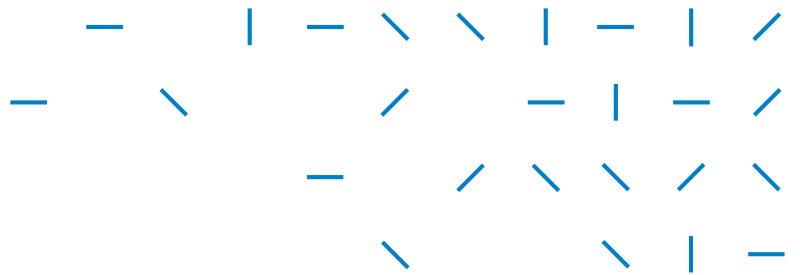




Baltic Centre for  
Media Excellence



# Policy Paper

---

Gap Analysis  
of Independent Media Skills and Needs  
in the Eastern Partnership  
*2019 Update*

Recommendations for donors and media development institutions



---

# Contents

|   |          |
|---|----------|
| <b>Objective</b> . . . . .                                  | <b>3</b> |
| <b>Methodology</b> . . . . .                                | <b>3</b> |
| <b>Gap Analysis 2019 findings – highlights</b> . . . . .    | <b>3</b> |
| <b>Analysis – how much change has there been?</b> . . . . . | <b>4</b> |
| <b>Models of support.</b> . . . . .                         | <b>4</b> |
| <b>Donor responses.</b> . . . . .                           | <b>5</b> |
| <b>New approaches?</b> . . . . .                            | <b>5</b> |
| <b>Recommendations</b> . . . . .                            | <b>6</b> |
| <b>BCME</b> . . . . .                                       | <b>8</b> |
| <b>Annex.</b> . . . . .                                     | <b>9</b> |

---

## Objective

This paper provides research-based evidence and analysis to assist donors and other stakeholders in taking decisions and setting priorities regarding the types of interventions and funding modalities needed to strengthen independent media in the countries of the Eastern Partnership. The final goal is to provide citizens of these countries with unbiased news and information, as well as a greater plurality of voices, free from commercial and political influence.

It is based on the results of a study updating the baseline *Gap Analysis of Independent Russian-Language Media Skill Set in the Eastern Partnership* (GA) commissioned by the BCME in 2016–2017. The baseline GA consisted of six country reports, as well as a regional overview of findings and recommendations, and a policy paper for the donor community.

The current study follows the same format and assesses progress in skills improvement, maps new gaps in independent media outlets' skill sets and explores the degree of donor response to the earlier recommendations.

There has been a change in scope with the current update. Based on recommendations in past studies from researchers and their respondents, the narrow focus on Russian-language independent media has been abandoned. The full rationale for this is spelled out in the regional overview of this year's update which accompanies this document, but in summary: independent media outlets in both national languages and the Russian language share many of the same challenges, skills gaps and support needs, and it's not exclusively Russian-language media that are exposed to Kremlin-generated narratives.

## Methodology

The BCME recruited country researchers with a track record of media research and expertise recognised in the domestic and international media community. They worked to a research template (attached as Annex) calling for research consisting of:

- Interviews with journalists, media managers, academics and media NGOs
- Desk research of existing literature
- Where significant, providing updates to quantitative data on the country's economy and demographics, the size of its media and advertising market, and the level of media freedom. Where quantitative data were unavailable or unreliable, qualitative assessments from local experts were expected

- Analysis based on the research findings and authors' own in-depth knowledge of the country's media market.

Elements of the study update were:

- Updates to national overviews, consisting of description of changes to the political and economic context, and identifying major media outlets and major independent outlets
- Updates to media landscape overviews, covering the regulatory and legal environment, advertising market, state of public service media and overall level of media independence, description of journalism higher education
- Updates to the baseline gap analysis of media skills at selected independent media outlets with a focus on:
  - Media management
  - Sources of funding and business models
  - Content production
  - Marketing and branding (including social media strategies, and audience engagement techniques)
- Conclusions and analysis of major changes
- Recommendations for training, skills improvement, coaching and other support programs.

