Needs Assessment of Independent Media in the Neighbourhood

A summary of the report produced
for the European Commission's DG NEAR

Contents

Disclaimer

The views set out in this report are those of the authors and do not necessarily reflect the official opinion of the European Union

Introduction

This summary presents the top-level findings of an eight-month research project aimed at assessing the needs of independent media in the EU Neighbourhood (East and South). The study was carried out by four international experts who visited 11 of the 16 partner countries and conducted interviews with more than 500 representatives from independent media, media support organisations and state bodies. They also reviewed around 800 studies, reports and articles covering media landscapes in the two regions.

The aim of this initiative was to promote a better understanding of the challenges faced by independent media outlets in the target countries as well as to identify and highlight their development priorities. The experts also assessed the extent to which EU funding mechanisms are effective and appropriate in providing support to these stakeholders. The findings presented in the final report which was submitted to DG NEAR in February 2020 will help to inform EU funding programmes for independent media over the next four or five years.

The research highlighted clear opportunities in both regions for **bilateral engagement.** Operating in an increasingly competitive and politicised market, independent media outlets share an interest in accessing funding to develop new content and explore innovative formats, particularly those that appeal to social media audiences. They also recognise the pressing need to diversify their revenue streams and increase their resilience to external pressures. Key priorities voiced across the partner countries included:

- Support in developing workable business and monetisation models as well as improving management systems and streamlining operations;
- Greater emphasis on audience research with a view to bringing content closer in line with actual needs;
- Support for investigative journalism and programming for young people (including children);
- Continued investment in community and localised media, thereby filling the information gap in the regions;
- Improved governance in the media sector by supporting representative groups and rights-holders and by facilitating legislative and regulatory reforms;
- In the South, the development of national strategies for media reform which seek consensus between local stakeholders and help optimise the efforts of international donors.

The needs assessment also explored the potential for developing two **regional programmes** which could complement or extend bilateral efforts. Here, the focus was on identifying ways of addressing common challenges while acknowledging the marked differences in the political and economic contexts of the partner countries. Areas of interest included:

- The creation of a funding mechanism in each region to foster the development of public interest journalism. The fund would be open to both private and public service media and grants would be accompanied by targeted consultancy;
- New models for social media engagement that speak to younger audiences by repackaging news content and explaining complex issues in accessible, engaging formats;
- The development of regional mechanisms or coalitions to bring pressure to bear on national governments;
- Networks of best practice through which new ideas and approaches can be channelled, including knowledge sharing on new business models and commercial alliances;
- In the South, a regional policy forum to provide resources and support for policy-makers;
- In the East, a regional Russian-language broadcaster capable of reaching mass audiences and countering Kremlin-sponsored disinformation campaigns.

The enduring need to improve donor strategy and coordination was a common theme in interviews with beneficiaries and implementing agencies alike. It was felt that impact was often undermined by programmatic shortcomings which were prevalent in both regions. The following priorities were, therefore, highlighted:

- Funding mechanisms should be based on clear criteria and able to respond swiftly to requests for support;
- Core support should be allocated to media outlets which occupy a proven niche; serve an identifiable audience; and make a clear contribution to the plurality of content on local media markets;
- Donor-funded programmes should combine grant-giving with capacity-building, mentoring, research initiatives, innovation labs and business incubator schemes;
- A network of local stakeholders should be established across the two regions with a view to conducting needs assessments and gap analyses on a rolling basis;
- Media development actors should introduce improved frameworks for monitoring and evaluating their programmes, thereby providing clear evidence of impact and capturing replicable approaches;
- The EU Delegations should play a more proactive role in encouraging national governments to honour their commitments to media reform;
- The European Commission should take the lead in coordinating donor efforts and should establish a clear vision based on shared values and agreed goals.

Analysis of sectoral themes

Media business environment and revenue models

The tough business environment faced by independent media was highlighted across the Neighbourhood. Advertising markets in both regions are dominated by political interests while the absence or weakness of professional organisations means that advertisers have significant latitude to impose unfair and unethical conditions on media. Furthermore, the overall dynamics of the market are changing. TV, in particular, is facing a growing challenge from online platforms and an increasing proportion of advertising revenues are being drawn down by Google and Facebook.

Nevertheless, the drive to achieve sustainability and reduce dependence on donor funding has become a key strategic goal for donors and beneficiaries alike. Although there is a widespread perception that donors' expectations in this regard are unrealistic, independent media outlets across both regions have been attempting to diversify their income by experimenting with new business models such as native advertising, crowd-funding, paywalls and subscription-based applications as well as various services such as content syndication and brand spin-offs. However, despite their best efforts, the sustainability gap remains wide.

Consequently, the report recommends sustained support for fostering a fair and equitable market through introducing legal frameworks; lobbying for a share in the revenues generated by tech giants; and funding high-quality audience research. Donors were also urged to help media develop new business models and organise regular regional forums to share experience. In addition, strategies for reducing operating costs were seen to be an important factor in achieving sustainability.

Media ownership

Opaque media ownership remains a significant problem in the partner countries, exacerbated by the fact that the general public lacks the skills or knowhow to recognise tendentious reporting. Digital media, in particular, are poorly regulated and are often established by groups with a political agenda. In the South, the problem has a regional dimension with three media sub-ecosystems funded by rival powerbases: Saudi Arabia and the UAE, Qatar and Iran. This has allowed these countries to create a coherent narrative that looks and sounds genuine to those unaware of the hidden ownership.

There is, therefore, a pressing need to support the introduction of laws and regulations aimed at ensuring the transparency of media ownership and preventing concentration. At the same time, public awareness of the negative effects of opacity and concentration should be raised by supporting media literacy programmes. International cooperation is recommended, building on the EU's track record in promoting transparency in this field.

Understanding audiences

There is a widespread perception that media are disconnected from their audiences, particularly young people. However, the cost of buying in audience research can be unaffordable for smaller outlets whilst commercial agencies offering paid-for research often have low levels of credibility. Some independent media have resorted to grass-roots methods or ICT-based mechanisms in order to generate the data required to make informed decisions on editorial policy and content strategy.

Tunisia's audio-visual regulator, HAICA, is seeking to establish an independent audience research agency which will be supported by the wider media industry. This is a highly attractive model since it is not aligned to any media or business interests and, if properly governed, can act as a vital source of impartial data. Across both regions, investment in audience research, even in the form of standalone initiatives, is considered to be a priority. The report also noted a widespread lack of understanding of online analytics which mean that both donors and advertisers make decisions based on false perceptions of audience size or projected growth. A guide to interpreting online data could be a useful tool for multiple stakeholders.

