in past donor interventions.

1. Political, economic, and social context

The twin crises of the Covid-19 pandemic and the war in **Ukraine** have brough dramatic changes to the EaP countries and profound consequences in their politics, economies and social fabric. Ukraine, still at war defending its sovereignty against Russia's brutal and unprovoked aggression, while suffering the most severe effects, has also shown a remarkable degree of resilience.

The conflicts between **Armenia and Azerbaijan** in 2020 and in September of 2023, ending with Azerbaijan's recapture of the long-disputed territory of Nagorno Karabakh, have had added impact on those two countries. The resulting influx of 100,000 people from the enclave into Armenia led to serious social disruption in the country.

Ukraine and Belarus, have a set of needs distinct from the rest of the group and also as compared to past BCME studies – Ukraine owing to the war, and Belarus, with of political repression having escalated to the point where the majority of the country's independent media now operate in exile. Nevertheless, they also share certain common trends described in this study.

In the face of the weakness of advertising markets, combined with changing media consumption patterns and emergence of new business models, media in this region are still evolving. They are making progress in convergence, multimedia production, development of new revenue sources, and social media strategies, and the skills this environment demands, although this report also shows significant skills deficits on these fronts.

In **Armenia**, **Azerbaijan** and **Moldova**, the movements across borders of large numbers of Russians and Ukrainians since the outbreak of the war have led to greater demand of **Russian and Ukrainian language media content**.

In **Moldova**, snap parliamentary elections in early 2021 ushered in a pro-Western, pro-EU government, much more open to reform, including that of media, than its predecessor. **Georgia** faces parliamentary elections in 2024. The public is distrustful both of the ruling Georgian Dream party, which is accused of backsliding on democratic reform, but there is also distrust of opposition parties, leaving society polarised.

2. General media landscape

Economic fallout

Following the hits to the economies of some EaP countries from the pandemic and the war in Ukraine, and other localised adverse conditions, business advertising fell in most markets. Azerbaijan's, Georgia's and Armenia's economies grew over the past year – Azerbaijan thanks to its abundant energy resources, Armenia and Georgia mainly as a result of a massive influx of people and money from Russia after its aggression in Ukraine, as well as increased trade with Russia. But despite this growth, even in these three countries **the advertising markets remain feeble**. This comes against the global changing patterns of media consumption and resulting disruption to traditional media business models in which advertising used to be the core revenue source.

Most independent media studied here **are fully or partially dependent on donor funding**.

Reports from several countries indicate a significant **shortage of qualified personnel** for editorial and commercial departments. Sales, marketing and grant managers are in particularly high demand. Some media outlets also voice concern that international media development organisations distort the labour market by attracting the most talented media professionals – domestic media cannot compete with international organisations in compensation levels.

The economic climate means that even those media outlets that were previously commercially viable are becoming dependent on grant support. Lacking the sustained experience of donor supported media in **proposal writing and grant application procedures**, they are expressing a need for assistance in developing those skills.

Enabling environment

Despite their differences, independent media face financial challenges and **varying degrees of political roadblocks** in all EaP countries.

The **political environment** for independent media to function deteriorated markedly in Azerbaijan and, dramatically in Belarus where it is no longer safe to function as an independent journalist or even consume independent media. It is becoming increasingly hostile in Georgia where independent journalists face verbal and physical attacks, death threats, illegal surveillance, lawsuits and limits on access to information.

In Moldova and Ukraine, the now opened path to the European Union (EU) accession has prompted reform. The **regulatory and legal framework** has improved in Moldova, accelerated by the shift in the direction of national politics following parliamentary elections in 2021. Nevertheless, the old challenges related to media polarisation and concentration remain. Similarly, Ukraine, consistent with its ambition for EU accession, has passed a new media law in early 2023 which experts generally agree, aligns Ukraine more closely with EU legislation and norms. Some of its details have raised concerns among the Ukrainian media community and civil society.

These two countries' and Georgia's ranking in the Reporters without Borders media freedom index rose significantly; Ukraine by 27 places, and Moldova by 12 (**63 places since 2019**), and Georgia by 12. This means media freedom in Moldova is highest rated among EaP countries.

