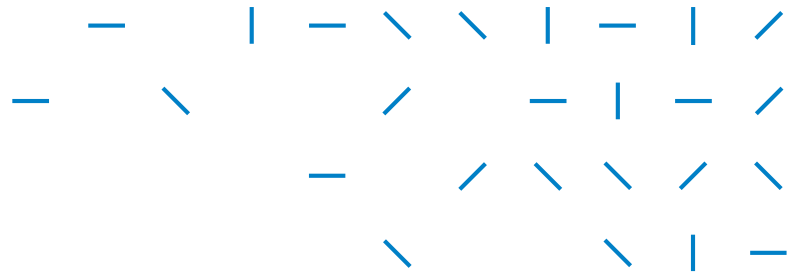




Baltic Centre for
Media Excellence



Gap Analysis of the Independent Media Skills and Needs in the Eastern Partnership 2021

Overview and Recommendations

by MAGDA WALTER
November 2021



Contents

What we learned?.....	3
Background	3
2016 Main Findings	3
2021 Findings.....	4
Recommendations.....	9
Methodology	11

What we learned?

Independent media in the Eastern Partnership countries are struggling. They face competition from oligarchic or state-controlled media companies; governments that are either repressive or, at best, slow or reluctant to create an enabling media environment, or to facilitate access to information; and an economic melt-down from the Covid-19 pandemic. The Baltic Centre for Media Excellence (BCME) research indicates they will continue to struggle for the foreseeable future, perhaps indefinitely, and donor support will be essential to keep them delivering quality public interest information to citizens. But despite the challenges, the last five years have seen improvements in the quality of content, and of digital and management skills. In addition, examples of innovative business and editorial solutions have appeared, many of them achieved as a result of donor support, but also thanks to the tenacity, dedication, and courage of the journalists themselves.

Background

The first Gap Analysis of the Independent Russian-language Media Skill Set in the Eastern Partnership (GA) was commissioned by the Baltic Centre for Media Excellence in 2016, with the support of the European Endowment for Democracy. The aim of the study was to produce a tool for the design of future projects and initiatives to support independent media, to inform donor policy choices and to create a baseline for future assessment of progress. The GA produced six Country Reports – Azerbaijan, Armenia, Belarus, Georgia, Moldova, and Ukraine, as well as a Regional Overview of findings and recommendations, and a Policy Paper for the donor community.

The current study is designed to measure progress in skill development, track changes in donor responses, and map potential new gaps in the independent media skill set using the 2016 findings as a baseline. Since 2019, at the recommendation of national, and other, experts, the study has covered all independent media, rather than focusing exclusively on Russian-language outlets.

The research team and BCME have determined that this year's research will compare developments and progress with the baseline study (conducted in the summer/autumn of 2016 and presented in early 2017), instead of tracking only interim changes since the release of the most recent update conducted in late 2019. The previous two updates analysed only incremental one- or two-year changes, which in some cases appeared negligible. The current report applies a longer lens. The research team and BCME have concluded that such an approach would be of greater value to all stakeholders at this 5-year mark.

The 2016 GA was a ground-breaking study in several aspects. It deployed a wider regional scope instead of focusing on media development needs in a single country – the prevailing approach taken by donors and implementers in the past. Perhaps even more importantly, it sought to explore skills gaps and thus development needs through a bottom-up consultation with the recipients of development assistance – the media companies and local journalism associations, activists, and educators in the destination countries themselves. And the objective was to inform donor priorities, rather than confirm existing donor assumptions.

Finally, the country report authors were national media experts - academics and journalists - closest to the local media, with the contacts, knowledge, and trust of their respective countries' media communities.