## Gap Analysis 2019 findings – highlights

Detailed findings, across all three studies, are included in the six 2019 country report updates and the 2019 regional overview, but key areas remain unchanged since the 2017 baseline reports:

- There were two categories of findings: **an inventory of the skills gaps** in individual countries and regionally; and **feedback about donors' and media development implementer interventions**, along with respondents' suggestions for changes needed in order to ensure greater impact and responsiveness to their needs.
- In the long and detailed list of skills gaps identified in the baseline study, two sets of skills appeared the most pressing to address: **business and management knowledge**, and **multimedia and digital skills**, which are essential both to content production and business strategies. These gaps persist according to the current update, but there has been modest progress in addressing them.

- 
- **Audience research**, key to understanding audiences and developing healthy business models, is unavailable to most independent media outlets and a solution to this continues to elude the donor community.

## Analysis – how much change has there been?

The regional overview shows no dramatic change in the condition of the independent media in the EaP countries. It records some limited progress in reshaping the design of some of the support programmes provided by donors and international media development implementers – a key pillar of the GA 2017 recommendations.

As before, there are significant variations in skill set weaknesses and needs, but also strengths among the countries studied. The greatest needs, not surprisingly, are recorded in Azerbaijan and Belarus – and, perhaps disturbingly, there is a perception among the independent media communities in both countries that donors are becoming “less interested” in supporting them. This clearly must be seen in the context of legal restrictions on foreign funding of NGOs and media in both countries but addressing this deserves special attention.

At the other end of the spectrum is Ukraine, with its population of almost 45 million and a mass media market. Its geopolitical importance and size have made it the region’s largest recipient of foreign assistance. Despite all the political and economic challenges, some of the strongest independent media companies have emerged here, many with profitable business models. The country has strong and mature media NGOs driving reform and professional development in the media. It has donor-supported institutions providing the much-needed media management training: the Ukrainian Media E-School (UMES) and Media Manager Academy (MMA) are addressing some of the most pressing needs of media in the country, especially among regional media. MMA programmes are planned in Moldova and Belarus.

## Models of support

As in previous studies, respondents indicate that existing training formats are not optimal. Embedding a mentor or coach in a newsroom to work with the team over a longer period is seen as more effective than short-term workshops. Exchange programmes providing short journalist placements in foreign media, followed by reciprocal visits by the staff of those outlets to partner newsrooms in the region, also rate high. But there are too few such programmes; they continue to be short-term and focused

on quick wins. Many respondents express a need for a more long-term approach.

Some change in the design of training programmes has been noted, with projects becoming more focused on needs articulated by the beneficiaries themselves. But respondents continue to point out that many programmes are designed with a generic, Western-centric formula and fail to consider local cultural, political and economic specificities.

The ongoing emphasis on content production – and on themes determined by the donors, such as gender or LGBT rights – frequently does not reflect the true priorities of the media or their audiences. Quality content is always needed, but some respondents have suggested allowing grantees in content production projects to more frequently select the subjects they consider important to cover rather than these being decided for them in advance by donors when designing projects and inviting proposals.

There are also suggestions about providing more multi-lingual web-based learning resources which journalists can access as needed. This would be more accessible to smaller newsrooms operating on a shoestring budget which cannot afford to release staff to attend training workshops. GA 2017 recommended support for the creation of learning modules that could be used repeatedly and across programmes, so that curricula wouldn’t have to be created from scratch with each new project.

Small regional media are at a particular disadvantage. They lose out on training opportunities, as their teams are too small to release journalists for training. Also, the universal challenge of accessing reliable audience research is particularly acute in these tiny markets because collecting and selling data or focusing qualitative studies on these small population samples is not profitable. At the same time, donors, reluctant to fund TV companies with small market shares, require plans for sustainability as a condition for grants, which small regional media are not likely to be able to achieve without first obtaining the expertise to do so, leaving them in a vicious cycle of donor dependency.

Ad hoc audience studies commissioned by large international media development NGOs are only a partial answer to the glaring absence of consistent and ongoing professional audience research, both quantitative (especially TV and radio ratings) and qualitative, in most of these markets. They provide a snapshot of a given moment, but not the longitudinal data necessary to analyse trends.

---

## Donor responses

Some of the issues raised in the past two reports appear to persist. Donors target selected grantees already known to them rather than spreading the funding to – often smaller and struggling – media outlets whom they know less about. This is something past research has recommended rethinking.

