



Europe & Eurasia Media Sustainability Index Annual Report

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I. Summary

The 2015 Europe & Eurasia (E&E) Media Sustainability Index was published, after a delay of one month, in April. IREX is taking steps to prevent a delay in 2016 by making changes to the two studies that caused the delay, as well as one of the other studies that had caused delays in past years.

The E&E Media Sustainability Index was cited in more than 80 reports and research papers. Its use supports in-depth research into topics of media development and advocacy for media freedom. Of note, in 2015 IREX found that governments are suggesting that the Media Sustainability Index findings be taken into consideration by case officers reviewing applications for refugee status.

II. Study Findings

The [2015 Executive Summary](#) provides an analysis of overall findings based on a reading of the entire study and in the context of past studies. Topics investigated include the decline in business management scores across the region since the 2006/2007 study; a comparative look at audience research and measurement within the region; a summary of panelists' views of media ownership transparency, and; some of the bright spots of media development despite much attention on several of the more severe cases of recent backsliding.

One of the topics not covered was the impact of disinformation coming from Kremlin-controlled media or its supporters. Few studies—although Ukraine was a notable exception—spoke of the impact of efforts by the Putin government to control the information sphere and upend the role of the media as an impartial reporter of facts and professional analysis. The past year, which will be the subject of the 2016 study, has seen an expansion of efforts by the Kremlin's backers to influence the media. From reports of pro-Kremlin NGOs in Georgia offering to buy prime-time space from under-resourced local broadcasters to attempts at expanding programming even within the EU, such as Bulgaria, panelists will likely be discussing how outside influence is impacting the ability of their media to take on the role of the Fourth Estate.

III. Monitoring and Evaluation Analysis

Note: Monitoring and evaluation (M&E) data is attached as Annex 1.

The targets established by IREX to demonstrate use of the Media Sustainability Index were in one case surpassed, in a few cases nearly achieved, and in two cases far from achieved.

Monitoring of use of the Media Sustainability Index this past year uncovered its use as a tool to determine refugee status and verify the claims of applicants. Both the governments of Canada and Ireland list the Media Sustainability Index as possible tools to be used by case officers when reviewing applications.

1. Website Usage

IREX has as a target 9000 unique pageviews annually of the overall E&E Media Sustainability Index web page. Over the past year it received 4251 unique pageviews. IREX also has a target of, on average, 300 pageviews from within each country for the relevant country web page. Over the past year, this average was 33.

Unique pageviews of the E&E web page had increased compared with 2014, however were still short of the target. IREX intends to increase promotional activities over the coming year to increase traffic to the main E&E web page. IREX will also post the methodology in as many E&E languages as the questionnaire is already available (currently 13) to increase understanding by local populations; this is available through the main E&E web page. Scores table will be linked as well in each of these spaces so that, even if the chapter text is not available in their language, an understanding of the study and the scores will be more accessible.

With regards to individual country pages, the unique pageviews decreased compared with 2014. The likely reason for this was that IREX suffered an attack on its website in early 2015 and was unable to fully restore the website until June. Individual country pages of the Media Sustainability Index were unavailable during that time and all traffic came through the main E&E web page. Further, the ability to track PDF downloads was unavailable during this time; searchers using Google, for example, and linking directly to a PDF of the chapter were therefore not tracked at all. For the 2016 edition IREX is ensuring that all direct PDF downloads will be tracked.

2. Mass Media Citations

IREX has as a target 200 total annual citations of the E&E Media Sustainability Index, with an average of 12 per country by media from within countries under study. IREX does not count mass media that simply republish its press release, even though this would add thousands of citations (only one is included as representational). The reason is that republished press releases typically are not featured on the main page of mass media websites and therefore not viewed by many, if any, of the audience. Therefore, media that either feature the press release conspicuously or provide more depth of coverage are included.

Over the past year, mass media citations missed their targets significantly. IREX will be making additional resources available to in-country study coordinators to promote and track local news coverage of the Media Sustainability Index.

3. Citations in Academic Studies

Over the years the Media Sustainability Index has provided researchers with valuable data and insights into media development and other development or human rights topics. Over the past year, 21 new research papers were found to have cited the E&E Media Sustainability Index. IREX has a target of 30 per year. IREX promotes the use of the Media Sustainability Index to academics through outreach activities such as conference participation and outreach to students and academics. IREX will continue such activities.

