

National consultations on solutions to promote media viability while preserving media independence

Discussion paper, December 2021

Countries covered: Brazil, El Salvador, Indonesia, Jamaica, Lebanon, Namibia, Nigeria, Pakistan, Senegal and Tunisia

This document was produced by Free Press Unlimited based on research commissioned during 2021 by UNESCO's International Programme for the Development of Communication (IPDC).

Responses to this discussion paper can be sent to IPDC.Secretariat@unesco.org, and will help enrich the ongoing work of IPDC on the economic crisis facing independent journalism outlets in developing countries.

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1. Introduction

This discussion paper provides summarised transcripts of country-based consultations on media viability with stakeholders in the media sector. The national consultations draw on the knowledge exchanges and research provided by UNESCO and The Economist Intelligence Unit (EIU), and aim to explore the feasibility of possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism. The national consultations were organised and summarised by Free Press Unlimited (FPU). All the work from FPU on this project, and on the subject of media viability, can be retrieved on <https://kq.freepressunlimited.org>.

Independent media organisations have a vital function in a democracy. They hold powerful actors to account and provide reliable information people need in order to make informed choices. However, media houses and outlets around the world struggle to sustain themselves. Declining income streams are a problem for most media worldwide, and in low income countries the problem is even more pressing. Media and journalists working in these countries may already face a high degree of repression, threats and assaults. The economic crisis following the global pandemic has negatively impacted the entire media sector on the economic level, and further weakened media viability in countries already suffering from repression of freedom of expression. A weakened financial status of media houses brings along several risks, such as media capture by politically affiliated enterprises and other companies. This may seriously impact their editorial independence, and thus access to reliable information for citizens.

As one of the aspects related to media viability, media business models are a topic of interest to media and media support organisations alike. Media outlets around the world are increasingly diversifying their sources of revenue. However, as the revenues per income streams - such as advertisement - are decreasing, the diversification of income models remains a challenge. For media operating in very challenging press freedom environments there are few possibilities to generate commercial revenue.

Media operating in a low income environment have possibilities to diversify income, but the limited purchasing power of people in these contexts also limits the growth of these media. Media in the comparatively less challenging environments also need to continuously update their business models. Considerable flexibility and resilience is required to survive while developing a diversified income model over the course of many years, especially considering the digitalisation and influence of big technological companies on media, the advertisement market, and outreach.

Overall, media will need to receive continued support to innovate their business models, as well as access to stable funding sources.

The issues affecting media viability are complex, and require different interventions - from advocating at the level of governments, to educating the public about the importance of reliable information. In this report, the focus is on better understanding, from a practitioner's point of view, how preserving media viability is considered in ten different countries: Brazil, El Salvador, Indonesia, Jamaica, Lebanon, Namibia, Nigeria, Pakistan, Senegal and Tunisia. It focuses on challenges and opportunities for sustainability of independent media. In particular, the income streams and business models of media, access to (online) advertisement, the impact of big tech, and the way independent media are affected by the contexts in which they operate, are highlighted.

2. Methodology

In order to explore the feasibility of possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism, FPU organised and supported national consultations in Brazil, El Salvador, Indonesia, Jamaica, Lebanon, Namibia, Nigeria, Pakistan, Senegal and Tunisia.

Approach

Participants were identified for engagement in each of the ten countries. Each national consultation, generally consisting of three stakeholders, was conducted on the basis of the following approach:

- FPU summarises conclusions from research by the Economist Intelligence Unit (EIU) on key indicators/findings in the country.¹
- **Question: Are these findings correct and actual (still valid) according to you? Is any essential information missing about the media landscape?**
- **Question: What are the challenges to media viability in country X?**
- **Question: What would be possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?**
- **Preconditions: What needs to change with regard to the enabling environment (legal, political, social, economic, technical) for these solutions to be effective and sustainable?**

Structure

The national consultations took place between June and September 2021 and were recorded, transcribed and summarised into ten country reports presented below. For some of the national consultations, multiple, smaller interviews were held. In some instances, there were written contributions from more stakeholders, or input was taken from previous FPU research on media viability in the same countries under study.²

¹ The EIU, since renamed as “Economist Impact” has conducted research on media viability in all ten countries in the framework of wider research on the subject supported by UNESCO. A selection of the conclusions from the EIU report from each respective country was taken from a draft version of the report, and shared with the media stakeholders before the consultation.

² See, for example, FPU, *Income Models of Independent Media in Difficult Contexts*, Evaline Schot, October 2020.

The country-specific summaries of consultations presented below are structured by two questions:

- What are the challenges to media viability in country X?
- What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

The FPU staff member in charge of consultations in the specific country was charged to summarise and interpret the national consultations within this structure. Their summaries are presented in this report.

Disclaimer

Unfortunately, yet understandably, few participants to the national consultation gave their consent to share the recording publicly as the situation in their country is very precarious, with a decline in the state of democracy and independent media. Participants from several countries gave consent using the information on the condition of not mentioning their name, not even if part of a larger group of consultants. Therefore, a list of consulted media stakeholders per country is also not included in this report to protect their identity and trust in formulating their honest views as contribution to the country reports. FPU has a list of all contributors available for specific follow-up inquiries.

Through the applied methodology, the summarised consultations present the view from media stakeholders on media viability in their respective countries. As a consequence, there is a certain degree of subjectivity in the country summaries as the essence of the consultations is to understand the challenges and opportunities on the ground in terms of media viability while reflecting on the local challenges, opportunities, and the global context affecting media. The summaries depict views from the consultations. They serve to shape recommendations regarding the feasibility of possible solutions to preserve media viability without compromising editorial independence and the integrity of journalism.

Acknowledgments

Free Press Unlimited worked with a team of in-house staff, both country specialists and Knowledge and Quality staff, to conduct the national consultations and compose the country

summaries. Other Free Press Unlimited staff were involved in editing all country profiles and drafting this report. The Free Press Unlimited's team consisted of: Saskia Nijhof, Michael Pavičić, Tim Schoot Uiterkamp, Mira Chowdhury, Manizja Aziz, Marnix de Witte, Arthur Alvarenga, and Isabel O'Farrell.

This report with summaries of the national consultations on media viability in ten countries will be published on the knowledge database from FPU: <https://kq.freepressunlimited.org/>.

3. National consultations on media viability - global trends

The following section presents common trends observed within the summaries from the ten national consultations on media viability:

