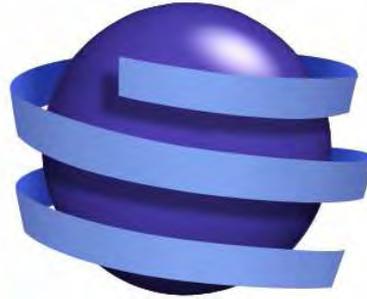




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U-Media Project Internews Network in Ukraine

PERFORMANCE MONITORING REPORT 2008
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**U-Media Project
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**Performance Monitoring Report 2008
Strengthening Independent Media in Ukraine**

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U-Media Project Performance Monitoring Report 2008

This is the fifth Performance Monitoring Report for the U-Media Project, and the final report for the first phase of this project where comparable data has been gathered over 5 years. Much of the data gathering will be altered for the coming 3 years as some of the program objectives have changed. The data and analysis presented in this report compare the 2007 and 2008 performance data for the U-Media Project and track the general tendencies in media since 2004, based on the USAID-approved PMP (Performance Monitoring Plan). USAID reports the data related to the first two performance indicators measuring the quantity and quality of news production by target/partner media outlets. The data developed for the additional PMP indicators is used for project management purposes. An outside consultant worked with Internews to put this report together.

The U-Media PMP complements the MSI (Media Sustainability Index), while providing more concrete data to evaluate and manage the project, using internal and external research from a broad spectrum of sample groups – media, consumers, advertisers, and media law experts. Survey instruments include industry standard checklists, calculations of actual time or space devoted to news content, focus groups, issue-specific questionnaires, panel discussions, and direct surveys of confidential financial information voluntarily provided by individual media outlets.

The MSI defines five objectives that, when scored and combined into a single averaged score, rate the state of the media environment from “Unsustainable, Anti-Free Press” to “Sustainable.” The objectives are:

Objective 1: Free Speech:	Legal and Social norms protect and promote free speech and access to public information.
Objective 2: Professional Journalism:	Journalism meets professional standards of quality.
Objective 3: Plurality of News Sources:	Multiple news sources provide citizens with reliable and objective news.
Objective 4: Business Management:	Independent media are well-managed businesses, allowing for editorial independence.
Objective 5: Supporting Institutions:	Supporting institutions function in the professional interests of independent media.

The U-Media Project correlates its PMP indicators with the above MSI Objectives:

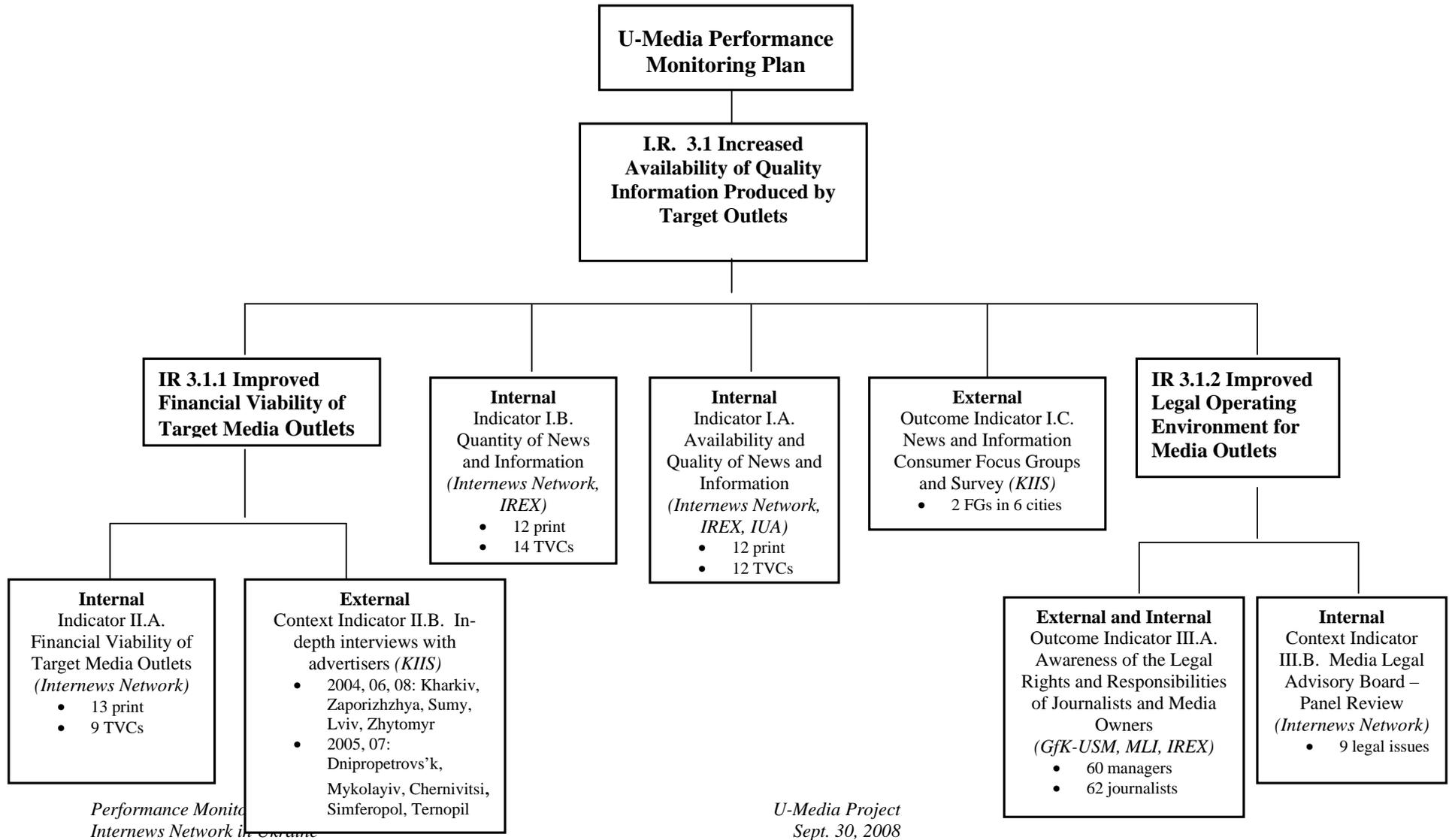
Indicators IA, IB, and IC (MSI Objectives 2 & 3)	Increased Availability and Quality of Information and News
Indicators IIA and IIB (MSI Objective 4)	Improved Financial Viability of Targeted Independent Media Outlets
Indicators IIIA and IIIB (MSI Objectives 1 & 5)	Improved Legal Operating Environment for Media Outlets

U-Media has completely integrated MSI Objective 5 (Supporting Institutions) criteria into the project itself via contractual relationships with eight core partner organizations that implement the majority of project activities.