RSF MEDIA FREEDOM INDEX

Country	Value
Moldova	28
Armenia	49
Georgia	77
Ukraine	79
Azerbaijan	151
Belarus	157
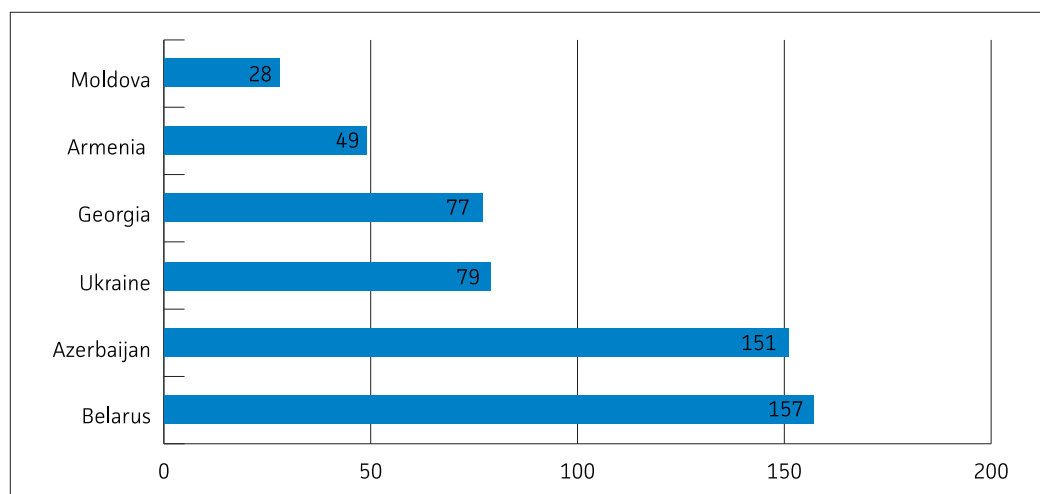
Disinformation

The perfect storm of a global pandemic, a major European war, and the rapid expansion of social media activity in recent years have all contributed to the **explosion of disinformation**, destabilising societies. In the EaP countries the Russian government is widely accepted as the main source of false narratives via Kremlin sponsored media, their local proxies and social networks. Local politicians are also seen as generating and spreading their own false narratives.

These efforts, aimed at dividing societies, and preserving or regaining political influence in cases where national governments follow pro-Western, pro-EU policies, intensify in the lead-up to national elections. The narratives centre on attacking western values, including human rights, (labelling many of them 'decadent' or 'anti-family'), the European Union, and the North Atlantic Treaty Organization (NATO).

Experts in Moldova and Ukraine agree the most vulnerable audiences are Russian speakers in both countries. In Ukraine, media analysts believe media literacy campaigns need to primarily target residents of occupied and frontline territories, the internally displaced and older citizens.

Big Tech

Journalists, media managers and media experts point out that the corrosive effects of disinformation are exacerbated by **policies of the Big Tech platforms**. In an environment where public discourse is moving online and onto social media platforms, and many outlets rely on social media for distribution of their content, they are often hampered by platforms' practices. They include blocking or mislabelling of legitimate news content, account removal, and shadow banning by malign actors, and the platforms' slow response to complaints or requests for reinstatement. This distorts audience metrics of their reach and deprives users of timely public interest information.

Belarusian media face additional challenges, among them platforms recognising Belarus as part of the "Russian segment" of the internet. In Google News searches, for example, searches in Belarusian are not possible, and Russian language searches take users to Russian state propaganda sites and channels.

Also, Meta and Instagram ban advertising originating from outside the country appearing alongside political content ("issues of public importance"). And visibility in Google search results can be limited for sites that are permanently blocked by Belarusian, and Russian, governments.

National versus local

A trend shared across the region is the **disparity in skills and content quality between national media, and regional and local outlets**, which are closer to communities and often in a better position to deliver public interest content of immediate value to audiences' everyday needs. And in Georgia, among the local media, there is further division – those with consistent donor support are more resilient to political pressures and provide quality information. The smaller, underfunded media are struggling.

Smaller media across the board are less likely to have **editorial and commercial staff functions separated**; very few local media, even in Ukraine – the largest market - can afford dedicated sales or marketing personnel.

These disparities and the need for **greater emphasis on support for smaller local outlets**, and those that are currently being missed by donors is a prevailing theme of this study and other research in the media development sector and conference interventions on the subject.

From the Georgia report: 'It is recommended that donors engage with those small-scale media in cases of demonstrated ability and potential for growth, and if the media outlet meets independence criteria and serves under-covered regions and/or vulnerable communities.'

Audience research

The lack of consistent, reliable and affordable **mechanisms for monitoring and measuring audiences** has been a long-standing challenge. This has been a major barrier to the full development of independent media as healthy businesses in EaP countries, even in the largest market, Ukraine.

