



ProMedia II Regional Final Report

September 30, 1999 – September 30, 2014

USAID Cooperative Agreement No. DGS-A-00-99-00015-00

Submitted to:

Bureau for Europe
& Eurasia
USAID
Washington, DC

February 16, 2015

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Executive Summary

USAID's ProMedia II Regional project, implemented by IREX between 1999 and 2014 provided a flexible tool to support independent media in a time of transition in Europe and Eurasia (E&E).

The project supported multi-year, full-time technical assistance projects in three countries: Bulgaria and Albania from 1999 to 2004 and Macedonia from 2000 to 2004. It gave USAID a platform to follow-up early assistance under another mechanism that gave rise to European Radio for Belarus, which has grown into an important off-shore alternative news source in a country with a largely state-controlled media. It gave IREX an opportunity to turn an idea for measuring a media sector as a whole into the Media Sustainability Index, a respected authority on the state of media in the E&E region. Finally, it served as a tool to fund a number of small-scale regional projects and to bring together disparate media development projects in E&E so that personnel could learn lessons from one another and make use of a strong network of talent working on similar issues.

Genesis

ProMedia II was a collection of individual media development projects that spanned from Croatia to the Caucasus, most beginning in 1999. These projects were born out of the ProMedia Project, a single cooperative agreement that ran from 1996 to 1999, also implemented by IREX. ProMedia revolutionized media development: USAID and IREX worked cooperatively to move beyond short-term trainings, study tours, and offshore advocacy to a full-time project with local and/or expatriate media experts leading efforts in each country to approach media development from a holistic standpoint. In addition to journalism training and establishing legal frameworks in new democracies, staff and consultants worked with media professionals to learn how to manage a media outlet in a market economy that was new to them. The projects also emphasized the establishment of a robust yet adequately sized network of supporting institutions that provide members with services, advocacy, and are the institutional memory of the profession.

ProMedia II continued this work in most of the original ProMedia countries (save where USAID had ended programming altogether), with most projects being driven by USAID's local representative offices and missions. Bulgaria and Albania (and later Macedonia) remained under USAID/Washington, which also chose to set aside funding to ensure that the various ProMedia II projects throughout E&E would remain networked and also to take advantage of opportunities to support cross-border small projects. The ProMedia II Regional project took up these tasks.

Legacy

Just as ProMedia was not an end in itself, neither was ProMedia II, both the Regional and other country-specific cooperative agreements. These gave way to a number of follow-on projects, some of which are operating today. Similarly, media development—and democratic development as a whole—is a continuum everywhere: it never ceases to evolve (or sometimes devolve). Just when it seems that it is safe and attention can be turned elsewhere is when things will likely go awry. The example of present-day Hungary is a striking reminder of this.

Therefore, much of what ProMedia II Regional accomplished could only have been done with the foundation put in place by the first ProMedia. Some of the legacy is the result of the back-to-

back commitment made by USAID. Some of the legacy of other interventions will no doubt owe their results in part to both ProMedia I and II.

Further, the media situation in two of the three countries where ProMedia II Regional engaged in technical assistance projects has deteriorated since 2008. IREX believes that this is neither the fault of project deficiencies nor of USAID choosing to cease these project components of ProMedia II Regional in 2004. Rather it is part of a larger trend of the pendulum swinging back in favor of political forces bent on entrenching themselves in power. And importantly, the capacity developed by USAID and its implementers will serve to propel democratic development forward once media are given the space to once again practice with less fear and fewer impediments to good journalism.

In ProMedia II Regional, that capacity is the result of a number of achievements:

- Creation of the Union of Albanian Journalists, Broadcast Training Center/ProMedia Foundation (Bulgaria), Bulgarian Media Coalition, Media Legal Support Group (Bulgaria), Association of Journalists of Macedonia, and Macedonian Institute for the Media. These organizations, all still active, support quality journalism and lobby for a positive enabling environment for media. Their personnel are experts in their fields and share with their colleagues the lessons learned from the earlier transition years and international media development projects, including ProMedia II Regional.
- Development of European Radio for Belarus from an infant offshore radio station into one of the most important sources of objective news produced by Belarusians for Belarus. In addition to providing objective and critical news in the present day, European Radio for Belarus news staff will be prepared to play a key role in the media space of a someday more open Belarus.
- A culture of modern, professional media management practices. Media managers in Bulgaria, Albania, Macedonia, and at European Radio for Belarus employ business plans, staffing plans, market research, and editorial and content strategies to help them survive and protect their independence in a tough media market.
- Professionally produced, quality journalism. While examples of one-sided or libelous journalism can be found still—and perhaps always there and everywhere—in the countries where ProMedia II Regional operated, there is a cadre of gifted and dedicated journalists in each country that understand and practice ethically and meet high journalistic standards. This includes investigative pieces that uncover corruption and topical reporting on issues affecting minorities or vulnerable communities.
- Thirteen years of rich data documenting the advancements and setbacks of media in the E&E region through the Media Sustainability Index. Scores over time show at a glance the trajectory of 21 E&E countries' media sectors. In-depth reports accompanying the scores provide context and information that is not found in other sources as to the reasons behind the improvements, stagnation, or regression.

Introduction

The Promedia II Regional cooperative agreement covered diverse media-related programming over its 15-year lifespan. Such programming can be categorized as follows:

- In-country media development technical assistance projects operating independently of one another in Albania, Bulgaria, and Macedonia;
- Support of European Radio for Belarus (now Euroradio), which informs audiences in Belarus;
- Annual implementation and publication of the Media Sustainability Index in 20 to 21 countries in the E&E region;
- Discrete trainings and conferences for the benefit of regional participants or to create regional solidarity among media professionals.
- Collecting and disseminating best practices and new approaches in media development by coordinating interaction of personnel across disparate media development projects being implemented in the E&E region.

The various components funded during the period were often unrelated, with the goals specific to each project. Therefore, each is covered below individually. An exception to this is represented by the regional activities. Many supported the individual components taking place under this and other media development assistance awards. Others served to bring together the media development community active in the E&E region through conferences, platforms for sharing ideas, and develop solidarity among local and international actors. These activities are collected under the heading “ProMedia II Regional Activities.”

Furthermore, with the exception of the Media Sustainability Index and support for European Radio for Belarus, other components’ activity ceased halfway through the implementation of the cooperative agreement. Given the time that has passed since then, and since each component provided reporting through ProMedia II Regional annual reports or their own individual reports, this report provides a summary of achievements and how components met stated goals. Lessons learned and recommendations are included only as relevant: for example, ProMedia II Albania ended 10 years ago and follow-on projects, funded through other agreements, superseded that work.

Finally, those interested in more details about specific components are encouraged to seek more information in ProMedia II Regional annual reports, which are available through USAID’s Development Experience Clearinghouse.

ProMedia II Albania

This component, running from 1999 through 2004, fielded an expatriate chief of party for much of the time who was supported by a small local professional and administrative staff. The component focused on achieving the following four intermediate results:

- I.R. 1 Publishers and station managers effectively and efficiently manage media enterprises
- I.R. 2 Journalists provide readers, viewers and listeners with objective and useful information
- I.R. 3 Legal and regulatory frameworks support free speech
- I.R. 4 Journalism profession self regulates based on a code of ethics (amended from the original CA, which more broadly covered the development of supporting institutions)

While Albania's media sector currently has many development needs, ProMedia II Regional strengthened Albanian media along the lines of the four stated I.R.s. These achievements continue to support the Albanian sector today as reported by the Media Sustainability Index; Albania consistently ranks as one of the E&E region's better performers, scoring in the upper half of all countries every year since 2008 and maintaining a score within the "near-sustainability" range during that timeframe.

I.R. 1 (Media Management) Key Achievements

1. Creation of AlbNet: private local television operators approached IREX in the latter days of the project to request help in the creation of a network that would help them share content and collectively reach advertisers, thus increasing revenues. By project's end, an IREX trainer worked with AlbNet to draft a business plan and to prepare materials for network promotion. Project funds provided a package of programming (films and documentaries) broadcast by AlbNet. The network began broadcasting in March 2005 after the project ended. By the end of 2006, after having grown to 10 stations covering nearly half of Albania, AlbNet dissolved because it was unable to raise sufficient income in Albania's anemic advertising market.

AlbNet addressed two key issues affecting local media in Albania. Due to poverty and the small size of Albania's media market, local outlets determined that forming a network would best strengthen their chances for organizational survival. In addition, the national media outlets operating exclusively in Tirana had no interest in covering the micro-level problems of local governments. In the absence of the local media, the risk of creating a very centralized and narrow media environment was great.

2. Forum for the Protection of Producers and Authors (FMPA): Throughout Albania's transition history until 2004, Albanian audio-visual content was distributed and broadcast with little to no regard for intellectual property laws on the books. Supported by IREX, FMPA gained registration in March 2004 and quickly worked with public and private television stations and VHS and DVD distributors to formalize royalty arrangements. By the end of the project, FMPA distributed \$33,000 to its 85 members (copyright holders). Television operators had a convenient avenue for compliance. FMPA was negotiating with broadcasters and other parties in neighboring Macedonia and Kosovo to protect Albanian-language content there by providing an easy way to comply with copyright laws.

FMPA's ultimate aim was to support indigenous local film production. It did this by acting as a watchdog on intellectual property right laws, as well as facilitating crucial dialogue between local authors and producers and the public, private television operators, and the companies that distribute and trade Albanian works. FMPA worked completely in line with the law and with full transparency. Doing so had a positive effect throughout the media and increased public confidence in FMPA's membership and in the success of FMPA initiatives. The initiative saw much success, and FMPA has been officially acknowledged by the Ministry of Culture as key to furthering and protecting Albanian culture.

