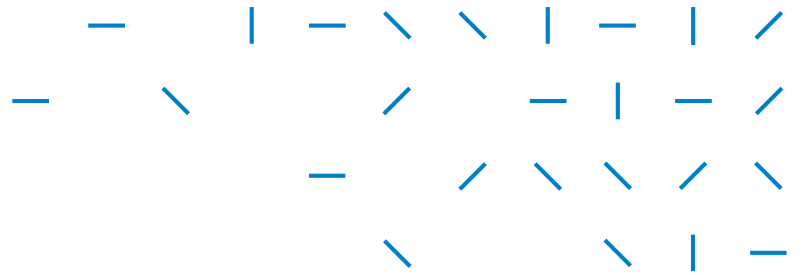




Baltic Centre for
Media Excellence



Gap-Asset Analysis of Independent Media Skill Set in Eastern Partnership Countries

Research Template for 2021
Follow-up Country Reports

2021



In 2016, the Baltic Centre for Media Excellence commissioned the Gap Analysis of Independent Russian-language Media Skill Set in Eastern Partnership (GA) with the support of the European Endowment for Democracy, in order 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 Template is designed to measure progress in skill improvement and map new gaps of the independent media skill set using the 2017 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 in the media climate, skills’ gaps and media assistance effectiveness with the baseline study (conducted in the summer/autumn of 2016 and presented in early 2017), instead of tracking changes only since the release of the most recent update in late 2019. The research team and BCME have concluded that, at this 5-year mark, such an approach would be of greater value to all stakeholders.

1. Context (1,5 pages)

1.1. General

Only update the following social, economic, demographic indicators **if there were major changes**. Write a short country profile. It should encompass two timelines: a longer historical view of country’s evolution since 2016 (and the baseline GA report research), and a more detailed review of developments since November 2019 (the last GA update).

There is no need to research the statistical data again, nor to provide an introductory note about the country, borders, history etc., since previous studies and other resources provide that. Charts from previous reports can be reused.

- 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)*

In this section, the most important updates needed are the impacts of major international and national events (such as elections, armed conflict and political unrest) on the country’s social, political and economic landscape.

There is a separate section below for the impact of all these events specifically on the media market (1.2).

The impact of the Covid-19 pandemic is also to be addressed in a dedicated separate section below (1.3).

1.2 Describe the country’s media market (please do not write about skills gaps and other assistance needs in this section).

Briefly describe its evolution since the baseline 2016/2017 GA. How have press freedom indicators according to Reporters Without Borders changed? (Provide a graphic presenting rankings over the last 5 years). How has the size and strength of the advertising market evolved? Have notable foreign investors entered/

left the market? Have there been 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. Have there been major changes to the legal and regulatory framework?

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

Please focus on Russian-language media only to the extent they meet the above criteria and have the potential to reach and influence a significant section of the public.

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 March 2017? 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 and management skills; changes in faculty to include a greater number of staff with practical journalism experience; or investment in equipment)?

What are the main forms, sources and challenges of disinformation? What are current solutions? What else can be done, especially by donors?

1.3. What has the impact of the Covid-19 pandemic been on the media?

Please list major impacts in **bullet points**, drawing from the 2020 Snap Report on the Impact of the Covid-19 Pandemic on the Media Sector in Eastern Partnership Countries?

1.4. Major independent media players

List 10 major independent media players (for this year's report we will focus only on the independent media - not the major market players, which may be subject to private or state editorial influence). Instead of creating separate tables of different media categories, in two tables list the titles, and other information (national and regional, see example below), and in an added column indicate on what platforms they operate. Because of the reported difficulty and unreliability of audience numbers, any changes since the baseline Gap Analysis research need to be described in qualitative terms in the narrative portion of this section.

Have any changes occurred? If yes, what? Is there sufficient data available on audience reach/share/circulation/unique visitors? What is their level of editorial independence, and does it meet with any challenges? What is their ownership and/or funding models? Please address these questions as compared to the status as of late 2016/early 2017 (the baseline GA). For print media please note if the frequency of publishing has changed (for example, if a publication used to come out twice a week in 2017, 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.

In interviews, please keep in mind, and ask directly if possible, the questions posed in the Conclusions section of this template.

Please use the following tables as templates for the lists:

TOP 10 INDEPENDENT NATIONAL MEDIA

Name of outlet	Circulation/Share/Unique visitors (if data is not available or unreliable, please explain other criteria used to determine the outlet's reach and influence)	Owner/Funding model	Format/Platform

TOP 5 INDEPENDENT REGIONAL MEDIA

Name of outlet	Circulation/Share/Unique visitors (if data is not available or unreliable, please explain other criteria used to determine the outlet's reach and influence)	Owner/Funding model	Format/Platform

Note: For the purpose of this section and section 2.2, the classification of media as independent will be based on the BCME selection criteria (please see attached document), and on the country researcher's knowledge of the domestic market. They must meet the following minimum criteria:

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

(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)

2. Gap-asset analysis of media skills

2.1. 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 a *national* (so all media not just the ones on the list of independent outlets) overview of *skills gaps*, including an assessment on whether some of these gaps have been closed, using the 2017 GA as the baseline. Please, be brief in listing developments, less descriptive. Pay particular attention to the following skills, highlighted in the 2017 GA findings:

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

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

2.2. Section 2.1 above provides a general overview of the entire national media skills landscape. This section will focus *only* on the chosen independent media organisations from Section 1.4 (**6 pages**):

2.2.1. 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?

2.2.2. 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? Have new revenue-generating genres been developed since 2017 (i.e. membership models, donations, crowdfunding, paywalls, subscriptions)?

2.2.3. 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, health, science and conflict reporting). Which newsrooms have converged? How do journalists use social media in their content production and investigative work which they may have not done prior to Gap Analysis of 2017? Is audience engagement a factor in content production?

2.2.4. 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?

2.2.5. 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 ap-

proaches, 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 of selected outlets, journalists, media educators and activists, for section 2.2.2 - annual reports if the company publishes them, regulators' records, other desk research.)

3. Conclusions (0.5 Page)

Summarise main trends that emerge from above research. Are there changes to generalised media skill gaps in your market since March 2017? Are there clear trends, gaps or overlaps in current media development activities? Which of them have been addressed since March 2017? Have partnerships been created or does the status quo present further opportunity for partnerships with others? What opportunities or barriers to enhancing media skills persist 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? Have donors and international implementers been responding to the feedback from beneficiaries as recorded in the BCME research since the baseline study? Where have they succeeded? What continues to be overlooked/neglected?

List 7 main changes/improvements that have taken place between summer/autumn 2016 and summer/autumn 2021 within the 5 areas defined above in 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 and support models not currently used in existing media development programs, and not already identified in 2017 GA that would help deliver the needed results?