4. Hard Copy Distribution

IREX mailed 577 copies of the E&E Media Sustainability Index over the past year. This does not include approximately 120 copies provided to USAID/Washington and copies handed out by IREX at events. Although IREX seeks to promote the use of its website for reasons of cost savings and reducing its carbon footprint, a limited number of hard copies are valuable to users who are interested in multiple countries and as a way to reach individuals who may not otherwise visit the IREX website. IREX will continue to collect names of users interested in receiving hard copies, with a target of 650.

5. Use by Advocates, Donors, and Policymakers

The Media Sustainability Index continues to be a valuable resource for media freedom and media development advocates to document needs to a wider community and press for new laws and more openness within countries to media and journalism. Donors and development implementers rely on it to identify areas requiring specific assistance. Policymakers, such as the European Union, rely on the findings of the Media Sustainability Index to guide interactions with countries being studied to determine candidacy for membership or evaluating the need for further assistance. Related organizations such as the U.S. Broadcast Board of Governors use it to determine the need for continued programming in certain countries or languages.

IREX's target of 25 citations was exceeded this year, with 44 identified references to the Media Sustainability Index by advocacy organizations, international donors, or policymaking groups.

IV. Project Activities

The 2015 Europe & Eurasia Media Sustainability Index was published online on April 28, 2015. Hard copies were prepared on May 19. On May 4, IREX issued a press release and used social media and other means to promote the release of the 2015 edition. Hard copies were delivered to USAID/Washington, 21 USAID missions and US embassies within the E&E region, and mailed to 477 recipients on IREX's mailing list.

Overall the study proceeded according to the work plan, with individual country panel discussions taking place in November/December 2014 and draft scores and chapters submitted to IREX in December 2014 or January 2015. Editing occurred between January and Early March, and most pre-publication activity completed in March.

Challenges and Adjustments

The production of two chapters this year delayed the completion of the MSI by approximately one month: Azerbaijan and Belarus.

With Azerbaijan, difficulty in conducting the study in-country, as had been the case in past years, was a primary cause, as was a delay caused by the lack of availability of the previous year's author and study coordinator. The alternate chosen was someone who had previously worked on

the study. This individual cited various reasons for the delay, but timeliness of completion by this individual had been a problem in previous years as well. The 2016 study will be completed by a new individual. Although this person has not undertaken the study in the past, this individual is very familiar with the Media Sustainability Index, the media situation and media profession in Azerbaijan, and the importance of completing USAID-funded activities on-time.

Regarding Belarus, the same individual responsible for completing the study for the past four years worked once again on the study in 2015. This person had not been late in the past with providing a completed draft study. The same individual will continue with the study in 2016, but with a firm commitment as to completion and more direct oversight and check-in on progress on the part of IREX staff.

Further, another study that has in the past caused delay was either Kazakhstan or Kyrgyzstan. These studies were conducted by the same person, based in Bishkek. For the 2016 study a local Kazakh will be selected to undertake the study, alleviating some of the workload on the Kyrgyz consultant responsible for both in previous years.

Annex 1 Media Sustainability Index Usage

Table 1: Website Usage

Indicator & Definition: Unique pageviews. Unique pageviews provide an estimate of individuals accessing a website's content. In this case, individual portions of the Media Sustainability Index will be measured (i.e., individual country pages that contain summary information and PDF versions of the country's chapters since 2001).

Data Source: Google Analytics

Targets: Main E&E page 9000; 300 average for individual country studies from within country.