Core funding is another need that has been brought up in the past, considering many outlets merely struggle to cover operating costs on a daily basis and lack the resources for capital improvements of rapidly changing technology. The levels of core funding have not increased; they may have decreased.

A number of ideas brought forward in past reports do not seem to have been taken up; some of these were complex and involved major changes, but others were relatively easy to implement, such as software or equipment purchases, or donations in kind – potentially negotiated with the private sector – that could go a long way to addressing the basic infrastructure needs of the most cash-strapped media companies.

A perception that donors set priorities in isolation, based on their foreign policy agendas – leading to a lack of coordination and duplication – was conveyed during a series of focus groups conducted by the BCME with national media NGOs and journalists' associations in the six EaP countries.

There is little evidence that donors have explored market-based support solutions such as venture capital, low-cost loans, seed money or incubator models for media start-ups – also brought up in the baseline report. These are risky to develop, and often in such cases the preference is to stay with familiar solutions even if they have outlived their relevance.

Despite warnings of the risk of perpetual grant dependency, no one is yet calling for discontinuing this form of support. But if donors want to see better results in terms of media outlets achieving sustainability, the support needs to place greater emphasis on building skills that will enable companies to achieve this. Some of the editors interviewed already prefer to avoid relying on donor support, arguing it hinders outlets learning to operate as businesses.

This argument was made in stark terms in the GA 2018 update: "... we have media outlets, oriented on donors exclusively, and media oriented completely on the market. Preserving such a situation will lead to zero sustainability of the first and discrimination of the second, so we should broaden a third group – media with diversified funding, using donor support for their growth and success as business entities."

Some beneficiaries believe donors perpetuate grant dependence even as they require beneficiaries to have sustainability plans. These requirements are often stifled by the same donors' own conditions, as many grants prohibit monetisation of content.

There appears to be a widespread reluctance to depart from familiar models, and this is interpreted as being due to fear of the effort and cost of implementing new ideas.

There will be consequences of enhancing market-based conditions and strengthening media businesses – for some of the media companies as well as for many of the organisations delivering media assistance, the implementers. Inevitably, the weaker media companies will most likely fail; the media development implementing sector could also shrink as robust media businesses mature. There is an argument to be made that this is a price worth paying in order to wean many media companies off donor dependency and help those strongest editorially and most valuable to society survive. It is for this intermediate survival sustaining phase that a range of new approaches of blended donor/market-based financing may need to be deployed.

At the same time, there will always be a need to support vital – in many cases hyperlocal – media outlets, which may never become profitable or even be able to break even in these weak markets. And yet they are vital to their communities, bringing citizens information that is essential for them to make informed decisions about politics and their own lives.

## New approaches?

Respondents fail to see any positive effects of donor coordination on the ground. Coordination as recommended in the past meant a need for donors to *pool* resources for projects rather than simply *tell* each other what they were doing in the region. Any improvement in coordination to date is rarely evident to the beneficiaries themselves.

Country authors point out that donor governments can do more than provide direct grants to upgrade skills in independent media organisations in the countries of the EaP. Providing advocacy expertise and pressure for reforms of the media sector should be part of a donor's comprehensive and effective media development strategy.

From one of the focus groups conducted with national media development organisations: "There is a great appetite for a more collaborative and holistic approach to media development programmes, which would account for local expertise of media NGOs and develop projects that would include journalism, management and research skills, and not pursue what is 'hot' right now."

---

And from one of the country reports: “The existing problems can successfully be addressed only if a consolidated approach is taken by the national government, media community and international donors. Efforts in the sphere of training and education need to be combined and coordinated with improving the regulatory framework, promoting self-regulation and ensuring a media business-friendly environment.”

Therefore, the BCME’s policy recommendations to donors, based on analysis of the GA 2019 update, other relevant literature cited in previous GA reports and elsewhere, and our collective expertise, broadly fall under two main themes: creating mechanisms for **sharing international and national best practice and expertise**, including more emphasis on the private sector, and **greater coordination**, although not simply through exchanging information, but the harnessing of efforts in creating **joint projects** for greater impact, rather than fragmenting efforts and resources. Centralised solutions, especially if they are owned by the beneficiaries themselves – so partnership schemes, cooperatives and regional training centres (such as the media management schools in Kyiv) not facilitated by foreign implementers – are more likely to produce long-lasting results that are rooted in local cultures and conditions.