- The **intersection between media and politics** remains very strong in several countries under study. In these conditions, there is often little transparency on media ownership and a lack of transparency on local funding sources of media.
- Relatedly, in some cases, a **change in government policies** was raised as an important precondition to possibly change the negative discourse towards the (public) media. A different political climate may benefit the financial conditions of a media outlet, for instance by lifting difficulties in acquiring media licenses or access to (governmental) funding by independent media.
- The advertisement markets for media are, in many of the countries under study, still **controlled by a few large, more traditional media outlets**. Generally, the advertising market is driven by a number of factors, including a network, political patronage, and the ability of media owners to utilise relationships with the corporate sector. Due to the digitalisation of media and the advertising market, the market has further changed over the past years. There is limited to no regulation in the distribution of advertisement funding based on quality standards for journalism. Some media practitioners proposed to address this problem by stimulating national governments to support regulatory bodies for media advertisement.
- While digital advertisement is on the rise, **most revenue of online (media) advertisement is directed to big tech companies**. An increased amount of advertising money is flowing towards social media platforms, and Internet advertising has been rising exponentially, as observed in all countries under study. The media sector as a whole is suffering from this trend, particularly the more traditional print media who are struggling to make the transition to online media. In some countries under study, media are not even eligible to generate an income on the large social media platforms. Policies to regulate online advertisement is imperative to strengthen the competition position of traditional media.
- The **COVID-19 pandemic has challenged** the global economy, including the **media sector**. The COVID-19 pandemic has accelerated the number of newsroom closures, salary cuts and job losses for journalists around the world. In some countries, printing of newspapers was halted and the media are struggling to generate fresh sources of income. In response, media practitioners believe it is important to keep **advocating for COVID-19 response subsidies, stimulus packages and tax incentives** specific to the media industry.
- **The economic situation has a strong impact on media viability**. In some of the countries under study, the media sector must seek funding abroad to continue operating as there is no basis for sustainability within the national economy, and many business models for media do not work in this context. Some media operations have been forced to close,

journalists have left the country to more viable places for journalism, or media refocused their business model on online clicks to generate an income, which negatively impacts the quality of the media. Within this context, **media support organisations, civic companies and the diaspora** are proposed by media practitioners as sources to generate an income.

- **Innovation, grants and training support from big tech companies should better address the needs of the media sector within the local context.** There are possibilities in terms of training and innovation, but the impact on revenue and capacity building for independent media is very limited. There is a need to support traditional media in their transition to online media by providing know-how and sharing of good practices. In addition, independent and smaller-sized media could develop partnerships through e.g. fact-checking projects and apply for seed funding support, as opposed to large fundings which they are ineligible for.
- The way **audiences are consuming the news shifted from print to digital** over the past years, as observed by the media practitioners in all countries. Much of the audience is consuming news from within their own ideological bubbles, from social media platforms or (sponsored) influencers. **Media literacy programmes** are important to educate people in understanding how to validate information circulating on social media.
- The rise of **digital advertisement impacts the quality of independent media**; there is a rise of clickbait and copy/paste journalism, copyright protections are often not respected nor enforced, there is little monitoring on quality and ethics, and ultimately, most online advertising is directed to social media platforms. Independent media are struggling to take a slice of the cake. In support, the media sector requires **a better, updated framework for (online) advertisement** with equal access and a fair distribution, and a **minimum of journalistic standards** for online media to be monitored by governing media bodies.
- **Social media algorithms disadvantage findability online of local and independent media.** Some audiences look for factual alternatives and a counter narrative, and are willing to hear a different story, but can at times not reach independent media as the algorithms are disadvantageous for smaller media. There is a need for unified pressure from the media sector as individual media operations cannot easily engage with Internet giants. In response, media practitioners proposed, for example, **forming a nation- or region wide media alliance** to have a stronger voice. There is a need for engagement with big tech companies by the media sector on the impact of algorithms, and ‘fake news’, on the access to reliable information. Media, academics, digital literacy activists and audiences should collaborate to invest in, and increase, digital literacy and media trust.
- There is a **lack of sustainable business models for media** that can be applied, and considered positive examples. Even though the number of revenue streams has increased, it seems that the amount of incomes generated through each stream has decreased compared to traditional media revenues. This affects both traditional and new media. It is important for independent media across the world to have more exposure to positive business models, to professionals, to learn from other media houses, and to have access to

consultants and experts in media viability. Many **media are still largely reliant on grants from private and institutional donors** for their sustainability. However, a business model cannot solely be built around donor funding. Donor funding can only be an intervention and serve as support for ‘young’ media houses, and not a solution. It is more important than ever for media businesses to dissect their own work, products and services, to better understand their audiences and to apply these findings into their business models. An important and effective intervention strategy would be **to offer training and coaching** to media professionals on the development of their own business models.

- **Media viability studies** are important to understand country-specific challenges and opportunities, and to propose functioning business models for independent media. In recent years, an increased amount of studies have been conducted, and this is a positive start towards better understanding which business models could be explored by media operations. **Twinning of media operations** is proposed as a solution to learn from each other in a trusted way. Other proposed solutions by media practitioners are the creation of a forum, or a safe online platform where (digital) media organisations, including (social media) platform companies can discuss the issues they are facing.
- Media practitioners feel they are in need of **more audience research** in relation to media consumption. In order to explore new platforms and engage audiences, and to study possibilities for public participation to finance media operations, it is important to answer questions such as: how to understand the needs of the different audiences? How can the media reach the right audiences?

4. National consultations on media viability - summaries

Brazil

What are the challenges to media viability in Brazil?

On wealth concentration

- Wealth concentration creates monopolies in society, including by the big media outlets of the country.
- Business interests overrule editorial independence, and the government is barely involved through regulation. Furthermore, those who manage media outlets are businessmen, and journalism is seen as a business with low government involvement, and no public perspective.

On the lack of sustainable models for independent media outlets.

- Lack of sustainability for 'independent media' outlets since there is not much awareness of sustainability models, or access to funds. There is also a lack of business models which benefit independent media outlets specifically.

What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On a change in government

- Change in the relationship between the government and media outlets is needed because the main problem lies with the lobby-based relationship between the present government and the oligarchic media environment.
- There should be public policies for financing, and surpassing publicity based financial sources.

On new business models

- Set up both a regulatory media body where rules are followed, and a compilation of the regulatory instruments.
- Develop more local(ised) media outlets which are supported by local governments.
- Promote a learning of best practices on sustainability from the media outlets that are independent (such as Nexo Journal), and find financing sources in support of independent media outlets.
- Ensure transparency in the media outlets.
- The wealth concentration should be diversified.
- Establish a new legal framework that addresses all these problems mentioned above.

El Salvador

What are the challenges to media viability in El Salvador?

On the change in government

- Change in the relationship between the press and state apparatus since 2019.
- ‘Leftist’ media (Diario-Colatino, independent weekly, Gente Ve and Radio Maya Visión) practically disappeared. There is no longer a media group that displays a leftist school of thought.
- Co-optation or domination of state channels by the current administration: this happened with Channel 10 (El Salvador’s national TV channel). Under the changed government, staff changed and the authorities also hired more than 100 journalists with better salaries than the previous ones.
- Funding from Facebook and Google for the digital newspaper El Faro was published, as well as some private initiatives. In addition, a grant from the emergency fund was received by the newspaper El Mundo.

On government funds

- During the COVID-19 pandemic, the state never carried out a policy of stimulus for the communications or journalism sector. Although the communications and journalism sector could access several of the stimuli that the state proposed, several did not apply for fear that when they received them, the state would announce them publicly.

On lack of access to information

- Journalists not affiliated with state media lack access to public information and credible/quatable sources within the government.
- It is increasingly difficult for journalists to do proper investigations due to the lack of an Institute for Access to Information, an independent Public Prosecutor's Office, and a Human Rights Ombudsman's Office.
- Concerns that changes to independence of judicial system could make it harder for Journalists to be watchdogs of the State.

On advertising

- Vast majority of media outlets depend on state advertising. Currently, the policy is to create their own media (Canal 10, Diario El Salvador, social networks), which has left the main media corporations with reduced income.
- Globalisation of companies means that private advertising is often defined by international conglomerates. Large corporations have stopped advertising in the national media and local media, and are investing in large social network companies. This leaves national and local media with fewer resources.