The chart below illustrates how the PMP internal and external research provides measurable input to the Interim Results, which in turn support USAID’s Strategic Objective 3: “Citizens actively engaged in promoting their interests and rights for a more democratic, market-oriented Ukraine.”

Information Flow Chart: Strategic Objective 3

“Citizens actively engaged in promoting their interests and rights for a more democratic, market-oriented Ukraine.”



Summary Analysis of the 2008 Research

The U-Media project has successfully supported a cadre of strong, increasingly self-sustaining non-governmental organizations dedicated to professionalizing Ukraine's media. After five years as core U-media partners, they are better qualified and prepared to help move media into a new stage of development.

The Independent Association of Broadcasters (IAB) is one example of U-Media's success. IAB has grown from accruing 5 percent of its budget in 2003 from membership dues to 65 percent in 2008. Its 112 non-state members are represented by a board of 15, who determine the organization's goals and the tasks of executive director Kateryna Myasnykova. She describes the board as active and engaged, and her organization as having new life under its member-based management.

As U-Media partners like IAB, the Media Law Institute (MLI) and the Regional Press Development Institute (RPDI) have expanded their work and impact, Ukraine's political situation has become more and more complex and corrupt, wielding greater influence on the media sphere than any group of NGO actors can counteract. The leaders of these NGOs agree on the problem: In a climate that places no value on ethics, media will have no ethics. Media has become nothing more than a commercial entity, with the pursuit of money its only goal. As Kostyantyn Kvirt, Internews Ukraine (IUA) executive director, says: "What we have now is stabilized media, based on money and absence of values."

"Money is first, and journalism is last," says Taras Shevchenko, MLI director. "When the whole system is so corrupt, media is not going to be clean either." Natalya Ligachova, Telekritika's (TK) chief editor, has written extensively about the loss of media's social mission and the lack of normal coverage of people, institutions and life. The Ukrainian citizenry certainly understands the impact of this stunted approach to journalism; how the media lacks interest in shaping common values has been discussed in focus groups that are part of the PMP data collection.

In 2008, the public continues to distrust media, which they see as serving financial or political interests with no consideration for the public interest – much less to deliver the kind of information that people need and are more willing than ever before to pay to receive. Over five years of monitoring to measure public assessment of regional media, Ukrainians have developed an acute media literacy that underscores how the media – one-time hero of the Orange Revolution – has squandered the public's good will. In focus groups and quantitative research, readers and viewers complain about news that doesn't matter to their lives, unprofessional presentation and untimely coverage, and media connections to the powerful and partisan that obviously taint coverage.

During this evaluator's visit to conduct the PMP evaluation one week before the Kyiv mayoral election in May, she was handed a pricelist for the costs of appearing on various news talk shows. Prices varied from \$1,250 for a morning appearance to \$3,000 for an evening show – with a range that almost doubled, to nearly \$7,000, for appearances closer to the election date. Such corruption is not only associated with the growing popularity of the sport of elections. The phenomenon of *jeansa* – paid-for stories masquerading as factual journalism – is burgeoning. (One of the largest circulation dailies in Kyiv featured a front-page package in May on the opening of a new airline service with cheap flights to regional cities – with no other sources, commentary or reporting except for enthusiastic endorsement of the news in the company's press release.) Industry trainers and observers say owners and editors help promote the practice with hiring, salary and tax practices that keep profits in their pockets and push journalists to unethical practices to bring home enough pay. *Jeansa* is so omnipresent that Ligachova says even regional journalists are joining the discussion about it that she keeps alive on the TK website. But she says that overall the level of journalism is so low and the number of truly professional journalists so few, it is difficult to imagine how to change the overall level of unethical practices.

At the end of the U-Media project's fifth year, its performance monitoring data point to two top accomplishments: its industry-supporting partners and a media-savvy Ukrainian public. While exceptions exist, measures of media quality and financial viability show many companies struggling to adapt to a changing world, shackled to incessant political cycles of stasis and upheaval, and deeply addicted to unethical practices that help fuel profits. In a country with arguably one of the best legal media frameworks in the region, protection of freedom of speech, access to information and adherence to rule of law and the European Court convention are still flimsy and brittle. Other issues also complicate the landscape and threaten the pluralistic information market Ukraine does enjoy. Digital conversion, corporate buyouts, competing national newspaper brands and destatization results have the potential to dramatically reduce access to information, with especially dire results in the regions.

On top of these troubles, much of the journalism is bad, too. Opinion is rife; professional standards are quite low. Cliché, haughty tone and information taken directly from press releases, the Internet and official sources are common to read and hear in the capital and the regions. IUA trainers Igor Kulias and Sasha Makarenko say they consider the past year a period of newsroom stagnation, labeling reporting at TV stations the "passive newsroom." Journalists wait for news from the outside, with stations becoming toothless information agencies for the sources that send PR releases. No real news is reported. The trainers say they conduct intermittent informal monitoring and estimate that approximately 90 percent of all broadcast news is actually political, economic, business, or government PR. Many regional stations save money by hiring only a few journalists and using outside news sources.

But the PMP also pinpoints bright lights across Ukraine – TV companies like Chernomorskaya and STB and newspapers like MIG and Dancor Sumy. These newsrooms continue to work with U-Media partner organizations and other media developers, some from outside the country, to improve their journalism, responsiveness and objectivity, professionalize their presentation and design, and win the readers looking for media to trust.

The next phase of development should see U-Media's sturdy media NGOs working with civil society partners to tackle corruption in media and public life, promote media literacy for the citizenry and generate stronger and sector-specific journalism and investigations that focus on the country's pressing need for democratic development.

The public is hungry for reliable information. For the fifth consecutive year, focus group participants in regional markets chose trustworthiness, or reliability, as the most important criterion for media. Consumers don't trust what they get because they know that journalists lobby the interests of media owners and politicians – which is a huge step forward in grasping what influences mass media and an understanding that they lacked five years ago. As the audience has become more sophisticated and demanding, media has been found more lacking. For readers and viewers, being able to get what they want in a timely manner and to get all sides and points of view on a story without having to go to other sources has become more and more important over the years.

Polling results this year indicate that the audience's growing ability to discern trustworthy sources is influencing the kind of media buyers consume, even at the national level, where reading of periodicals was down 9 percent and radio listening down 5 percent. For the first time, polls indicate that local and national media are competing with each other: The drop in the national media market is reflected in a mirror increase in the regional press, TV and radio consumption. Satisfaction levels, however, rose only for regional radio, with TV channels dropping and press staying virtually the same as 2007.