Certain global initiatives addressing some of the issues highlighted here already exist (see the examples below), so replicating their approaches or forming partnerships with them would harness existing know-how, lessons learned and expertise, and apply them to this region.

## Recommendations

From the 2017 and 2018 policy papers, annotated to reflect the situation in 2019

### 1. Investment in media intelligence

- As strengthening of business skills is cited in all the countries studied as a key need, and reliable audience research is a vital pre-condition for developing business strategies, a fund should be set up to create a professional, independent and **reliable audience research** facility, providing audience data that is grounded in international commercial standards and ongoing – rather than obtained from isolated ad hoc studies – to media outlets in the region.  
*Note: This is a vital gap that has not been addressed in any media assistance intervention to date. Respondents underscore that providing data is not enough; media managers need to understand why audience profiles are needed and learn how to interpret them and turn them into business strategies.*

- Facilitate **partnerships between top journalism schools** in the region and those in donor countries in order to improve journalism curricula.  
*Note: One such program has been implemented in Georgia with the support of the US Embassy*

- To establish a mechanism to provide **free legal support to independent media** in the EaP countries. There are existing national models of media law networks and the Media Legal Defence Initiative ([www.mediadefence.org](http://www.mediadefence.org)) provides this assistance internationally, so strengthening legal support available to EaP media need not be reinvented, simply scaled up.

### 2. Investment in skills and financial sustainability

- Develop **media management and business training modules** to enable best practice training and replication across programmes. The skills gaps most frequently cited are in strategic business planning, marketing and sales, diversifying revenue streams, and human resource management. These modules must include commercial expertise from the private media sector and from business schools. While not widespread in media development activities, starter content for such modules is available in the form of online resources, which some media development organisations have started providing already. Language versions are also needed.  
*Note: The baseline study and 2018 update highlighted the unnecessary transaction costs of creating fresh training curricula for many new projects. Funds could be more efficiently spent and freed up for other initiatives if a database of resources were to be shared among all media development organisations. This would require a break from old moulds of working in isolation, and a bold new approach to coordination and sharing.*
- A comprehensive, wide-ranging programme of **digital media skills training**, harnessing an ad hoc task force from international and national media outlets, academia and the private sector.  
*Note: See above for the rationale for this. The scope of skills needing improvement, as articulated by beneficiaries, is broad: from data journalism to interactivity to social media strategies to multimedia production skills. Media companies in EaP have made strides in improving these skills, often through their own efforts, but a consolidated strategy for support is needed.*

- There is an urgent need, especially in Belarus and Azerbaijan, to scale up programmes to provide risk assessment, advisory support and training in **digital security**.

### 3. Donor programme redesign

- Redesign calls for grant proposals, so they reflect the need to **embed external trainers** or seasoned journalists and media managers in media companies in order to achieve a tailored and lasting impact.
- In training programmes, stronger emphasis should be placed on **long-term mentorship and tailor-made consultations**.
- Expand **placements at larger national or foreign news organisations** for editorial, technical and management staff. These will inevitably require introducing public-private partnerships (possible models are the News Corp Fellowship Programme, or the Knight International Journalism Fellowships).  
*Note: Such schemes are already being introduced. One of them is the Ukrainian Confidence Building Initiative (UCBI/USAID) and a similar programme by IREX in Georgia which works effectively in selecting the right specialists and seconding them to the newsrooms that participate in the project.*
- Re-examination of **funding mechanisms**, especially the reluctance of most donors to provide capital and seed funding. Many independent media outlets are unable to remain competitive or even in business without purchasing new equipment or software, and most donor assistance does not include such investments.
- Where national legislation allows, support through **market-based mechanisms** – low-interest loans, refundable grants, investment, seed money and venture capital – would broaden choice (the Media Development Investment Fund ([www.mdif.org](http://www.mdif.org)), with its unique model, delivers the most effective assistance of this kind, having a demonstrable record of success – establishing a partnership or subsidiary of the Fund for the region as opposed to creating a new entity would be a shortcut to swift action).
- **To explore increasing the circle of beneficiaries** of financial support. To launch an education and advisory project to stimulate and support business-owned independent media outlets to approach international donors (assistance in basic project writing, implementation, reporting skills, and the design and distribution of donor maps).