3. Financial Training for Local Television: IREX training of station staff yielded positive results even if full sustainability eludes much of the Albanian media today. Training did make a difference in both the short-run and the long-run. For example, TV Teuta significantly increased its advertising revenue and reduced its dependence on foreign

programming by substituting locally produced shows. Amantia TV initiated a computer based accounting system and developed a sound business plan; the station owner was able to produce financial statements after assistance from IREX. Finally, in one case project assistance helped TV4 prove that repeated visits by tax authorities were motivated by political pressure after airing content critical of local authorities. Because their finances were in order, they could easily show that they were in compliance with all tax provisions. This training has taken hold more broadly: the 2014 Media Sustainability Index reports “Albanian media generally prepare and follow business plans to secure funding, to make decisions on expenditures and staff, to plan for capital expenditures, etc. Accounting and financing practices are generally in accordance with international standards. The newsrooms of the main television stations and newspapers employ accounting, marketing, and human resources professionals.”

The economic environment for media is grim, as the country’s regions have been decimated financially. What little advertising does exist is quickly eaten up by the national licenses (KLAN, TVA, and TVSH) leaving few avenues for smaller local stations to earn revenue. The “legal” revenue that does emerge is through “congratulation” advertising. The operating costs of media outlets are covered by donations or by the ownership which uses other businesses to prop up their less profitable media ventures.

During ProMedia II IREX staff visited many broadcasters throughout the country in order to help them develop their media operations as businesses. Training focused on strengthening local news outlets’ ability to compete in the Albanian market by reducing dependence on donor funding, improving accounting systems and procedures, and developing sales and business plans.

4. Audience Measurement: During the life of the component, IREX supported the Institute for Opinions and Statistics to undertake audience measurement and market research surveys in 14 cities. While the advertising community lauded the research and expressed hope that the survey would continue in the future, many station owners were unhappy to find that they were not in leading positions, as their marketing efforts had in the past proclaimed. Buy-in from stations, therefore, was challenging. After the project, the Institute for Opinions and Statistics sought a partnership with AGB Nielsen, which would have helped secure the future of such activity. Unfortunately this partnership fell through and now there is little verifiable market research or audience measurement conducted in Albania.

Through these surveys, IREX sought to address the undue influence of political support in determining flows of advertising revenue. Using a formula honed in previous programs, the IREX-supported research organization, ISO, was able to produce powerful and accepted measurements of viewership. Each rating period lasted twenty-eight days and utilized a diary maintained during that period by each member of the family. The panels were selected by ISO to be both statistically appropriate and diverse enough to create a true sample. The surveys were repeatedly conducted in fourteen of the country’s population centers through the end of ProMedia’s Albania programming.

I.R. 2 (Objective and Useful Information) Key Achievements

1. *Hapur* Anticorruption Program: Modeled loosely on the CBS News stalwart *60 Minutes*, *Hapur* programs sought to uncover corruption in Albania. Broadcast by 24 local

television stations (and after the component ended, by the state broadcaster), the program spurred several reactions by authorities to its stories:

- a) After *Hapur* revealed the abuse of funds for construction of the Sukth-Durres highway, the government forced the construction company to repair several parts of the highway;
- b) Irregularities in a public tender for the construction of a water depot in Gramshi reported by *Hapur* forced the authorities to redo the tender;
- c) *Hapur's* exposure of tax evasion by the Tepelena company forced the State Audit Agency to audit the company's books;
- d) After *Hapur* reported on illegal construction in Llogara National Park, authorities ordered and effected the destruction of six illegal buildings.

Hapur used the *60 Minutes* format to report on incidences on everyday corruption in Albania. Five different packages in each program were tied together by commentary from the anchor. The stations produced the ten-minute inserts under the supervision of two *Hapur* editors, one of which was responsible for content and fact-checking, and the other monitored production quality. Through *Hapur*, IREX ProMedia provided journalists with essential media training in ethics, investigative reporting, production, and writing. In addition to raising public awareness of corruption issues, *Hapur* also supported indigenous television programming.

2. *Heroes of Albania: Heroes* was a 30-minute program that aimed to foster civic activism. By traveling all over the country, *Heroes* journalists and producers attempted to show how Albanian people can improve their own lives and the lives of those around them by simple acts of "heroism," such as building a school. At the beginning of the program there were only two production crews, but by the end of the component there were 10. The program became increasingly popular with the viewing public, as evidenced by requests for stations to broadcast the show. In a significant achievement at the end of 2004, *Heroes* was also broadcast by Albanian state television.

Heroes provided local television stations with low-cost indigenous programming while strengthening the professional skills of journalists through producing documentaries and media stories. In the field, *Heroes* producers worked with local stations in order to show them production techniques, script writing and editing. Each show included 25 minutes of content and 2.5 minutes allotted for PSAs. Two minutes were allotted to sell ads. Local stations have become motivated to produce their own human interest stories and have shown remarkable improvement in their production quality.

I.R. 3 (Legal and Regulatory Framework) Key Achievements

1. National Council of Radio and Television (NCRT): IREX helped government regulatory bodies, particularly the NCRT, gain efficiency through consulting and specific projects such as frequency mapping. However, structural and leadership issues that would have required key legislative reforms kept NCRT from becoming an effective regulator. Work under this I.R. was ceased before the component ended.

I.R. 4 (Professional Self-Regulation) Key Achievements

1. Union of Albanian Journalists (UAJ): Work under this project failed to achieve the goal of creating a union by the time this component ended. However, follow-on work by IREX

succeeded in 2005 (the year following the close of this component) in establishing the UAJ. Politics and other operating challenges prevented a speedy establishment of the UAJ, but groundwork laid by this component clearly helped get UAJ up and running. The UAJ exists today and is considered, according to 2014 Media Sustainability Index panelists, to be the only meaningful voice for Albanian journalists.

In Albania, journalists' rights are often at risk. Without employment contracts, broadcasters can fire reporters and editors at any time without fear of legal retribution. Working with local journalists, IREX supported the creation of the UAJ. The organization developed a self-governing code of ethics, and formed a board that resolved ethics infractions. The guild also mediated negotiations between the publishers and the journalists.

ProMedia II Bulgaria

This component, running from 1999 through 2004, was led by a local resident advisor, supported by a local professional and administrative staff. The component focused on achieving the following intermediate result:

IR 4.2.4: Advocacy and Public Support for Reform through Media

This consolidated and replaced an earlier set of intermediate results:

I.R. 2.1.2.1: Improved Electronic Media Legal and Regulatory Framework

I.R. 2.1.2.2: Improved Professionalism of Media Outlets

I.R. 2.1.2.3: Increased Effectiveness of Media Associations

IREX contributed significantly to the establishment of a vibrant and professional independent media environment in Bulgaria. Notably, IREX achieved success in building the legal, professional, and institutional framework for the ongoing development of independent media in the country. IREX left behind the legacy of Broadcast Training Center/ProMedia, a Bulgarian entity providing, 10 years later, high-quality professional training to the broadcast and print media and supporting independent television production in key areas such as investigative journalism. The major milestones of the component's achievements in Bulgaria include:

Legal and Regulatory Framework

1. **Passage of the Radio and Television Law:** IREX provided crucial legal assistance in drafting the initial act and follow-up amendments. American, European, and Bulgarian legal experts were actively involved with three consecutive parliaments and two consecutive regulatory bodies in all phases of drafting, passing, monitoring, and improving the law.

The Radio and Television Law took away licensing authority from the government and passed it on to a single independent regulatory body, the Council for Electronic Media. With ProMedia support, a highly respected media expert nominated by the independent media organizations was appointed as a member of the regulatory body.

2. **Passage of the Telecommunications Law (1998 passed, amended in 1999, 2000, 2001, and 2002):** IREX provided crucial legal assistance in drafting the initial act and the follow-up amendments. American (from the law firm Covington & Burling), European (EU

Commission, Council of Europe), and Bulgarian legal experts were involved with three consecutive parliaments in all phases of drafting, passing, monitoring, and improving the law. As a result, the Committee for Regulation of Communications, an independent regulatory body, replaced the government's direct participation in broadcast licensing procedures. Hundreds of national, regional, and local independent broadcast, cable, and satellite radio and television stations were licensed.

3. Freedom of Information Legislation: Working with the Access to Information Program and Parliament, IREX provided crucial assistance in all phases of the drafting, public discussion, passage, monitoring, and improving the Freedom of Information legislation package. The Access to Public Information passed in 2000 passed with amendments in 2002. The Personal Data Protection Law passed in 2002. The Classified Information Act was passed in 2002.

The Access to Public Information Laws became the first pieces of Freedom of Information legislation passed in Bulgaria. IREX/ProMedia provided effective technical assistance and financial support to the Access to Information Program (AIP) and the Bulgarian Media Coalition (BMC) to help them initiate public discussion provide civic education on international standards of access to information regulation and advocate for better and easier access to information rules.

After the adoption of the legislation, IREX/ProMedia continued supporting AIP and BMC in the in monitoring the laws' implementation and providing legal assistance in cases of information refusals.

4. Media and Citizen Associations Monitor Implementation: With IREX support the Association of Bulgarian Broadcasters (ABBRO), Media Legal Support Group, Bulgarian Media Coalition, and Access to Information Program monitored the implementation of the passed legislation, thus providing fairness and transparency to the process.