Despite this appearing in every needs assessment conducted by the BCME since 2016, a solution has eluded donors. This has been particularly challenging for broadcast media. Very few pay for research unless donors fund it. But these are occasional studies not ongoing tracking of ratings. Markets are frequently seen as too small to support a robust advertising sector, thus, to justify the entry of commercial audience measurement companies, and those that are present are perceived as unreliable or corrupt, as is the case in Moldova.

The current study suggests that **online sources**, especially social networks and messengers like Telegram, **have either taken over or are inching closer to TV as main sources of news** for large sections of the audience in several countries. In Georgia and Armenia, the gap between TV and social media has narrowed, especially among young audiences. A 2023 survey in Ukraine showed 77.9% of Ukrainians turned to social media for information. In Moldova 54% of the public cite the internet as their primary source of news, TV is 30%.

Now, with media managers and journalists having access to a multitude of online metrics tools allowing them to measure and take the pulse of their audiences (such as Google Analytics, SimilarWeb, Adobe Analytics, SocialBakers, Moz.com, HubSpot and others), this problem has taken on a different dimension (see next section).

Today, however, an added variable complicates capturing audience needs and analysis of demographic data – the movement of large numbers of people, primarily Russians and Ukrainians, across borders, and the latter within their country as well.

3. Skills gaps and strengths

The already mentioned growing trend of **audiences turning to the internet**, and more specifically social media platforms for news, coupled with the shift to online advertising, creates a growing need for skills covering many aspects of content creation and its monetisation. Media managers seek for themselves and their teams the advanced skills and technology needed to further granulate, engage and grow online audiences and build sound business and editorial strategies. Those advanced tools and software, need to be **customised for countries' alphabets and languages**, to refine those strategies.

Most **journalism schools teach theory** rather than practical skills, with several notable exceptions mentioned by the national media experts, among them the Moldova School of Journalism, Georgia's Caucasus School of Journalism and Media Management, and the Kyiv-Mohyla School of Journalism in Ukraine. And in Azerbaijan, not only theory but also loyalty to the regime is on the curriculum.

Content production

One cannot generalise too broadly about the diverse range of skills among independent media studied in these six countries, but there are indications of common trends. Broadly speaking, the authors of national reports for this study see media skills, especially in content production, as vastly improved in recent years, whether it be audiovisual production, advanced writing skills or use of social media for news gathering.

Journalists are reported to have the basic skills need to produce content in **formats tailored to different online platforms** (although the levels of those skills vary – between national and local media, and between countries). But managers and editors stress that developing and improving such skills has to be continuous, given fast changing technology and consumer habits.

Thematic reporting continues to be patchy. The teams of most independent outlets are too small and budgets too tight to allow working on specialised beats, but a few have managed to dedicate individual reporters to report on subjects where they have added expertise at least sporadically. Armenian and Georgian experts report high levels of thematic specialisation among reporters which nevertheless is often underused for these reasons.

Advanced writing and productions skills also vary widely, but the common gaps most often cited are: data journalism, including open-source intelligence (OSINT), use of visuals and graphics (especially in economic and investigative journalism). Analytical writing and commentary remain a challenge.

The skills' disparities mirror the disparities in size and funding levels between national and local media.

Belarusian exile media face exceptional difficulties in accessing information. Most are criminalised by the regime. As a result, staff and freelancers in the country operate covertly, officials refuse to engage, experts are hesitant about granting interviews, and the user generated content (UGC) from inside the country, which exile journalists depend on, is also limited by threats of criminal liability for those who contribute information.

Audience strategies

Many outlets have been **developing new revenue streams**, in addition to advertising although they are not generating sufficient volumes to ensure commercial viability. Those include services (video production, publications) subscriptions, some donations, especially from wealthy expatriates, partnership projects, YouTube revenue, newsletters and podcasts.

Audience revenue models, however, such as memberships, paywalls, donations tend to be harder to implement in countries either at war (Ukraine) or those where standards of living remain low, and the public are not keen to pay for content they are able to access for free.

In at least three of the countries studied (Azerbaijan, Moldova and Georgia) – media editors and managers expressed interest in obtaining support to **develop mobile news applications** as means of limiting disinformation and preventing wrongful blocking and takedowns of content on social media. This would need to be preceded by research on the likelihood of audiences using them instead of social networks to access information.

One interviewed editor spoke of open-source software for such applications, accessing which would add significant to their distribution options.