- The existing non-state media groups were unable to retain their best journalists when the authorities, offered salaries that practically doubled and sometimes tripled the salaries they had in traditional media. The measure brought journalists into the state apparatus and thus diminished the investigative press.
- The state media (Televisión Legislativa, Canal 10, Radio Nacional) are perceived as a propaganda machine that is complemented by an ultra-powerful communications structure in all state institutions. This makes it difficult to seek a different kind of journalism.
- There is an attack on journalism funded by international cooperation funds. These media, like Factum and El Faro, played the role of watchdog for more than ten years. The creation of the Institute of Access to Public Information allowed them to compare sources and to be able to make the exercise of power transparent. However, they can't operate as they used to.

What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On the present political context

- Difficult to provide an effective solution, because of changes in the separation of powers, where media has become more of a single state apparatus.
- Challenging to promote a public media law with the current correlation of forces in the legislature.
- Important not to repeat the strategy that sidelined the elections of its representatives in the Institute for Access to Information. This left the door open for the authorities to choose the commissioners in their own image and likeness.

On the connection to the public

- Digital portals that seek to break media control should try to reach more sectors of the population in order to enjoy popular roots.
- The media receive little support from the public when they are attacked because they have not created a link. Thus, it is difficult for them to create an economic model in payment for the information they provide.
- Media under pressure should seek public support which could help in retaining their status and credibility as watchdogs of El Salvador.
- The media should turn to more attractive and shorter formats to attract the interest of the audience, who are looking mostly for audiovisuals.
- Imminent danger of replicating the neighbourhood recipe of atomising the press with the creation of very many different websites as alternatives to the state media apparatus; instead a new model of journalistic enterprise must be created that is managed by a group of diverse schools of thought that stands united.

On enabling journalism and education

- Create a new model of journalistic enterprise, managed by a group of diverse schools of thought which stands united.
- Reform journalism schools in order to strengthen journalism which is capable of creating a generation that believes in the principles of ethics and freedom of the press. At the same time, this generation needs to know the new information platforms in order to develop economically profitable digital environments.
- Strengthen a training centre to minimise risks that meets high standards for companies to send their staff to training processes. However, they must remain independent of journalistic associations or instances that are already linked to other interests. The main objective is to minimise risk, regardless of the journalistic company in which the person works.
- Create media that is rooted in the population, i.e. it is not possible to think of a journalism of elites without having a journalism that is close to the large social sectors so that they can contribute to guaranteeing the defence of press freedom.
- Strengthen the creation of an economically strong media group, capable of standing up to propaganda machinery disguised as journalism.
- Create or improve an independent functioning Institute of Public Information that is accessible for all journalists.

Indonesia

Note: Due to its geography as a sprawling archipelago, the issue of media viability in Indonesia is highly dependent on perspective and level of analysis. The many layers of government as well as the at the same time highly concentrated traditional media and scattered local media landscape (radio and online), bring different types of challenges and possible solutions to media viability

What are the challenges to media viability in Indonesia?

On the size of the advertising market and ability to support diversity of the media³

- Cost of production of print media is problematic as advertisements are no longer controlled by content distributor companies. While digital advertisement is on the rise, most revenue goes to big tech companies. More advertising money is flowing towards platforms like Instagram, and to online influencers (so-called ‘celebgrams’).
- There is a lack of data: for companies, it is much easier to collect data on audiences on social platforms as compared to when they advertise on online media outlets. It is not clear how much

³ Throughout the consultation, individual YouTubers and influencers on Instagram where sometimes referred to as homeless media content creators and Celebgrams

advertising money is going to influencers. Data about local government spending on advertising is not properly recorded. While there is data at national level, this is lacking at local or district level.

- The advertising market is controlled by large media companies and is concentrated in the large cities. This is problematic as Indonesia is a large archipelago, so there is not equal access to the advertising market for local media.
- According to research by AJI and IFJ, the COVID-19 pandemic has negatively affected the income of 80% of surveyed journalists. (This research is based on a questionnaire distributed to 38 cities where there is an AJI chapter. The survey took place between October 27th 2020 and November 13th 2020; 792 respondents filled out the form; respondents came from various posts and ranks in media organisations, from upper management, senior editors to support staff and content writers including freelancers.)

On media influencers and their role in the media landscape

- There is a growing trend of influencers who are becoming really rich because they earn money through their followers on the platforms that they are active in. Youth see this as a future job possibility.
- Content of influencers is becoming a news source as they use journalistic principles to create content akin to feature journalism.
- The government and other news sources like to work with influencers due their reach and less critical approach.⁴
- The media should think about this development seriously, and reflect on it. Why do the foreign affairs or the health minister prefer to be interviewed by a YouTube content creator? Should the media compete with these channels as their content often contains important information such as when an influencer interviews the health minister about COVID-19 health policies.

On media competition, media consolidation and merger control

- Concentration of ownership creates problems in terms of diversity of content and diversity of voices. Adaptive, integrative and democratised regulation is needed to ensure that the whole archipelago is represented. The issue is not just that there is a consolidation of media groups, but that there is a concentration of 10 to 12 holding companies. These branch out beyond the media industry into other industries. This situation affects mostly traditional media: there are many small and diverse online media outlets in the various provinces and regions.

⁴ See for instance: <https://en.tempo.co/read/1365346/jokowi-invites-youtubers-artists-to-campaign-for-covid-protocols> and <https://www.thejakartapost.com/news/2020/08/15/influencers-apologize-for-supporting-job-creation-bill-after-furor-among-followers.html>; and <https://www.thejakartapost.com/life/2021/04/08/why-jokowis-presence-at-youtubers-wedding-sparked-a-predictable-backlash.html>

- The Omnibus law and the impact it has on the broadcasting law is something to closely watch. There is no obligation for broadcasters to secure the diversity of content from various, regional regions. Licensing has been eliminated. Limits for broadcasting time for radio and television in the Omnibus law were removed. This has threatened the diversity of content.⁵
- There is no precedent that the Business Competition Supervisory Commission has ever enforced the law or controlled competition law among media companies. There is no specific rule or law on how this competition among the media sector should be regulated.

On regulatory safeguards against horizontal concentration and competition

- Current regulation cannot address cross ownership. Administratively, it is difficult to verify ownership.
- Lack of enforcement of existing law and regulations and poor monitoring of compliance of current regulation which can only be enforced through the weak instrument of ministerial regulation, that only allows for administrative sanctions. The Broadcasting Commission (KPI) sanction powers have never been effectively implemented, and it has limited authority and its impartiality is questioned.
- Some of the owners of big companies are also politicians and influential people in society and in government.

On public funding and direct subsidies for national new media, including COVID-19 related

- Nationally, the subsidies, stimulus package and tax incentives did not give much help to the media and was not specific to the media industry. The pandemic impact is bigger than this help can provide and is far from over.
- Only some regional governments have specific funding available for the media and cultural sector and the incentive is limited, so it can only help out a little bit.
- Local level budgets sometimes have a portion available to local media, but this is being used in ways that critically affect media independence. The budget is used to control the media and many media outlets and journalists make news that serve the government. It also helps to keep afloat media organisations that are not sustainable in their business operation. It should be evaluated if this type of funding jeopardises media and press freedom.