Journalists' working conditions

It is widely recognised that journalists who lack job security and who earn poverty pay are more likely to be open to unethical practices, particularly in countries where the jobs market is limited. As a rule, media professionals in the South and the East are paid below the national or sectoral minimum wage. Work contracts, where they exist, offer little protection while professional bodies or regulatory authorities are apparently unable to maintain standards. Employment conditions for journalists working for digital media are the worst in the sector.

It is, thus, recommended that donors support collective bargaining and social dialogue to achieve at least minimum employment standards. Journalists' unions need capacity-building and technical support to negotiate collective agreements with media and employers' organisations. Unions would also benefit from assistance to organise and represent digital media workers, thereby giving them an independent collective voice.

Journalists' safety

As one expert stated, "Everybody should know that there is no free press without a safe press." In the majority of cases, violence against journalists goes unpunished and harassment – often in the form of legal cudgels – leads to widespread self-censorship. Violence against women journalists is of particular concern, while aggressive trolling is rapidly becoming an occupational hazard.

The report highlights efforts spearheaded by UNESCO to establish national media safety mechanisms to monitor, report and investigate attacks and threats against journalists. Although the response from some national governments in the partner countries has been positive, this area of work remains underfunded. It is, therefore, recommended that the issue is addressed at government level in line with the UN Plan on the Safety of Journalists. Donors should also support law-makers in developing legislation to protect journalists' rights.

Influence of blogging and citizen journalism

Respondents noted that citizen-driven blogging and reportage had become core components of media development programmes in recent years. In some scenarios such as the conflict in Syria and the revolution in Egypt, bloggers had played a vital role in providing information to the outside world. However, experts also warned against a perceived tendency among donors to view support for bloggers and so-called "infomediaries" as an alternative to promoting professional journalism. They also highlighted the dangers of journalists using Facebook pages and Twitter accounts as credible sources of information (e.g. in Libya).

The report moots the idea of harnessing grass-roots reporting through technology and network-building, thereby allowing media outlets to engage with citizen journalists and local correspondents but to use them as part of an editorially robust newsgathering process. In addition, stakeholders in Moldova pointed to a campaigning tool pioneered by TV8 which had the potential to unite citizens in a common cause and, thereby, promote cohesion within local communities. It was also thought that projects aimed at facilitating debate online should include sufficient budget for managing online communities as well as embracing a strong editorial premise.

Reaching young people

As media across both regions struggle to connect with younger audiences, experts called for more research into the needs of young people and their consumption habits. Existing studies suggest that young people want to see more programming on employment opportunities, health and education but this kind of content is broadly absent in the media space. In particular, the lack of bespoke programming for children is seen to be a missed opportunity to promote cultural values and media and information literacy (MIL) at an early age.

The report recognises the value of other MIL activities such as press/media clubs at schools; online games; inspirational talks given by working journalists; summer schools for aspiring young reporters that are organised by media outlets; placements at news agencies for schoolchildren and journalism students; and guidelines for parents on how to properly discuss and teach MIL at home.

The report suggests that regional programmes could play an important role in facilitating a transfer of expertise and ideas, particularly by providing a forum for young people to share best practice and innovative approaches. It was also felt that media outlets could benefit from training in repackaging content for different age groups and platforms, ensuring that it was shareable and relatable and, therefore, enjoyed wider resonance.

Analysis of content-related themes

Countering disinformation and propaganda

Stakeholders recognised that support for fact-checking platforms and other forms of counter-narrative had played a vital role in bringing the concept of disinformation and misinformation into the public consciousness. They have given new insight into the scale of disinformation campaigns and their impact on local populations. However, it was also thought that more could be done to ensure that the outputs of fact-checking initiatives reached mainstream audiences and resonated with younger people.

It was suggested that content should be more dynamic, immediate and responsive, reversioned for different platforms and proactively marketed. Innovative formats should focus on making complex issues easy to understand and more accessible to a broad cross-section of the audience. The tonal register needed to change, said respondents, embracing humour and satire as essential tools for an effective counter-narrative and using the language and style of social media influencers to promote key messages.

It was also felt that counter-narratives should provide what state-sponsored regional channels were unable to deliver – expertise, hyperlocal models and authoritative voices. It was recommended that fact-checking should be more widely integrated into editorial processes rather than being seen as a standalone activity. The approach

pioneered by Faktist in Norway whereby an external agency conducts fact-checking initiatives on behalf of multiple media partners was seen to have significant potential in both regions.

Combating hate speech and extremist rhetoric

By the same yardstick, respondents thought that initiatives aimed at combating hate speech should be owned by the media rather than by civil society. Respondents stressed that media outlets had a responsibility for improving their editorial processes and that donors should focus on helping them to adopt internal policies and mechanisms aimed at enhancing inclusion (e.g. by improving diversity in editorial teams).

Respondents suggested that the most effective way of combating hate speech was to promote self-regulation systems which typically combine codes of conducts and complaints bodies, such as ethics committees or media ombudsmen. At the current time, such institutions are almost entirely absent in the countries covered by this report. This is compounded by the lack of existing or effective accountability mechanisms.

Investigative journalism

The bulk of investigative journalism in the target countries is grant-funded and produced predominantly by individual journalists or small teams. This is largely because media outlets are either concerned about the fall-out of publishing investigative pieces or argue that they elicit limited interest from audiences. Furthermore, effective investigative journalism requires a wider ecosystem which is either not available or poorly developed in the two regions. Countries lack a supportive legislative environment as well as trained data scientists and lawyers who can assist media professionals in their work.

Given the fragmented nature of investigation journalism, donors should endeavour to pool existing resources, where possible, or consider establishing a consolidated fund for local initiatives. It is also essential for the topics for investigations to be developed in-house as part of an editorial process rather than imposed from outside. This can be achieved by introducing a culture of visual investigations which are relatively inexpensive and require limited training in the use of open access software.

Gender equality

There is very little accurate research and data on the presence of women journalists in the sector and their working conditions. Analysis of their impact on the quality and diversity of content is also sparse. Furthermore, as highlighted by one media development expert, "They are absent in the audience and engagement strategies for most media, a neglected part of the population." However, several respondents (all women) criticised what was perceived to be a disproportionate emphasis by donors on gender-specific programming. They believed that this focus distracted media from more pressing concerns and allowed donors to fund programmes which were politically palatable in host countries but which were unlikely to lead to sectoral change.

There was a perceived need to use bespoke research on women in the media to introduce effective policies and to assess progress made towards gender equality. In addition, women should be given greater prominence in programming as well as increased participation as presenters, guests and moderators. Newsrooms should be encouraged to increase their focus on the challenges faced by women and young girls in marginalised communities both by deploying specialist correspondents and by creating "safe spaces" online for women to share experience on key topics.

Conflict-sensitive reporting

According to some stakeholders, there is little evidence to suggest that initiatives aimed at promoting conflict-sensitive reporting have had a positive impact on editorial policy or working practices. This kind of sectoral change would require a high degree of political will as well as increased dialogue between media professionals from different identity groups. It could be facilitated through regional networking events and co-productions as well as through concerted efforts to improve diversity in newsrooms.