4. Donor support

Independent media journalists and managers, as well as representatives of national media organisations are reporting **greater donor receptiveness** to their feedback on the need for changes in the content and modalities of media support programmes. They welcome the emphasis on interventions more **tailored to the needs of individual media outlets**, and the focus on **longer term in-house coaching or mentoring** and urge the expansion of such programmes. According to managers' interviews for the report as well as those who spoke at the October 2023 Donors' Meeting, short-term workshop that are still fairly common, often do not reflect local needs and interests, and small outlets have trouble releasing scarce staff to attend them.

There are **more programmes focusing on management**, strategic business planning and revenue generation, the need for which media managers have signalled for years. But the demand for improvement of those skills remains unfulfilled.

Media and media NGOs have become more vocal than in previous years in calling for support from donors not just through grants and capacity building in journalism and media management, but also support in **pressuring their governments to improve the legal framework** conducive to media freedom or abide by international and domestic commitments already made and existing on paper but not always adhered to in practice.

In Azerbaijan, where for years BCME studies reported low levels of donor media development activity, an increase in training and mentoring programmes is being noted in the last two years.

Also, from an editor in Azerbaijan comes the idea of creation of a centralised national training centre, a model which potentially could benefit other countries. It is seen as better option than multiple random training projects lacking cohesion in relation to needs, and often duplicating each other.

Interviewed media managers almost universally stress that their preferred form of financial support is **core funding rather than a project-based approach**. Not only are projects not always relevant to the needs and interests of targeted audiences but some managers point out that project funding clashes with donor requirements for financial viability of media companies. Fulfilling the requirements of projects distracts from long-term and strategic business planning.

5. Recommendations

BCME reports, drawing from inputs from the journalists, media managers and media NGOs at the receiving end of donor assistance, have repeatedly recommended **joined up, jointly funded solutions** to certain persistent

and enduring problems plaguing independent media in the region. These have not materialised, with aid remaining fragmented, and based on what the media community has been telling us, not always suited to the needs of the beneficiaries. To address this, and other outstanding challenges faced by media outlets, the following recommendations are:

- **Greater collaboration among donors** – this has been frequently brought up in responses by those interviewed for the country national reports, and in meetings with donors.

- **Content production skills** most needing continued improvement: audiovisual materials, data analysis and visualisation, OSINT techniques, thematic journalism (especially on election coverage), investigative journalism, fact-checking.

- To support projects delivering basic or advanced capacity building in skills and tools for developing **successful media businesses in the new digital landscape**. Those include: content distribution on online platforms, advanced audience research, engagement and analysis for development of editorial and business strategies; organisation and workflow management, revenue generation and diversification, marketing.

- To continue supporting **advocacy efforts of civil society and the professional community** for national governments to improve the legal framework for media or support self-regulation where appropriate (Armenia), and to abide by commitments already made, and by EU standards and regulations through:

  - Support national NGOs that advocate for media reform, access to information and media plurality.

  - Capacity building for media communities in developing and improving effective advocacy skills.

  - Direct influence (built-in conditionality) on EaP national governments in the context of broader development assistance packages.

- Identify **small local and hyperlocal media outlets** currently not on donors' radar. Also provide enhanced support to those that already are. They can be assisted through:

  - Investigative journalism programmes, as media closer to communities can better report on local corruption. This will be particularly important in the reconstruction of post-war Ukraine.

  - Offline networking events for regional media that will nurture new contacts, business opportunities, knowledge sharing and collaborations.

  - The wide range of digital skills described throughout this study that are in demand across the region are least developed among local media, so the need for enhancing them is greatest here.

- Experts and media managers in all of the studied countries are calling for **less project focused funding in favour of longer-term institutional support**. Planning for growth is impossible when media businesses are in an ongoing survival mode and focusing on fulfilling donors' requirements on projects.

- Fund national and international organisations providing **legal support to media**.

- **Pressure on tech companies** to develop mechanisms that prioritise legitimate, verified news content over misleading information on their platforms, prevent wrongful content removal and guarantee timely resolution.

- Donors could also consider the proposal by participants in this study to create or facilitate access to open-source **mobile news applications**.

- Many of the above recommendations are also relevant to **Belarusian exile media**. But they also report needs and challenges specific to their circumstances:

    - Expertise to develop **secure methods for collecting and verifying UGC**.

    - Expertise in **circumventing censorship**.

    - Support for **joint projects** among exile media organisations.

    - Training in **social media marketing, fundraising, project management, OSINT, and creating and repackaging content** for different online formats and platforms.

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