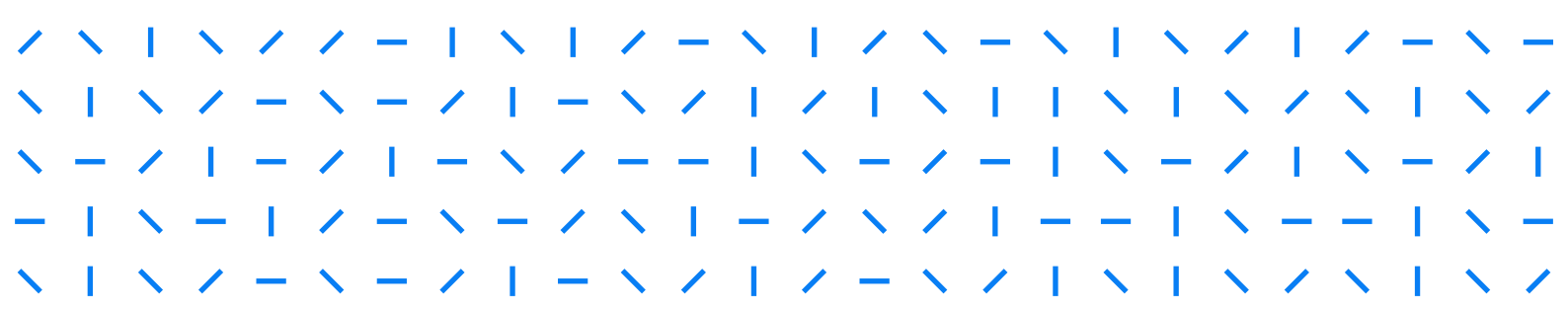**Baltic Centre for
Media Excellence**

Regional Overview of Findings and Recommendations

Gap-Asset Analysis of Russian Language
Media Skill Set in the Eastern Partnership

Contents

Key findings

Regional overview

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 list the current weak points of their outlets – from the absence of audience data, to gaps in investigative reporting to lack of editorial guidelines. But only a **coordinated and targeted** effort by the donor community can help them access knowledge to fill these gaps. The following overview lists the most pronounced needs. The Recommendations chapter outlines the remedies the country report authors found most pressing. They also stress that traditional approaches to media development need to be re-evaluated.

The countries of the EaP represent a very diverse group in terms of economic and political development. Their post-Soviet experience is marked by economic upheavals, political struggle, entrenchment of authoritarian regimes in Belarus and Azerbaijan, and armed conflicts, some of them ongoing, others leaving territorial disputes unresolved in a state of so-called "frozen conflicts" between Moldova and Russia, and along the borders of Armenia and Azerbaijan, Ukraine and Russia, and Georgia and Russia. And just as it is hard to speak of pronounced common political characteristics for this group of countries, likewise it is hard to compare the state of their media markets and the levels of media freedom, as differences are considerable.

The Press Freedom Index[1] compiled by Reporters Without Borders places countries in four groups: good, fairly good, bad and very bad. Azerbaijan and Belarus fall into the bottom category with independent media practically non-existent, while Ukraine, Moldova, Armenia and Georgia are ranked "fairly good", nevertheless each with a range of challenges identified by the country researchers of this study.

Media Freedom Rankings

https://rsf.org/en/ranking
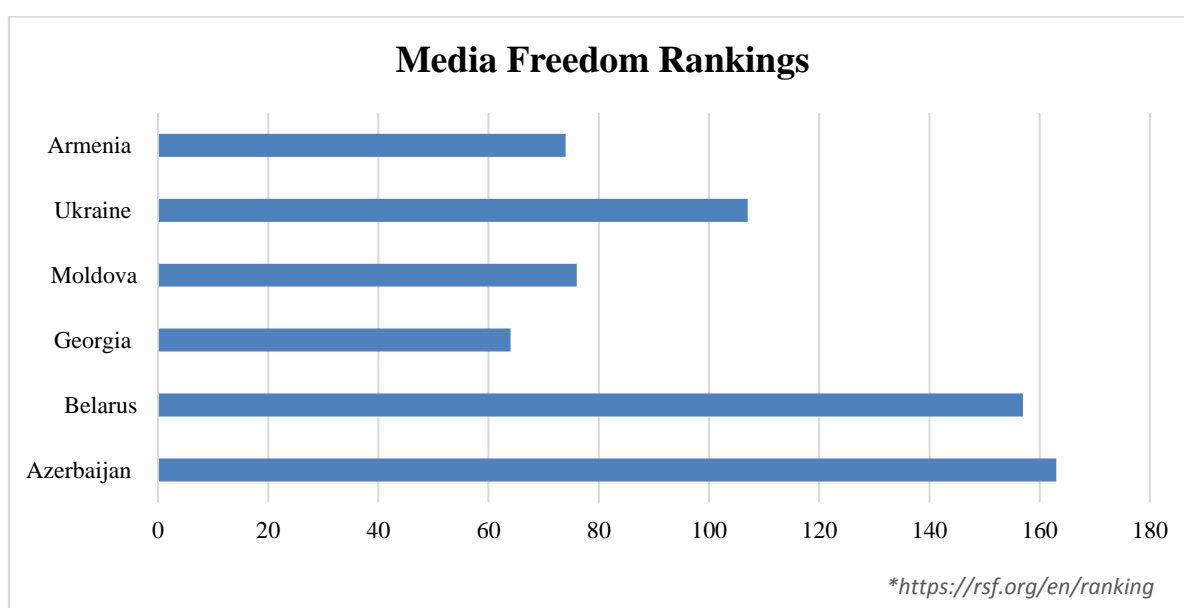
Note: the highest ranking represents the lowest level of media freedom
Source: 2016 world Press Freedom Index