Regional advertisers, who have lagged behind the public in understanding the role of media and the audience's reactions to it, are now evaluating the same factors that readers and viewers consider when making their choices. They factor in local news, professional presentation, objectivity and responsiveness. They continue to see television as the location for image advertising and press as the

best place for specific product promotion and sale. But they also report a continuing move to the Internet, with even small- and medium-sized businesses reporting that they are developing and using websites for outreach, marketing and advertising.

The legal and regulatory environment is suffering. Protections for the industry – and journalists’ awareness of them – both fell again this year. From an all time high of 2.0 after the Orange Revolution in 2005, after five years the average score of the legal environment is exactly the same as it was in Kuchma-era 2003 – 1.6, a decrease of 0.2 from 2006’s 1.8. The scores on all discussion topics decreased except for two, where they remained the same as in 2006, and the panel noted that the situation had either worsened or remained unchanged since the previous year.

And journalists and managers’ overall awareness of media law fell from last year’s all-time high – from 6.0 to 5.4 – indicating, according to evaluator Mary Mycio, their “difficulty mastering the practical application of laws directly involved in their everyday work lives.”

Developing models for delivering information and advertising that might address these multiple obstacles should become a high priority for new initiatives by U-Media partners. New media is the natural home for such efforts, as the increasing use of Internet is recorded in multiple regional cities, with frequency of use also jumping – 11 percent of respondents access it daily or several times a day. The share of users who have access at home increased 7 percent to 54 percent. Internet versions of newspapers and magazine are growing in popularity, too, up 6 percent over last year, to 54 percent.

What way forward?

U-Media’s sturdy media-supporting local partners – far stronger than those of most in countries of the former Soviet Union – need to focus on promoting, building and strengthening connections between mainstream media and Ukrainian media NGOs, journalism education institutions, civil-society organizations and new media companies.

But the most important connection they should promote is to build stronger and more professional ties to media audiences. How? Now is the time to concentrate on journalism, focus on skill development, increase the level of critical thinking, advance the building of intellectual capital, and focus on both technical ability and the knowledge required to do deep and significant reporting on valuable and worthy topics. This challenge is one on which politically compromised and profit-intent owners are not likely to engage, requiring exactly the kind of support U-Media is designed to provide: external grants, outside training and new thinking. (A concurrent effort to improve protections from officials and under-informed judges is also vitally important for journalists and editors who might actually try to focus on improved journalism.)

Discussing this goal with the leaders of the U-Media NGOs compiles a variety of obstacles to this prescription for modern media development.

The absence of audience measurement, beyond national data being gathered by national broadcasters, means regional media companies don’t know what the audience wants and cannot deliver it. Broadcasters and press management also lack skills that would help them tackle this deficiency: budgeting, personnel and resource development, strategic thinking. Some don’t even understand that they need these skills, believing that money in the pocket is the best indicator of success.

Journalists need training and education – but they don’t want it unless it can be directly linked to methods of making money. In general, journalists and editors have a low level of intellectual aspiration and are averse to taking risks. As a whole, the journalism community is not discussing ideas, staying informed about the global media industry or looking ahead with vitality and creativity to the upcoming challenges that will come as the Internet sweeps across the region.

Ethics is at the bottom of the journalistic consciousness, and will require a public campaign to show journalists, managers and owners how low the industry's image has sunk. One observer compared *jeansa* to the experience of meeting a glass factory worker walking through a commuter train, selling boxes of wine glasses: Ukrainian journalists see their product as a commodity for sale, a chance to make money on the side after the factory day is over.

While tackling these key obstacles is a huge task, the right strategies are key:

- No media assistance should be free. Recipients should make some reciprocal investment, including such measures as payments or written commitments to document internal changes as the result of training or to engage in substantive exchanges with other non-competing media companies.
- Media assistance should always reflect the overall problems to be addressed, whether directly or indirectly: audience research, digital conversion, ethics, management development, Internet convergence.
- New training models should be tied to content production, include distance learning, and replace the one-time seminar for long-term and cyclical training.
- Media companies seeking assistance should be mobilized to reform journalism education institutions.
- Donor money should be used to leverage industry money to address these overall needs.
- Drive for reciprocation on destatization that will build support for local media, social content, retraining, and new media development.

Topics for training, suggested by media NGO leaders:

- * How to leave the mass market for the niche market.
- * Journalism best practices.
- * How to write.
- * How to manage.
- * Staff development.
- * Communication processes.
- * Management structure.
- * Copyright.
- * How to set priorities.
- * Best practices through exchange programs.
- * Manage conflict from growth.
- * Advertising and marketing in the converging world.

Finally, it is vital that media-support institutions focus beyond their own bailiwicks to work in concert with other organizations, corporations and individuals to bring a broader approach and wider meaning to their work. Sharing and meeting goals with organizations concerned with different elements of civil society will teach them how to be more future-oriented, lead to new methods for sharing and leveraging funding, and build more universal goals around democracy-building in Ukraine.

The management of the U-Media project also has questions to tackle as it works with its partners to try to right the course of Ukrainian journalism. Among them:

- Develop strategies about reversing the emphasis on business sustainability as the be-all and end-all of capitalistic journalism. Selling everything has led to a deep corruption and journalistic malaise.
- Reward the most ethical of outlets. Options might include the reward of free training, national awards for ethical national and regional coverage. They might include negative awards for bad behavior: An effort similar to Telekritika's annual Dusya spoof awards might be one way to identify bad actors to the public.
- Explore and better understand the regional information market and its needs. At the same time, fund, sponsor or encourage mechanisms to provide information about the collapsing global information market and its potential impact on the Ukrainian media industry.

- Develop ethics requirements for choosing partners and media-assistance recipients. How can we make the most ethical look like and become the special recipients of attention that will show how important ethics can be? Develop ethical norms and testing for them that precede any training programs.
- Explore legal, ethical, national or international pressure that can be brought to bear on companies that pay journalists for stories. Use the standing of the project, Internews and its partners to create public pressure against this corrupting practice.
- Constructively link the press with Telekritika, to create the same kind of tool to push print media for ethics and better behavior.
- Sponsor, teach and promote media literacy. In partnerships with civil society, drive for the need to educate young people and teach them how to learn the difference between real and paid information. Examine ways to use the Internet to do it. Develop cooperative and collaborative programs that pull in all the key actors to foster a new conversation about developing civil society, media literacy and social literacy for media.
- Closely study how others have built multi-faceted and riveting anti-corruption journalism programs that help people understand the ultimate costs of a bad system and bribes. Promote journalism that illuminates the cost of bureaucracy and corruption, explains processes that streamline bureaucracy and cut back on corruption, and explores what Ukraine will gain by fighting against this engrained practice.
- Lead by example a movement to bring media NGOs together with civil society organizations to address all these questions, and bring them, ultimately, to the public.