What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On general observations of the media landscape

⁵ See also: <https://www.ifj.org/media-centre/news/detail/category/press-releases/article/indonesia-journalists-oppose-controversial-omnibus-law.html>

- While there is no news on media outlets, print or online, that can sustain themselves financially, there are a lot of radio stations that are economically sustainable that are often supported by both local and national businesses. Local media can survive.
- There is potential for sustainability of quality journalism in Indonesia. According to the latest Reuters Institute Digital News Report 2021⁶, Internet penetration has reached 71% of the total population. This creates potential in the use of media and technology, as more people have more access to media and information.
- Ensure continuation of journalism in the pandemic: the government gave priority to vaccinate media workers.
- Be aware of the challenge ahead regarding disinformation and media viability. We still need good journalism that literally serves the people. Audiences should feel the need for quality media. If people feel that they need good media and good information, they are willing to support it. But this too is a challenge because according to recent research, the trust in news in general has dropped to its lowest point (39% of the population has trust), according to the Digital News Report. The report assesses that 37% say they trust the news on search engines and 31% trust the news on social media.

On education and training

- Focus on education and training to better serve audiences with quality content without sacrificing journalist principles and ethics; leverage the potentials: the markets, the advertising budgets, the audiences are there.
- Focus on inclusive journalism training.

On innovation

- Explore new platforms and engage audiences: when the film industry collapsed nationally due to COVID-19, some local filmmakers managed to continue their film productions, some with small budgets from local government budgets, others by going to online (streaming) platforms where they published their work, still reaching their (paying) audiences.
- Invest in a learning and knowledge center that collects knowledge from across the globe on how media can survive financially and as a business
- Explore the possibility of the public participating in models to finance media companies; ask the public to become more involved in funding quality media content.

On advocacy, dialogue and collaboration

- Invest in a collaborative movement for media viability in Indonesia. It is not only the media that have to prioritise high quality journalism. The challenge is to find an answer to the disruption of click-bait and viral trends.

⁶ <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2021>

- Media, academics, digital literacy activists and audiences should collaborate to invest in and increase digital literacy and media trust; audiences should feel the need for quality media.
- Set up a dialogue with the digital giants such as YouTube, Google, Facebook to achieve fair profit sharing with media companies.
- The media industry and the platforms also have to be committed to provide truthful information next to high quality journalism. All these stakeholders are working together now to counter disinformation on the pandemic, but the challenge is there because of the echo chamber that sustains e.g. anti-vaxxers' opinions.
- Ensure revision of the competition rules and merger controls in the Broadcasting law; regulation should be integrative, not overlapping, and should be adaptive to technological change.

Jamaica

Note: Jamaica has lots of professional associations that are helping to lobby for change and the improvement of the industry.

What are the challenges to media viability in Jamaica?

On the lack of protection

- Different forms of self-censorship exist. When reporters want to report on crime or corruption, their safety is a major concern.
- One of the things lacking in the media ecosystem is protection for journalists against physical harm in doing investigative pieces.
- Difficult to build an interface between the journalist and the person they are investigating.

On the dependency on government advertising

- Government is a large buyer of advertising in relation to the private sector. Around the time of political campaigning, when it is time for national elections, there is an increase in advertising in the media sector from the political campaigner, some of it is funded by private sector organisations.
- The government spends a lot of money on COVID-19 (vaccination) campaigns.

On media capture

- Foreign investment is a recent development, related to lack of capital in Jamaica.
- Digicel as a major player is important. Big Tech companies are taking over everyone's media.

On the dwindling advertising revenue

- Smaller media outlets in particular are facing the challenge of a declining revenue.
- The advertising revenue has declined overall in the industry, and that is because of the multiplicity of stations in number.

On the retention of skilled journalists

- Caribbean School of Media and Communication (CARIMAC) started offering a journalism degree in 2011, in response to the need to train journalists specifically. Before this, graduates who worked in Journalism were trained in a degree in Media and Communication, that offered specialisations in Print Journalism, Broadcast Journalism-Radio, Broadcast Journalism-Television.
- There is a trend that youngsters start working in the media, but they do not necessarily remain. Retention in the newsroom, particularly of young journalists, is a problem. Journalists move from newsroom to newsroom. A lot of journalists will also go to the field of marketing eventually, and become PR-managers or PR-officers. Or they work as communication officers in government agencies.
- Challenge at CARIMAC is that students will study journalism and then they will graduate and say they do not want to work in the newsroom because the salaries are not attractive. What can be done to retain and attract young journalists to build careers in journalism and not leave eventually?
- The newsrooms employ individuals who are available and give them on-the-job training. But there is this ongoing cycle of the quality issue because the newsrooms are not able to retain skilled journalists.

On traditional media

- A challenge in the newsroom is that the older media workers do not want to learn new skills because they feel they are not going to be good at multimedia journalism, so they also end up leaving.
- Notion of traditional media: when there is a merger, there seems to be the tendency to hold on to what existed previously, and keep the platforms separate. The advertising sector will complain about a merger because they have to spend an advertising budget with the newspaper arm separately from the television arm and the radio arm. They want to spend one advertising budget with the entire media entity and the ads will be placed across the platform.
- Despite the media merging, it still operates separately because of the unwillingness to let go, to innovate, to take risks.
- Some graduates are not excited to work in the media because it is perceived as being too old school. Multimedia journalism is taught but students are forced to write only print stories for a newspaper.
- Disconnect between the old and the young which is not being managed well and this affects media viability. In addition, senior management is perceived by their workers as not giving full support.

On trust in the media and media literacy

- The trust deficit in institutions, including media, needs to be addressed. The question of whether media are trusted might elicit different responses across demographic groups, influenced by

people's use and the definition of media. However, the answers are inextricably linked to how people value media and media viability.

- People seem to be valuing journalistic news no differently than other sources such as information circulated on social media. The virality of 'fake news' (mis/dis/mal-information) might in itself be a measure of what people 'value' and 'trust'.
- Lack of digital media and information literacy (including awareness of issues around algorithmic bias, manipulation by recommender systems, deep fakes etc).

What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On entrepreneurial journalism

- Set up some kind of incentive or starter programme to help journalists with venture capital. There are some very good journalists, but media managers do not really understand the significance of the newsroom because they came out of business management where they have a shareholder responsibility first and foremost.
- Give journalists some business management training.
- CARIMAC started offering a two-year Master in Media Management. 12 students attended as the first cohort in September 2020, and 16 applicants will start in September 2021.

On documentary making

- Place more of an emphasis on documentary making for journalists, and those working in the creative arts sector. There is a lot of room for development and improvement in this area.
- There are entities like JAMPRO who will look at marketing films. Documentaries and historical pieces should be treated as a whole different entity and try to promote it that way too. On financial support during COVID-19 pandemic
- There may have been COVID-19 allowances for certain companies, but there were no dedicated government interventions or allowances or tax relief specifically for media companies.
- Media workers in Jamaica are essential workers. During times of crisis, some sort of furlough would be appreciated - leave whereby 70-80% of basic pay that is met through some scheme – to include journalists, so that they do not lose their job. This would be very important and welcome in the landscape.

On multimedia journalism

- Teach journalists how to make podcasts, because that is one of the ways they can also use their skills to be able to do something different. Journalists need to have an understanding they are not just going to write for a newspaper; they are multimedia journalists now.
- There should be a more seamless integration of the traditionally separate platforms.

On capitalisation

- Investors do not look at the media in Jamaica to get a return on their investment.
- Consolidation is needed: media houses should get themselves in order and join forces to get a listing (maybe 2 or 3 together), and then go after the capitalisation and keep the doors open.
- Cease dependence on government advertising because independence will enable criticism of the government, without risking a cut in advertising revenue.