Donors should promote ethics within the media sector rather than giving ownership of this issue to civil society (as has been the trend in recent years). Media-CSO engagement can help to explore and promote media responsibilities in divided societies whilst more clearly defining the role of civil society in shaping or contributing to the media agenda. Greater ownership of this issue within the journalistic community should lead to increased readiness to put editorial systems in place for dealing with conflict-related issues. However, these should not be seen as separate frameworks or guidelines but as a key component of existing ethical codes.

Engaging on social media

Mainstream media have come to recognise that social media engagement is no longer an optional add-on: it needs to be an integral part of their editorial strategy. Even leading outlets in several partner countries asked for support in improving their ability to engage on social media and distribute their content via multiple platforms.

They believe that this is vital in attracting young people as well as responding to perceived changes in consumption habits and content sharing.

However, there are others who feel that social media is, at best, an irritant and, at worst, a conduit for hate speech and disinformation. They argue that, as a rule, social media engagement is poorly managed and comments are highly partisan and divisive. Consequently, some respondents did not feel that social media engagement was useful in generating or fostering the culture of debate which is lacking in many countries.

The report's core recommendation is to help mainstream media invest in high-quality journalism that is produced specifically for social media platforms. Bespoke content can play a vital role in helping traditional media to win the trust of audiences and promote more questioning attitudes to agenda-driven content. Innovation labs can provide beneficiaries with the opportunity to experiment with new approaches such as interactive games, online polling and podcasts that give content fresh impetus and increase its exposure.

EU integration

Programmes commissioned by EU Delegations in order to promote EU values or showcase the achievements of EU-funded projects were considered to have achieved mixed results. The success of initiatives such as "Moving Forward Together" in Ukraine was ascribed to their ability to stay in tune with the expectations and sensitivities of target audiences. In Georgia, Rustavi2's "European Tour" was praised for its innovative, immersive approach. However, in Moldova, stakeholders pointed to the emotional and sentimental payload of pro-Russian messaging in the media and argued for an increase in soft media content funded by the EU.

Several interviewees highlighted a largely unexplored opportunity for bringing the EU closer to the hearts and minds of populations in partner countries by tapping into diaspora communities living in the EU Member States. Editors in the East shared the view that these migrants could act as effective ambassadors for closer EU integration at little or no cost.

In the South, the EU's approach to the region has been described as "highly Eurocentric, interest-driven, top-down and thus unequal/asymmetric, as well as depoliticising, technocratic and highly securitised". The same report argued for "inclusive, flexible, bottom-up policies based on the principle of equality of the partners on both sides of the Mediterranean". There is an urgent need to provide the space for inclusive dialogue which promotes local agency while considering common challenges.

Analysis of instruments for media support

Regional networking and programme exchange

Regional networking is seen to have value when it relates to a specific area of expertise which is widely lacking in the partner countries. Children's programming and innovative business models were both given as examples. In the South, multiple stakeholders agreed that regional networking and cooperation across the region were vital for improving their work at the national level and laying the ground for establishing a regional framework capable, in the long run, of sustaining an independent media sector.

In the East, opinions were divided on the value of programme exchange in the Russian-language information space. Critics said it was based on the flawed assumption that what was interesting to Russian-speaking audiences in one country was, by default, interesting to those in another. However, proponents of the approach argued that these initiatives were relatively young and needed more time to prove their worth.

The report urges donors to support professional networks that are organic and needs-driven rather than artificial constructs developed or imposed by projects. As the media industry is in flux, its future will be determined by the ability of its main actors to organise themselves; to maximise their bargaining powers; and to take a stand against totalitarian regimes, monopolies and tech giants. There is also a value in using existing networks to facilitate mentoring and consultancy on an institutional level or within the framework of specific co-production activities.

Training and capacity-building

While most respondents felt that training was still desperately needed, they were concerned that training delivered in the framework of international projects did not always respond to their specific needs and development goals. They complained that these capacity-building programmes often focused on skills which journalists could not use in the workplace while, they said, training workshops were agreed and designed without consulting the media organisations concerned. A lack of buy-in at a senior level reduces the chances of trainees being able to apply their new-found skills to practice.

Increasingly, in-house training combined with funding for content production seems to be the favourite model for journalists and media outlets alike. This can take the form of mentored assignments or consultancy that is

embedded within the editorial workflow Deploying local trainers to work in tandem with international experts is considered to be a highly effective way of ensuring that training outputs are rooted in local realities.

Consequently, there were calls for continued investment in long-term training of trainers (ToT) programmes which included top-up modules, skills exchange, co-training opportunities and technical assistance. Donors were also urged to explore the concept of national training centres that are industry funded and have strong governance mechanisms. Seed funding could give such operations the time and space to demonstrate their worth and secure industry buy-in.

Core funding for independent media

Core funding for media outlets is outlawed in most countries in the South and, if not declared, can cause serious problems for the recipients. In the East, however, direct support is more widely accepted as an operational necessity. Some argue that it distorts the market and, traditionally, has been given to outlets which have limited outreach or appeal only to an intellectual elite. There is also widespread resentment towards "donor media", often characterised as NGOs impersonating media outlets in order to receive core or project-based funding.

Proponents of core support to independent media argue that it is essential to maintain pluralism in the sector and to ensure that audiences have continued access to high-quality journalism. They point out that, in the existing political and economic climate, truly independent outlets have no other way of surviving and that core funding is necessary to help them take the first, faltering steps towards sustainability, even if it is unclear when and if actual sustainability can be achieved. However, they also agreed that direct financial support should be accompanied by targeted consultancy and professionalization.

The report recommends that donors rethink their policy on providing core support, providing a clearer definition of the criteria for allocating core funding. While such funding should never be unconditional, it must be long-term. Organisations leading a hand-to-mouth existence are unable to forward-plan or invest in technological or programmatic improvements. Primarily, media applying for core funding should be able to demonstrate a clear editorial vision that responds to the needs of a well-defined audience. However criteria should also include:

- Institutional: transparency of ownership, clear HR policies (including diversity and gender), proper governance and fair working conditions.
- Editorial: a set of policies integrated into editorial processes as well as evidence of diversity in content, innovation and presence on multiple platforms.
- Financial: diverse income sources, a track record in managing external funding, a realistic business plan and a strategy for streamlining running costs.
- Strategic: mechanisms for proper audience research, an understanding of the wider market and evidence of strategic partnerships.

Upgrading technology and infrastructure

Financial pressures offer independent media little room for investing in infrastructure or upgrades and a perceived reluctance among donors to invest in technology causes a good deal of resentment in both regions. As one consultant commented, "It's like teaching people to run, then tying their legs together." The report recommended greater flexibility in this regard.