Actual: Main E&E page 4251; individual country 33

Chapter	Unique Pageviews	Top 3 unique pageview locations (based on IP address; actual location may vary)
Main E&E page	4251	US: 780; Germany: 237; UK: 140
Executive Summary	384	US: 102; UK: 19; France: 19
Albania	150	Albania: 34; US: 28; Canada: 6
Armenia	109	Armenia: 34; US: 22; Georgia: 19
Azerbaijan	108	US: 25; Azerbaijan: 12; Georgia: 6
Belarus	82	Belarus: 15; US: 15; Germany: 6
Bosnia & Herzegovina	180	Bosnia: 59; Austria: 19; France: 12
Bulgaria	93	Bulgaria: 34; US: 12; Bosnia: 9
Croatia	74	US: 19; Croatia: 12; Austria: 12
Georgia	168	Georgia: 41; US: 39; Germany: 15
Kazakhstan	95	Kazakhstan: 22; US: 22; Kyrgyzstan: 3
Kosovo	164	Kosovo: 62; US: 25; Bosnia: 15
Kyrgyzstan	148	US: 37; Kyrgyzstan: 19; Singapore: 9
Macedonia	147	US: 28; Macedonia: 25; Bosnia: 25
Moldova	93	Moldova: 71; Germany: 28; US: 9
Montenegro	54	US: 25; Montenegro: 3; Serbia: 3
Romania	107	Romania: 19; US: 9; Bosnia: 6
Russia	116	US: 31; Russia: 19; Kazakhstan: 12
Serbia	266	Serbia: 145; US: 34; Germany: 9
Tajikistan	98	US: 37; China, Singapore, Switzerland: 9
Turkmenistan	43	US: 9; Kazakhstan: 6; Kyrgyzstan: 6
Ukraine	187	US: 34; Ukraine: 25; Germany: 19
Uzbekistan	115	Uzbekistan: 28; US: 25; South Korea: 15

Table 2: Mentions in Mass Media

Indicator & Definition: Substantive references to the Media Sustainability Index in online, print, social and/or broadcast media. “Substantive” indicates a judgment that the article discusses in at least minimal detail the findings relevant to the region as a whole or an individual country or subregion. IREX will not include very brief references that simply link to the website.

Data Source: Google Alerts and searches; partner reporting

Targets: 200 total; 12 average per country. **Actual:** 20 total; few found from within countries under study.

Source	Date	Article Name and Link	Country or Region
RFE/RL Radio Azadliq Blog	12/14/2014	IREX in Azerbaijan and the Crisis of Democracy Promotion	Azerbaijan
	Dec. 2014	For Azerbaijan, IREX is SPY-REX Why authoritarian regimes are scared	Azerbaijan
The Sofia Globe	6/26/2015	Concerns about deterioration of Bulgarian media environment persist – US state dept	Bulgaria
Agenda, Georgia	6/26/2015	US State Department 2014 report assesses Georgia’s media environment	Georgia
Caucasus Business Week	11/10/2014	Georgian Government’s Management Quality (International Final Expertise)	Georgia
Reuters	5/4/2015	Hope for Fourth Estate in Eastern Europe Despite Many Hardships	Int'l
Deutsche Welle	4/30/2015	DW offers a press freedom navigator	Int'l
Deutsche Welle	4/29/2015	Media freedom around the world: New website offers rankings at a	Int'l
Deutsche Welle	4/27/2015	Five tips to using media freedom indices	Int'l
Deutsche Welle	2/11/2015	The Media Sustainability Index by IREX	Int'l
Deutsche Welle	6/16/2015	Sobering look at media sustainability in Europe and Eurasia	Int'l
Emergency Journalism	10/14/2014	Old Problems Persist even in Digital Media Era	Int'l
European Stability Initiative	2015	The Russian Debate Online	Int'l
ICTDev dot org	5/4/2015	Hope for Fourth Estate in Eastern Europe Despite Many Hardships	Int'l
Deutsche Welle	2015	The #Mediadev Roundup II	Int'l
NAT Kazakhstan	4/23/2015	Media Sustainability Index 2014	Kazakhstan
Balkan Insight	6/25/2015	Serbian Media's Plight Worsening, IREX Reports	Serbia
InfoBalkans.com	6/25/2015	Serbian Media's Plight Worsening, IREX Reports	Serbia
Euractiv.rs	6/24/2015	Održivost medija u Srbiji pogoršana	Serbia
Center for International Media Assistance	5/8/2015	IREX releases 2015 Media Sustainability Index for Europe and Eurasia	US

Table 3: Citations in Academic Studies

Indicator & Definition: References to the Media Sustainability Index in the foot/endnotes, etc., of published and unpublished academic works.