2016 Main Findings

To assess progress since the 2016 study, it is first necessary to summarise its main findings. Then, as now, the

six countries varied widely in levels of media freedom, and in political and economic development, but despite these differences, they shared some similar challenges in the media environment. Those were:

- Media mainly controlled by political or business interests, often serving as tools to advance those interests
- Insufficient market and audience data
- Weak economies and thus a limited advertising environment
- Poor quality of journalism education: mainly theory without practical training

While it is impossible to reiterate in full the long list of skills currently needing improvement that the country reports identified, there were several key common themes among the recorded gaps in knowledge:

- Media management, audience analysis, business planning, advertising sales and marketing, human resources, new revenue streams.
- Digital skills – web design, interactivity, infographics, audio-visual production, advanced social media strategies (for content creation and distribution, marketing, and audience engagement).
- Thematic reporting – economy, legal system, health, science, environment, conflict and addressing hate speech.
- Investigative reporting – several outlets led the way but visualising and organising complex reports needed enhancing.

In addition, the research provided important insights into the design of media support programmes. Among them was a suggestion that large multi-year grants were not always the most effective from the perspective of the beneficiaries, while undoubtedly easier to distribute and administer for the donor. Project funding was seen as frequently problematic, especially for media where economies and advertising markets were weak and unable to sustain commercially viable companies. Those outlets were better served by core funding, while start-ups required seed funding.

A large proportion of respondents strongly suggested that the popular training format of short (two to five-day) workshops had limited impact and longer-term, ongoing support was likely to be of greater benefit. A format where journalists and managers have in-house workplace mentoring, coaching or consultation, it was suggested, would yield better results. Most media outlets also stressed there was insufficient support for strengthening media as independent, strong, and transparent businesses.

2021 Findings

Political, economic, and social context

The design of the current study deliberately chose to only sketch out key political and economic developments in EaP countries; only major developments that may have significantly affected the media environment will be mentioned here. This was to help focus the attention of country researchers, and of their audience - the donor governments - on the evolution of media programmes compared to the skills gaps and needs reported in the baseline study in 2016.

Over the past five years, there were multiple shifts in political winds across all countries following national elections. The most frequent domestic theme in national elections was a pledge to reduce corruption, but

subsequent policies to fulfil those pledges tended to fall short of the ambition, according to civil society. Frequently, most notably in Moldova and Georgia, changes in government heralded a reorientation of the country's foreign policy direction, with the pendulum swinging back and forth from policies more closely aligned with Russia to pro-EU, Western oriented ones. This points to the depth and persistence of Russia's ongoing influence on the internal political debates of its neighbours.

The most significant developments with an impact on the political, economic, and, consequently, the media landscape in the studied countries were the 2020 Armenia-Azerbaijan war over the disputed territory of Nagorno-Karabakh; the brutal crackdown in Belarus on protesters, opposition leaders and journalists, following nationwide protests over the disputed results of the presidential election in August 2020; and the Covid-19 pandemic.

In the latter two instances, donors responded by creating flexible emergency funding mechanisms, and re-directing funds. In many cases, implementers restructured existing programmes and created new ones, and provided scores of new pandemic and health reporting resources.