On the other hand, experts agree, it is essential that media outlets asking for investment in technology are committed to deploying it as part of a strategy or long-term plan. There is, for example, a clear value in purchasing equipment or investing in software solutions which will ensure that beneficiaries can enhance their competitive edge, reach new audiences or bring down their wider operating costs.

Funding for programme production and public service journalism

A focus on support for thematic programming has led media actors in the South to accuse donors of attempting to control the editorial agenda and upsetting the balance of media coverage. They argued that there were numerous public interest themes – with far greater relevance for local societies – that enjoyed little or no donor support. In the East, media complained of unreasonable demands from donors to produce high-quality content for minimal amounts as well as the significant bureaucratic overheads associated with producing donor-funded outputs.

Three countries in the South have launched domestic initiatives for funding public service journalism which deserve to be strengthened and supported. Donor-funded interventions could be used to develop and promote governance mechanisms for these funds with a view to avoiding politicisation and establishing the necessary checks and balances to ensure fair competition. They should also consider involving professional organisations in the distribution of local funding. This will lend credibility to the process as well as promoting local ownership. Furthermore, national public debates on media funding would give the practitioners the chance to demonstrate ways in which they serve the public and the added value they bring.

Grant and sub-granting schemes

Sub-granting is widely used by donors as a means of passing on funding to local organisations which themselves lack the track record or resources to apply for large grants. It has the advantage of ensuring that funding decisions are made by project management staff with a good experience of the sector and the operating environment. However, ultimately it still favours those who understand the system and can write credible proposals. And one study commented that "media reported devoting disproportionate amounts of time and resources to chasing and documenting grants and, as a result, operated like NGOs, not regular media outlets".

Consequently, it was concluded that the rules for allocating and managing sub-grants to media organisations should reflect their constraints and core functions. While, unquestionably, the basic principles of accountability need to be observed, the focus should be on the results rather than the processes involved. It is strongly recommended that EU sub-granting processes are dramatically simplified in order to make them more attractive – and viable – to a broad cross-section of media outlets.

Supporting media in exile

Stakeholders from countries such as Azerbaijan and Syria recognised that, without media in exile, there would be virtually no access to independent information in the country. Clearly, there are inherent risks in supporting media which may be tempted to accept funding from opposition parties seeking a platform to promote their agenda. And, locally, it is unlikely that these outlets will ever be perceived as fully independent. But it is also considered that the risks can be mitigated through careful monitoring and sustained capacity-building efforts.

Clearly, few donors have the resources and the mandate to support these media outlets indefinitely but there should be consensus within the donor community about the breadth and focus of this support. Here too, funding is often linked to thematic programming or promotional activities. Practitioners agreed that the optimum solution was to receive the core funding necessary to provide a consistent, high-quality service and then to apply for project-based funding to support the development and production of additional programming which responds to clearly defined audience needs (as opposed to donor priorities).

It is also essential that donor-funded media observe internationally accepted employment rules and standards, even when such projects may be short-term or established in response to crisis situations. This issue goes hand in hand with the problems of continuity which are inherent to most donor-funded projects. However, when media workers are operating in exile, some with refugee status, there is a clear imperative to make sure that they are not being exploited and that Do No Harm principles are observed.

Regional programmes

Both regions

Throughout the country missions, there was widespread support for a **regional funding instrument** capable of rallying disparate voices and mobilising a wider circle of independent operators. In the view of multiple respondents, this instrument should focus on promoting public interest journalism but should be media-agnostic, open to both public service and private media, particularly those embracing innovative digital technologies. Selection processes should be based on industry criteria and implemented by media experts. A regional fund should also offer direct consultancy for programme production as well as for experimenting with different revenue-generating models and implementing effective business plans.

Donors should help establish **new models for social media engagement** that speak to younger audiences by presenting news content and complex issues in accessible, engaging formats. These models could also ensure a broader audience for fact-checking initiatives and other "serious" content by mobilising influencers and finding a more dynamic tonal register that resonates with young people. Targeted research and training would help practitioners to gain a better understanding of what makes audiences "tick" as well as current consumption trends and browsing habits. This knowledge could then be applied to practice through grant-funded initiatives aimed at improving content dissemination strategies and online marketing.

Tailored support for the **development of children's programming** was a widely articulated need. Presenting young children with high-quality entertainment, educational and news programming will not only help them to understand the events and processes affecting their lives, it will also shape their critical understanding and consumption of media content as they grow up.

Funding for **targeted and sustained research** on the media sector is also seen to be a priority in both regions. Gaps in current knowledge and insight include the true size of advertising markets, media consumption trends, and in-depth analysis of the digital media landscape. Professional associations and media think-tanks could act as key strategic partners in generating this kind of data while approaches and methodologies could also be shared through regional networking events.

Neighbourhood East

Donor-supported interventions in the Eastern Partnership countries risk being drowned out by the noise of the Russian propaganda machine – not least since they are often enacted in partnership with the same organisations and appeal largely to a progressive and liberal demographic. There is an urgent need for a more coordinated and cohesive action which can deliver more effective results.

The Russian language as a vehicle for culture, a social influencer and a powerful political instrument was seen to be an essential consideration for any regional programming option. There was also a broad agreement that the international community's reluctance to support the creation of a **Russian-language regional TV channel** had been a tactical mistake which, given the continued dominance of television, could not be compensated for by investment in online platforms alone. In this context, the aspiration of the Polish public TV subsidiary, Belsat, to broadcast in Russian deserves attention. Belsat already has a wide network of correspondents across the Russian-speaking world as well as the necessary production and broadcasting infrastructure. Recent investment in its Russian-language website offers significant potential for innovative multimedia outputs and online programme provision. Since it operates from outside the region, Belsat would be significantly less vulnerable to interference and persecution than channels based in the Russian-speaking world.

In addition, donors should explore the potential of **radio stations** to deliver locally attuned content and become low-cost hubs for the production and dissemination of digital outputs (including podcasts). Outside the large cities where audiences are often neglected by national TV, radio can offer a cheap and impactful alternative to television. There are several opportunities to stimulate the growth of community radio stations in Armenia, Georgia, Moldova and Ukraine. There are also possible partners in Belarus and Azerbaijan. A regional programme could provide significant benefits to these often isolated operations by building a community of best practice and providing small grants to existing stations.

There is a perceived opportunity to invest in developing **media think-tanks and press clubs** with a view to fostering a cohort of key influencers who have the potential to impact on policy reform. Examples are Detector Media in Ukraine and the Press Club Belarus which could also act as observatories for local trends in their respective markets, providing excellent value for money when compared to external consultancy. A regional funding mechanism could unlock their ability to support the drafting of new laws by providing policy-makers with opportunities for accessing the experience of peer institutions, both in the region and across the EU.