Data Source: Google Alerts and searches; partner reporting

Target: 30 **Actual:** 21

Source	Date	Article Name and Link
Rosemary Armao, State University of New York	2/7/2014	Development Efforts to Promote Investigative Reporting: A Preliminary Assessment of Centers in Azerbaijan, Jordan, Bangladesh, and Bosnia
International Journal of Digital Television Volume 6 Number 3 - Western Carolina University	9/1/2015	Transformation of the Public Broadcasting Systems in Croatia and Macedonia as Indicators of Democratic Transformation
Presented to Media Management and Economics Division of the Association for Education in Journalism and Mass Communication. Authors from University of Stockholm; University of Georgia; Royal Institute of Technology.	9/25/2015	The Impact of Market Competition and the Internet on Journalistic Performance in Developing and Transitional Countries
National Council for Eurasian and East European Research	9/29/2014	Mass Media in Post-Soviet Kyrgyzstan and Kazakhstan: The View from Below. An NCEER Working Paper by Azamat Junisbai
Demokratizatsiya	Summer 2015	Youth Media Consumption and Perceptions of Electoral Integrity in Kazakhstan and Kyrgyzstan
Demokratizatsiya	Summer 2015	The Persistence of Media Control Under Consolidated Authoritarianism: Containing Kazakhstan's Digital Media
Demokratizatsiya	Summer 2015	Mass Media Consumption in Post-Soviet Kyrgyzstan And Kazakhstan: The View From Below
Presented to International Communication Association; Authors from University of Georgia	5/24/2015	Methodological Issues in Measuring Media Freedom In A Global Context
Osservatorio Balcani e Caucaso (OBC) ; Published for the EU-funded project "Safety Net for European Journalists"	2015	Building a Safety Net for European Journalists
University of Macedonia	12/1/2014	Media in the former Yugoslav Republic of Macedonia: An Evaluation of the Media Landscape of FYRO Macedonia Before and After the Collapse of Socialism
Global Media Journal German Edition	Autumn-Winter 2014	From the Field: Windows of Opportunity – The Transformation of State Media to Public Service Media in Kyrgyzstan, Mongolia, Moldova and Serbia
Global Media Journal German Edition	Autumn-Winter 2014	Media and Development: The Dysfunctional Alliance by Mark Nelson
Eurasian Geography and Economics	12/3/2014	The Geopolitics of Russia's Annexation of Crimea: Narratives, Identity, Silences, and Energy

DW Akademie: Author - Jackie Wilson-Bakare	Nov. 2014	In the Service of the Public: Functions and Transformation of Media in Developing Countries - 04 Kyrgyzstan: Advancements in a Media-Friendly Environment by Jackie Wilson-Bakare
DW Akademie: Author - Erik Albrecht	Nov. 2014	In the Service of the Public: Functions and Transformation of Media in Developing Countries - 07 Moldova: Slow but Successful Reform, Need for Visible Journalistic Quality by Erik Albrecht
Albanian Media Institute	2014	Hate Speech in Online Media
College of Communication and Information University of Tennessee, Knoxville	2014	Conference Paper - The Point of No Return: Belarusian Audience Refusal to Use Western Broadcast Media After Exposure to Their Content
Amsterdam Law School Legal Studies; Institute for Information Law	11/21/2014	International Assistance and Media Democratization in the Western Balkans: A Cross-National Comparison
Bulletin of the Transilvania University of Brasov	2014	The Romanian Mayor – Present and Future Image
Post-Communist Romania at Twenty-Five: Linking Past, Present, and Future, Peter Gross	6/1/2015	Spectacular Alterations, Few Changes in Romania's Media
Southeastern Europe, Volume 39, Issue 1, pages 12 – 34- Peter Gross	4/1/2015	(Happily) Living in Sin: Media and Politics in Romania
Southeastern Europe, Volume 39, Issue 1, pages pages 62 – 96; Izabela Kisić	4/1/2015	The Media and Politics: The Case of Serbia

Table 4: Hard Copy Distribution

Indicator & Definition: Recipients of hard copies of the Media Sustainability Index. List can be shared for review by USAID upon request.

Data Source: Mail distribution list

Target: 650 total. **Actual:** 577

Table 5: Use by Advocates, Donors & Policymakers

Indicator & Definition:References to the Media Sustainability Index in speeches, evaluations, reports, advocacy documents, funding solicitations, etc., by local and international groups.

