Baltic Centre for Media Excellence

Regional Overview

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

Contents

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 and updated for the first time in 2018. 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 skill improvement, maps new gaps in independent media outlets' skill sets and explores the degree of donor response to the earlier recommendations.

Introduction

"Cash-strapped – and, in some countries, harassed by the authorities – independent media in the Eastern Partnership (EaP) countries lack an enabling environment for the professional growth of their journalists and healthy business development for their organisations. Media managers report the weakest points of their outlets – from the absence of audience data, to gaps in investigative reporting to the lack of editorial guidelines." These were the opening sentences of the regional overview of the baseline Gap Analysis (GA) the BCME conducted two years ago.

There has not been much change since that report, but slight progress has been made in some areas. Certain improvements have resulted from changes in the political environment, others from adjustments in approach on the part of donors or implementers, but a significant proportion appear to be a result of the initiatives of the media outlets themselves; their journalists, editors, owners and professional associations. Some recognise the link between economic and editorial independence, and are attempting to develop viable business strategies, as well as creative formats for delivering content, improving engagement with audiences and enhancing their companies' proficiency in navigating the digital universe.

Over the past two years there has been some adjustment of the support models, especially in the approach to journalism training, although it is difficult to measure the

scope of this. Projects are beginning to be tailored to the needs of individual media outlets and journalists through in-house training and coaching, or grants for specific content. Donors are heeding the feedback they have received from beneficiaries: that when needs are identified and met on a case-by-case basis, outcomes are more effective and enduring.

Other changes are clearly more organic, as journalists and managers adapt to the challenges and opportunities of new technology and the economics of the media industry. These range from more aggressive use of social networks for content production, audience feedback and distribution, to managers diversifying their companies' revenue streams, to innovation in developing multimedia formats – and, in some of the countries, greater thematic specialisation on the part of journalists.

The Russian language

There has been a deliberate change in the methodology for this year's GA update, based on past recommendations from country experts and their respondents. They made the case that focusing exclusively on independent Russian-language media does not fully mitigate the Kremlin-originated narratives to which media consumers are exposed, nor does this automatically create more choice in sources of information.

In certain conditions, we were told, the focus on the Russian language can be mis-directed or even counterproductive. In Georgia and Armenia, Russian-language media outlets are marginal, and narratives influenced by the Russian state are conveyed via media broadcast in the national language, or passed on through Russian sources (agencies, Russian national TV channels) for foreign news, as the domestic media lack resources to gather international news for themselves. In Ukraine, according to local experts, this focus can foment language-based divisions, which are already being exploited in the country by external sources.

Therefore, the decision was made to remove the focus on Russian-language media for this year's GA update, while at the same time not ignoring it where it has substantial significance.

1. Context – major changes

1.1 Political overview

Since the EaP countries are a very diverse group in terms of size, history, culture and the economic and political trajectories they have taken since the fall of the Soviet Union, it is difficult to speak about common characteristics. The same applies to their media markets, and to the levels

of media freedom in these countries. Nonetheless, some common trends exist, and will be noted where relevant.

The past year has seen major political change and elections in four of the six countries: Armenia, Georgia, Moldova and Ukraine. Most experts agree it is too early to determine the longer-term direction of political change, and how the condition of media outlets in these countries will be affected. The political landscape in Belarus and Azerbaijan remained largely unchanged.

Georgia's democratic transition has hit bumps over the past year and a half, with domestic and international civil society groups reporting undemocratic practices during its 2018 presidential election, a decline in press freedom and a rise in hate speech. There have also been calls for reform of the electoral system, and public protests against a perceived shift away from the country's pro-European foreign policy orientation by the ruling Georgian Dream party.

Moldova and Armenia saw sweeping changes. In Moldova, the lock on power held by the Democratic Party, controlled behind the scenes by oligarch Vladimir Plahotniuc, was broken following parliamentary elections in February 2019. This led to the new coalition government moving to pass reforms of the judiciary and to break up several entrenched monopolies, as well as promises of more legislative action, including important reforms to the media sector. That coalition fell apart several months later, and the fate of reforms is now uncertain.