Neighbourhood South

In the highly politicised environment of the Neighbourhood South where several states are using all means at their disposal to keep media and journalists in check, regional programming is essential for developing an independent media sector. One respondent commented, "[Regional projects] complement or initiate national initiatives without being forced to seek the consent of national governments. [They] also allow funders and media development agencies to bypass national sensitivities."

There is a need to promote **better governance models** in the media sector by supporting independent institutions that can fairly and effectively govern and regulate media, including media councils, telecommunications and spectrum regulators, anti-monopoly authorities, self-regulatory bodies, journalists' and bloggers' associations, universities and training centres. Regional programmes have the ability to promote appropriate models and build networks of best practice through which new ideas and approaches can be channelled.

Donors should promote the establishment of **media representative groups** (publishers, media management, journalists' unions, independent regulators and self-regulatory structures) in those countries where they do not currently exist. Any initiative of this kind should also work to strengthen the capacity and independence of the existing actors.

It is recommended that the EU supports the creation of a **policy forum** where key stakeholder groups can meet, discuss and exchange ideas as well as sharing their experiences of reform processes. Audio-visual regulators, self-regulation bodies, publishers, media employers, journalists' unions and press freedom organisations would all benefit from such a platform. It could also give these groups the opportunity to engage with governments, policy-makers and regional organisations with a view to examining a broad range of media policies and frameworks.

Discussions at the policy forum could be shaped by **national strategies** for supporting independent journalism. Following nearly a decade of media development activity in most of the partner countries, many stakeholders agree that this is an opportune time to revisit the possibility of developing national strategies. The EU can learn from the mistakes of the past by ensuring that the development process is led by media representatives.

The EU should assist in building **regional coalitions** which can facilitate capacity development and reform processes. The recommendation is to rally local organisations around issues which reflect sectoral priorities and interests.

National findings: East

ARMENIA

Summary

Nikol Pashinyan's government is perceived to have limited control over the media sector which is largely owned by allies of the former regime. As a result, leading politicians have retreated into social media and the Prime Minister issues most of his communiqués through Facebook Live. Given Armenia's poor track record in promoting media freedoms, there is an urgent need to restore public trust in the media – including the public service broadcaster – by assisting individual outlets to produce content which reflects common concerns and aspirations. However, efforts to engage with audiences through social media has unleashed a deluge of polarised commentary which is in danger of contaminating the media space.

There is a general feeling that, after a long hiatus, donors have started to "re-engage" with Armenia. Hopes were expressed that this would lead to more joined up, audience-focused programmes. One initiative recently mooted by key stakeholders is the creation of a national content fund offering grants for programmes that address important social issues rarely covered by commercial media. Support is also needed for outlets seeking to diversify their income streams and to compensate for the major loss of advertising revenue to Google and Facebook.

Recommendations

- Donors should support the development of the proposed national fund for public service journalism by channelling expertise from other countries where similar funds are operational and exploring ways of ensuring that its governance model limits political interference.

- There is a manifest opportunity to assist the development of community radio stations in the regions through an initiative led by Radio Hay which has been granted licences to broadcast in 61 locations.

- Targeted consultancy to Public Television of Armenia could help to build public trust by strengthening the channel's editorial credentials and enhancing its capacity to offer professional training to staff.

- Local media need assistance with the development of business models which properly reflect the realities of the operating environment but which conserve editorial integrity.

AZERBAIJAN

Summary

Government narratives continue to dominate not only the state media but also private channels, many of which are owned by relatives or associates of President Ilham Aliyev. However, several respondents reported an apparent thaw in the government's hardline attitudes to freedom of speech, prompted, they said, by a realisation that audiences were shunning state-sponsored media in favour of foreign satellite channels. A recent surge of popular discontent may also have persuaded officials to moderate their stance.

Political and financial pressures have forced independent media to shut down or move abroad. Meydan TV and Kanal 13 remain the leading media in exile and both use a variety of tools such as WhatsApp groups and social media forums to maintain high levels of audience engagement. In the regions, media remain largely subservient to the authorities although some retain a loyal following. A few continue to receive donor funding by sidestepping the rules which ban media outlets from accepting money from abroad.

Recommendations

- Funders and implementing agencies should continue to support local media where possible, employing creative means to ensure that the available funding reaches those who need it most.

- Efforts to foster solidarity among Azerbaijani media in exile could be highly effective in improving the quality of coverage and offering donors maximum return on their investment. The possibility of establishing a hub that links the existing players has been discussed.

- Donors have an opportunity to take advantage of the perceived thaw and support the few individuals who continue to champion freedom of expression in Azerbaijan. These individuals could help to devise a strategy for supporting independent media, ensuring that disparate efforts are properly targeted.

- There is a value in continuing to run training workshops outside the country but efforts should be made to ensure that these initiatives properly reflect the needs of local beneficiaries.

BELARUS

Summary

Although generous subsidies give state media a competitive advantage, online outputs have proven adept at attracting advertising and diversifying their income (e.g. through paywalls and crowd-funding). Regional outlets, however, struggle to survive and many are entirely dependent on donor support. Some stakeholders say they have been badly hit by the marked shift of focus (and, therefore, funding) away from Belarus and towards Ukraine. There is widespread recognition of the need for urgent action in the face of the growing threat from Russian-inspired media and the resulting propaganda mushrooming inside Belarus.

The sector has seen increasing investment in urban, youth-focused start-up websites which avoid confrontational journalism and topics directly challenging the state, preferring to concentrate on lifestyle and culture. This kind of assistance appears to be part of a wider strategy to support softer content formats in order to ensure that the related projects can be properly registered with the authorities (now a legal requirement). These formats have significant potential to engage audiences as cultural influencers in promoting social change and reform in a restricted political environment.

Recommendations

- It is thought that the focus on educational and cultural programming should be maintained, perhaps by developing a podcast bank as well as audiobooks and radio dramas.
- Media literacy programmes could provide an opportunity to engage with the regime as an effective means of combating fake news and disinformation from Russia.
- There is room for laying down the foundations for future media policy and reform by investing in organisations such as the Belarusian Association of Journalists and the Press Club Belarus and developing their ability to act as media think-tanks.
- Funding the production of public interest content for both private and public media could help overturn the perception that media-related interventions in Belarus are targeted against the regime. However, continuing support for investigative journalism projects based outside Belarus remains an imperative.

GEORGIA

Summary

The politically-motivated takeover of Rustavi2 in July 2019 is widely seen as a devastating blow to independent media in Georgia. The team from Rustavi2 swiftly established a new channel, Mtavari, which has already built up an impressive audience. However, some observers have criticised Mtavari for adopting the same partisan and confrontational stance as Rustavi2. Meanwhile, the public service broadcaster has lost significant credibility in recent years, particularly after the appointment of a Director-General who previously worked for TV channels aligned to the ruling party.