A detailed description of the research and results for each indicator follows.

I. Increased Availability and Quality of Information and News

Intermediate Result 3.1: “Increased Availability of Quality Information Produced by Target Outlets”

Inputs: Summary of all U-Media Project inputs to Intermediate Result #3.1.

The U-Media Project is designed to develop skills that allow journalists to responsibly cover difficult issues and produce articles and programs that engage citizens on topics of local importance. Key to this objective are trainings provided through seven core implementing partners: IUA, IAB, UAPP (Ukraine Association of Press Publishers), TK, the MLI, AIRPPU (the Association of Independent Regional Press Publishers of Ukraine), the RPDJ. Additional training projects are done by organizations funded through the Open Media Fund, implemented in partnership with the International Renaissance Foundation.

All PMP data was collected during the winter and spring of 2008. The period of 2007-2008 was dominated by the pre-term parliamentary elections in September 2007 and a post-election period when the political situation was very unstable and had significant impact on the media and their activities. During the year after the pre-term parliamentary elections, the media situation in Ukraine has become more complicated than many journalists, experts, and international organizations expected. The media seemed to switch to entertaining projects, and the daily news became more and more like such shows. This is the result of the country's continuing political crisis. Media-related legislative initiatives are still at a standstill.

This year Ukrainians generally were not just disappointed in the political leadership but also exhausted to expect promised changes for the better and observe a constant political show in the country – all happening on the background of the galloping inflation and a worsening economic situation in general. In this light, money is still the primary motivation for many journalists and media outlets, and the *jeansa* phenomenon is now so common that even the general public is learning how to distinguish it. This leads to a growing disbelief among the audience of what is in the news and its non-satisfaction with the level of news and information programs as well as interest in the entertaining projects.

In response to these challenges, U-Media partners were active members of high-level government election-related committees and councils, kept working on the improvement of the media laws and legislation, and on the improvement of the news quality and journalism ethics. U-Media partners also provided a voice from the regions, alerting national committee members to problems that regional media faced and pressed the government to respond and not to ignore their concerns.

U-Media partners, such as the MLA, MLI and IAB who focus on media law and legislation, have continued trainings for judges, lawyers, and for journalists on defending their rights, and have found themselves called upon more frequently to represent media in defamation cases. The associations – IAB, UAPP, RPDJ and AIRPPU – have provided their membership with information and legal support through daily and weekly publications, and some court representation. MLI has proactively used strategic litigation to stimulate reform, and is involved in several cases connected with freedom of speech and access to information. Partners also continue efforts to improve the quality of journalism through trainings.

Detailed information on all U-Media core partner project activities can be found in Internews Network's semi-annual reports. The partners regularly communicate and effectively coordinate media assistance projects. Below is a brief summary of each partner's activities during this reporting period:

Through the U-Media Project, subgrants are given to UAPP, the Association of Independent Regional Press Publishers of Ukraine (AIRPPU), the Regional Press Development Institute and operational support for the Crimean Information and Press Center (CIPC).

- **The Media Lawyers' Association (MLA, former LDEP):** It conducts the bulk of legal training of journalists, lawyers, and judges and jointly implements legal programs with Internews Network and other partners. It provides legal consultations and direct financial support for legal defense and conducts regional seminars to establish a cadre of well-trained media law professionals. MLA staff and referral lawyers have continued providing first-rate legal services for Ukrainian media professionals.
- **Crimean Information and Press Center (CIPC):** CIPC's Monitoring Committee on Freedom of Speech in Crimea project continues with legal consultations and legal defense for independent media. This project monitors freedom of speech in Crimea, and provides assistance to journalists and media outlets. CIPC conducted a supplementary project to provide legal help and consultations to media outlets and journalists during the pre- and post-election periods. CIPC issues a bulletin, *Mass Media: Law and Practice*, in order to increase awareness of media law issues. Between Oct. 1, 2007 and March 31, 2008, the CIPC conducted numerous events, among them 42 press conferences that hosted 976 participants, numerous professional development seminars and trainings. Its Center for the Legal Aid and Protection of Journalists provided 24 pre-publication consultations and 72 legal consultations.
- **The Regional Press Development Institute (RPDI):** This is IREX's legacy organization. The RPDI is a Ukrainian not-for-profit organization that promotes democratic civil society through the development of independent, sustainable and pluralistic media in Ukraine. The institute focuses on educational, training, informational, and consultative programs primarily for print media outlets and media professionals, while also providing various innovative services and useful professional resources through websites and printed materials.
- **Open Media Fund for Ukraine (OMFU)/International Renaissance Foundation (IRF):** IRF's OMFU provides direct grants to media and civic organizations to support projects concerning information distribution, local governance and accountability, citizen rights, and media advocacy. In June 2007 the Joint Management Team (JMT) decided to support one project to create a virtual media library (portal), 11 projects on "Media Rights Advocacy and Legislative Reform", 13 projects on "Preparing and disseminating informational products in order to raise governmental responsibility and accountability" and four projects in the "Journalists exchanges between regions" competition. Most projects started in August 2007. In June 2007 experts gathered to identify the possible priorities of a competition to be dedicated to snap parliamentary elections in Ukraine. Soon after the meeting a competition entitled "Free and independent coverage of snap parliamentary elections in Ukraine in 2007" was announced. On July 13 the JMT decided to support 12 projects. The JMT also approved seven negotiated grants to U-Media partners dedicated to election-related issues. A six-person joint management team representing Internews Network, its core partners and IRF, with USAID maintaining observer status, manages the fund. IRF administers the fund.
- **Internews Ukraine (IUA):** IUA is a local NGO that provides broadcast journalism, managerial, and financial/business skills training as well as technical support and in-house radio, television, and web-based news content production. IUA is partnered with 61 media outlets in 38 cities in 24 regions. IUA conduct trainings on news content, production, and business skills improvement. Before elections IUA took active part in the work of the National Commission on Freedom of Speech and Media Industry Development. The Commission is an advisory body to the President of Ukraine. The National Commission continued elaborating Concept of public broadcasting in Ukraine involving well-known

experts; monitored editorial policies of television and radio companies to be in line with editorial statutes. The special focus of the Commission was snap parliamentary elections. Within the reporting period Analytical Department of IUA was created to strengthen the position of the organization on the media. IUA's lawyer continued to add legal sessions to all trainings and provide legal consultations to media companies.