General media landscape

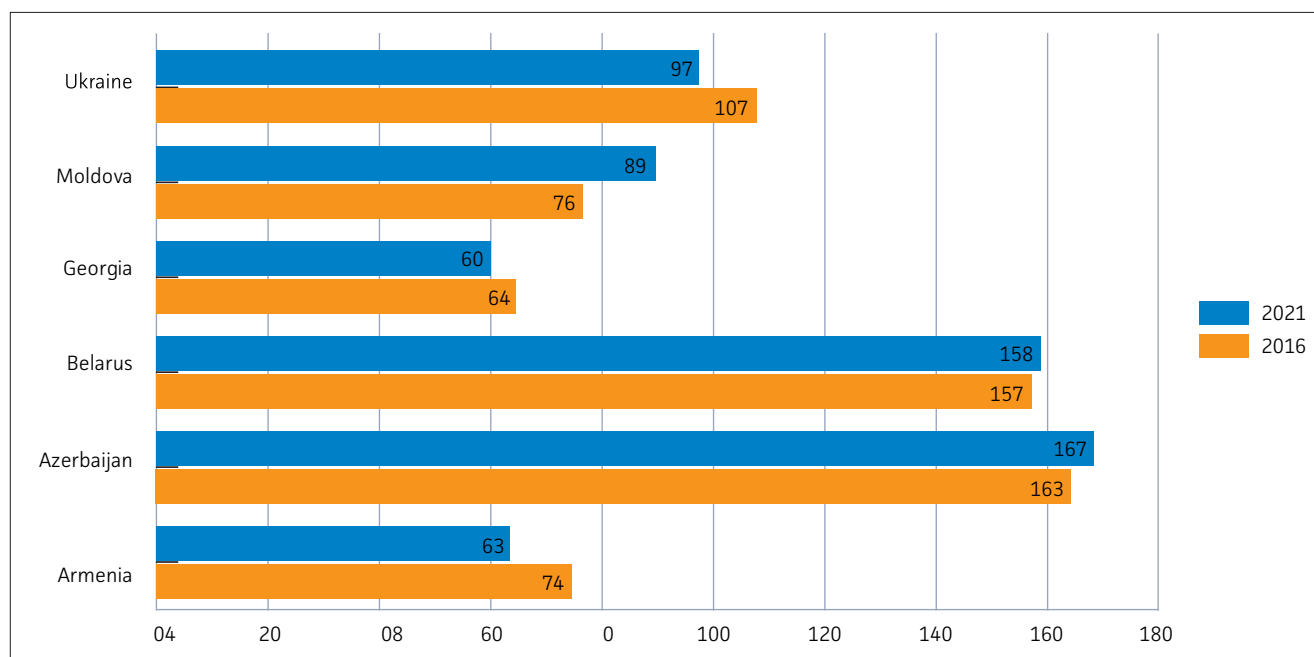
Three common themes resonated across all countries in 2021 despite their economic and political differences: the impact of the pandemic; the rise of disinformation and hate speech; and lack of national government support. Russia is identified as the main source of disinformation, while domestic politicians also use it for political advantage. Not one EaP government produced an improved and more enabling environment for independent media to operate in and flourish. In fact, there have been increases in online threats and abuse, and incidents of physical violence against journalists in Armenia and Georgia that went unpunished by authorities, and there was overwhelming violence and repression by security agencies in Belarus.

The current research, as well as last year's BCME Snap Report on the impact of the Covid-19 pandemic on the media, indicates that across all studied countries - although to varying degrees - governments used the pandemic to limit access to information. Some pushed legislation limiting freedoms that was not always related to the health emergency. In Armenia and Moldova, governments reversed some of the restrictions after a few weeks following protests by civil society.

The economic impact was extensive. Amid lockdowns, the economies shrank, as did advertising budgets, depriving media of the revenue, which many of them were just beginning to rely on. In Ukraine, the largest and most mature media market, the situation was more complex. Some sections of the advertising market - broadcast and digital - grew, while others - cinema, outdoor and print - crashed. Experts predict the advertising market there to rebound in the next year. But the much smaller markets in the other countries all suffered. At the same time, the crisis presented opportunities for some media. As the public turned to trusted outlets to keep them informed about the health crisis, some cemented their reputation. For many media it also hastened a transition to improving digital skills, the use of statistical information, and health and science reporting. The collapse of advertising markets has also led to experimentation with funding models that had been previously underdeveloped, such as crowdfunding, subscription and membership.

Media freedom ranking by Reporters without Borders (RSF) as compared to 2016 improved for Ukraine, Georgia, and Armenia in 2021; it declined for the other three countries. There has been little progress in reducing the political polarisation of media in all the studied countries.

Figure 1: **World Press Freedom Index in the EaP countries, 2016, 2021**



Source: Reporters without Borders Press Freedom Index (higher score equals less freedom)

The overwhelming majority of independent media have migrated (or been created) online. And while having a robust online presence is essential for any media outlet today, what is notable is that of the 59 national independent outlets studied, 44 have an online only presence, while a mere 15 of them have either a broadcast or print version, besides being online. Among local media, however, there was a larger proportion of legacy media companies.