Serzh Sargsyan, who ruled Armenia for a decade as either president or prime minister, was unseated after street protests, dubbed the "Velvet Revolution", erupted in March of 2018. They came in response to what opposition figures described as his latest "power grab" – an attempt to become the head of state for the third time. The new government elected in December 2018 pledged to undertake wide-ranging reforms and a war on corruption.

And in Ukraine, voters rejected the political status quo, electing a new president and parliament on campaign promises of rooting out corruption, improving living standards and ending the war in the east. But the new government will face other challenges. Since the GA update in 2018, the UN has identified an increase in human rights violations: of freedom of opinion and expression, peaceful assembly and association, religion, and the right to non-discrimination and equal protection under the law.

1.2   Media landscape

While common characteristics are not always easy to define, in all EaP countries media, albeit with varying levels of ed-

itorial independence, continue to be politically polarised. Television remains the main source of news, and the most pronounced battle in all these countries is for control of TV channels – except for the closed systems of Azerbaijan and Belarus, where the state controls all television channels and most other media outlets.

However, online news platforms are catching up with television as a preferred source of news. Internet penetration and the growth of telecoms continues at a healthy pace throughout the entire region. Journalists are quickly learning to incorporate social media and their audiences into their work.

The quality of journalism education is another across-the-board shortcoming, with most universities failing to teach students practical skills in gathering information and producing content, not to mention advanced digital skills. The J-schools in all the countries have outdated equipment, curricula and textbooks, and in most of the countries do not hire journalism professionals as faculty. GA 2017 recommended developing partnerships between the region's best institutions and foreign schools, and at least one programme has begun addressing this (see section 2, below).

Another trend common across much of the region is the gap in skill levels between national and regional media. Most of the country reports stress that any progress recorded is almost entirely limited to national companies, while smaller regional outlets continue to struggle, and the skill deficiencies of managers and journalists are disproportionately greater there.

Journalists clearly face the greatest challenges in the two countries with the most restrictive governments. Reporters without Borders (RSF) observed a further deterioration of press freedom in Azerbaijan, and, while its ranking for Belarus improved slightly, RSF attributed this to deterioration in other countries rather than progress in Belarus.

In their bid for comprehensive control of information flows available to their citizens, both governments moved to tighten control of the internet. In neither country is it possible to name truly independent media outlets other than a handful of online platforms – as well as some exile media outlets, which are not included in this review.

In both countries the governments fund most media companies, making discussion of a market-driven media sector largely academic. But a key barrier to the development of healthy media markets exists in all the other countries in the group – a barrier the international donor community appears to continue to ignore: the lack of reliable and professional audience measurement. Across the region,

inconsistent – and often unreliable, untrustworthy or corrupt – audience research methodologies not only make it impossible to draw any *regional* conclusions or comparisons, but also prevent viable business strategies for *national* markets from being built.

In Georgia, the media landscape over the past year has been dominated by tussles over control of the country's most popular commercial TV channel, Rustavi 2, and concerns by citizens' groups about the political bias of its coverage, as well as that of the public broadcaster, GPB.

Meanwhile, in Moldova, the initial political opening did not translate to an immediate improvement in the circumstances or quality of the media sector. Growing media concentration and political control of content, harassment of journalists and a monopolised advertising market led to a drop in the country's media freedom ranking, but trust in the media remained high despite these developments.

Armenia's press freedom ranking improved dramatically following its "Velvet Revolution" in 2018. Nonetheless, experts see enduring challenges the new government needs to start addressing. These involve the need to improve the transparency of media ownership and funding sources, and legislation regulating broadcasting.

Despite the enactment of long-awaited reforms on media ownership transparency and access to information, and reform of public service media, Ukraine suffered setbacks in press freedom. In addition to criticising government bans on Russian media and internet sites, international press freedom watchdogs condemned the oligarchs' continuing grip on major national media outlets, and a lack of editorial independence, as well as manipulation of news stories, particularly during the election campaigns.