- **IAB (Independent Association of Broadcasters):** IAB represents 104 media outlets in 62 cities in 25 regions, including two associate members – the Association of Network Broadcasters (Ukraine wide) and the Association of TV and Information Networks of Crimea. IAB conducts trainings, provides legal assistance, and collects and disseminates industry information to/from its membership. The organization also assists members in obtaining licenses and registering trademarks and advocates for the industry as a whole with government and regulatory bodies. IAB's Information Center made an average of 27 postings a month to inform its members on all media events. It distributes its "Digest" on a weekly basis to television and radio companies (TVRCs) in all regions. IAB provided 481 legal consultations, assisted 5 stations with licensing procedures with the NCTRB, and prepared 16 requests, complaints, responses, comments and provided representation for media companies before state organs and local administrations. IAB also distributed 21 "The Legal Center Reports" bulletins to association members.
- **UAPP (Ukrainian Association of Press Publishers):** UAPP membership includes 110 publishers of about 400 newspapers and magazines, representing approximately one third of the independent publishers in 39 cities in 22 regions. UAPP conducts business skills trainings, provides legal support, and networks publishers with the advertising community. UAPP's Legal Center provided training and legal support to its membership.
- **Telekritika (TK):** TK is an Internet-based publication providing review, analysis, and critical assessment of TV and radio program content and media trends. The website proved to be often first source of information for regional journalists during elections. TK was able to distribute news and information quickly and efficiently. TK hosts web-based discussions/forums with government, media, global experts, and the general public and regularly conducts opinion polls on various topics of importance to the media. A print version of "Telekritika" was introduced in 2005. Since late 2006, with local sponsorship, the magazine has improved its design and increased circulation. The popularity of the TK website also continues to grow.
- **MLI (Media Law Institute):** MLI worked on the amendments to the election law, the law on television and radio broadcasting, public service broadcasting, the law on information, transparency in ownership, media denationalization issues, access to information, and issued statements concerning topical law issues. MLI also counseled media outlets with specific legal problems, continued a distance-learning legal-education project, provided input on current Ukrainian media legislation, and maintained relationships with international media law organizations. MLI held its third annual International Media Law Summer School and conducted 48 classes for a total of 94 classroom hours, round-table meetings, and conferences for 20 participants. MLI continued to monitor media legislation and practices and published findings in its weekly electronic bulletin, "Development of Legislation and Practices in the Media Field" that is distributed to 263 representatives of state organs, media lawyers, professors, post-graduate students, and university students. MLI is a member of the Public Council at the National Council for TV and Radio Broadcasting of Ukraine. MLI also continued its focus on Strategic Litigation and continued two lawsuits: against the Constitutional Court of Ukraine and against the National Council for TV and Radio Broadcasting of Ukraine.

- **AIRPPU (the Association of Independent Regional Press Publishers of Ukraine):** AIRPPU is a member of UAPP and became a partner of IREX in 2006. The AIRPPU protects the interests of independent regional press publishers, forms and spreads ethical principles of media activity, and establishes contacts with partners in Ukraine and abroad. The association unites 23 market leaders representing all Ukrainian regions, and the total circulation of AIRPPU member newspapers is more than 2 million. AIRPPU is working on its organizational development.

*Note that the grant to IREX/LDEP ended in June 2007. Internews Network's U-Media project continued to coordinate and collaborate with most IREX subgrantees (AIRPPU, RPDI, UAPP, CPIC) in Year 5.

Indicator I.A: Increased availability and quality of news produced by targeted media outlets

Sub-indicator: The technical and editorial quality of news and information produced by partner media outlets.

Target:

The technical and editorial quality of news and information produced by partner media outlets grows 2 percent.

Methodology and Scoring: News **Quality** Analysis

Twenty-four partner media outlets (12 print, 12 television) in 14 cities are asked annually to provide copies of news programming or publications for a specific date (February 26 for broadcasters and the week of February 25 for print media outlets in 2008). Expert media panels evaluate each media outlet's production using parallel print/broadcast quality criteria checklists (Attachment A). Scoring is completed by teams of three experts from Internews Network and Internews Ukraine (broadcast) and three experts from Internews Network, Ukrainian Academy of Press, and RPDI (print).

The broadcast news production analysis is scored on a 1 – 100 (100 percent) scale as outlined. Print news and information production is rated on a 1-84 scale corresponding to 100 percent. Print scores are converted to a 100 percent base for ease in combining and comparing scores.

Indicator Measurements and Justification:

The scoring criteria evaluate technical standards and editorial content according to industry standards in developed media markets. All target cities except Pavlograd are regional centers and represent a geographic and demographic cross section.

Data Source:

Internal. The expert media panels collected, analyzed and scored the news broadcast and published in February during meetings in April (print materials evaluation) and in May (broadcast materials evaluation) 2008. One print expert was replaced due to personnel changes. Broadcast experts stayed the same.

Quality of Broadcast and Print News and Information Production
Broadcast and Print Editorial and Technical Quality Scores:
2004 Baseline, 2005, 2006, 2007 and 2008

#	BROADCAST QUALITY Name of TV station	Average Score 2004	Average Score 2005	Average Score 2006	Average Score 2007	Average Score 2008
1	"Reporter" Odessa	53	70	50	52	0**
2	"Chernivtsi" Chernivtsi	43	43	65	55	51
3	MG "Objektiv" Kharkiv	65	89	24	62	49
4	"ATN" Kharkiv	67	48	46	55	67
5	"Rivne-1" Rivne	73	58	50	77	62
6	"TV-4" Ternopil	30	34	48	36	57
7	"Alex" Zaporizhzhya	66	51	29	57	56
8	"Ukraina" Donetsk	51	45	33	50	75
9	"Chernomorska" Simferopol	88	84	74	90	84
10	"Channel 34" Dnipropetrovs'k	38	38	40	37	n/a
11	"Lux" Lviv	87	52	n/a	n/a	n/a
12	"STB" Kiev	62	66	81	83	87
<i>Total Score:</i>		<i>723</i>	<i>678</i>	<i>540</i>	<i>654</i>	<i>588</i>
<i>Average Score:</i>		<i>60*</i>	<i>57</i>	<i>49</i>	<i>60</i>	<i>65</i>