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[1] 2016 world Press Freedom Index, Reporters Without Borders, https://rsf.org/en/ranking

Across the region, advertising markets are weak and media monopolies prevail on a national level, controlled either by the state or large private holdings (oligarchies), resulting in varying levels of editorial politicisation. Regional and local media **struggle financially**. They lack capacity to commission or conduct robust audience research, which would enable them to produce healthier business models, leading to sustainability and greater independence.

Systematic nationwide audience measurement is uneven, practically non-existent in Belarus and Azerbaijan, and unreliable or corrupt in Armenia, Moldova and to a lesser extent in Georgia. Even in Ukraine, where data is available, outlets seldom can buy professional ratings, relying on free tools.

Advertising markets are stagnant or sinking, and it is difficult to get accurate advertising spend data in an environment where editorial content is often difficult to distinguish from advertising.

The transition from state to public media has not happened in Belarus and Azerbaijan; public service broadcasting (PSB) is under considerable political control in Armenia and Moldova, where in the latter the parliament appoints a supervisory board and the state budget directly funds the broadcaster. PSB governance and level of independence has improved in Georgia since 2012, with members of the supervisory body nominated by civil society and approved by the Parliament. In Ukraine reform of the former state national broadcasters is being finalised, while regionally reforms are happening more slowly.

Russian language fluency, levels of consumption of Russian-language media of the populations, as well as the characteristics of local independent Russian language media vary markedly. This ranges from practically bilingual Ukraine and Belarus, and to a lesser extent Moldova, to the countries of the Caucasus where national languages predominate. There, Russian content still has a presence, but in a slightly different iteration in each country. So, in Armenia, most Russian-language media are either under Armenian or Russian political influence, but the public finds independent Russian content on Armenian bilingual or multilingual websites. In Georgia, **Kremlin influence is evident** in several Georgian-language media controlled by Russian political interests, while independent content can be found on a handful of small domestic Russian-language websites. In both Georgia and Armenia, editors indicate they target this content not only at domestic audiences who prefer their media in Russian, but also strive to produce an alternative to the Russian state-driven narratives, as well as address their own Russian-speaking expatriate communities in Russia and elsewhere.

The findings of the country studies confirm the complexity and the challenges faced by those who work at creating alternatives to the Kremlin media dominance. Yet it is particularly urgent, given that most of the country reports reveal that a substantial number of dominant Russian language media in their countries are simply direct franchises or subsidiaries of the Russian state-sponsored media such as the *Komsomolskaya Pravda* newspaper or TV channels *Pervyi Kanal, Rossyia 1 or NTV*.

Journalism education leaves graduates inadequately prepared for working in the industry. Except for Georgia, journalism schools teach theory rather than practical skills, seldom have lecturers with practical journalism experience and lack funds to buy equipment and software. But even in Georgia, textbooks are outdated, and data journalism, thematic reporting, and media management courses are not offered.

We do find more common threads in the analysis of gaps in skills and professional development needs among the targeted media, however they are not limited to the Russian-language media specifically, but are generally shared by the rest of the media. Many experts interviewed in the reports suggest it might be counter-productive to treat independent Russian-language media in isolation.

Key findings: gaps

One major gap across the six countries is the absence - most glaring among regional media - of consistent, **professional audience research**. Apart from the largest media companies in the largest media market, Ukraine, few outlets have the finances or expertise to conduct, commission or purchase such research. Consequently, sound or even any **business plans** are seldom in place.