Conversely, print media appear to be in severe decline, mirroring global trends even in vastly stronger economies, especially in the wake of the pandemic.

Country	Independent media			
	National – top 10		Regional – top 5	
	Online only	Other	Online only	Other
Armenia	8	1 print, 1 radio		4 TV, 1 print
Azerbaijan	10		3*	
Belarus**	8	1 radio, 1 TV	5	
Georgia	5	1 radio, 4 TV	2	1 TV, 2 radio
Moldova***	6	1 print, 2 TV	3	1 TV, 1 print
Ukraine	8	2 print	4	1 print

* Only 3 independent outlets selected

** Belarus' situation is exceptional, includes exile and foreign media. Following the government crackdown, many Belarusian outlets moved all or some of their operations to neighbouring countries. For details, please see Belarus country report.

*** Only 9 selected

OF ALL NATIONAL AND LOCAL OUTLETS STUDIED 70% HAVE AN ONLINE ONLY PRESENCE.

This trend warrants further study, as it will undoubtedly have implications for the overall impact of independent media on the national discourse in countries where TV is still the main source of news and information for the majority of the population, but with the internet – and especially social media – catching up.

Political and commercial interference with editorial content remains an entrenched feature in all countries. But firewalls between sales and news departments have begun emerging when compared to 2016.

Cross-border collaborations and partnerships are not mentioned at all in the 2021 reports, while in the baseline report, they were seen as a journalistic strength and practical solution to scarce resources through pooling those for joint projects. The Nagorno-Karabakh conflict may have set this back in the Southern Caucasus for decades.

Skills gaps then and now

The current study reveals several very encouraging shifts in types of funding being offered, and in the format of training support in a number of current programmes. There is also a changing focus onto the key skills where gaps were reported as pervasive five years ago (and as shifting very slowly, or not at all, in the interim GA updates of 2018 and 2019). Most notably, the baseline study (2016) had stressed the lack of business and management expertise among media managers.

Comparisons with the baseline and the interim reports reveal, however, that certain recommendations were either rejected, ignored, or slipped through the cracks, and may be worth revisiting (Please see below: Needs still unmet). Others were addressed but only partially, or only in some countries. Media managers and experts in the two closed countries of Azerbaijan and Belarus, and in Armenia, where democratisation has stalled (if not regressed), see little donor impact on the condition of the independent media. In Armenia despite efforts of a robust media NGO community, there has been backsliding on reform of the legislative framework.

Belarus, with its extraordinary situation requires even more extensive levels of support (very specific suggestions are offered in the Belarus country report). There are also still many unmet skills needs in Azerbaijan, where the independent media community still feels forgotten by donors.

Positive changes

Donors and implementers are responding to some of the key recommendations that first emerged in the baseline study. Content production no longer dominates media support programmes. The shift to strengthening business skills and media companies' financial viability is clear in reports from three of the studied countries (Moldova, Georgia, and Ukraine), and to some extent in Armenia

The country reports from Ukraine, Moldova, Armenia, and Georgia all document more **management skills** training being delivered in strategic business planning, organisational development, diversification of revenue streams, and audience analysis. Those schemes also tend to be **better tailored** to the needs of individual outlets and the markets they operate in. This was practically non-existent five years ago. There is a greater presence of in-house coaches and mentors, and those programmes are often longer in duration than past workshops of several days.

In Georgia, media have more frequently obtained **core funding**, and in Armenia and Moldova there were grants awarded to cover employee salaries to relieve the economic impact of the pandemic. But there is significant scope for offering **capital investment and capital improvement funding** for equipment purchases or upgrades to allow companies in all countries to keep up with fast changing technology in today's media environment.