**Averages are given with the exclusion of "Reporter" Odessa.

#	PRINT QUALITY Name of Print Media Outlet	Average Score 2004	Average Score 2005	Average Score 2006	Average Score 2007	Average Score 2008
1	"MIG" Zaporizhzhya	86	81	70	71	75
2	"Nashe Vremya" Zaporizhzhya	57	61	52	61	68
3	"Slovo" Odessa	54	58	47	47	38
4	"Express" Lviv	76	87	68	75	73
5	"Media Post" Kharkiv	32	42	47	57	0***
6	"20 Khvylyn" (formerly "RIA Zhytomyr") Zhytomyr	61	58	68	66	66
7	"RIA Plus" Ternopil	82	73	69	71	73
8	"Ternopil's'ki Ogoloshennya" (formerly "Ternopil's'ka Gazeta") Ternopil	63	65	62	59**	59
9	"Populyarnyye Vedomosti" Pavlograd	64	65	64	56	52
10	"OGO" Rivne	57	59	63	70	70
11	"Rivne Vechirne" Rivne	50	61	56	53	53
12	"Dancor" Sumy	68	73	68	73	75
<i>Total Score:</i>		750	783	734	700	702
<i>Total Average Score:</i>		62	65	61	64	64

<i>Combined Print & Broadcast</i>	<i>2004</i>	<i>2005</i>	<i>2006</i>	<i>2007</i>	<i>2008</i>
Average Score:	61*	61	55	62	64,5

*Note: The 2004 PMP report had a mathematical error for the total broadcast quality score. The score was 56 instead of the correct score of 60, thus affecting the total combined print and broadcast quality score. All 2005 report documents have been changed to reflect the corrected 2004 scores.

**Averages for 2007 are given with the exclusion of "Ternopil's'ki Ogoloshennya."

***Averages for 2008 are given with the exclusion of "Media Post."

Analysis:

Overall, the U-Media Project exceeded its 2008 target of 63 points (See Attachment B), with a combined print and broadcast quality score of 64.5 – the highest score in five years. While the print score remained the same as last year at 64, broadcast jumped 5 points to an all-time high of 65.

Broadcast: According to the National Television and Radio Broadcasting Council, as of Jan. 1, 2008, Ukraine had 1,426 licensed television and radio broadcasting companies, of which approximately 994 (69 percent) are private, 396 (27 percent) municipal and 36 (2 percent) are state-owned. The majority of these outlets (roughly 1,200) are local broadcasters. Over the past five years, the overall number of television and radio broadcasting companies has increased by 215. The bulk of the increase has been in the number of private outlets (242), with state-owned companies increasing by one, and municipal outlets decreasing by 23.

Four stations – "ATN" Kharkiv, "TV-4" Ternopil, "Ukraina" Donetsk, "STB" Kyiv – increased their scores.

ATN Kharkiv has not participated in U-Media journalism trainings over the past three years, but the station does keep in regular contact with Internews Ukraine, continues to be a VAN/News Factory partner, and is an active member of IAB. According to this year's KIIS focus group discussions, the majority of local respondents name *ATN* among the top local channels that viewers watch on a regular basis. The channel's popularity has remained stable over a long period, but if last year respondents

preferred “Simon,” this year they prefer *ATN*. Some respondents cited “negative changes” on *Simon*, mentioning that some of the *Simon* team left for *ATN*. This may be a reason for the perceived improved quality and more attractive news programs.

Although **TV-4, Ternopil** improved by 21 points this year, its scores have been consistently some of the lowest over the last five years. The station’s participation in journalism trainings at IUA has decreased over the years, but staff members have participated in TV Design, Effective Newsroom Management, and Sales/Advertising training this year. Also an IAB member, the station’s management participates in conferences and meetings on a regular basis. Its only competitor is the local state channel TTB, which does not match TV-4’s popularity.

Of all the PMP partner stations, **Ukraina–Donetsk** experienced the most significant leap in quality -- up 25 points. This may be due to the station’s recent work with Polish trainers and consultants on all facets of television production, including news reporting.

The single TV station that has showed a steady, incremental rise in quality over five years has been **STB**, the only national channel in the mix, and owned by oligarch Victor Pinchuk. Its news show “Vikna” is still considered one of the best and most objective news shows among all national channels.

Chernivtsi experienced a small drop in points. It has not regularly participated in IUA trainings for several years, although the station’s management visits IUA on a regular basis for consultations, meetings and conferences. Director Gena Sergeev is the chairman of the IAB board, and not very involved, if at all, with news production. The station was a recipient of IREX’s State Department-funded Ukrainian Media Partnership Program last year, and has been active in study exchanges with journalists in Georgia.

With the departure of the director of **Media Group Objektiv/Broadcast Company “Simon,” in Kharkiv** in 2006, the station had a complete staff turnover. Historically, it was a regular participant in IUA trainings. Over the past two years, several new chief editors trained at IUA in Effective Newsroom Management, but they weren’t able to institute changes at the station and subsequently left. KIIS focus group respondents this year were not satisfied with the channel’s current quality and professionalism, claiming that the station provides short and concise news items that are simply taken from the Internet.

Rivne-1 experiences high turnover because conditions at the station aren’t very good and salaries aren’t very high.

Alex – Zaporizhzhya has not been showing signs of growth and does not often interact with Internews Ukraine any more, although the station is a News Factory partner, as well as an IAB member. The station’s dependence on the local tycoon and owner - one of the large industrial enterprises in the city - makes the news very obviously biased, KIIS respondents say, and the channel is geared more toward a younger audience.

Chernomorskaya, although suffering a drop of six points in quality this year, has maintained a high rating over the past five years. Headed by dynamic director Tatyana Krasikova, the station maintains professional standards and is in regular communication with IUA’s trainers, in addition to other U-Media partners such as IAB, of whom they are a member, Ms. Krasikova is on the IAB board as well. Chernomorskaya continues to send journalists for trainings conducted by IUA in Kyiv or in Crimea.