2. Key findings: what has changed and what has not regarding skills gaps, assets and media needs

If there is one key finding that stands out in this year's reports it is a growing awareness among media managers and implementers of media development, as well as some donors, of the importance of incorporating programmes to strengthen business and management skills into media development interventions. In the baseline GA study, respondents repeatedly stressed their needs in the areas of business planning, human resources and leadership, marketing, advertising sales and diversifying revenue streams. An emphasis on how deficits in these skills can act as barriers to strong and independent media companies had always been missing from media development.

Against the backdrop of a global technology revolution which is upending media business models everywhere, in this post-Soviet region, many media managers and proprietors are still only beginning to come to grips with the very basics of monetising media content, especially news and information.

Profitability continues to be a struggle for all but a handful of, mainly large, media companies, with experts attributing this to the size and weakness of advertising markets in all the EaP countries. Ukraine is an exception; the only mass media market in the region, where about half of the interviewed independent media companies have profitable business models with multiple revenue streams. Nevertheless, across the region, we see a range of ambitious efforts at diversifying funding sources, whether by providing production services, selling content, renting property or crowdfunding.

Most media outlets have now mastered the in-house use of online metrics tools, but few have the resources to commission external, independent and commercially designed market research, especially qualitative studies, which are essential to understanding audience preferences. This is particularly vital to measuring and analysing audiences for the most popular medium – television.

2.1 Business and management skills

Media managers across the region are recognising the need to develop their companies as viable businesses, engage in strategic planning, compete for audiences by improving quality and are developing new business models and formats. Some go as far as to avoid grant support in the belief that this is not conducive to long-term commercial viability.

But most media outlets still indicate they would benefit from more training and coaching in developing business plans, strategic planning, human resources and other management issues.

International donors and media development organisations are also paying more attention to strengthening management, marketing, branding and advertising sales skills at independent media companies, offering more training or even occasionally providing direct support for the hiring of specialist staff, such as when *Internews* paid the initial salary of a marketing professional for the *Ziarul de Garda* newspaper in Moldova.

Some successful programmes have been introduced, most notably the establishment of the Media Manager Academy in Ukraine, which is now expanding its reach to other EaP countries. This complements the management programmes

offered by the already existing (since 2014) Ukrainian Media E-School. The well-established media management programme at the Stockholm School of Economics in Latvia continues to be successful; even media managers from Belarus have attended, despite the uncompetitive media market there, and found the knowledge gained extremely useful. But the demand for such training far outstrips its availability.

2.2 Audience research

As noted earlier, the absence of robust, reliable audience research is a major factor crippling media companies across the region. The donor community has not yet found a formula to deliver support that would enable such research and develop the expertise to analyse it effectively. **Because media development support has traditionally been dependent on grants, not business solutions, and is delivered in the form of isolated projects rather than joined-up initiatives, a solution to this problem continues to elude the donor community.**

However, there has been significant progress across the region in the use of social media metrics, mainly independent of any donor activity, and this has translated into increased user engagement rates and numbers of visits, helping shape editorial decisions.

Editorial teams are now honing their skills in harnessing social media: to generate story ideas, solicit news tips, disseminate stories, get audience feedback (likes, shares, reposts), and interview sources, as well as for fact-checking. But few have clearly designed content distribution strategies.

In a sign of progress from previous years, each of the interviewed media outlets in Ukraine has a social media marketing (SMM) specialist. And at some of these outlets, the journalists themselves are also involved in the promotion of their material on social media. Only a small proportion of the media outlets in the other countries have SMM strategists.

2.3 Media literacy

The research of the 2017 baseline GA signalled the growing threat in the region (and beyond) of disinformation and media manipulation, especially deployed as a political weapon by the Russian government. It identified an urgent need for the introduction of media literacy programmes – for journalists, educators, young people and the general public. That threat has grown exponentially in the two years since that report. NGOs, donors and the governments of EaP countries have begun addressing this and the related problem of hate speech with a range of measures.