IREX/ProMedia assisted ABBRO in recruiting a new executive director, planning and conducting its regular industry trade show, and hosting its first annual program competition.

Professionalism

1. The Broadcast Training Center (BTC) was established in August 1999 (under a prior cooperative agreement but supported throughout this component in ProMedia II Regional) as the only television training facility in Bulgaria, also providing training to radio stations. Since 1999, BTC/ProMedia has become a trademark for professional television training in Bulgaria, utilizing the highest international standards in news journalism to replace the former tradition of state broadcasting. In 2004, the IREX office re-registered under Bulgarian non-profit law as a separate entity that endures and continues the mission of the project component. BTC/ProMedia has a pool of Bulgarian and international trainers, able to provide support for independent media in developing professional journalism skills, as well as technical and management skills.

BTC began as a small news studio complex with newsgathering capacity, all based on easy to use and learn digital technology using the Panasonic DVC Pro standard. Trainees learned practical skills such as television reporting, news production, television camerawork and television news picture during three to four-week long courses. The

Center also provided a number of highly-regarded on-site trainings for media outlets. IREX ProMedia worked to ensure the Center's stability, helping it utilize training fees.

2. BTC/ProMedia also developed unique experience in independent television production. Its weekly anti-corruption investigative journalism program *Na Chisto* presents a new model for high quality independent journalism. Independent media outlets shy away from such productions because of their high sensitivity and potential for controversy with advertisers and political affiliations of the media outlet. BTC/ProMedia is a unique independent platform making such crucial productions possible, and has developed a unique network of television affiliates covering 75% of the country's populace.
3. BTC/ProMedia developed partnerships, through the Media Advocacy Campaign, with other USAID implementing organizations operating in USAID priority areas of anti-corruption, rule of law, local government, fiscal decentralization, ethnic and social issues, and business development. Bulgarian media have enhanced their ability to cover such issues, supporting the goals of increasing the appearance and discussion of such issues among Bulgarians.
4. Under ProMedia II Regional, BTC/ProMedia was instrumental in providing support for the launch and professional development of key media outlets, including:
 - a) bTV: the first independent broadcast television station with national coverage in Bulgaria;
 - b) UTV – Cable Bulgaria: the first independent cable television station with national coverage;
 - c) Evropa TV and SKAT TV: the largest national cable networks based outside Sofia;
 - d) TV Roma: the only Roma broadcaster in Bulgaria;
 - e) InfoRadio: the first news-oriented national radio network;
 - f) Trained more than 200 personnel from dozens of local television and radio stations across the country.
5. Investigative Journalism Program: After September 11, 2001, IREX provided Bulgarian citizens with accurate and objective information about efforts to combat terrorism and exposed links between terrorism and organized crime.
6. Implementing Professional Journalism Standards: In partnership with the Center for Independent Journalism, the Journalism Unions, and the Free Speech Forum, IREX helped develop the Professional Code of Ethics in 1997 under the previous cooperative agreement and under ProMedia II worked for its broad adoption.

IREX worked to unify the large number of conflicting professional codes of ethics were adopted over the years. Working with the Center for Independent Journalism, IREX ProMedia developed a common list of Principles of Professional Journalism. The document was discussed and adopted by all member organizations of the Bulgarian Media Coalition.

Media Associations

1. IREX helped establish ABBRO in 1998 under a preceding cooperative agreement. Under ProMedia II, this support continued. Today ABBRO is still an active trade association. ABBRO effectively protects and promotes the business interests of its

members and serves as a free speech advocacy body. Since IREX helped establish ABBRO, membership has grown from 36 to 127 members, or 95 percent of broadcast media outlets in the country. With IREX support it has become an important instrument for improving media legislation in support of independent broadcasting and provides a wide range of services to its members, such as legal advice and professional training in journalism, production, and management. Since 2001, ABBRO has hosted the MediaMarket, a major platform for buying and selling production capacity, software, and equipment. Since 2002 MediaMarket has taken on a regional component, with exhibitors from neighboring countries. ABBRO also provides support for broadcast association development and regional media cooperation in in southeastern Europe. ABBRO, in recognition of its significant progress, was elected in 2000 to serve as the secretariat of the Southeastern Europe Network of Associations of Private Broadcasters. With IREX support, ABBRO provided association management training to partner associations from eight neighboring countries and served as the hub for initiatives for regional cooperation.

2. The Group for European Media Legislation in Bulgaria, the predecessor to the Bulgarian Media Coalition (BMC), was founded and supported under ProMedia II Regional.

The BMC actively promoted independent journalism and freedom of speech. It became an institutionalized partner of the regulatory bodies, the legislature and the Government on issues concerning media regulation.

3. Media Legal Support Group: With IREX support and training, this specialized media law assistance group provides support to media organizations and journalists on issues such as licensing, media legislation, legal training, and libel and defamation law.

The Media Legal Support Group was an association based on the experience and expertise of the lawyers from the Media Law Task Force. The Group provided assistance to independent journalists and media outlets by providing legal advice and representation and working on the improvement of media legislation.

4. IREX fostered cooperation on media development issues among all media related associations, unions, and NGOs. A total of 14 media associations, including all industry associations like ABBRO, all journalism unions, and all major freedom of speech and freedom of information activist groups were brought together to cooperate on regulatory and professional issues. In recognition of its importance, BMC is the only non-governmental institution contributing regularly to Constitutional Court cases. BMC monitors the implementation of media legislation and implements a project to improve media coverage of civil society.

ProMedia II Macedonia

This component, running from July 2000 through 2004, was led by an expatriate resident advisor supported by a local professional and administrative staff. The component focused on achieving the following intermediate results:

- I.R. 1: Legal and regulatory framework support free speech and the development of a free enterprise market system within the media
- I.R. 2: Supporting institutions exist and function in the professional interest of media
- I.R. 3: Journalists provide the public with objective, fact-based, and useful information
- I.R. 4: Radio, Television, and Publishers effectively manage media enterprises

The Macedonia component under ProMedia II Regional achieved several notable successes despite operating in a turbulent environment. By 2005 (one year after the component ended), according to the Media Sustainability Index, Macedonia's media had achieved a score of 2.58, placing it solidly in the "near sustainability" category. This was an increase from 1.73 in its initial 2001 score. While the Media Sustainability Index does not measure project achievements, it does show that overall the situation in Macedonia was improving.

However, by 2014, Macedonia had devolved to its historic low of 1.40 and several panelists asked to remain anonymous after they had been harassed for their participation in 2013. This dire situation was the result of a sustained effort by the government and its allies to control information and squelch free expression and critical media. Macedonia's media did not have the supporting institutions and ability to remain resilient in the face of such overt, coordinated pressure.

Below IREX details several of the key achievements made before the political crisis that have hamstrung Macedonia's independent media. These achievements may serve as building blocks should the situation in the country improve or follow-on assistance efforts for independent media be undertaken; indeed there exist media professionals who have the capacity to produce quality journalism if they find the freedom to do so.

I.R. 1 (Legal and Regulatory Framework) Key Achievements

1. IREX worked with the Media Development Center (MDC), a local NGO, to write a Broadcast Law that received the backing of the international community, including the Council of Europe in 2003. Throughout 2004 IREX and its partners continued to lobby hard for its passage. By the end of the component activity in 2004, the law had still not been passed. MDC promoted understanding of the law by media by organizing a series of roundtables throughout the country.

The MDC served as IREX's main partner in Macedonia during the ProMedia II program. Early on, IREX influenced the MDC to reform its manner of organization to make it more transparent and responsible. The MDC became a leading force in promoting the adopting of the Broadcast Law in Macedonia.

2. IREX's partner, the Association of Journalists of Macedonia, organized a rally in defense of press freedom rights in 2002.
3. IREX and the OSCE organized a working group to discourage illegal broadcasting and piracy. Two meetings were held, chaired by the government's spokesperson and attended by the deputy minister of transport and telecommunications, the minister of culture, the president of the broadcasting council, and the director of telecommunications. The death of President Trajkovski and the subsequent political turmoil interrupted proceedings.

A number of Macedonian broadcasters were re-broadcasting international programs without permission. The working group's task was to enforce existing legislation to reduce piracy and illegal broadcasting. A secondary IREX role was to increase communication between the parties.

4. MDC produced an analysis of a new draft law on access to information drafted by the local NGO Transparency Macedonia in cooperation with the Ministry of Justice. The draft has been widely criticized. MDC used its analysis to lobby for improvement of the draft law.

I.R. 2 (Supporting Institutions) Key Achievements

1. With IREX support, the Macedonian Institute for the Media (MIM) established itself in 2001 as the major (and only) mid-career training center for the media in Macedonia. MIM not only organizes and coordinates training for media but also debates and discussions aimed at encouraging the media to take on a self-regulatory role, and to act in a restrained and responsible manner. In 2004 MIM launched and completed the first semester of its practicum based, multi-ethnic one year diploma in journalism course. MIM continues working currently.

MIM has, at its disposal, a fully equipped television training classroom, a print newsroom with Internet access, allowing it to double as a computer assisted journalism training facility, a radio studio and a good quality media library. It played a very important “behind the scenes” role of guiding and assisting other organizations, including the AJM. During the life of ProMedia II, MIM became a coordinating body for training and media related activities funded by the international community.

2. With support from IREX, the Association of Journalists of Macedonia (AJM) in 2001 adopted new leadership, and set up six regional centers. It is still active and works to improve journalism standards.