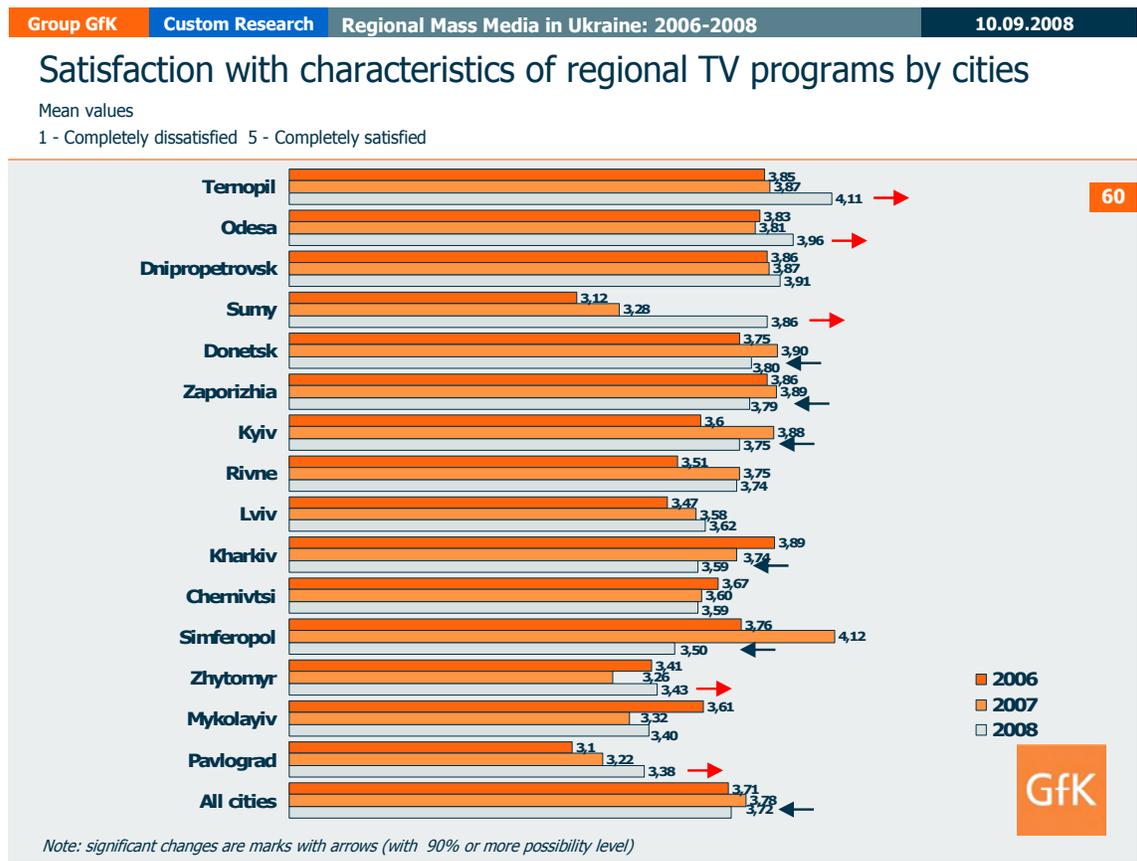
No tape was received from **Channel 34 – Dnipropetrovsk** this year, despite repeated requests.

Reporter in Odessa stopped all news production to begin other television and studio production, and was not included in the 2008 average. Last year we reported that its owners were “planning to start a

24-hour news channel in the future,” but this year its reports are published and aired on the Internet and radio only.

Lux in Lviv has not participated in the PMP since 2005, after the station became a political tool for its owner, who was running for mayor several years ago. Now, as a local city councilman, the owner is the major figure in the news broadcasts and only positive events are covered. KIIS focus groups recognize this bias, and are tired that the station lacks stable airtime and a concrete program schedule, always interrupting Noviy Kanal programming. However, respondents felt that the channel’s journalist team works professionally. Lux is an IUA’s News Factory partner, as well as an IAB member.

While GfK-USM’s May 2008 15-city media survey of 4,450 adults to measure preferences and use of regional media is not included in this report, its results show a decrease in the overall satisfaction level of watching regional television’s informational programs. This may be due in part to widespread political and business PR, and *jeansa*. The main reason cited for not watching regional TV channels is the lack of information that is interesting or of importance to people. The secondary reason is lack of objectivity and credibility. Viewers are most satisfied with channels’ “technical availability” and program design, as well as promptness and broadcast time.



Although respondents’ preference for television as the primary source of information remained basically the same, the amount and frequency of regional TV viewing decreased this year. The percentage of viewers who watch every day or almost every day dropped from 35 percent to 20, with 7 percent fewer viewers who watch TV on a weekly basis.

Print:

MIG, *Nashe Vremya+*, *RIA plus* and *Dancor* increased their scores, due mostly to expanding the number of the news pages and redesign. Experts mentioned that these newspapers had become more popular among the readers by publishing more local news important to readers.

In addition to these newspapers, *OGO* and *20 Hvylyn* participated in Ukrainian Print Media Partnership Program (UPMEP) funded by U-Media – through which they visited each other to share best practices and experience. The growth at *Dancor* and *MIG* is, in part, attributed to this particular project and what they learned from their colleagues.

Slovo newspaper is falling and now has the lowest marks. It belongs to the National Law Academy and personally to Sergey Kivalov (former head of the Central Election Commission), and is mostly used to promote the Academy and Kivalov, and publishes many hidden ads. To some extent it could be called a corporate newspaper.

Populyarnye Vedomosti has been gradually decreasing and becoming more tabloid. However, the newspaper participated in a training conducted by Internews Ukraine on “Climate Change and Energy-Saving Technologies” this year.

Express scores decreased slightly, due mostly to failures related to design, and photo and caption use.

Media Post was closed by the publisher and converted into a web-portal called MediaPort. This was strictly a business decision.

The remainder of the papers’ scores stayed at the same level as the previous year. The evaluation experts mentioned that they found hidden political ads in the local press, but less *jeansa* than the previous year because no elections were being held at the time of this year’s evaluation.

Armed with skills and experience gained from years of IREX-U-Media trainings, RPDI and the press publisher associations, AIRPPU and UAPP, have successfully continued the high quality of print training in a variety of spheres – from beginning journalism skills to sales and advertising to investigative journalism. During this past year, print partners participated in RPDI’s nine-day journalism school, as well as a large number investigative journalism trainings, which play a large role in the ACTION-MSI anti-corruption project.

AIRPPU conducted a series of beginning journalism trainings on editing, sales and distribution, and advertising and marketing management, for more than 100 representatives from all association member publishers. Trainings took place mainly in the three regional centers established by members – all participants in this PMP – in Rivne (*OGO*), Poltava (*Zhovta Gazeta*), and Melitopol (*MV*). Also playing a role in the ACTION-MSI project, UAPP conducted trainings on improving the quality of investigative journalism, including trainings on investigative journalism awareness, the topic as a genre, and the role of management. More than 50 journalists and editors from member publishers attended the trainings.