Data Source: Google Alerts and searches; partner reporting

Target: 25 **Actual:** 44

Source	Date	Article Name & Link	Country or Region
State Department	5/1/2015	Highlights of State Department and USAID Efforts to Support Press and Media Freedom	US
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Albania	Int'l
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Bosnia and Herzegovina	Int'l
Konrad Adenauer Stiftung	7/14/2015	Media Freedom in Bulgaria	Int'l
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Croatia	Int'l
Konrad Adenauer Stiftung	7/14/2015	Media Freedom in Kosovo	Int'l
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Macedonia	Int'l
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Moldova	Int'l
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Montenegro	Int'l
Konrad Adenauer Stiftung	7/14/2015	Media Freedom in Romania	Int'l
Konrad Adenauer Stiftung	6/9/2015	Media Freedom in Serbia	Int'l
Organization for Security and Co-operation in Europe Mission in Kosovo	6/1/2014	Freedom of Media and Safety of Journalists in Kosovo	Kosovo
The Media Project	6/25/2015	Kosovo's Media Closer to Sustainability	Kosovo
South East European Media Observatory	9/22/2014	Flash Report 5: Albania	Albania
Institute for Development Policy	2015	The state of the Media in Kosovo 2015	Kosovo
Center for Civic Education	2015	Equal Chances for All Media in Montenegro?	Montenegro
European Union	6/8/2015	Recommendations of the Senior Experts' Group on Systemic Rule of Law Issues Relating to the Communications Interception Revealed in Spring 2015	Int'l
WAN/IFRA	3/31/2015	Kazakhstan Doesn't Encourage Profitable Public Media	Int'l
WAN/IFRA	3/31/2015	Unbalanced Allocation of State Advertising in Azerbaijan	
WAN/IFRA	3/31/2015	Government Subsidies Exert Pressure in Bulgaria	
WAN/IFRA	3/31/2015	Discriminatory State Advertising in Ukraine	
WAN/IFRA	3/31/2015	Growing Concern over Advertisers in Bulgaria	
WAN/IFRA	3/31/2015		
Internews	2/1/2015	Understanding the Information and Communication Needs Among IDPs In Eastern Ukraine	Int'l
South East European Partnership for Media Development, funded by European Union	7/1/2015	The Charlie Hebdo Effect in the Balkans	E&E
Romanian Center for European Policies	Nov. 2014	The Sustainability Index of the National Anticorruption Directorate	Romania
Freedom House	2015	Nations in Transit - Albania	Int'l
Freedom House	2015	Nations in Transit - Moldova	Int'l
Freedom House	2014	Nations in Transit 2014 - Tajikistan	Int'l
Freedom House	2015	Nations in Transit 2014 - Armenia	Int'l

The Hague Center for Strategic Studies	2015	Beyond the Cold War of Words: How Online Media Can Make a Difference in the Post Soviet Space	Int'l
Center for International Media Assistance	6/1/2015	Global Journalism Education: A Missed Opportunity for Media Development?- Charles C Self	US
Center for International Media Assistance	4/3/2015	Creating Sustainable Media in the Balkans	US
Center for International Media Assistance	7/2/2015	New Report: The "Dark Side" of Media Development	US
European Parliament	10/22/2014	Freedom of Media in Western Balkans	Int'l
Osservatorio Balcani e Caucaso in cooperation with the South-East Europe Media Organisation	2015	Building a Safety Net for European Journalists-Eugenia Siopera	E&E
Center for Research and Policy Making and Analytika	2013	Assisting Media Democratization after Low-Intensity Conflict: The Case of Macedonia	Macedonia
Albanian Media Institute and Analytika; by Ilda Londo	2013	Limited Assistance for Limited Impact: International Media Assistance in Albania	Albania
World Bank	2015	Worldwide Governance Indicators	Int'l
UNDP	2014	Measuring Democracy and Democratic Governance in a post-2015 Development Framework	Int'l
Immigration and Refugee Board of Canada	2015	National Documentation Packages	Int'l
Media Diversity Institute	4/2/2015	Creating Sustainable Media Systems in the Balkans	Int'l
Refugee Documentation Centre (Ireland): Legal Aid Board	Mar. 2015	Country Information Pack - Albania	Int'l
UNESCO	7/28/2015	Journalists' Safety Indicators: National Level	Int'l