The AJM plays an important and growing self-regulatory role through its Council of Honor, publishing criticisms of the media, private and state, where the media has acted against the AJM’s Code of Ethics. Through its regional centers, AJM offers an excellent opportunity to increase the influence of Macedonia’s ethnic minorities in the association

3. With IREX support, MIM and AJM introduced a new code of ethics for journalists in 2001.

The code of ethics aimed to foster a culture of responsibility, restraint and accountability in journalists. The adoption of a Code of Ethics and formation of a Court of Honor created debate on the role of responsible journalism in Macedonia.

I.R. 3 (Journalism Quality) Key Achievements

1. In 2004, more than 250 journalists attended seminars on election reporting and related laws across Macedonia in the lead up to presidential elections. IREX conducted seminars and training, as well as organized local associations and NGOs to promote media responsibility during the 2002 national elections.

AJM cooperated quickly and effectively with IREX in setting up a series of regional trainings on election reporting, disseminating facts and information about the laws affecting the media during the elections, and organizing a “media support system”.

2. In 2004 IREX concluded its two-year program of in-house television news and production training. Five of the seven broadcasters led the successful establishment of a television network that at the time rivaled the country's national broadcasters.

In Macedonia, IREX supported the strengthening of local news and local broadcasting. The trainings focused on streamlining newsroom management, efficiently using existing technology, reformatting the news-bulletin's program structure, and developing stronger production disciplines.

3. More than 80 local and regional journalists received training in 2004 to improve their skills as correspondents and more than 180 local and regional journalists received English language training hosted by AJM. IREX funded and guided the establishment in 2001 of a tri-lingual online news service, Press online, (www.pressonline.com.mk), which provided reports and articles in Macedonian, Albanian, and English. The website targeted vulnerable youth of Macedonia, aiming to break down the barriers to the exchange of information across the ethnic/linguistic divide.
4. In 2001 IREX organized and funded safety training for approximately 100 media professionals. Five intensive "conflict awareness" courses were run during the peak of the country's armed conflict crisis in June and July. IREX purchased 20 flak jackets and helmets for distribution to media professionals active in the conflict zone, on a loan basis. IREX also coordinated the purchase of a further 33 kits by other international donors.

The trainings taught media professionals how to use the safety equipment, and how to minimize risk in conflict zones. The courses were conducted by AKE, a British-based company that is used extensively by the international media

5. In 2001, with IREX support, MIM organized an exhibition of the work of photojournalist Ron Haviv. Haviv is a U.S. photojournalist whose work documented the horrors of 10 years of Balkan conflict and the potential horrors Macedonia faced. A very successful roundtable debate was held in Skopje to coincide with the exhibit, bringing together leading media professionals from the Balkan region and the international community, as well as the major media players in Macedonia. This was the first public forum where media from the Macedonian and Albanian communities openly addressed their differences.
6. IREX supported in 2002 investigative reports on corruption in Macedonia's customs service and specialized coverage of national elections; in 2003 IREX organized an award for the best stories on human trafficking as well as providing support for quality journalism.

Kapital reporters took part in IREX's regional program activity of investigative journalism training held in Sofia, Bulgaria. They used this training in their investigations of corruption in Macedonia. MIM hosted a seminar on human trafficking for IREX entitled "Trafficking in the Balkans and Beyond." The purpose of the event was to motivate and encourage coverage of this important issue.

7. Specialized reporting training included: business and financial journalism courses; more than 200 journalists attended workshops on Macedonia's second national census; intensive television news production workshops focusing on diversity and social issues;

more than 200 journalists attended a series of seminars on HIV/AIDS hosted by AJM; investigative journalism; and computer-assisted reporting.

I.R. 4 (Media Management) Key Achievements

1. In 2004 the Association of Private Electronic Media of Macedonia hosted a second annual national Media Market trade fair for the broadcast industry, opened by the minister of transport and telecommunications.

The trade fair was part of IREX and APEMM's strategy to help cultivate the media industry in Macedonia. The fair was a success and increased business and business professionalism within a multi-ethnic, trans-national environment.

2. In 2002 IREX supported the completion of a second national market research for the broadcast and print media. A new national market research format was introduced successfully in the fall of 2003 for the broadcast media.

This was part of IREX's long-term strategy of bringing the industry to the point of financing its own professional market research data. In 2004, IREX finally succeeded in its aim of securing direct financial support from the media industry for a comprehensive, professional market research tool.

3. IREX hosted specialized training in sales and marketing for the broadcast industry, specifically targeting local broadcasters.

The long-term aim of the support was to assist these key broadcasters to develop a network strategy that enhances their commercial viability. Five of the seven stations succeeded in establishing a network.

ProMedia II Regional Activities

Between 1999 and 2005 IREX implemented a series of both related and independent activities within the E&E region. Some of the activities had as a primary goal to develop solidarity among regional media around a certain topic or through a training initiative; some strove to share best practices in media development and to coordinate among IREX and other USAID-funded project staff (and sometimes representatives of other local or international NGOs); others focused on opportunities in countries where USAID had no on-going media development presence.

The project eventually settled on the following intermediate results:

I.R. 1: ProMedia management program-wide is integrated and provides a resource for learning, communicating, and informing.

I.R. 2: ProMedia offers a menu of field-based events that serve to tie together Resident Advisers, journalists, USAID, and the media assistance community for improved coordination and higher-level impacts.

I.R. 3: ProMedia regional activities support cross-border and regional activities that support the development of independent media throughout the E&E region.

Details of each are contained in past annual reports. Below is a summary of the activities and, as relevant, notable impact or outcomes.

1. From 2000 to 2005 IREX sponsored regional conferences in Hungary, Croatia, Lithuania, Turkey, and Morocco. Participants included not only USAID and IREX media development experts, but representatives from BBC World Service Trust, Internews, Soros, and others. Panel discussions covered sharing best practices, adopting common approaches, and addressing and analyzing common challenges.
2. In 1999 IREX supported the Central and East European independent news agency coordination conference in Bratislava. More than 35 attendees representing agencies in 14 regional countries plus a few west European agencies came together to discuss a news exchange based around issues such as economic or corruption coverage and establishing technical and mutual support partnerships.
3. In late 2000 IREX supported the initial meetings that founded the Southeast Europe Network of Associations of Private Broadcasters. This organization's objectives included raising professional media standards, developing intra-industry cooperation, initiating common projects and programs, representing member initiatives to international institutions and donors, setting common ethical and professional standards, advocating for international frequency regulation, and pushing for favorable legal reform.
4. IREX funded a series of locally organized corruption reporting workshops, such as a three-week course in Montenegro in 2001 that led to reporting on corruption at Montenegro's airline. The project also supported directly investigative reporting projects and resulted in many articles published, such as revelations of how the Armenian army concealed numerous crimes and murders during 2002. This reporting motivated the military to step up the prosecution of accused murderers within its ranks.
5. Under the Regional TV Programming Initiative, IREX coordinated the purchase of regional television programming for four private broadcasters in southeast Europe. The purchase of one serial and a mini-series shared by stations from Bosnia, Kosovo, Montenegro, and Serbia set an important precedent of cross-border cooperation within the broadcast industry. The programming purchase fostered regional cooperation among leading private broadcasters in the former Yugoslavia and led to joint business-related decisions and program exchange.
6. IREX worked with the Stability Pact Media Task Force to support nine National Working Groups. This activity helped promote effective media legislation in each of the nine countries and empowered local organizations to take the lead in media law reform. Key topics were addressed through television productions, such as war crimes and the role of the army in the break-up of Yugoslavia. These productions were designed to help the citizens of Serbia come to terms with the past.
7. IREX sponsored cooperative television productions by neighboring regional or local television stations. Resulting productions included a documentary on mistreatment of orphans in Kazakhstan and Kyrgyzstan; a finance and business series in Croatia, Bosnia, and Serbia; and a documentary on sex trafficking by a team of 19 reporters from Albania, Bulgaria, Moldova, Croatia, Kosovo, Macedonia, Romania, Serbia, and Montenegro.
8. IREX supported the expansion of the BETA News Agency's Clean Hands website to investigate corruption in countries throughout the SEE region. More than 100 articles were produced covering a wide range of corruption issues in 10 countries.

9. With cost-share from the Charles Stewart Mott Foundation, nine journalists from Bosnia, Croatia, Kosovo, and Montenegro received funding to cover war crimes trials at The Hague. Participating journalists provided approximately 200 articles or reports from The Hague during the course of 2005. Citizens in the former Yugoslavia were informed about the war crimes trials via radio and television stations, as well as print media.

External Broadcasting for Belarus

Beginning in 2006, the ProMedia II Regional project added a component that provided support for European Radio for Belarus (ERB), now Euroradio, an exile radio station based in Poland and led by Belarusian and Polish media professionals that targets a Belarusian audience using Internet, satellite, AM, and FM. Support for ERB began under USAID's ProMedia Belarus project in the fall of 2005 with grant support for equipment. The ProMedia II Regional project provided a grant to ERB to support operational costs, broadcasting, and limited equipment the following year after the close of ProMedia Belarus. Activity also included leading the coordination of international support to Euroradio from funders such as the European Union and Canadian government. This activity continued through the end of the project and has been replaced by a USAID direct grant to Euroradio.