- To establish a mechanism for **small and medium ad-hoc development grants**. These may be limited amounts to meet very concrete, one-off needs important for further development (e.g. designing a webpage, purchasing special training or consultancy services, purchasing software, carrying out audience research, conducting internal assessments, drawing up internal policies and guidelines, etc.). Such an approach will make donor support more needs-oriented and customised.

### 4. Coordination and exchange

- **To improve (or establish) platforms** to coordinate the efforts of donors and other institutions delivering media assistance at the national and international levels. The existing formats should become more inclusive, and engage NGOs and educational establishments, delivering training and financial support to independent media outlets to ensure a common vision and a greater degree of synergy.
- To ensure the **sharing and coordination of methodologies** of media needs assessments and audience research of different kinds.
- Creation of **new platforms**, domestic and international, **for journalists to exchange ideas and address common problems**. This would allow journalists and media managers from the region (and beyond) to meet. Joint media projects and collaborations could result, such as team work on investigative reports, documentaries and cross-border projects.  
*Note: There is a perception that donors “don’t like conferences”. That is understandable if they are mere “talking shops”. But there is possibly nothing on this list that is easier to organise and fund, and that creates a more lasting impact on media businesses, and on their editorial practices and content than such conferences. Media in EaP countries lack the funds to attend major international professional gatherings where deals are made, partnerships established, and best practices shared.*

---

## New recommendations, based on 2019 update findings

### 5. Support in advocacy for regulatory and legal reform

- Create a database of **regulatory and legal experts**, and organisations, to assist local journalists' association and media NGOs in lobbying for and assisting national governments in media reform.

*Note: The experts cite the need for reform in breaking up oligopolies in media and advertising, such as those existing in Ukraine and Moldova. They also cite the need for reform of broadcasting laws, such as an effort underway in Armenia by three journalism associations, who are working on the draft of new legislation liberalising licensing procedures for private multiplex operators and broadcasters.*

- Similar expert assistance is needed in sharing existing international practice in regulating and penalising **offensive and dangerous content**.
- Build **conditionality for reforms** into all economic assistance packages, ensuring media ownership transparency, media plurality and the creation of an enabling business environment for media outlets  
*Note: This may already be happening. Exploring this was not within the scope of this study, but nevertheless respondents brought it up in several interviews.*

### 6. Investment in countering disinformation, which is particularly severe in this region, as Kremlin-generated narratives are pervasive

- Incorporating **fact-checking and verification** techniques into all reporting and other content production training programmes – for both online and legacy media – and into journalism schools' curricula. An extensive body of knowledge has been developed in recent years. A project aggregating the best strategies and making them available to all parties across the region would, again, be the most effective approach.

## BCME

The BCME is unique in its potential as an institution and facilitator of these activities. Among the expertise of its core team are combined decades of knowledge in international journalism, media management and education; local and regional cultural fluency; and having established the trust of media professionals in the Baltics and the Eastern Partnership region.

Established Western media implementers with decades-long records in media development (such as Internews, the IWPR, IREX Europe, the Thomson Foundation, Zinc Network, Thomson Reuters Foundation and others) regularly approach the BCME to enlist it as a partner in the Baltics. This is a result of its recognised competence and record to date.

In its short lifespan, the BCME has assembled eight member organisations from among highly competent players in the EaP region, representing all six countries, and it actively cooperates with more than 35 media development organisations.

The BCME has demonstrated the capacity to swiftly design training modules in the Baltic countries, and is able to scale these up, whether in management or digital skills, provided appropriate funding becomes available – preferably core funding, as this which allows it to grow. BCME also has the network of contacts to develop and administer such programmes, with its existing group of partners, and can convene an ad hoc task force of experts to assist with this.



# Gap Analysis of Independent Media Needs in Eastern Partnership Countries

Research Template for Follow-up Country Reports 2019

## Context (1,5 pages)

### 1.1 General

Provide any significant changes to the following social, economic, demographic indicators and write a short country profile based on them, including an overview of the political situation, since March 2018 (there is no need to research the statistical data anew, unless the researcher is aware of major changes). The political developments and overall economic climate are the most important updates needed.