The remaining independent operators are donor-supported web platforms and community radio stations which have virtually no prospects for sustainability. Nevertheless, a handful of local players have pioneered highly innovative ways of generating revenue, which could act as models for other media in the region. Attracting younger audiences remains a challenge faced by most media in Georgia, however, there have been moves – particularly by community media – to improve engagement with audiences and mobilise networks of citizen journalists.

Recommendations

- With pro-Russian narratives in the ascendant, there is an urgent need to build resilience among marginalised or disenfranchised groups through sustained investment in the community media sector. It is recommended that a fund is set up to provide these outlets with core support and training.
- Despite Mtavari's perceived partisan stance, the EU should consider funding various programme strands on the channel which remains a crucible for creative talent and has a unique ability to reach large audiences across Georgia.
- Support for the development of business models is crucial if independent media organisations are to wean themselves off donor funding. There are a number of successful approaches which can be road-tested and replicated.
- Improved networking and exchange between journalists across the country, including in the breakaway regions of Abkhazia and South Ossetia, could help to facilitate peacebuilding efforts and cohesion.

MOLDOVA

Summary

Mainstream media is controlled by political interests and strongly influenced by Russia. At the same time, a crisis in regional media has led to a growing information vacuum outside Chisinau, heightening local vulnerability to Russian influences. Independent media outlets are rapidly disappearing and donors have focused their efforts on the few remaining proponents such as TV8, Ziarul de Garda and Nord News. However, they remain vulnerable to the vagaries of donor funding which is short-term and unpredictable.

Recent events have demonstrated that local perceptions of the EU can easily be undermined and challenged, particularly as pro-Russian voices remain both strong and ubiquitous. Innovative approaches need to be adopted to reverse this trend and the involvement of EU-based diaspora communities from Moldova in media programming could play a significant role in this process.

Recommendations

- The report recommends exploiting the potential of the Moldovan diaspora in Europe to promote EU values and to act as a bridge between the EU and their communities at home. Subscriptions to local news platforms from Moldovans living in the EU could be a source of crucial financial support.

- There is a need to invest in the digital transformation of legacy media in the regions, helping ailing newspapers to develop as providers of local news. More generally, digital media should rally online influencers around specific issues, fostering a discourse which is fuelled by user-generated content.

- Donors should support the production of high-quality Romanian-language infotainment content that focuses on social themes in order to act as a counterbalance to Russian-sponsored disinformation and propaganda. This content could be re-versioned or subtitled, however it should retain a unique Moldovan flavour rather than attempting to imitate Russian-language programming.

- There is significant potential to create a nationwide network of speech radio stations which could also operate across a range of platforms, including social media.

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UKRAINE

Summary

There are signs that the grip of Ukraine's oligarchs over the media may be relaxing as leading owners, faced by the rapid migration of advertising from TV to digital media, start to sell off their assets. Furthermore, President Volodymyr Zelenskiy has vowed to challenge the oligarchic structure of the media and bring it in line with Western standards of genuine pluralism and free speech.

There is widespread criticism of donor-funded programmes which focus on online start-ups and ignore legacy media. Predictably, the critics come from more conservative media circles such as trade associations and unions but, nevertheless, they have a valid point: most start-ups which have been established according to Western hyperlocal models have little or no chance of surviving beyond the period of donor funding.

In addition, some local stakeholders remain sceptical of the reform process currently being enacted at the former state broadcaster – now Public Service Broadcaster: UA. They say there is more to gain by investing in the development of regional branches of PSB:UA and creating digital media hubs.

Recommendations

- The creation of digital media hubs could boost the ability of local independent media to organise and manage high-quality content production. The potential to establish a nationwide network of speech radio with a strong online presence based on the Ukrainian PSB infrastructure is also worth exploiting.

- In addition, a national podcast bank could be created with an app coordinated by the public broadcaster that allows automated scheduled downloads and streaming akin to the BBC Sounds strategy.

- Another area thought to have wide potential is greater donor engagement with selected denationalised newspapers which are keen to undergo a digital transformation but which lack the funds to do so.

- Proposals to introduce a culture of investigative journalism into mainstream media operations were widely articulated. Investigative efforts should be coordinated on a national level with professional commissioning mechanisms and a robust dissemination strategy. A regional fund could play an important role in this process.

National findings: South

ALGERIA

Summary

Most media institutions in Algeria depend on advertisements placed by the government and known as "public advertising" which is used as a cudgel to ensure that media remain loyal to the regime and to silence any criticism of its alleged corruption. Most media outlets are still run by individuals close to the former President, Abdelaziz Bouteflika, and his brother. However, despite the oppressive environment, there are a number of prominent independent media – mainly newspapers and websites – which continue to rail against the status quo.

Online media have come under fire from the government for attempting to provide impartial information about the recent Hirak movement. Several websites have been blocked, for varying periods of time, yet they have managed to remain relevant and responsive. The new government's declared commitment to media reforms may offer an entry point to donors hoping to engage with the sector and enable these platforms to fulfil their true potential.

Recommendations

- Donors should invest in projects aimed at modernising the management and administration of media outlets, introducing practical measures to eliminate the red tape and gatekeeping processes that prevent Algerian journalists from being creative.

- There is a perceived value in modernising curricula at university level and bringing them in line with the demands of the modern media industry. Journalism faculties could act as key implementing partners in the delivery of in-country professional training programmes.

- Increased targeted support for online media could help to enhance skills in areas such as safety, digital security, investigative journalism and social media management.

EGYPT

Summary

State interference in the news has reached unprecedented levels with reports of editors at state media receiving strict directives through a WhatsApp group which determine their editorial line, choice of stories, pictures and running order. In state TV studios, content is continually monitored by a representative of the security services while opposition figures are forbidden from appearing on screen. The two largest media networks – the Egyptian Media Group and D Media – are said to be controlled by the General Intelligence Service and the army.

Only a handful of independent media outlets – mostly websites – are still in operation. The three leading players – Mada Masr, Manassa and Welad El-Balad – survive mainly on grants since most of their advertising income has vanished. However, as the editor of Manassa commented, "The mere fact of existing under the current circumstances is in itself an indicator of success."

Since May 2017, more than 150 websites offering news and other services have been blocked by the state. Several respondents criticised the international community's apparent reluctance to take a more confrontational stance.

Recommendations

- Representatives from across the media sector called on the EU to apply political pressure on President Abdel Fatah El-Sissi's government and demand radical changes in its approach towards media and human rights. Local stakeholders believed that EU assistance channelled through the bilateral envelope should be conditional on improvements in the country's human rights record.

- The EU should adopt long-term strategies and channels to ensure the flexibility and continuity of media grants. A media-specific funding mechanism, able to deliver support directly to media institutions with minimal administrative costs, would provide a vital shot in the arm for the beleaguered sector.