On allocation of resources to the newsrooms

- Establish a balance of the allocation of resources to the newsroom: news items are sometimes under-resourced in comparison to other products that the media house is working on. For example in the newsrooms, there is a lack of resources for investigative stories. They have to pay out of pocket to access certain documents, they cannot hire a camera crew. But for certain shows there is sponsorship and the media looks very viable.
- Jamaica is a small market but there are some very popular media products, and they are quite viable, e.g. annual sports championships are very popular.

On innovation

- As a media market, Jamaica has been able to continue some very popular entertainment shows (sports and music). In terms of media viability, there are shows that are sustained on air: Television Jamaica created 1spotmedia.com which is an excellent example of how a media organisation built their own streaming platform. They monetise it by selling it to the diaspora. Nation-Wide Radio (90FM) creates content for their app (and for other social media platforms), especially documentaries on issues such as kidnapping, girls being lured by older men on social media. They are building up a library of documentaries that you can access through their app, so they move away from being a radio station to becoming a media station. SportsMax TV (owned by Digicel) broadcasts in 26 countries throughout the Caribbean, North America and Canada. People can watch live content whenever they want to.
- A book titled 'Still on Air: Producing Television in Small Markets' looks at the success of local programming (by focusing on the longest running shows).

On enabling economic environment

- Examine the legal and regulatory framework within which the media operates. For example, the regulatory design should not make one form of media uncompetitive against another, even if they are regulated differently.

Lebanon

What are the challenges to media viability in Lebanon?

On the intersection between private and public sector, and politics

- No transparency on media ownership and funding.
- Intersection between authorities and business is massive. The main sources of income from the mainstream media are coming from banks, who are allied to politics and are owning the media and its message.
- The political and financial independence of the media are generally non-existent. Financial sustainability is one of main reasons that owners of business, but also of the media, ally with politics.
- Independent media are an important notion when speaking about media viability, not only financial independence. The strong intersection between business and authority affects media seeking editorial independence.
- Legal preconditions are problematic for the media in Lebanon. You cannot speak about media viability without speaking about access to information and freedom of expression first.

On the advertisement market

- Media capture is fully integrated in all forms of media, but also in all other sectors. Everything is strongly intersected and intertwined.
- Advertisement market is limited and dominated by several large media companies. Advertisement and incentives for media are generally unavailable for media with an independent editorial team.
- The Lebanese advertisement market is still mostly directed to mainstream television and newspapers. Traditional media runs its business model on politics. For example, during the 2018 elections there was almost no access to mainstream media by independent politicians. In addition, even though there was the highest number of female candidates ever, this was not reflected in the media coverage. There is a media culture of ‘only access when you pay’, which was further triggered by the financial collapse.

On the economic situation

- Major difficulty for Lebanon is the economy, which affects the entire country and also the media sector. Media cannot survive on the Lebanese currency, but needs foreign currency to retain its operations.
- Many talented journalists have left the country to go places where they have more job security and income.
- Focusing on Lebanon for revenue is difficult, also in terms of subscriptions and donations, pay per content, etc. The majority of the Lebanese do not have access to a bank account (and related e-commerce), and cannot pay or donate online. The collapsed banking system implies that many media viability models based on a functioning internal market do not work in Lebanon. There is no estimation when this could change, but it is not expected to reinstall itself in the coming five years at least.

On access to funding in support of media

- Traditional media are starting to implement rights-based business models that were previously used by more alternative media to receive donor funding. The traditional media, largely television stations, have become more rights-based too, as they consider funding from donors as a fresh source of income. They present themselves with an agenda of reform, but other than the specific funding they apply for, their agenda often remains strongly political.
- The International community often considers an integrated approach at a high level to support the media sector. However, in doing so it runs the risk of legitimising those violating media rights, and indirectly promoting political goals.
- Common for donors to discuss funding directly with the media, trying to bridge support between traditional media and new initiatives and trying to stimulate diversity and pluralism. The risk is that the editorial teams of the traditional media are more resourceful, and thus can manipulate these processes. It is crucial to integrate some criteria in these support efforts, such as code of ethics, monitoring impartiality, etc.

On the difficulty of outreach

- Traditional and new media are both struggling with outreach. They wonder how to understand the audiences and how can the media reach the right audiences?

On the support of new media

- A legal structure to enable media start-ups and support new media operations is non-existent and therefore diversity and pluralism of the media ecosystem is obstructed.
- The absence of a legal ecosystem for media startups means they have to find external ways for funding, e.g. through NGOs, civic companies, etc.
- Small media initiatives at an organisational level are often not well structured, have no business models, run mostly on volunteers, lack awareness on sources for funding, have no access to legal support, do not know how to be legally established, how to address legal cases, and lack (editorial) strategies.

On the relation with big tech

- Building relations with big tech is time-consuming and challenging. The big tech are interested in quantity, in the numbers, which is also applicable for the training they offer. There are efforts to enter into a dialogue with big tech to support quality journalism in Lebanon, however, outreach and access to their network is difficult.
- Google, Facebook, and others have a pronounced presence in the region, but they do not have much interest in discussing the impact of social media and their algorithms on the media landscape. They are ready to engage on the surface, but not very cooperative in practice. Their influence goes far beyond the capabilities of the media in Lebanon. These companies are at another level, and it is a challenge to truly engage with them.

- The audience is increasingly consuming its news through social media, such as Facebook and Instagram. Young audiences look for alternatives and a counter narrative, and are willing to hear a different story, but cannot be reached as the algorithms are not advantageous for smaller media. What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On focusing on the region, and international market

- Consider a stronger focus on advertisement in the region, and at the international level, expand editorial independence from sources outside of Lebanon.
- Media should approach private business, e.g. during large international events.

On building bridges between traditional media and alternative media

- Be pragmatic: partnerships between traditional media and alternative media could be beneficial to both to help bring the message to audiences.
- International support and funding should be critical. Supporting traditional media without code of ethics or professional journalism standards is a waste of money and decreases the audience's trust in the media. If there is any support to traditional media, it should be given under specific conditions, especially in these times of transition.

On the need for new media and new sources of income

- Great potential for alternative media
- Create new platforms, free from manipulation.
- Support small media initiatives, such as citizen journalism platforms, which are locally based and have strong engagement with the local community, reflecting their voices.
- More capacity support is required to encourage the potential of new and alternative media. They have a different discourse from traditional media platforms and have the potential to attract youth. In alternative media, women are more strongly represented, taboos are broken, there is a limited presence of religious figures, police and security people, etc.
- It is important that these alternative media are supported by assessing their needs, working on strategies and structures, raising possibilities for alternative funding, understanding their niche, supporting Quality And professional journalism skills, and having seed funding available to them.
- There is a need for the media sector to bring a counter-narrative to foster critical thinking.

On private donations to support media

- Online advertisement creates new possibilities. The downside is that for smaller media, the revenues are still insufficient and not sustainable.
- Subscriptions, through paywall or voluntary subscription (donations) should be considered, especially with a large diaspora. The Lebanese diaspora responded strongly after the financial collapse and the Beirut blasts. Lessons-learned from diaspora supporting media in other parts of the world should be studied as the diaspora can support quality journalism.

On providing productions and services to diversify income streams.

- Media could focus on production and services to generate an alternative source of income.
- There is demand from the international market for production and media services in Lebanon. For example, production of video content and documentaries, training, translations, designing, etc.