In Belarus, where most media rely on government funding, there is no incentive for research or revenues. Georgian TV channels rely on two main providers, who furnish widely differing data. Moldova's main TV ratings provider is controlled by the country's largest media owner, and has been accused of falsifying data to his benefit. And, independent papers and websites there cannot afford the fees charged by the official audit agency.

Besides economic barriers to this, there is also a major skills gap; most of the independent media offering Russian language content lack staff with **skills in advertising sales**, promotion and marketing.

For journalists, **thematic reporting** is rarely possible at such outlets, but also most other media. Small editorial teams require flexibility to assign reporters to any story that surfaces. At the same time journalism schools do not furnish students with the in-depth knowledge required to do specialised reporting, especially on the economy. The same applies to **investigative reporting**; with scarce resources, this vital aspect of media's role in holding power to account is compromised. This is more pronounced in print and broadcast media, as online portals generally enjoy greater independence, and there are several well established investigative reporting sites in the region.

An area of journalism that is underdeveloped is **conflict reporting**, especially in Ukraine, where also hate speech in media is common.

Most managers report having **codes of ethics** in place or mandating that those established by national journalists' associations be followed. But both media managers and national media experts point out that in practice, in an environment where proprietors' interests influence news and analysis, it is a challenge to stay true to the principles of separation of news and opinion, and avoiding conflict of interest.

Editorial guidelines are rare, as are **in-house training schemes**, or mechanisms to assess skills and professional development of employees. Most quality assessment takes place only in editorial meetings or one-to-one sessions with editors.

Nevertheless, given the long history of media development activities in the region, those interviewed for the reports often say that knowledge of basic principles of professional journalism are well established. So, it is suggested that the foundations of ethics, impartial reporting techniques, protection of sources and of the vulnerable are well understood if not always practiced. They should continue to be strengthened where possible, but can be done by local professional development institutions and watchdog groups in civil society.

Basic reporting skills are cited as a clear gap only in Georgia where the independent online outlets are usually small, with young and inexperienced teams. Advanced reporting skills and organisation of complicated reports can be improved everywhere.

The media outlets at the centre of this study, many of them online platforms, would benefit the most from international donor and implementer support for skill sets demanded by the digital age: **data journalism** and infographics, named in all countries of the region; advanced **social media strategies,** as many use basic tools effectively already; **website design** and layout; and **multimedia skills,** with audio-visual production values such as video shooting, editing, and audio needing the most improvement.

The production skills gaps are most vital in broadcast media and online outlets. However, **newspaper layout** and design, still photography, especially colour, and increased use of info-graphics are widely reported to be inadequate in print. These would increase their attractiveness to readers, especially since the Russian state-sponsored media are cited as having superior production and visual appeal across all platforms.

Online security awareness must be strengthened, particularly in the closed societies of Azerbaijan and Belarus, where such programmes already are offered, but not to a degree that fills the needs.

But given the overwhelming economic challenges of most the region's media, a major theme of this study, is to suggest that core funding, **investment, and business expertise** are the most needed form of support; most of the regions independent outlets rely on donor funding for their survival.

Key findings: assets

The main objective of this study was to identify the gaps in skills in the EaP countries, so that donor and media development organisations priorities can be correctly targeted, and respond to needs that are identified by the actual beneficiaries, rather than driven by geopolitical agendas in distant capitals. This explains why the methodology was designed with a bias towards gaps, rather than assets. Nevertheless, there are a number of strengths that need to be highlighted, as they will also inform future support.

The reports have identified **strong local media development organisations** and journalists' associations, most notably in Ukraine, Armenia and Moldova.

Most media managers have emphasised the **strength of teams** and team work in their organisations. This is especially true in areas of the Caucasus where cross-border reporting is practised. Another aspect of collaborations is the creative range of partnerships for marketing and cross promotion various media have developed in Moldova.

While it is still an area that could use much greater attention in the future, and appropriate support from donors and media development implementers, nevertheless a number of new organisations in several of the countries studied have begun to **diversify their revenue streams** creatively. One of the most interesting, and not always replicable elsewhere, is the *1in.am* online portal in Armenia, with two distinct versions, one for the overseas, mainly US, Armenian diaspora, and the other for local users. Advertising revenue from the former subsidises the latter.

Journalism education in Georgia stands out as a standard-bearer in creating practically oriented, **hands-on curricula** that produce graduates ready to be recruited straight into the media without additional learning on the job required.