This component focused on the following goals:

- Increased broadcast reach and internet visits of ERB;
- Marketing campaigns launched;
- Diversified funding

ERB launched live on February 6, 2006 on the Internet, on February 22, 2006 on satellite radio, on February 26, 2006 on AM signal from Lithuania on Radio Baltic Waves, and on March 6, 2006 on FM signal from Poland on Radio for You, (AM broadcasting was supported by the E.U.). It operates from a headquarters in Warsaw, with a registered bureau in Belarus providing reports coming from Minsk and Belarus's regions. In 2010, Euroradio instituted video both from its reporters and by placing cameras in its studios; this allowed, for example, live reporting from the 2010 elections and post-elections protests. They also developed interactive functionality using call-in programs, Skype, and instant messaging.

Soon after launch, ERB provided comprehensive election coverage of presidential elections in Belarus. It reported live from the protests following the elections, interviewed leading opposition candidates, reported on the arrests of protesters, reported from the election commission, and provided reports from six regions through regional stringers. Throughout the life of the project, ERB continued to cover stories that media within Belarus ignored or used one-sided coverage in reporting.

ERB soon developed a strategy to target a young (17 to 35 year old) audience, tailoring content and marketing efforts at that demographic. As early as November 2008, IREX-sponsored audience research conducted by an independent research agency found that ERB was the leading external radio broadcaster.

ERB's and Euroradio's work did not escape the attention of Belarusian authorities, as its offices were raided in 2008 by KGB officers. No personnel were arrested, although equipment was seized—and later returned. On December 25, 2010, about a week after the country's controversial presidential election, Euroradio's registered correspondent bureau in Minsk was

raided by KGB agents who took away all equipment (flash drives, laptops, cameras, a mixing console, etc.); the value of this equipment was estimated to be \$15,000 and it was never returned. Despite the 2010 raid, journalists continued to work, updating the web site without interruptions.

Attacks online also tried to silence Euroradio. On Election Day 2010, www.euroradio.by was hit by a distributed denial of service attack. After Election Day 2010, Euroradio continued to be blocked by Cosmos TV, a Belarusian internet provider, while users of ByFly reported occasional problems with access either to streaming or to the web page.

Nonetheless, Euroradio's coverage of the 2010 elections and post-elections protests received excellent reviews. IREX Europe commissioned content analysis of its coverage, which showed no substantive bias to any particular candidate and relatively balanced coverage across all of its news and public affairs programs.

Activities

1. Professionalization.

IREX and its partner IREX/Europe worked with ERB and Euroradio over the course of many trips to Warsaw on editorial management training, journalism, project management, marketing, and business management. Training focused on Warsaw staff given the problems inherent in traveling into Belarus. IREX consultants also provided management and marketing consulting, focusing on improving program format, scheduling, and internal and external marketing. IREX also helped Euroradio develop an overall management strategy, in terms of its internal structure and its plans for growth. The approach to each differed, as described below.

Programming and Marketing: An IREX media business and marketing consultant provided both on-site and virtual consulting to ERB to help develop the programming of ERB to a stage where ERB could take over its own programming. This technical assistance also focused on marketing, including how DJs themselves serve a role as marketers of the ERB brand. The consultant provided on-site training to DJs and management on developing a coherent and attractive programming schedule, how to integrate live and taped segments, how to market using the internet, how to "sell" radio, etc. The result of the trainings and consultation was a staff that understands programming, has mastered the basics of promotion, and understands that radio must build relationships with the listeners.

Journalism and Editorial Management: Between 2007 and 2010, IREX provided a journalism quality consultant to work with ERB journalists and editorial management in both Minsk and Warsaw. This consultant conducted a focus group among listeners and used the results to inform the station's editorial management on changes needed. Technical assistance focused on improving content by making presentation more exciting and less like other sites, increasing interviews in content, tackling topics that are most relevant and interesting for the audience, and ensuring that balanced reporting does not mean "safe" or boring reporting. The consultant specifically worked with the Minsk editors, the regional correspondents, and Warsaw management to improve their skills. Later consulting focused on correspondents, elections coverage, reporting for morning programs, reporting for long-form programs, and long-term editorial planning.

While funding limitations required cessation of journalism and editorial management training, other sources of funding, such as a European Instrument for Democracy and Human Rights

grant to IREX/Europe, allowed BTC/ProMedia (see Bulgaria, above) staff to continue work with Euroradio as it switched to live broadcasting for some of its timeslots.

Website Design: ERB launched a new website in January 2007 and made improvements thereafter following substantial consulting from IREX/Europe, the Media Development Loan Fund (now Media Development Investment Fund), and Media Dots (Serbia). The new site was designed to make news more accessible, increase the ability of visitors to receive news in a variety of formats (RSS, Podcasts, streaming audio, html), and increase interactivity. In addition, ERB, on a September visit to Washington, DC, met with Washingtonpost.com's website design lead to discuss how a website should best present text news.

Management: IREX/Europe staff worked continually—both onsite and remotely—with ERB and Euroradio senior management to improve their skills, specifically focusing on station management, efficient use of resources, donor relations, and political relations. This assistance addressed with ERB the problem of the falling value of the dollar and its effect on operations (a real reduction in operating revenue necessitating a reduction in expenses). It also focused on the management structure of ERB and the roles and responsibilities of senior staff (editors, president, vice-president, and project manager) to ensure that staff had clear responsibilities, were given the necessary authority to do their jobs, and that decision-making was flexible and results-driven. IREX/Europe staff also advised ERB and Euroradio on their participation in various donor and political meetings.

In 2012 and 2013, a major focus was ongoing restructuring of Euroradio to adjust to decreases in donor funding. Euroradio reduced its overall costs by 10 percent without reducing news production. With the assistance of IREX/Europe, Euroradio optimized internal structures and operations and as a result created a smaller and more flexible operation.

2. *Expansion of Broadcasting*

This proved to be the most difficult component of the project. The Polish government was hesitant to support ERB and launched its own initiatives. IREX and ERB worked coordinated with the U.S. Embassy in Kiev in 2006, seeking to acquire broadcast time in Ukraine. The effort succeeded only after strong lobbying with the Ukrainian MFA and the Ukrainian broadcasting council. IREX coordinated with the U.S. Embassy in Poland to push the implementation of an agreement between ERB and Radio Dlia Ciebe in 2007 to increase the broadcast time slot; Radio Dlia Ciebe reaches a potential audience of 500,000 in the Brest area.

Early success in expanding coverage for ERB hit a roadblock between 2008 and 2011. During this period, IREX coordinated with ERB, USAID, other U.S. agencies, and stakeholders in Poland to grant access to a powerful transmitter in Bialystok. In 2012, these efforts finally paid off after a deal to swap time between Euroradio and Radio Racija, which has access to the transmitter.

3. *Belsat*

This component also provided grants for equipment and programming in 2008 and 2009 for Belsat in support of a USG pledge made to the government of Poland. IREX provided advice to USAID, U.S. Department of State, and Belsat regarding a strategy for Belsat and its possibility to make an impact and become sustainable. IREX advised USAID and State Department that, as a television station, expenses were such that long-term sustainability would be in doubt barring a long-term commitment by one or more donors.

Support of Euroradio resulted in success in each of the three goals, as detailed below.

1. Increased Reach and Audience

In 2006 ERB broadcast via buying timeslots on existing radio stations in Poland, Lithuania, and Ukraine. On October 1 of that year ERB started broadcasting on Melodia FM on two transmitters in Zarichnoe and Dubrovitsa, reaching a potential audience of approximately 500,000 Belarusians in the Pinsk region. On December 15, 2006 the contract with Radio Melodia was amended to include 6 four-minute news blocks each hour in the second half of the day in Pinsk and the Pinsk region.

Over the years Euroradio was able to secure more time and better timeslots, plus additional timeslots on the frequencies of Poland-based, Belarusian language station Radio Racija. By 2012, ERB's potential audience for terrestrial broadcasts was 2 million within Belarus. Satellite and Internet broadcasts allowed for the potential to reach the entirety of Belarus. Euroradio's success can be demonstrated by its robust listenership: a 2012 survey of Belarusians found that 5.1 percent of those polled listened to Euroradio, more than any other external broadcaster (see table 1 and table 2).

To take advantage of online radio broadcasts, IREX worked with the Media Development Loan Fund to develop a new ERB website to attract a younger audience and allow for more interactivity. The new website launched in 2007 at a time when ERB's website received fewer than 10,000 unique visitors per month. By project's end, Euroradio received more than 190,000 unique visitors per month and Euroradio content on other sites, such as tut.by, received more than 9 million reads for the year. Table 3 shows how Euroradio's online presence has grown over time, while table 4 shows the diversity in its social networking presence.