On forming media alliances in Lebanon to confront big tech

- A large number of independent Lebanese media operations are coming together as a media advertisement alliance, to address big tech, mainly Facebook and Google. However, technology and funding support is needed to support the alliance and to ensure they make more of an impact.
- Support and acknowledgment from big tech is needed. For example, support on how to profit from Google advertisements, to understand how the technology can be used for Lebanese media and discuss algorithms.
- Address algorithms: youth audiences are searching for an alternative and a counter-narrative, and they are willing to consume alternative media. Algorithms make it difficult for them to find these alternative media. The big tech platforms have the responsibility to contribute to counter-narrative, and support evidence-based messages.
- Fact checking initiatives from big tech companies could work very well with local media. There is a need for that type of collaboration, other than the mass training and very competitive grants that are on offer.
- The sector needs to continue engaging with social media platforms, not only about funding, but about reach and the impact of algorithms. The same responsibility goes for the international community – they also have to put pressure on big tech.

Namibia

What are the challenges to media viability in Namibia?

On freedom of expression

- Freedom of Expression is guaranteed by the constitution. But some politicians do not respect this, and the private sector has much influence through the power of advertising.
- There is self-censorship, and discouragement to communicate about the LGBTI communities.
- In relation to corruption, there was the “fishrot” scandal. Only after Al Jazeera wrote about it, the national media also picked it up.⁷

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<https://www.aljazeera.com/news/2019/11/23/former-namibian-minister-arrested-after-al-jazeera-investigation>

On Communications Regulatory Authority of Namibia (CRAN)

- The CRAN have played their role, but they are not so strong in terms of regulation. They have lost staff to the telecommunication industry, which weakens their capacity.

On the advertising industry.

- While Namibia's advertising industry is fairly well developed and competitive, the industry is under economic pressure, with advertising agencies competing fiercely for business and focused on cutting costs.
- The role of advertising agencies is disrupted by COVID-19 – media organisations now go straight to the advertisers.

On the oversupply of media outlets

- Oversupply of media outlets in Namibia without a corresponding supply of advertising revenue. In recent times, the media market has become very fragmented thereby splitting advertising revenues across a wide range of media outlets.
- Namibia is a small country (2.5 million people), some people think there are too many outlets compared to the population. Some media outlets are going online, some are cutting jobs, others stop operating. Around 40 journalists (out of 300 registered journalists) have lost their jobs.

On online media

- Traditional media houses have seen their dual markets business model increasingly erode as more and more audiences conveniently access content, predominantly for free online. Advertisers have redirected their budgets to digital advertising.
- People are accustomed to free content. People will resist paywalls. Advertisers go to Facebook, Twitter.

On the Namibian stock exchange:

- There are no news media organisations listed on the Namibian stock exchange and therefore no evidence of publicly listed news media organisations with credit ratings.
- It is a challenge for media organisations to grow and get listed.

What would be possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On political media capture

- Political situation in Namibia: there is the possibility that politicians will buy off struggling media houses so that they can advance their political ambitions. This will make these media houses financially viable, but their editorial independence will be destroyed and the integrity of journalists is going to be questioned.

- Creation of radio stations owned by politicians.

On innovative business models

- Some innovative business models are likely to evolve, but the quality of the journalism may suffer.
 - Example of Windhoek Observer: since COVID-19 they went from print to e-paper (distributed via WhatsApp) and they use audience data to approach advertisers .
- The Namibian Sun: they have a paywall that seems to work partly, but some people manage to circumvent it and get their content for free. They are sharing content and revenue between platforms and publishers.

On donor-driven journalism

- Rise in donor-driven journalism with focus on corruption. The Centre for investigative Journalism is largely funded by the Open Society Foundation. Donors may require coverage of certain issues, e.g. corruption, and necessarily support coverage of other issues that are equally important, like social justice issues.

On COVID-19 relief funds

- Invest in COVID-19 relief funds to save some media organisations, but also influence editorial independence.

On infrastructure

- Continue increase of internet access with new infrastructure.
- Improve the telecommunication infrastructure: Namibia is a big country with a small population and it is currently expensive for telecommunications operators to invest in rural areas.

Nigeria

What are the challenges to media viability in Nigeria?

On the convergence of print media and online media

- While there are multiple stand-alone online platforms, print media are making a very slow transition to online media. The challenge for print media is to figure out how to keep newspapers interesting for their readership, because all the information is available online as well.
- A lot of print media use their online presence to replicate the content that they have printed, rather than explore the ways in which online presence can allow for content that is not printed. Some outlets use their website simply as an archiving space, where they post the same articles that are printed.
- Media platforms that try to go online lose a lot of credibility because of the competition to keep up with the blogs. There is a chance that professionalism may go out of the window.

- As the cost of newspapers has increased, some Nigerians can no longer afford them and instead go online in search of news. However, the online space is no longer reserved for media professionals, but for everyone who uses the internet. As ethics and professionalism might therefore be at risk in the online sphere, some traditional media try to oppose it by not going online at all.

On job losses

- In Nigeria, there are job losses in the media, which ties in with the troublesome financial situation in the country. Quite a number of journalists have lost their jobs in the past two to three years, especially those working in print media.
- Newspapers are downsizing and the ones that do not downsize are barely surviving.
- Some print media are paying their employees per news article submitted for example, turning journalists into freelance reporters. This also has implications for the financial situation of journalists.

On the quality of media professionals

- Media outlets are forced to fire people, but at the same time are also encountering difficulties in hiring quality journalists. When media outlets come across media professionals that reach the desired standard of journalism, Affordability is an issue because the media are struggling financially. Really good journalists would like to earn a salary that is almost at par with what they would earn internationally, yet local media cannot afford this.
- Media organisations are not investing in training. Some journalists are not trainable or not willing to follow training, but the vast majority are very keen.

On advertising

- Advertising is driven by a number of factors, including a network, political patronage, and the ability of newspaper owners to utilise the relationships with corporate Nigeria. There are newspapers that continue to attract advertising for these reasons. However, not all of the money they attract is invested into the newspaper. A certain – older and not as tech-savvy demography – remains in power. Whilst there is an attempt to go digital, there is no clear understanding on how to do this. However, there needs to be a clear decision to invest intelligently in online presence, and for newspaper newsrooms and digital teams to work together.
- Nigerian laws, such as on advertising, dictate that advert procurement or calls for government jobs need to be printed, hence creating revenues for print media. This creates a favourable environment for print media, even if they might be reluctant to innovate.
- There is a general belief that there is no money in the media. The media sector is growing, but media owners often subsidise their own lifestyles rather than investing money back and supporting quality journalism. Sometimes the money is there, but is not being used for the business or the staff members, which distorts the picture.

On connection between the government and the media industry

- In Nigeria the political structure interferes with the economy. Not being in the good books with the government might have an impact on getting advertising from private individuals.
- The size of the media industry is also reflective of the size of the economy. Furthermore, there is a direct relation between advertising and what is happening in the economy. Whenever the economy worsens, advertising and training are always the first thing to go. So, when the economy does well, the advertising will grow.

What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On management

- Media outlets need to develop management in order to understand the business. In a project where media owners were interviewed, many of them could not answer basic questions, for instance on their mission. They had no documentation or figures or they were not willing to share.
- Part of proper management is keeping records and using proper auditors. Being a decent journalist does not automatically mean being a decent businessperson.