Perhaps most important asset is **the human resources**. Across the region there exists a generation of professional, often Western-trained, editors, reporters and trainers who can spread the knowledge; in Ukraine, most of the best quality independent Russian-language outlets have some of the country's most experienced editors leading them. And there is a healthy supply of bright, talented and **motivated young people** who are willing to accept their leadership and jointly give birth to some of the most professional, independent and vibrant news outlets across the region, as Ukraine's *Hromadske TV* and its spin-offs have proven.

Key findings: international donors

None of the international donors' fund projects exclusively aimed at the independent Russian-language media but they are often included in existing projects that are targeted more broadly at a given country's media. A detailed table of foreign donors is presented in Annex 1. Below is a list of the major donors operating in each country:

Country	Key donors
Armenia	OSCE, OSF, Friedrich Ebert Foundation, USAID, Germany
Azerbaijan	EU, Council of Europe, Germany, British Petroleum with the local PASHA Bank
Belarus	Data not available due to legal restrictions
Georgia	EU, USAID, OSF, The Netherlands, U.S.A, Germany
Moldova	The Visegrad Four, USAID, Civil Rights Defenders, Romania, Sweden, EED, NED, Germany
Ukraine	Sweden, Denmark, Czech Republic, Netherlands, OSCE, Germany, NED, Omidyar, USAID

Recommendations

Introduction

Despite the many differences in political, economic and cultural country profiles, and the characteristics of their Russian language media, the authors' recommendations are remarkably similar and consistent. As noted in the Findings, the skills gaps identified are for the most part common across these countries, and particularly acute in independent media producing Russian-language content. Where country specific remedies are recommended, this will be noted below.

What is fresh and important to take into account, is a number of recommendations on how support should be delivered, with suggestions often departing from the formats traditionally practiced.

Skills Improvements: Management and Business Planning

Issue: Training, consulting and technical support in business practices are offered in very few current media development programs.

Recommendation: Introduction of such programs or scaling up existing ones is key to improving the viability of media outlets. These should focus on:

- Audience analysis and business planning
- Monetising content, especially on online platforms
- Developing advertising sales and marketing skills
- Organisational management, including tools for assessing and developing staff
- Introduction of editorial guidelines
- Social media marketing strategies
- Diversifying revenue streams
- Newsroom convergence

Skills Improvements: Content Production

Issue: The media outlets at the centre of this study, many of them online platforms, have out-of-date skill sets in content production and content communication in the digital age. Skills in sourcing and delivering stories on complex issues are also insufficient, as well as conflict reporting and thematic specialisation skills.

Recommendation:

a) Across all the EaP countries there is an urgent need to upgrade journalists' skills to conform to the demands of digital media:

- Website layout and design
- Working across several platforms: multimedia skills
- Blogging
- Use of infographics
- Development of interactive content
- Data journalism.

b) General journalism skills gaps, not limited to digital media, that future training and professional development programs need to deliver:

- Audio-visual production skills: still photography and video shooting
- Audio production
- Video editing
- Improvement of storytelling techniques
- Reporting and packaging of complicated stories – in particular investigative reporting techniques on the economy and corruption
- Thematic specialisation, particularly in economic, health, social issues, education and environment reporting
- Newspaper layout and design, better use of visuals (photography, graphics)
- Conflict coverage (for Ukraine especially)
- Combatting hate speech, especially in traditional media where it is easier to manage content through editorial processes.
- Basic, and especially advanced, writing skills still need considerable enhancement. (Note: Those should always be conducted by Russian speakers, local or international, as other than introducing basic writing principles, it is extremely difficult to conduct writing workshops, clinics, and coaching through translation).

c) Other training and courses that are rarely available or not at all:

- In the absence of foreign correspondents in all outlets except for the largest national media – critical assessment of foreign (Russian) news sources, or trolls on social networks
- Journalist safety courses for hostile environments, war and armed conflicts.
- Cyber security
- Sourcing - through online research - where access to information is severely limited, (especially in the closed societies of Azerbaijan and Belarus)
- Technical skills for engineers, studio and lighting technicians for improvement of production values, and attractiveness for media consumers
- Translators for bi-lingual media in Russian and local languages; also for creating content in English in the case of media (especially websites) to be consumed by foreign audiences (this was cited as one way of improving financial footing through attracting foreign advertising).

Media Advocacy: Local and International

Issue: Media legislation and regulation most of the countries is restrictive, outdated or flawed, creating particular hurdles for independent media. Local and international civil society, and international donors need to develop advocacy and pressure strategies to improve them.

Recommendations:

- Azerbaijan – against restrictive legislative conditions created by the government for the media, which put independent media in the position of a constant struggle for

survival. Also, to prevent planned measures to further regulate social media and internet TV.