- Population
- GDP per capita
- Urban/Rural breakdown (% of population) (please use pie chart)
- Ethnic and linguistic composition (% of population) (please use pie chart)
- Age (under 18, 18-24, 25-34, 35-44, 45-54, 55-64, 65+) gender, education and income levels (% of population) (please use charts)

(Sources: national census data)

### 1.2 Describe the country's media market

Briefly describe its evolution since March 2017 and 2018. Have press freedom indicators according to Reporters Without Borders changed? How has the size and strength of the advertising market (break down by media) evolved?

Have any notable foreign investors entered/left the market? Have there been any major mergers or acquisitions of existing media holdings? Describe status of public service media (governance, funding, editorial independence). Note the major milestones in the public service media reform since 2017 (if applicable in your country).

List 5 major players in print, radio, TV and online comparing to the original Gap Analysis research template (2017) and update 2018. Have any changes occurred? If yes, what? Is there more data available on audience reach/share/circulation/unique visitors? Have some outlets dropped off the list and others been added? What is their level of editorial independence? Also list separately main independent media players and as above indicate their independence. What is their ownership? Please address these questions as compared to the status as of March 2017 and update in 2018. For print media please note if the frequency of publishing has changed (for example, if a publication came out twice a week in 2017 and 2018, but now has dropped the frequency to once a week or increased it to five times a week), note any changes in online presence and app development.

*Please use the following table as template for lists; please describe the independence level in text below (please only address changes to independence level since 2017 with update in 2018, or if earlier descriptions call for further elaboration)*

### TOP 5 PRINT MEDIA (and, respectively, RADIO/TV/INTERNET MEDIA)

| NAME OF OUTLET | CIRCULATION / SHARE / UNIQUE VISITORS | OWNER |
|----------------|---------------------------------------|-------|
|                |                                       |       |
|                |                                       |       |
|                |                                       |       |
|                |                                       |       |
|                |                                       |       |

## TOP 5 INDEPENDENT MEDIA NATIONAL

| NAME OF OUTLET | TYPE OF OUTLET (TV, PRINT, RADIO OR ONLINE) | CIRCULATION / SHARE / UNIQUE VISITORS | OWNER |
|----------------|---|---------------------------------------|-------|
|                |   |                                       |       |
|                |   |                                       |       |
|                |   |                                       |       |
|                |   |                                       |       |

## TOP 5 INDEPENDENT MEDIA REGIONAL

| NAME OF OUTLET | TYPE OF OUTLET (TV, PRINT, RADIO OR ONLINE) | CIRCULATION / SHARE / UNIQUE VISITORS | OWNER |
|----------------|---|---------------------------------------|-------|
|                |   |                                       |       |
|                |   |                                       |       |
|                |   |                                       |       |
|                |   |                                       |       |

*Note: For the purpose of this section and section 2.2, the classification of media as independent will rely on the country researcher's knowledge of the domestic market. Nonetheless they should meet the following basic criteria:*

- a) Significant audience reach, or the potential to expand it substantially
- b) Non-government ownership (can be public media, if they have no government interference in content)
- c) Non-interference into editorial process by the proprietor(s) or their political or business allies.

What is the internet and mobile telephony penetration? Please update these indicators.

Please describe changes to main legal and regulatory framework governing the media since March 2017.

In a couple of paragraphs, outline what skills are offered in major journalism schools and what is consistently missed. Have there been any new initiatives since 2018? New partnerships? New donor, implementer or government interventions, reforming university journalism education (most importantly updates to curriculum to provide more practical training, especially in digital skills; changes in faculty to include a greater number of staff with practical journalism experience; or investment in equipment)? What has been development since 2017?