On funding

- The media needs to be properly funded to enable the right personnel do the right things.
- A business model cannot solely be built around donor funding. Donor funding can only be an intervention and serve as support for young media houses, and not a solution. At the end of the funding period, the media outlet needs to be stronger and ensure that funding is never the only stream of income.

On twinning of media

- Many foundations working on media are already spending substantial amounts of money supporting media houses through grants, but at a certain point, these grants are exhausted. A possible solution would be to connect local media to international media, through twinning. For example, an international media house like NPR (National Public Radio, United States) could enter into a support partnership with a Nigerian media house. This partnership could help with skills exchange which would help to make a business viable.

On impact investors

- Media outlets need the support of organisations which understand the importance of journalism and its added value to development and democracy. Their money would be more than merely a one-off grant. Furthermore, impact investors that also invest in other sectors have considerable experience in running businesses, which is very helpful.

On repairing trust in the media

- Build up trust: local media have a responsibility to repair the trust of their audiences that has been lost, but which needs to be earned back and retained. Loss of trust in media is not necessarily connected to online media. Some of the trust was already eroded before online media became as popular as it is today. Nigeria is making some progress regarding self-regulation across both print and online media, through a sort of ombudsman system. By promoting quality, one is also promoting sustainability. Underlying all of this is a stable Nigeria, which includes a stable economy. Focusing on repairing trust and the quality of media are much more challenging in chaotic circumstances.
- Starting point must be sincerity. Media leaders need to accept that there is a problem and it needs to be solved, even if at the moment they are benefiting from it. The COVID-19 pandemic illustrated the fragility of Nigerian media in terms of sustainability, and there needs to be a motivation to come to the table to have conversations about this problem.

On ethics

- Media houses need to focus on professionalism, governance, democracy, and calling authorities to account. If media professionals become more professional, what they are selling is credibility - and people will pay for credibility.

On safety

- Safety is crucial - not just the physical safety of media workers and media organisations, but also financial safety. This can be achieved when there are stronger collaborations and stronger networks, because it will enable media outlets to better protect themselves.
- Media organisations cannot be asked to function if the authorities are not able to guarantee a safe space for them to operate within. The media needs to be able to operate without fear, which includes the fear of losing important investors.

Pakistan

What are the challenges to media viability in Pakistan?

On the lack of a clear Digital Media Policy

- A Digital Media Policy has been under discussion for the last 3- 4 years, but nothing substantial has been achieved yet.
- Stakeholders from society that have been invited to provide input to the government on this issue have been influencers, rather than journalists. As a result, digital media are not able to receive the same types of government funding and advertising.
- Digital media are not protected against (government) pressure to remove content.

On Facebook monetisation.

- Many types of services from Facebook, which media internationally are using, are not accessible in Pakistan. Most importantly, monetisation: this is not available to Pakistan-based organisations. More and more traffic is going via Facebook, but Pakistani media outlets are not able to generate revenue in this way.
- Social media algorithms disadvantage local media. Facebook and Google algorithms prioritise international media and deprioritise local media. This makes it more difficult for local and for new digital media to break through. If you search for Pakistani news topics, the top search results on Google are always the large international news sites.

On the difference between traditional and new media.

- Traditional media and new digital media outlets both operate online. Traditional media do so with very little efficiency, and with high maintenance costs. They receive most of the attention and advertisement income that goes to Pakistani media, as a result of the brand recognition that they have based on their other media products (newspapers and broadcast channels).
- It is difficult for smaller digital media outlets to break through, even if they are more efficient. Meanwhile, traditional media are not effective with online content.

On revenue and dwindling advertising revenue.

- In practice, copyright protections are not respected nor enforced enough. If a journalist or platform produces a good story, based on in-depth investigation, it will immediately be copied (often even without credits). As a result, no news consumer will pay for or subscribe to digital news. This undercuts the ability of good journalists to earn an income from their work. But even among journalists, the attitude to copyright is often very lax.
- Competition from international media organisations as well as social media companies is increasing with advertising budgets increasingly shifting to online media. Advertising revenue that used to go to Pakistani media organisations, is now going to the social media platform companies directly, or to international media outlets that are more visible than Pakistani media outlets. This is to the detriment of the advertising revenue Pakistani media outlets are able to generate.
- Competition is disproportionately affecting small and local independent media outlets. They cannot compete with traditional media for brand recognition, which means that the private advertisers are even further out of reach for these outlets than for 'traditional media'.
- Dependence on government advertising: over the last five years especially, the media has become more and more dependent on the government. The private sector has become less able to keep media outlets afloat. Government advertising is not always distributed on neutral grounds. Beyond the political dimension, local media are often overlooked given that by far the largest source of government advertisement revenue is the national government. Furthermore, it has been documented that the government uses its advertising budget to influence content by media organisations.

On regulation

- Media ownership concentration: the PEMRA law puts a low threshold on cross-media ownership that allows for more ownership concentration than should be possible. This leads to distortions that affect media freedoms. Editorial policies are being influenced by the need to access government advertising.
- In Pakistan, the current situation is one where higher audience concentrations in fewer hands lead to a greater likelihood of content manipulation and pressure to make compromises on content.
- Regulation hinders viability. Media viability is hindered by costly regulations, which in recent years have resulted in an increase in the frequency for license renewals as well as steeper license fees. What are possible solutions, to preserve media viability without compromise to editorial independence and the integrity of journalism?

On cooperation

- More cooperation between traditional media and digital-only media: there needs to be a real willingness from the side of traditional media to learn from newer media outlets and adjust their practices, then there is a large potential for the digital media landscape in Pakistan to become more efficient and thereby to fund more journalism with the same existing income.
- Cooperation with the Indian market: this is the closest market, and there is a lot of potential For Pakistani (digital) media outlets to align with Indian organisations. Indian digital media platforms currently offer (payment) options that do not exist in the Pakistani digital media market. Cooperating with Indian digital media organisations and learning from best practices in the Indian market could help Pakistani digital media organisations to become more effective.

On a forum to discuss issues with platforms

- Set up a forum where digital media organisations can discuss similar problems together.
- There should be an opportunity to discuss grievances constructively to see if digital media organisations and the platforms can jointly tackle the issues facing the digital media landscape in Pakistan are facing, which includes platform companies active on the Pakistani market.

On algorithms prioritising local and national content

- The algorithm of Facebook and Google should give particular priority to local and national news content.

On advertising policies

- Government advertising policy: there should be a clear, neutral and transparent allocation mechanism for government advertising. This should include clauses to allocate a certain percentage towards local media as they are most vulnerable and dependent on government advertising.

- Local media should reach an understanding with large private advertising companies. Private companies should reserve a percentage of their advertising budget for local media outlets. To achieve this, local media might need to cooperate and proactively reach out to these companies with a broad offering of local media to advertise in simultaneously.

On Google News Initiative and Civil Society Support

- This has some positive impact regarding training and innovation, but their impact on income and revenue is very limited.
- Media development organisations continue to make a positive impact in this regard, and this will remain necessary for the foreseeable future to ensure the existence of independent (local) news outlets. This is part of the media viability strategy for (local) online media outlets.

Senegal

What are the challenges to media viability in Senegal?

On the lack of sustainable economic model

- Lack of a sustainable economic model, which supports publicity for the private sector, and independent media, especially online.
- Current economic model is not sufficient for the existence of these media, and the revenues received are not in accordance with the needs of the sector. Need to reflect on other economic models since the leading media outlets are untouchable and also too powerful to be confronted by smaller media.