There is growing recognition that sales and editorial functions need to be separate, and in some media, they are already performed by different staff members. This is more likely to be happening at the national level than among the tiny resource-poor local media outlets where managers will multi-task as general managers and sales executives, while still staying involved in content production.

Video production skills are reported as having improved across the board. This is in part driven by media outlets' **increased presence on social media**, not just for posting content but sourcing stories, factchecking, promotion and audience engagement. To some extent, there is production of content exclusively for social media, but that can be much further enhanced. Interim GA reports in previous years suggested that not all this progress is solely due to donor and implementer interventions but has also been achieved through indigenous experimentation and innovation, as a generation of digital natives comes of age and enters creative and decision-making roles throughout all walks of life, including the media.

Needs still unmet

One gap, or rather a huge abyss, is the lack of affordable, reliable, and consistent **audience data**. This has been highlighted repeatedly in every GA report conducted to date. It was also first raised in an even earlier study, the European Endowment for Democracy's 2015 *Bringing Plurality and Balance to the Russian Language Media Space*. This has been entrenched and never addressed by the donor community. This inability to measure audiences on an ongoing basis hampers media planning of content and business strategies. It is perhaps the most pervasive problem that media managers, media experts and media NGOs repeat in practically every report that the BCME has produced.

This has probably not been addressed because it is a complicated problem, requiring time and innovative thinking in tackling it. It also has risk attached to it, and most likely requires a joined-up effort by donors in the development and funding of a solution.

While the volume of training programmes on media management and various business skills has grown, there is still a gap in offering **sales, marketing and promotion** courses, and a shortage of professionals in these fields in the market. Advanced social media marketing strategies are still rare.

While progress has been reported in the strengthening of **thematic reporting** for some of the media, the editors and reporters often question the topics selected by donors/implementers. One particularly stark example in Georgia cites a donor-sponsored course on coverage of debates by the political party youth teams, which had no relevance to local interests and needs of audiences, who would rather learn about health and economic issues.

As in the past, smaller regional media in all countries cannot afford the luxury of reporters dedicated to specific beats. There are also continuing skills gaps in economic reporting and coverage of foreign affairs. While original **foreign coverage** is rare, when it happens, it

LACK OF AUDIENCE DATA PREVENTS MEDIA FROM DEVELOPING SOUND BUSINESS STRATEGIES.

may be reliant on easily accessible or free Russian agency material and other content, with its inherent bias.

A need for an indirect form of donor support for media also comes up in the BCME studies. It is suggested that donor governments assist in amending **media legislation** or apply pressure on EaP governments to abide by existing laws and international norms that they have committed to. Experts interviewed for this study and participants in BCME sponsored events have called for media support to be linked to other categories of aid, and conditionality for compliance by governments to be built in (activists on the ground even suggest that various iterations of the Magnitsky Laws be applied to certain government and business figures in cases of clear violations of human rights).

With disinformation and propaganda presenting ever growing threats, training in **fact checking**, verification of images, understanding and recognising “deep fakes” and debunking must be expanded. **Media literacy** programmes for journalists, youth, educators, and the public at large are no longer “nice to have” but an essential part of a holistic general education curriculum. Many such initiatives are already happening in Ukraine, Armenia, Georgia, and Moldova; stepping them up is being called for in Azerbaijan. Not all are linked to donor support, and not all have been part of media development aid programmes.

In Georgia, some media not previously dependent on grants had trouble obtaining emergency pandemic funding. Most donors consider helping media companies become financially viable as a major goal. If companies that have been doing just that and are only turning to donors for temporary emergency support in a global crisis, are failing to obtain such support, this may warrant further investigation and correcting.

Recommendations

The comparison with recommendations made in the 2016 baseline Gap Analysis (and in other research conducted by BCME; see list of sources below) indicates which key recommendations were incorporated into media support programmes and to what extent, and which of them were not. But it does not offer an answer of why the latter were not implemented. The comparison also demonstrates the sheer volume of other, perhaps less critical, recommendations that the baseline study offered and that do not appear to have been even contemplated, at least not by the donors’ group as a whole.