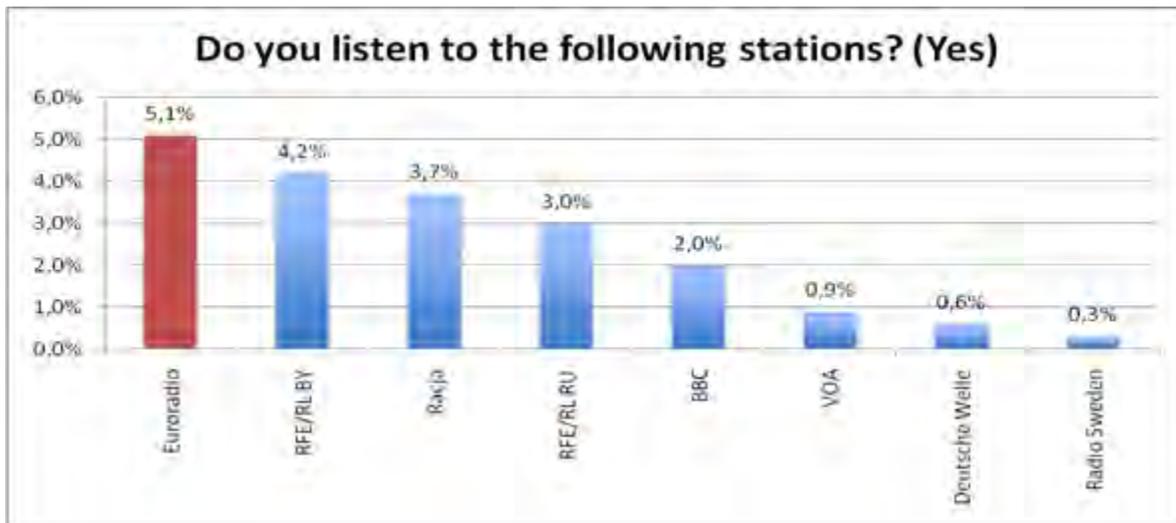
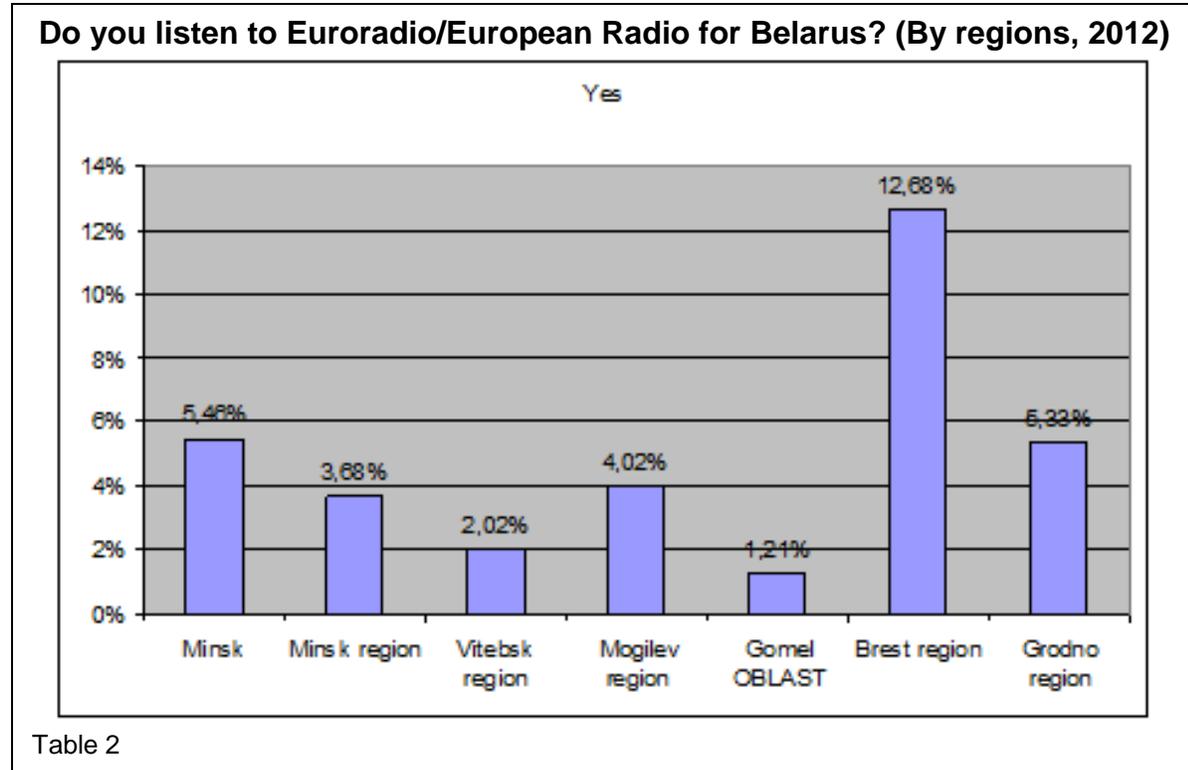


Table 1 (2012)



Euroradio - Growth in Web Traffic

Year	Unique Visits	% Annual Increase	Unique Visitors	% Annual Increase	Pageviews	% Annual Increase
2008	344,816	N/A	122,672	N/A	888,289	N/A
2009	680,243	97%	367,174	199%	1,369,893	54%
2010	1,136,544	67%	637,150	74%	2,791,453	104%
2011	2,083,121	83%	914,348	44%	4,458,789	60%
2012	3,403,317	63%	1,760,464	93%	6,725,825	51%
2013	5,609,544	65%	3,241,654	84%	9,417,033	40%

Table 3

Source: Euroradio Google Analytics

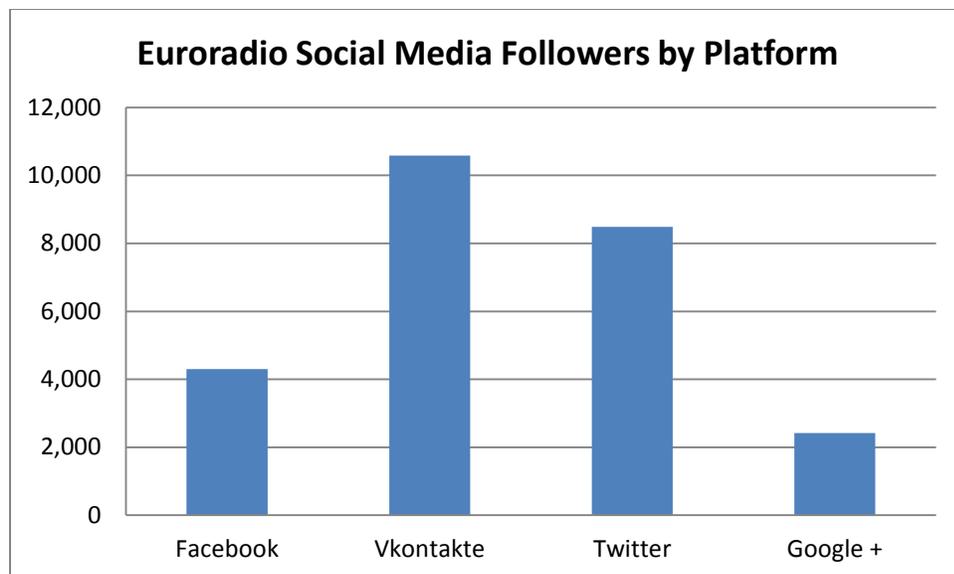


Table 4 (2013)

2. Marketing

Euroradio, as an external broadcaster with multiple channels of broadcasting to Belarus, needed excellent marketing to convince Belarusians to go through the extra effort of finding ERB on the Internet, tuning into a FM signal, or using AM or satellite (both of limited use in Belarus). ERB began in 2006 to ramp up its marketing with advertisements in Belarus, links from other websites, and music promotions. In 2008, ERB sponsored the Right to be Free concert in Lviv, Ukraine. Bands from Belarus, Ukraine, and elsewhere played to a crowd of 10,000, with many bused in from Belarus. By project's end, Euroradio sponsored more than 300 events per year, primarily concerts at which it received significant free exposure. It also was actively placing its banners at music and cultural events. Euroradio developed and produces a promotional newsletter aimed at an international audience.

3. Diversified Donor Base

When IREX began work with ERB, USAID and the Czech government were ERB's sole donors. IREX assisted ERB in approaches to other donors and proposal development. By December 31, 2006, ERB had expanded to include the Dutch government, the Danish government, and the Canadian government. ERB also secured a second grant from the European Union, and a second grant from the Czech government. By project end, Euroradio had also received funds from the European Instrument for Democracy and Human Rights and the European Union through IREX/Europe, additional grants from Canada, and the European Endowment for Democracy. IREX's work with Euroradio helped it achieve a level of management and internal financial controls that it was able to receive a direct grant from USAID to continue past the end of ProMedia II Regional.

Europe & Eurasia Media Sustainability Index, 2001 - 2014

This component of ProMedia II Regional was active for the entire period of the award. During this time IREX created and refined the Media Sustainability Index (MSI) over the first year of the project and then published 13 annual editions beginning in 2001. The Media Sustainability Index at first covered 20 countries, expanding to 21 in 2008 with the addition of Turkmenistan.

IREX prepared the MSI as a tool to assess the development of media systems over time and across countries. IREX staff, USAID, and other media-development professionals contributed to the development of this assessment tool. The MSI assesses five “objectives” in shaping a successful media system:

1. Legal and social norms protect and promote free speech and access to public information.
2. Journalism meets professional standards of quality.
3. Multiple news sources provide citizens with reliable, objective news.
4. Media are well-managed enterprises, allowing editorial independence.
5. Supporting institutions function in the professional interests of independent media.

These objectives were judged to be the most important aspects of a sustainable and professional independent media system, and serve as the criteria against which countries are rated. A score is attained for each objective by rating between seven and nine indicators (a total of 40 among the five objectives), which determine how well a country meets that objective.

The primary source of information is a panel of local experts that IREX assembles in each country to serve as panelists. These experts are drawn from the country’s media outlets, NGOs, professional associations, and academic institutions. The scoring is completed in two parts. First, panel participants are provided with a questionnaire and explanations of the indicators and scoring system. Each panelist reviews the questionnaire individually and scores each indicator. The panelists then assemble to analyze and discuss the objectives and indicators. IREX editorial staff members review the panelists’ scores, and then provide a set of scores for the country, independently of the panel. The average of all individual indicator scores within the objective determines the objective score. The overall country score is an average of all five objectives.