On the need for economic independence

- Need to recognise the importance of economic independence before looking for editorial independence.
- Create a new press institution that is more accountable with regard to the press code.
- Media professionals need the support of administrative finance/affairs experts.
- Many media outlets need financial support and also need a business focus to survive. There needs to be cooperation with journalists who own outlets and individuals who are finance-savvy. This does not mean complete control over the media by financial interests.

On the concentration of wealth

- The wealth concentration by some media outlets is posing a problem for the media landscape in Senegal.
- An issue for editorial independence is the increasing presence of business- focused outlets. Sensationalism is often used to attract money through advertisement, and ‘fake news’ is being spread. People rarely pay for memberships, and information from news outlets is often copied from other places. A lot of media outlets exist for the sole purpose of business and interests, such as

politics. There is no freedom of press in Senegal and the media that survive are focused on financial survival.

- Senegal lacks a legal framework that limits wealth concentration by some media outlets. What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On the legal framework

- Ensure a successful and pragmatic execution of the legal framework in Senegal: at the moment, the legal framework gives a lot of space for independent media, but existing media laws are barely applied.
- People need to follow the same vision of editorial and financial independence for the press in Senegal. At the moment, the big outlets overrule smaller ones.

On limited access to advertisement

- Advertisements to state-owned media needs to be limited and the private media needs more space to receive an income through advertisement.
- Limit the access to the advertising revenue by the public sector, for example a maximum of 40% of the advertising budget.

On taxation

- Prohibit the concentration of wealth in the media sector
- Tax the big corporations such as Google and Facebook because at the moment, there is too much wealth and opportunity for business-focused initiatives. Additionally, advertising needs to be tied to strict criteria in order not to ruin editorial independence.
- Develop a new economically sustainable model for media, with a strategy that new media can refer to and learn from, thus ensuring survival.

Tunisia

What are the challenges to media viability in Tunisia?

On the history and the intersection of sectors.

- History of Tunisia and the political development must be kept in mind to understand media viability in the country. Before the 2011 Jasmine Revolution, the media existed in service of the regime and served those in power. The media were fully controlled except a few media affiliated to political dissidents. Since the 2011 Jasmine Revolution, when many institutional and legal changes were needed to reform the media sector, the media field opened up, but only to a limited degree.
- Difficult to depict the media landscape in Tunisia without considering the intersection of all the markets, and of the public and private sector. In order to study media viability in Tunisia, a holistic

study is needed, as there are many levels, and all sectors are intertwined. All ecosystems are relevant in understanding media viability.

- History of the Tunisian press shows that the state played a big role in installing the first radio, the first newspaper, etc. Since the 2011 Revolution, despite some legal and constitutional changes, the government lacks a clear vision on the development of media, the importance of media as a democratic good, media as culture, or media in support of economic growth.
- Absence of a strong framework for independent media reveals low the understanding of how the media plays an essential role in supporting democratic processes and guaranteeing diversity, pluralism, independence and participation.
- A diversified and pluralist media landscape has not materialised, instead, the links between politics and large media have tightened over the years and the government has not taken the proposals from the media sector to guarantee this pluralist, independent media sector.
- Present political climate for media has become challenging for freedom of press and media viability. Without political will, the efforts of 10 years advocating for more media freedoms might be difficult to sustain. On advertisement and changes in the media landscape
- Lack of understanding on the advertisement market in Tunisia, and very limited investment in it. The market has not really changed since the 2011 Jasmine Revolution. The market is dominated by two to three large media companies who have traditionally controlled the advertisement market. There is a need for an agency that supports the fair redistribution of public advertisement for media.
- The economic crisis and COVID-19 had an impact on the advertisement market, which was gradually taken over by big tech companies, such as Google, Facebook and Amazon. Even though legislative reforms are still ongoing, legislation did not move along with the digitalisation of media and advertisement.
- Traditionally, television and radio are the dominant media, but over the years, the social media platforms have taken over that dominance. The business models of all media need to adjust as advertisement is no longer considered enough a source of income.
- Some newspapers have stopped their printed versions over the years. The economic situation and COVID-19 has negatively affected journalists and their work.

On new media and the dominance of big tech, social media

- Big tech has taken over the advertisement market, and the number of clicks is more and more dominant in defining the media and their revenues. The government has initiated funding for the digitalisation of the media, but this has not been enabled yet.
- Digitalisation and the influence of big tech influence is a hurdle for traditional media, who continue to count on the traditional market, private sources, public advertisement etc.
- Access to reliable information is a new phenomenon with big implications. The President started using social media - mainly Facebook - to communicate to the population, but that is problematic as it is only one voice. There are very important constitutional issues discussed but there is no feedback and debate.

- Online media based on clicks is not equal to quality journalism. Often the online platforms work with few journalists, there is a lot of copying/pasting, the journalistic principles are not adhered to, and the quality is not monitored.

On advocacy vis-à-vis the big tech companies

- Media cannot easily engage with the Internet giants, who now control the online advertisement market. Tunisia is, on a larger scale, also not a country that can negotiate and enable the online advertisement market driven by big tech to be more fairly distributed.

What are possible solutions to preserve media viability without compromise to editorial independence and the integrity of journalism?

On new technologies and media

- Rethink the way media can generate funding: the digitalisation and dominance of big tech has drastically changed the media landscape and advertisement market, but also opened new ways of engaging with audiences. Online media has also created opportunities to move outside the framework of Tunisia.
- Offer aspiring journalists the possibility to create their own media and give them the tools to construct a future of quality press with a focus on investigative journalism.
- Encourage participation of consumers in the media to foster their engagement.

On the role of media in a democratic society

- Foster media advocacy to help the authorities understand that media plays an essential role in supporting the democratic processes and guarantee diversity, pluralism, independence and participation.
- The media, including local media and skilled media professionals, should develop a culture of human rights and anti corruption for the benefit of the audience.

On breaking down media to better serve the audience

- Make the advertisement market available to all.
- Rethink the media: a media operation should break down its content and audience. Which media are preferred for which subject, and what resources are needed to adhere to the public's needs? How does the public consume media? There is not one audience, but many different ones, some want this, some that, some listen, some read, some see. The media need to respond to that by understanding how to diversify its products using graphics, text, videos, podcasts etc. However, a problem currently is that there are limited studies on audience consumption and behavior, and much of that is needed.
- Create a kind of loyalty with the consumer to establish a media that the audience trusts, likes and wants to be involved with, and ultimately, will want to finance. This requires the media sector as a whole to work with the community, understanding their needs, conducting surveys and

generating stronger engagement from the audience. This might also address another problem: potential audience(s) who do not know how to find alternative media sources because of the dominance of a few large media, and online algorithms.

On supporting traditional and new media

- Transition from a ‘standstill’ situation of media to developing new formats and more sustainable business models. Important to fund journalists and media operations that are ready for transition, who have a plan and who are principally strong on diversification, deepening and engaging, and who can be supported to create their own sustainable media.
- Support traditional media by bringing in the know-how of new media and its business models. Much expertise is needed, and a need to connect to professionals to build the capacity of the entire media sector in dealing with current challenges.

On advocating for independent, proximity media

- Focus on stimulating important state reforms in relation to media, guaranteeing the editorial independence of media, and focusing on proximity media to ensure true media viability and further diversification of the media.