- Furthermore, the cumbersome procedures required to apply for grants should be rationalised and lead-times should be dramatically reduced.

ISRAEL

Summary

The media sector in Israel is generally considered to be free, although many media outlets are politically aligned or reflect the views of their owners. The most significant development of recent years has been successful transformation of the Israeli Public Service Broadcaster (IPSB) which has now positioned itself as a role model for public service journalism in the digital age.

Nevertheless, local stakeholders speak of a climate of fear in the journalistic community. For Israelis, the concerns are mostly for job security and the financial future of the profession. Arab-Israeli journalists say that they fear for their physical safety.

Recommendations

- The EU Delegation in Tel Aviv should consider acting as a go-between in facilitating a series of consultations aimed at sharing IPSB's expertise with colleagues in the Eastern Partnership countries, particularly Ukraine, Georgia and Moldova. Closer integration with European public service media could build upon the approximation project already underway.

- A project in media literacy for Arab-Israeli schoolchildren and teenagers could help to promote the basic tools of newsgathering as well as critical thinking skills. A MIL programme could also serve to develop the resilience of schoolchildren and make them less vulnerable to extremist narratives.

- The EU Delegation should create a fund for investigative journalists which would provide grants for individual projects as well as offering awards for successful investigations conducted by grantees.

JORDAN

Summary

The Jordanian media sector is disorganised and struggles to defend its interests. The country has no media employers' or press associations, nor does it have a press council. This severely restricts the capacity of the media to advocate and negotiate for market reform and the allocation of state funds for the media.

Furthermore, the apparent lack of government will to support media reforms has led to a sense of resignation among independent media and freedom of expression groups. This is compounded by a perception that the advertising market is largely controlled by the government and is used to keep outspoken media outlets in line.

The TV market was augmented in 2018 by the launch of Al-Mamalaka TV, the second state-owned channel which is fast becoming the country's leading news provider. However, significant media outlets outside Amman are still virtually non-existent and have great difficulty in attracting talented staff. This situation leaves local communities voiceless, effectively excluded from participating in the national discourse.

Recommendations

- The EU should consider offering content production grants to press, digital media and digital start-ups, particularly in towns outside Amman. The grant scheme could include support for investigative journalism as well as professional and media management training.

- There is an urgent need to help establish and/or support groups which represent the media sector. The Jordanian Press Association would benefit from a capacity-building and exchange programme, enabling it to become more inclusive and more representative of the sector.

- Donor support for audio-visual content on mainstream broadcasters would help to ensure that channels such as Roya TV which currently leads the ratings are able to invest in more high-quality programmes, particularly for young people.

LEBANON

Summary

With very few exceptions, the Lebanese media is aligned to political, religious or sectarian power bases. TéléLiban, which should, in theory, act as a moderating influence in this polarised space, is chronically underfunded and poorly governed. However, the expected financial weakening of private TV channels and

the growing calls to reject political and religious sectarianism could give TéléLiban a unique opportunity to hone its public service credentials and fulfil its true potential.

In addition, media support organisations would benefit from capacity-building programmes aimed at equipping them with the skills and knowhow to negotiate forthcoming consultations on media reform as part of anticipated national reform processes.

Most digital and print media are unable to operate as viable businesses and rely on their owners to cover their losses. Of the 100 daily and weekly publications which once comprised the Lebanese print sector, just 10 remain in circulation. Compensating in part for the lack of credible independent media, a comparatively large number of active bloggers produce high-quality content. However, they have relatively small audiences and rely on donor funding, or the work of volunteers.

Recommendations

- The EU should support capacity-building and content production for TéléLiban and Radio Liban. This could take the form of joint productions between the national broadcasters and independent media production companies, thereby enabling the broadcasters to foster young talent and produce high-quality prime-time programmes which could dramatically improve their ratings.

- Grants for content production should include support for investigative reporting in the media. There are also several promising digital media start-ups which require funding to expand their content offering and develop their business models.

- A reform programme for the publishers' association and editors' union could help them to become more inclusive and representative of the sector. In addition, broadcasters and digital media would derive major benefits from having their own representative association to defend and advance their interests.

- Support for independent audience and market research would be an asset for the entire sector.

LIBYA

Summary

With the civil war now in its fourth year, Libya's media sector is caught in the cross-fire of rival political and ideological groups. In broad terms, loyalties are divided between General Khalifa Haftar in the East and the UN-brokered Government of National Accord in Tripoli. Libyan media outlets in exile are mainly funded by businessmen or political groups and, therefore, their editorial policies are, to a large extent, influenced by the loyalties or affiliations of their owners.

The majority of NGOs and donors working to support Libya's transition to democracy have moved out of the country, closed down their projects or transferred their operations to neighbouring Tunisia. Two legacy projects are still running: the Libyan Cloud News Agency, which was created in 2015 as part of a €2.7-million EU-funded project, and a Tunis-based web platform, El Kul, which aims to improve Libyans' access to information and encourage them to engage in free debate.

Recommendations

- Donors should continue to support projects aimed at creating independent media platforms. Even if the impact of projects like Libyan Cloud News Agency and El Kul is difficult to measure, they still represent a rare forum for interaction between people who believe themselves to be irreconcilably different.

- Although cooperation with Libyan media in exile is problematic for both donors and recipients, individual programmes that facilitate democratic debate and promote unity can secure a good level of buy-in.

MOROCCO

Summary

The majority of media outlets are controlled by the state or the security services while the TV sector is entirely owned by the state. Small in size and in budget, most independent websites struggle to survive and to provide a high standard of coverage. Seniors editors complain that economic and political pressures drive them towards self-censorship.

The government has cowed outspoken media outlets into submission by depriving them of advertising revenue. Several independent newspapers have been obliged to close down in the past few years after facing long legal battles and being forced to pay hefty fines for accusations they dismiss as false.

There are few opportunities for genuine engagement with media actors on the ground and the situation is unlikely to improve whilst existing legislation continues to act as a major barrier to press freedoms.

Recommendations

- It is recommended that donors use political leverage to call for urgent reforms of the media environment as well as to lobby for a change in the regime's hardline attitudes towards independent media and to encourage it to provide greater space for an exchange of diverse views.

- The EU should consider developing cooperation projects that equip journalists and aspiring journalists with the skills to use modern media technology. Morocco has three schools of journalism which could act as training partners. Training delivered by European experts would contribute to the development of practice-based curricula at these institutions.

PALESTINE

Summary

The Palestinian Authority's dispute with the Israeli government over tax returns, combined with the suspension of US funding, served to paralyse the economy for most of 2019. As a result, the advertising market has all but dried up and media outlets are struggling to survive. Local radio stations, which enjoy a high degree of popularity among communities across the West Bank, are particularly vulnerable and their decline would represent an even greater blow for local journalism than the recent disappearance of the once vibrant local TV stations which were driven out of business by changes in technology and a lack of funds for digitisation.