- Moldova – in favor of updates to the legal framework. The media legal framework is outdated. Most laws in force do not correspond to current mass media requirements, creating confusion. Laws concerning the media sector need to be updated (e.g. new law on print press), or lobbying strengthened for the approval in the final reading of the laws already drafted (e.g. new Broadcasting Code), but blocked in the Parliament.

- Media literacy initiatives and projects have proven to bring quality changes among media consumers. That will require lobbying and advocacy measures aimed at including literacy media modules both in school and university curricula.

- Independent media remain donor-dependent. International donors could make a significant contribution to media development by supporting political decisions that would strengthen economies.

Media Project Design and Delivery

Issue: Media development programs are seldom delivered in formats that bring lasting change. Many projects duplicate each other. One-off trainings that used to have impact at earlier stages of the region's transition when even journalism basics were in short supply, require updating, primarily to reinforce skills already learned through practical day-to-day in-house support.

Recommendations:

- Better coordination among donors and implements to avoid overlap and concentration of support on a few selected media outlets which serve limited audiences. This is about smaller grants for larger number of organizations, rather than large amounts for a selected few, as is the current preference of donors. Other outlets remain without attention and funding. Effective donor coordination in Ukraine could serve as a model.

- Few donors deliver core funding. Current funding mechanism focus on specific projects, creating an administrative burden which take managers away from, and often disrupts, day to day operations. Current models of donors support rarely provide for updated equipment or software purchases.

- Study visits, mentoring, and foreign placements are seen as more effective than one-off short workshops, practical learning giving more sustainable results. Also, many newsrooms do not have the capacity to release journalists for training. Visits could result in learning media management skills, while in-house mentoring by foreign journalists would allow coaching tailored to the needs of specific organizations and focus on real life stories.

- To support such activities, the creation of funding schemes for journalists and managers to benefit from placements in foreign media, from internships, and participation in professional meetings and conferences.

- Creating new platforms, domestic and international for journalists to exchange ideas and address common problems. This would allow Russian language journalists and national language journalists to meet together. Joint media projects and collaborations could be an outcome of these encounters, such as team work on investigative reports, documentaries and cross-border projects. Media in EaP countries lack funds to attend major international professional gatherings.

- In Belarus respondents cited benefits of previous umbrella projects such as the Photo Service IREX initiative which provided access to free stock photography by professional photographers, and exchange of photos.

- Legal support to provide pre-publication legal analysis of articles on legal issues, as well as support for media in the event of litigation.

- Corporate in-kind support along the lines of a Microsoft scheme providing free software to NGOs in Eastern Europe. Workshops on using the free software should be part of any such scheme.

- Systematic evaluation of the effectiveness of journalistic training programs and exchange of information between their organisers.

Media and Journalism Education

Issue: Journalism education in most countries focuses on theory; lecturers rarely have practical experience as journalists themselves. Textbooks are outdated, equipment non-existent or obsolete. Few journalism schools offer courses in specialised thematic reporting or digital tools.

Recommendations:

- Journalism schools should develop up-to-date teaching and studying materials that incorporate new standards and methods.

- Academic journalism education should also attract more practicing journalists as faculty.

- Professional ethics and media law should be incorporated into curricula to promote responsible media

- Foreign languages – journalists and editors would benefit from most international training offerings, fellowships, professional gatherings and placements with better knowledge of languages other than Russian.

Study Background and Methodology

The Baltic Centre for Media Excellence had commissioned the Gap Analysis of media skills in the countries of the EaP countries with the support of the European Endowment for Democracy, in order to create a tool for the design of future projects and initiatives for its EaP

Programme, and a baseline for their future assessment; to inform donor policy choices in support for independent Russian-language media in the region; and map donor activity and media literacy programmes.

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 2) calling for research consisting of:

- Interviews with journalists and media managers, academics, and media NGOs
- Desk research of existing literature
- Where possible providing quantitative data on the country's economy, demographics, size of the media and advertising market, and level of media freedom. Where quantitative data were unavailable or unreliable, qualitative assessments from local experts were expected
- Analysis based on the findings and own in-depth knowledge of the country's media market.

Elements of the study were:

- Country overviews, consisting of description of political and economic context, identifying major media outlets and major independent outlets with exclusive or partial Russian language content.
- National media landscape overview including regulatory and legal environment, advertising market, state of public service media and overall level of media independence, description of journalism higher education
- Detailed gap analysis of media skills in selected independent Russian language media with a focus on skills in:
  - Media management
  - Sources of funding and business models
  - Content production
  - Marketing and branding (including social strategies, and audience engagement techniques)
- Conclusions and analysis
- Recommendations for training, skills improvement, coaching and other support programs.

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