Many media literacy projects have been launched and are still ongoing in several countries but, based on the recommendations by country authors and their respondents, there still appears to be considerable room to scale them up.

2.4 Content production skills

The quality and variety of multimedia content is improving, and journalists are strengthening the skills needed to produce it (video shooting and editing; using audio, graphics and still images in addition to text). Websites are becoming more attractive and interactive; there are more blogs, streaming videos and podcasts. As described above, journalists use social media to solicit story ideas and to identify sources, as well as to generate audience feedback and participation.

Nevertheless, data journalism continues to overwhelm reporters, and investigative journalism tends to be too time-consuming and expensive for most outlets.

Journalism ethics remain problematic in practice, despite being the focus of many donors and training providers, and editors and reporters insisting on full awareness of professional ethical principles. Attempts to adhere to journalism ethics are often stifled by political and business pressures on newsrooms.

2.5 Increased need for cyber-security awareness and tactics

Even in 2017, we saw a growing need to raise awareness of cyber-security threats and to improve journalists' skills in protecting themselves – especially in the closed societies of Azerbaijan and Belarus – against hacking, trolling, and government surveillance. The need is far greater today, as threats have multiplied. Media development programmes have increasingly focused on the *physical* security of journalists in recent years, but our researchers report not enough has been delivered on *cyber*-security in this group of countries.

2.6. Journalism education

A new partnership funded by the US Embassy and delivered by De Paul University of Chicago allowed faculty from Georgian national and regional journalism schools to make a study tour of US schools of journalism. It aimed to establish partnerships, refresh curricula and introduce new teaching methods and trends. This followed recommendations in the GA baseline report of 2017 that such initiatives should take place.

2.7 Assets

The main objective of this update was to identify *gaps* in skills in the EaP countries, so that donor and media development organisations' priorities can be correctly assessed and targeted in the future. Therefore, the research questionnaire did not specifically call for identifying assets. But while they are not explicitly mentioned in this year's reports, there is no reason to believe that the strengths noted in the baseline study are no longer present. Those included **strong national media development organisations** and **journalists' associations**, and media companies with **creative and enthusiastic staff who work well in teams**. There were also examples of **innovative partnerships** between media outlets, or with other enterprises, plus successful **cross-border reporting projects**, especially in the three countries of the Caucasus. Many of the independent media outlets are led by the most **experienced, committed and competent editors** in their countries.

3. Conclusions

There is good and bad news. There is growing recognition among donors, implementers and the beneficiaries of media support themselves that building business skills needs to be a major component of the media development toolkit. There are already projects that are addressing these skills deficits and offering training and consultancy.

Also, the trend to make media support more tailored to the needs of individual national markets or organisations, as defined by the beneficiaries themselves, is gaining traction.

There has been progress in developing multimedia production skills, producing formats that are aligned with digital platforms and using social media to engage audiences.

But this progress has not moved the needle to a significant degree in strengthening independent media, and it is perhaps too early to evaluate the impact of the GA research and its recommendations.

The challenges faced by independent media in the region have not decreased, the changes in the political landscapes of several of the EaP countries notwithstanding. The political and economic pressures remain, and **more drastic and disruptive approaches may need to be considered**.

Many of the findings and recommendations of the baseline GA and its 2018 update either have not been addressed, or, if they have, the communities that needed to benefit from them are not aware of them.

The policy paper accompanying this overview repeats some of our recommendations from previous years, and provides further analysis and additional options for media support in this vital region.

4. 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 these findings and own in-depth knowledge of the country's media market

The elements of the study update were:

- Updates to the national overviews, consisting of descriptions of changes to the political and economic contexts, and identifying major media outlets and major independent outlets

- Updates to the media landscape overviews, including information on the regulatory and legal environment, advertising market, state of public service media and overall level of media independence, as well as descriptions of journalism higher education programmes

- Updates to the baseline gap analysis of media skills at selected independent media 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 programmes

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). <u>The political developments and overall economic climate are the most important updates needed</u>.

- 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

<u>Briefly describe its evolution since March 2017 and 2018</u>. 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?

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