Initially the MSI covered Albania, Armenia, Azerbaijan, Belarus, Bosnia, Bulgaria, Croatia, Georgia, Kazakhstan, Kosovo (pre- and post-independence), Kyrgyzstan, Macedonia, Moldova, Montenegro (pre- and post-independence), Romania, Russia, Serbia, Tajikistan, Ukraine, and Uzbekistan. In 2008, Turkmenistan was added. Under separate funding mechanisms, the MSI has also included Middle East and Africa editions, plus some one-off studies such as East Timor and Bangladesh.

Over the course of 13 editions in the E&E region, the MSI documented both progress and regression throughout the region. Using annual scores, the MSI has documented the rise, fall, and resurrection of the media in Georgia. It has detailed the onslaught against Russian media by authorities there and the recent plummet of media freedom—always limited but now nearing extinction—in Azerbaijan. The continuing suppression of the media in Belarus, Turkmenistan, and Uzbekistan has received annual attention. Relative successes like Croatia and Kosovo compare with successes that have since been damaged in countries such as Bulgaria, Romania, and Serbia. Recent improvements in Armenia or Moldova contrast with reversals in

Macedonia, where determined political pressure shows that media require a robust supporting environment to truly approach sustainability.

In addition to the scores that show trends over time, the MSI is a rich source of qualitative information from the perspective of its panelists who tell the underlying issues facing each of the 40 indicators. Individual chapters contain the salient points of the panel discussion. The Executive Summary of each edition not only provides a summary of key developments, but analyses trends within the region or subregions based on both the scores and recurring themes from chapter text. For example, the 2012 edition reported how divestment by west European media conglomerates of media holdings in countries such as Bulgaria and Romania was suddenly opening up once-trusted news sources to political interference by new local owners. In the two years since, panelists have described how the situations at these media have worsened, taking the overall media scene down with them. The MSI has also tracked how panelists have discussed over time the importance and impact of the Internet and social media on their work and audiences in their country.

The MSI has been used by both local and international parties seeking a better understanding of the media. Donors and policymakers rely on the findings to make decisions on level of overall development (when used with other tools) and to determine appropriate development interventions. It is cited in tenders and evaluation reports prepared by such groups. The MSI results can be used in monitoring and evaluation efforts to gauge overall sector progress against progress by project partners (e.g., if the overall sector falls but project partners improve or remain the same by project metrics, it is an indicator of positive impact). The World Bank Institute uses the MSI findings as part of its wider Governance Indicators, which judge the overall level of democratic and governance health in a country. International media and human rights advocates refer to the MSI in their studies, appeals, and policy papers. Similarly, academics use the MSI to track trends, study cause and effect, and support theses on democratic transitions and related topics.

The MSI also receives coverage by the media itself, both international and in the countries under study. The MSI has sparked discussion and debate among audiences, politicians, and media professionals in many of the countries it has studied. Media in Serbia and Bulgaria, for example, have reported how their lot has worsened as documented by the MSI. Armenian media picked up on how they scored tops in the Caucasus in 2012, and Georgian media later noted how they had taken that honor.

The MSI component focused on achieving the following result: publication of an annual report. This was achieved. The MSI was prepared in both hard copy and electronic copy and distributed via IREX's website and to U.S. and international to approximately 600 recipients. The MSI E&E edition will continue to be published under a new USAID award mechanism.

Select Findings

Since 2001, the MSI scores have revealed what at first glance is a lack of improvement. When overall country scores are averaged according to their subregion (Caucasus, Southeast Europe, etc.; see table 5), one can see that while changes in scores have occurred, altogether there has been little progress since 2001. However, looking at the percent change in overall score by individual country (table 6), one sees that there have been some countries that have gained while others have lost ground since 2001.

Studying the trends more closely reveals more detail. Table 5 provides a useful overview of scores over time, but in putting countries together by subregion some countries' gains are mitigated by losses in neighboring countries. For example, if in the Caucasus Azerbaijan is removed then the Caucasus average (i.e., the score for only Armenia and Georgia) is 2.46 instead of 2.03, a significant improvement from their averaged score of 1.74 in 2001 (with or without Azerbaijan in 2001, the Caucasus average is 1.74). Likewise, if Turkmenistan is removed from Central Asia, in 2014 that region scores a 1.58. This is somewhat better than the average of 1.32 with Turkmenistan, but significantly better (mostly thanks to Kyrgyzstan) than the 2001 starting point of 1.17. Still, when reviewing data for 21 countries combining subregional scores provides a manageable way to review overall trends.

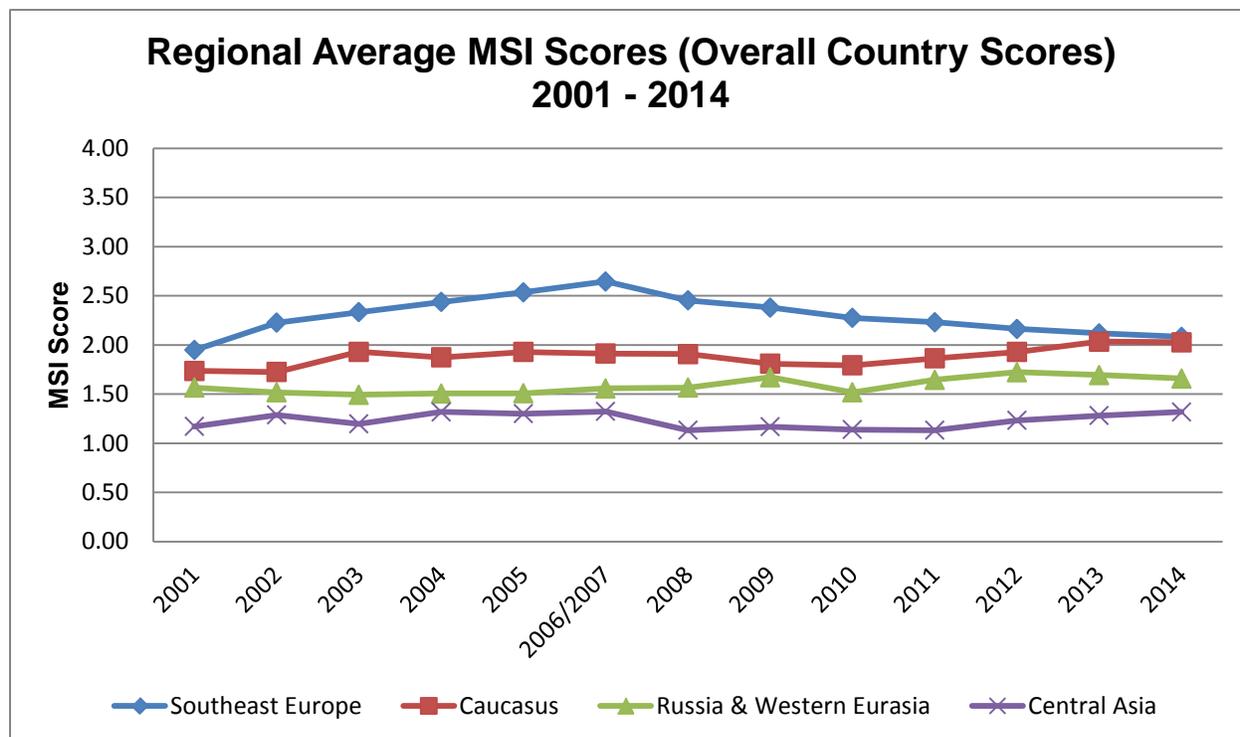


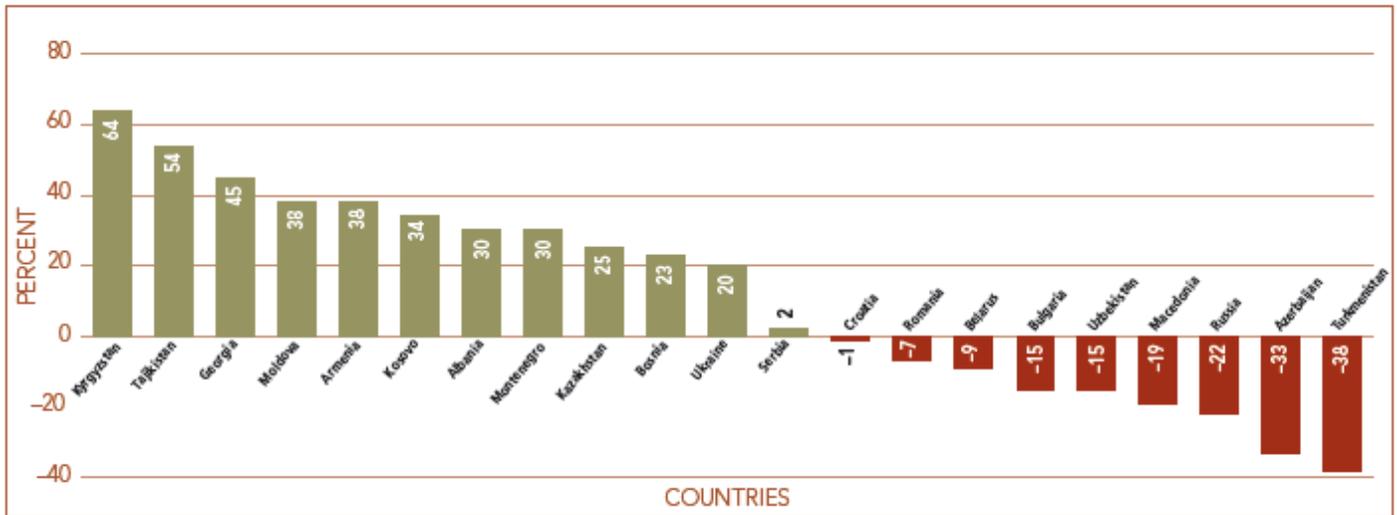
Table 5

Table 6 shows that there has been improvement and regression individually since 2001. Kyrgyzstan, Tajikistan, and Georgia have had the biggest gains while Russia, Azerbaijan, and Turkmenistan the most loss in score percentage-wise. This table does not show how recent the gains or losses are, nor does it show how, for example, Georgia in 2006/2007 scored 2.40 and fell to a low since then of 1.82 before recovering recently; since 2006/2007 it has improved by only 10 percent.