Some of those could be considered “low hanging fruit” – easy, less sensitive politically, and relatively inexpensive to implement, such as the translation of resources or assistance in journalism education reform. Others – such as the audience measurement conundrum or ensuring that EaP governments honour their own media laws and international norms - present a greater challenge that may not easily fit into existing funding mechanisms. Addressing that gap in the donors response’ is suggested in the recommendations below.

Continue and enhance:

- All aspects of media management skills, encouragement and introduction of diversified revenue streams, improvement in sales, marketing, and promotion skills offerings, organisational development
- Core funding
- Embedded, long-term and tailored coaching and mentoring for newsrooms and management
- In journalism: thematic – especially economic – reporting skills, (but topics determined by the media themselves not donors), data journalism, investigative journalism

-
- Advanced social media strategies
 - Media literacy programmes
 - Increased support for local media

Improve:

- Cyber-security for journalists and media companies
- Support for journalism education reform
- Monitor adherence by EaP governments to existing laws and international norms through conditionality in aid programmes, pressure, and diplomacy (some respondents in our research mention the need for targeted, Magnitsky style, sanctions)
- Support professional associations and media watchdogs in pressing for legal framework reform; policy, campaigning and advocacy skills and tools

Introduce:

- Plan to address the most pervasive challenge of media markets in EaP – audience measurement
- Programmes to support consortia, collaborations, and partnerships. These are trends already observed in other parts of the world, and some media in EaP countries are reported to have experimented with such structures. Creation of those can be facilitated by:
 - A bi-annual, post pandemic conference - a platform for journalists, editors, and media managers (rather than donors or implementers) to exchange ideas, share knowledge, and address common problems, launch joint media projects and collaborations
 - Schemes to provide content, resources, and training in local languages – translation services.

Take donor coordination to another level

- Form a small Donors' Working Group (or groups) to operate and communicate continuously between Coordination Group meetings and to drill down on issues discussed at the meetings (Donor Mapping will be critical for such a group's work):
 - Revisit past recommendations that were "discarded" and interrogate them, determining what is feasible and what warrants further study
 - Consult on potential solutions with media industry business and editorial professionals in donor countries, if needed
 - Explore the feasibility of jointly funded projects
 - Operationalise such project ideas - develop action plans
 - Focus on the special needs of Azerbaijan and Belarus

Methodology

This paper and its recommendations are based on six EaP country reports produced between June and October of 2021. They only reflect the recommendations from the authors of reports from Azerbaijan and Belarus to the extent where they coincide with the other four countries. As in the past, BCME recommends that donors working in those two countries, or planning to, familiarise themselves with the actual country reports and develop distinct strategies reflecting the authors' assessments and recommendations.

The six individual country studies were designed to record changes since the baseline study (please refer to the attached research template). This overview and the recommendations above also draw from other BCME research and relevant media development events:

- Baseline GA 2016 and the Policy Paper 2016 (presented in early 2017)
- 2020 BCME Snap report on the impact of the Covid-19 pandemic on media in the EaP.
- An online mini conference “Independent Media in the Eastern Partnership 2021” organised by BCME on March 25, 2021
- BCME focus groups with key media stakeholders in all EAP countries conducted in October/November 2019
- Interim GA updates 2018 and 2019
- Conferences (Riga Nov.2019), panels (Tbilisi – Nov. 2019).

Country Researchers

Boris Navasardian - Armenia

Arif Aliyev - Azerbaijan

Nino Danelia - Georgia

Pavel Bykouski - Belarus

Victor Gotisan - Moldova

Ievgeniia Oliinyk - Ukraine

Chief Editor

Magda Walter

Project Team

Gunta Sloga, Executive Director, BCME

Martins Murnieks, Head of the EaP Programme, BCME

Sandra Zilberta, Project Coordinator, BCME

Joanna Storie, Copy Editor

Ilva Paidere, Layout Designer

2021