The majority of interlocutors in Palestine agree that there are no viable business models which can ensure sustainability for independent media outlets. Furthermore, reforms to the legal and regulatory framework are essential in order to create an enabling environment for media sustainability in the future. However, the Palestinian Authority lacks a clear vision for media reform and is widely criticised for having adopted a chaotic approach, as exemplified by its efforts to pass a law to establish the Higher Media Council in 2017.

Recommendations

- Digital media are still unable to attract and maintain large audiences including on social media platforms. These platforms would greatly benefit from core funding and training to support the production of original content, partially compensating for the virtual disappearance of local television. Funding for content production should be accompanied by management training and technological support for the media.

- Building on the success of the public broadcaster's funding for joint productions, support should be given to a co-production programme that has an improved governance structure and that involves greater input from the private sector, particularly in the planning and selection process.

- Audience and market research should be considered a priority for support. At the current time, the speculative reports which have been produced are ultimately damaging for local media.

SYRIA

Summary

President Assad's government has become less tolerant of any kind of criticism. There are reports of dozens of journalists in Damascus – previously known for their longstanding support for the regime – being arrested for criticising the authorities on social media. Outlets working in the areas controlled by the Syrian Kurdish forces are mostly affiliated to different armed groups while journalists working in Idlib under the Levant Liberation Committee are subject to physical violence, imprisonment and intimidation. Currently, there are a small number of Syrian journalists covering events in the so-called Safe Zone which was established by the Turkish Army last October.

At the height of the Syrian crisis, there were over 900 media organisations in existence, according to the Syrian Journalists' Association (SJA). Now, most of the core funding for media has run out and the majority of Syrian journalists working in Turkey are employed by media organisations directly or indirectly funded by the Gulf states. Syrian media in exile are completely reliant on donor funding since there are no business activities within the Syrian refugee community and, therefore, there is no advertising market.

Recommendations

- Donors should continue to invest in high-quality, informative and independent Syrian journalism. Supporting the production of journalistically credible content for social media platforms is especially relevant in the Syrian context, as citizens inside Syria rarely access digital media based outside the country, fearing reprisals from the authorities.
- With no end in sight for the Syrian conflict, there is a strong rationale for investing in an independent TV outlet which could provide credible information to Syrians inside and outside the country.
- The legal and social uncertainties faced by Syrian journalists in exile undermine their ability to work freely and independently. There are a few Syrian and international organisations including the SJA which can help to protect their rights but they are in desperate need of support.

TUNISIA

Summary

Tunisia's media freedom ranking has improved steadily since 2011. According to the Freedom House report for 2019, it is now the only country in the Arab world with a free press while the Reporters without Borders annual index gives it pole position in the region. However, these advanced rankings do not necessarily reflect the existence of a strong independent media sector or high-quality journalism in Tunisia. Whilst legal and regulatory guarantees are important in fostering an independent journalism sector, more is required to actually create one.

New draft media laws were brought before the previous parliament more than two years ago. Professional groups, press freedom advocates and international organisations shared concerns that they lacked sufficient guarantees to safeguard the freedom of the media and the independence of the regulatory authority. It is unlikely that direct political pressure on the media will end any time soon but the plethora of media support organisations in Tunisia are well positioned to stand their ground.

Recommendations

- Donors should fund original content productions in the press and digital media sectors and among start-ups. An on-demand grant scheme to fund public service journalism in this sector would help them through the difficult transition.
- The international community should lend its support to HAICA's two legislative projects which are currently under consideration by parliamentarians. One of these aims to establish an independent market and audience research agency which could become a replicable model for the region.
- There is an enduring need to help Tunisia's national broadcaster (TTV) to develop programming which will appeal to young audiences and strengthen its links with the creative industry. A joint production initiative between TTV and independent filmmakers could also foster the growth of the fledgling independent production scene.
- Regional radio stations provide a lifeline to local communities but they are currently in danger of extinction. International donor support is, therefore, a continuing necessity.

Perceived priorities for improving funding mechanisms

An overhaul of the funding paradigm

It is difficult to escape the impression that the international community has been trying to enact changes in digital markets by using analogue techniques. Stakeholders across both regions argued that donor support is not sufficiently informed by the latest research into the impact of technology and business imperatives. Funding programmes are still built around well-worn themes and staid approaches while projects are often designed and implemented by generalist project managers with little or no media experience. In the opinion of media development experts interviewed during the study, the paradigm needs to shift towards a model which combines targeted financial support with professional advice and oversight. This should be complemented by greater continuity and a clearly articulated strategic vision which ensures that potential beneficiaries can make informed decisions when applying for funding.

Flexible and responsive funding models

The approach taken by donors such as the EED, the Soros Foundation and the National Endowment for Democracy was widely appreciated by beneficiaries. In particular, they valued the concept of "partner" status that was based on a long-term relationship and regular (annual) funding cycles. It gave beneficiaries a sense of community as well as sufficient assurance of regular income to be able to make long-term plans and take key strategic decisions.

Increased political influence to support media reforms

There is a perception among end beneficiaries and development agencies across the partner countries that the EU under-exploits its political muscle and is too wary of crossing swords with local government stakeholders. They believe that EU Delegations are uniquely well positioned to bring pressure to bear on political elites to honour their declared commitments to pursue reforms in the media sector.

New monitoring and evaluation models

A lack of realistic indicators for the success of media projects has led to a high degree of disillusionment with their eventual impact. Neither donors nor implementing agencies should be afraid of modest returns. Furthermore, there should be sufficient flexibility in the relationship between both parties to recalibrate activities in line with feedback received. This relationship should be based on a constructive dialogue whereby the results framework is a dynamic document which is revisited throughout the project lifecycle.

Ongoing assessments of the sector

It is recommended that donors including the European Commission invest in a robust assessment mechanism that tasks a network of local partners with the collection and dissemination of data on a rolling basis. This research could also include comprehensive mapping of media projects in partner countries as well as independent impact monitoring. This kind of data collection would need to be performed according to an agreed framework and operating guidelines which are consistent across the two regions.

Dedicated media programme managers at EU Delegations

EU Delegations would benefit from dedicated media specialists within their programming teams. In recent years, media has been combined with other areas of endeavour (e.g. governance and civil society) and yet media support remains a key priority area which requires specific experience and skills.

Improved coordination and donor strategy

There is a lack of donor coordination in some countries – an area in which the EU is well positioned to take a lead role, drawing on the model being used to good effect in Ukraine. Coordination is essential to avoid duplication; explore synergies; pool resources; ensure proper knowledge management; and demonstrate a united front and consistent approach to local stakeholders. It can also serve to strengthen lobbying at government level for greater commitment to media reforms.