(Sources: Reporters Without Borders, media regulatory agencies, media and journalism associations, audience surveys, media reports, market reports and assessments by independent consultancies or industry organisations. Interviews with media experts/observers)

## 1. Gap-asset analysis of media skills

### 1.1 National overview (1 page)

Please note: this is not a replication of section 1.2 (any media freedom issues need to be addressed there), but rather an overview of skills gaps, including an assessment on whether some of these gaps have been closed, using the 2017 GA and 2018 update as a baseline. Please, be short and listening developments, less descriptive. Pay a particular attention to the following skills, highlighted in the 2017 GA findings:

- Management and sales skills
- Audience analysis
- Thematic reporting
- Digital skills

(Sources: desk research of publically available domestic and foreign literature, interviews with leading journalists and academics, media development organisations, media freedom NGOs)

---

1.2 For the selected *independent* media organisations that had been interviewed for 2017 GA, and have received the recommended support since (5 national and 5 regional were suggested, but this is at the researcher's discretion and depending on the size of the market):

**1.2.1 Media management skills.** Is there a code of ethics? Editorial guidelines? Does the company conduct audience research and analysis? Is there strategic and business planning based on such analysis? Is there a skilled sales force? If not, who manages advertising sales? Is there a mechanism for an internal assessment of content quality? Providing staff with evaluations and professional development opportunities?

**1.2.2 Funding and business models.** Funding sources? Is company dependent of a single revenue stream? If not, what revenue streams are in place? Have the outlets that rely on donor funding gained more access to core funding since 2017 and with update in 2018? Have new revenue-generating genres been developed since 2017 and with 2018 as mid-term line (such as native advertising)?

**1.2.3 Content production.** Have there been specific initiatives addressing advanced writing (including blogs, and complex investigative stories), interviewing, broadcast presentation and production, data journalism, use of visuals and graphics (especially in economic and investigative journalism)? Are journalists developing skills in thematic reporting (in particular economic, conflict reporting). Which newsrooms have converged? How do journalists use social media in their content production and investigative work which they haven't done prior to Gap Analysis of 2017 and then prior 2018?

**1.2.4 Marketing and branding.** Have news organisations developed or improved social media marketing strategies beyond basic promotion and distribution of content via social media? Are there nationwide independent mechanisms for measuring audience numbers and do media outlets commission bespoke research? If so how is audience feedback tracked and managed? What marketing and PR skills have been strengthened/introduced to promote content and build brand awareness?

**1.2.5 Training.** Have the media outlets introduced staff training plans? Which have introduced designated coordinators of training activities? What training have the content producers undergone in the surveyed period since 2018?

Have training programs offered by international media development organisations changed training approaches, introducing placements of trainers/mentors/coaches in individual media outlets, for longer periods (1-3 months)? Do content producers have opportunities to benefit from placements in foreign media outlets?

(Sources: Interviews with business and editorial managers, journalists, media educators and activists, for section 2.2.2 – annual reports if the company publishes them, regulators records, other desk research.)

## 2. Conclusions (0,5 Page)

Summarise main trends that emerge from above research. Are there any changes to generalised media skill gaps in your market since March 2018? Are their clear trends, gaps or overlaps in current media development activities? Which of them have been addressed since March 2018? Have partnerships been created or does the status quo present further opportunity for partnerships with others? What opportunities or barriers continue to enhancing media skills and are apparent in the overall context, political and economic, in which media operate? Have some of them been of long-lasting and intractable? If there is a lack of progress, where do you see the cause?

## 3. Main changes from 2017 to 2019

List 7 main changes/improvements what have happened/improved or another way around between March 2017 and June 2019 within area of 5 parameters (defined 2.2.1. – 2.2.5.)

## 4. Recommendations (0,5 Page)

What types of further media support and other interventions would help to cover the gaps?

Are there training methods not currently used in existing media development programs, and not already identified in 2017 GA that would help deliver the needed results?

---

## **Country Researchers**

**Arevhat Grigoryan and Boris Navasardian** - Armenia

**Arif Aliyev** – Azerbaijan

**Nino Danelia** - Georgia

**Pavel Bykouski** – Belarus

**Victor Gotisan** – Moldova

**Ievgeniia Oliinyk** – Ukraine

## **Chief Editor**

**Magda Walter**

## **Project Team**

**Janis Siksnis**, Acting Executive Director, BCME

**Katrina Tetere-Frolova**, EaP Program Assistant, BCME

**Martins Murnieks**, Head of the EaP Programme, BCME

**Oleg Naumenko**, Project Coordinator, BCME

**Will Mawhood**, Copy Editor

**Artis Taurins**, Layout Designer

*2019*