Looking at a limited number of countries (table 7), in this case the three countries that benefitted from technical assistance projects under ProMedia II Regional, one can see the progress and regression over time. Looking at this data shows that only Albania has more or less held fast, even if down a bit from its high in 2006/2007. Bulgaria and Macedonia, after steady growth, have both fallen below their 2001 starting points in recent years.

In addition to the numerical scores the MSI reported on emerging trends affecting the media in the E&E region. The 2011 edition compared panelist comments on several issues from 2001 with their comments 10 years later.

PERCENT CHANGE IN MSI 2001-2014: EUROPE AND EURASIA



* Data for Turkmenistan is since 2008

Table 6

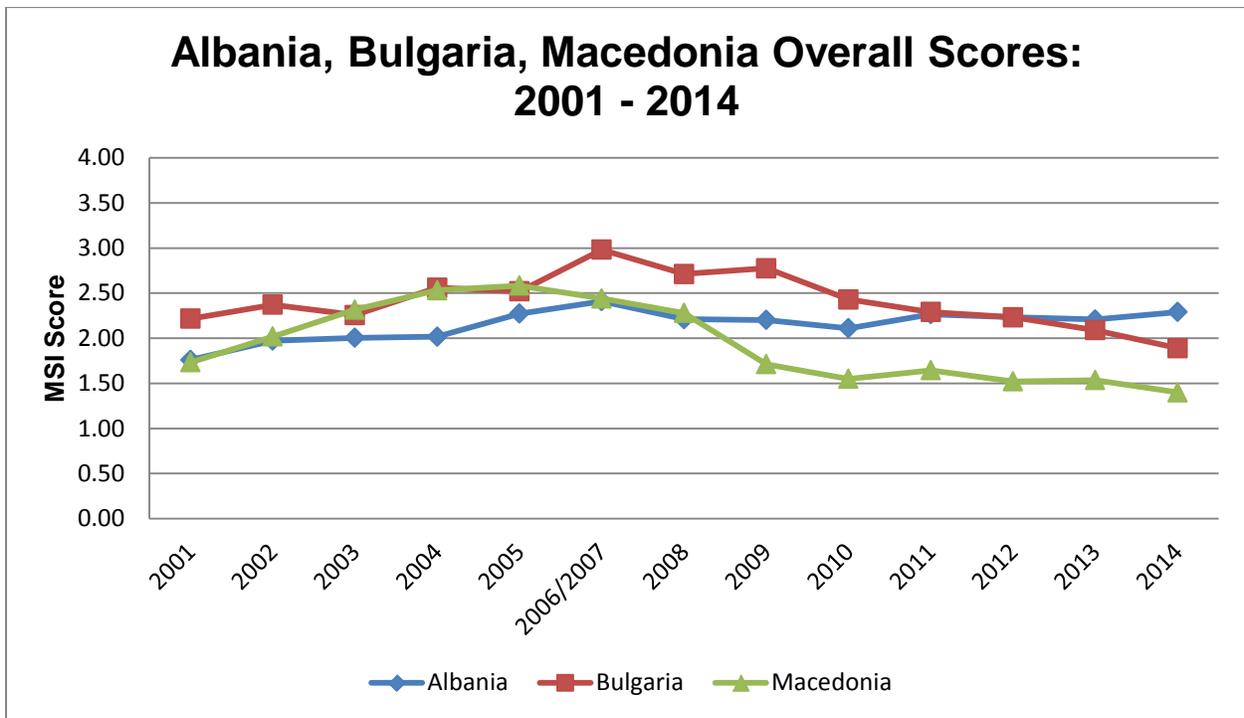


Table 7

For example, in discussing broadcast licensing, in most of the countries in the region political authorities have not shown a willingness to cede control of the airwaves. Panelists' comments in many country chapters from both 2001 and 2011 characterized their licensing process as lacking transparency. However some developments were positive: Croatian panelists in 2001 acknowledged promising changes that had not yielded practical changes; in 2011 they criticized the operations of the licensing agency, but conceded that political control is no longer a

significant factor. Kosovo's broadcast regulator had not even been established in 2001 but by 2011 panelists described the licensing process as transparent.

The issue of self-censorship also showed a lack of positive change, although panelists reported changes underlying the reasons media practice this. In Bosnia, panelists listed a number of reasons why journalists in 2001 would practice self-censorship, including fear of offending politicians and conforming to business interests. In 2011, economic factors were given as the prevailing reason. Panelists in Kosovo cited lack of security as a reason that, in 2001, journalists did not cover organized crime. In 2011 the political leanings of editors was the primary problem: journalists themselves did not shy away from covering topics but often found their stories shelved.

The final two editions funded by ProMedia II Regional highlighted, among other developments, two regional issues impacting the media:

- The transition to digital broadcasting is not on track in most of the countries studied.

The switch from analog to digital broadcasting is agreed to by International Telecommunications Union treaty, and is expected to be completed by the end of June 2015 throughout the Europe & Eurasia region. In most countries, the 2014 MSI found, little progress has been made either because of angling over control of frequencies, government incompetence, or both. There have been few examples within the region of a cooperative approach between an independent regulator and strong trade groups to develop a satisfactory outcome to the transition.

In countries where the switch has begun or been completed, panelists did not express happiness with the end result. Macedonia switched in June 2013, but according to the panelists the government did not approach it in a transparent way, leaving many broadcasters unable to plan adequately. Particularly for local broadcasters, the costs of the switch would have been prohibitive and many opted to become cable-only channels. Given that cable covers only urban areas, many of these stations lost audience and the ability to deliver a local perspective to local audiences. Ukrainian panelists expressed the belief that the transition will result in the public being less able to access private broadcasters as easily, and will favor broadcasters that create a "virtual reality" in their news coverage. In these cases, the transition has hurt plurality rather than helped it as would be expected.

In other countries, the process has not started because governments seem to have been unable to prioritize the switch for a variety of reasons and trade groups have not stepped up to push the matter ahead. In Bosnia the process is stuck because several tenders for purchasing transmission infrastructure failed. Moldova's ambitious plan may not get off the ground because private broadcasters lack the cash to establish planned multiplexes. Panelists in Kosovo said that the broadcast regulator has only got as far as completing a draft strategy that was subject of criticism by private broadcasters. According to Armenian panelists, neither the government nor media outlets nor citizens are financially and logistically prepared for the digitalization process. Georgia has adopted a transition plan, but it remains a work in progress.

Successful models from many countries around the world could be applied in these countries, but these are not being utilized properly. Overall, the resources and energy given to the digital transition by governments in many of the 21 countries studied by the MSI leads one to believe that true plurality in broadcast media is not a particular priority for officials. However, the lack of unity on the part of broadcasters and their willingness to follow the lead of governments certainly play a role in the chaos that is plaguing the switch.

- A new media wave is washing over Eurasia

The 2013 MSI found that the same tensions between new and traditional news media that are at the heart of the media sustainability debate in Western Europe and the United States are moving east across southeastern Europe, western Eurasia, the Caucasus, and Central Asia.

The most immediate consequences have been an observed drop in professional journalism and business management scores across the region. Both objectives started out in the first few years of the Media Sustainability Index well below other three objectives. Both made gains through the first years of the 2000s. In the 2006/2007 study, business management scores in the region had broken above the regional average, and professionalism had reached its all-time high, only modestly trailing the other objectives. Since then, panels across the region have been describing a downward trend in professionalism, journalistic ethics, and the balance of entertainment and information. Similarly, the panels have also observed deteriorating business performance, falling sales, and advertisers that have lost interest in their products. If the general economic malaise in the region is not cited as the culprit for these trends, then the audience's shift to new media is.

No matter why the audience migrates online or to satellite television and radio—whether in search of cheaper, fresher, more targeted, or sensational content—the traditional media are left behind with the smaller, less marketable remainder. The loss of audience share causes a loss in revenues, which are passed on to journalists in lower salaries. Journalists and editors are more willing to turn to state grants and paid advertorial writing to make ends meet. Several panels described reporters who are working at two or three outlets, and, in better cases, spend their days frantically rewriting an original story several ways for several outlets; in worse cases, they spend them blatantly plagiarizing all of their output.

As a panelist in Montenegro described it, “Internet portals indicate more and more that electronic journalism has the edge over traditional. I think that in the future, only the best media will survive with radical business reforms.” Exactly what reforms will rebalance the media field remains a mystery.

A panelist in Ukraine put it plainly: “Although the number of Internet media outlets has increased, it does not necessarily mean an increase in objective news.”