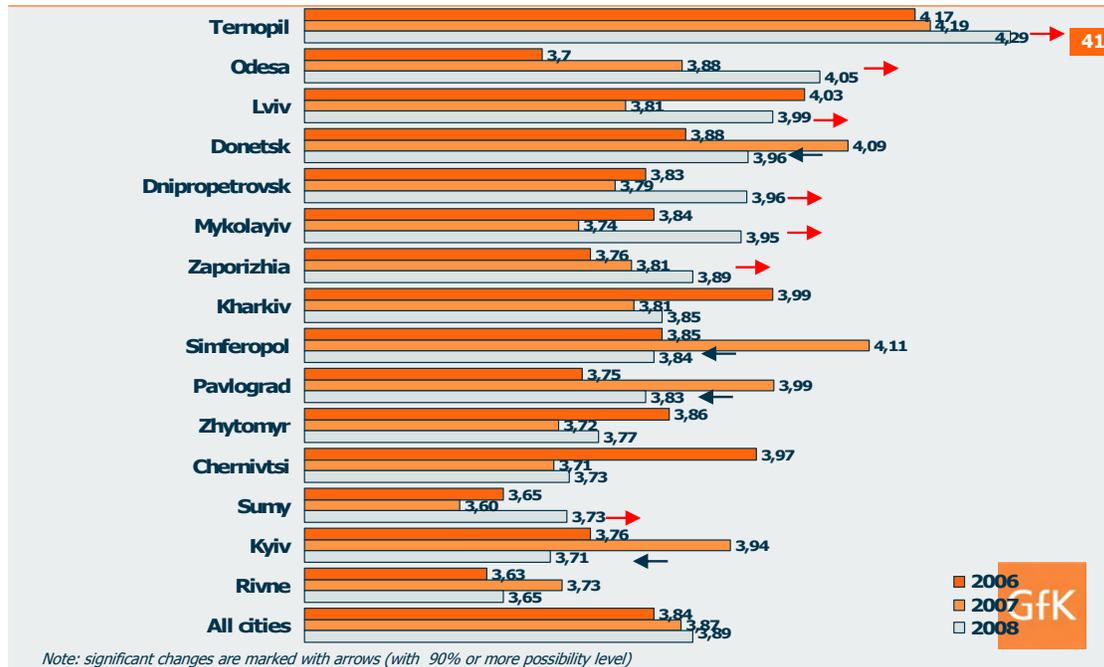
Partner newspapers *OGO* and *Rivne Vechirne* also participated in trainings, held by Internews Ukraine, on covering social issues.

In the GFK-USM media survey, satisfaction with regional press did not change, but general reading and awareness increased, by 3 percent and 2 percent respectively. Readers are most satisfied with availability of publications and, not surprisingly, least satisfied with objectivity and credibility of information, although this score increased somewhat.

Satisfaction with quality of regional periodicals in general

Mean values

1 - Completely dissatisfied 5 - Completely satisfied



The four newspapers that showed an increase in quality this year were located in some of the cities where consumers were found to be more satisfied with regional publications – Zaporizhzhya (two newspapers), Ternopil and Sumy. Of course, two of the newspaper locations (Lviv, Odessa) that showed a decrease in quality, according to the evaluation team, did not correspond to the readership survey locations of increased satisfaction. The major factors that influence satisfaction among readers are publication design and completeness of information provided, factors that showed significant increases in 2008. These factors may be the cause for the quality decrease in *Express* (design problems) and *Slovo* (biased news coverage). Consumers this year were also less satisfied with price.

Note: Quality Criteria Checklists, Performance Data Tables, and Data Quality Assessments for Indicator I.A can be found in Attachments A, B, C, and D.

Indicator I.B: Increased availability and quality of news produced by targeted media outlets

Sub-indicator: The **quantity** of the content of news and information produced by partner media outlets.

Target:

The **quantity** of the content of news and information produced by partner media outlets has increased. Print and broadcast targets are 1 percent and 5 percent respectively.

Methodology and Scoring: Information Quantity Analysis

Using the same edition of the week of Feb. 25, 2008, print media experts measured and calculated the amount of space in square centimeters used for news and information. This figure is then expressed

as a percentage of the total available newspaper pages. Scores are based on a 1 to 100 percent scale. Broadcast outlets provide a listing of all news and information programming produced each week. The broadcast score is expressed as the number of actual minutes of news and information produced weekly. A total of 26 partner media outlets in 15 target cities are reviewed and scored on an annual basis. Repeats of television programs are not included. The scores for broadcast and print quantity production cannot be aggregated and are expressed as separate components for the sub-indicator.

Indicator Measurements and Justification:

Broadcast: total number of minutes/hours per week devoted to news coverage. Print: square centimeters of total editorial space of news content expressed as a percentage of total content. The analysis produces comparable data each year from a defined group of partner media outlets. The data is reliable, objective, and comparable over time. Increased quantity of local news and information will result in a better informed Ukrainian public.

Print media experts have noted that the measurement of print news quantity as a percentage of page-space rather than in absolute terms is not ideal, as most Ukrainian newspapers should be striving for a higher ratio of advertising to editorial to improve self-sustainability.

Data Source:

Internal. Internews Network and IREX collected, analyzed and scored the news production quantities to determine appropriate values for this indicator.

Quantity of Broadcast and Print News and Information Production

Broadcast Quantity Scores: 2004, 2005, 2006, 2007 and 2008

#	BROADCAST QUANTITY Name of TV station	2004 Total Weekly News Production	2005 Total Weekly News Production	2006 Total Weekly News Production	2007 Total Weekly News Production	2008 Total Weekly News Production	2004 Min. of Weekly News Production	2005 Min. of Weekly News Production	2006 Min. of Weekly News Production	2007 Min. of Weekly News Production	2008 Min. of Weekly News Prod-on
1	MG "Objektiv SIMON" Kharkiv	7 hr 20 m	8 hr 30 m	3 hr 36 m	6 hr 03 m	6 hr 18 m	440	510	216	363	378
2	"ATN Channel 7" Kharkiv	3 hr 24 m	6 hr 42 m	6 hr 00 m	6 hr 00 m	9 hr 24 m	204	402	360	360	564
3	"Alex" Zaporizhzhya	4 hr 13 m	5 hr 11 m	4 hr 13 m	5 hr 43 m	5 hr 43 m	253	311	253	343	343
4	"LUX" Lviv	3 hr 30 m	2 hr 05 m	3 hr 55 m	6 hr 12 m	7 hr 41 m	210	125	235	372	461
5	"Channel 11" Dnipropetrovs'k	6 hr 01 m	8 hr 33 m	11 hr 05 m	11 hr 02 m	11 hr 02 m	361	513	665	662	662
6	"Reporter" Odessa	7 hr 02 m	8 hr 44 m	12 hr 42 m	6 hr 04 m	0 hr 0 m*	422	524	762	364	0*
7	"Rivne-1" Rivne	3 hr 22 m	2 hr 11 m	12 hr 00 m	7 hr 56 m	8 hr 06 m	202	131	720	476	486
8	"TV-4" Ternopil	4 hr 20 m	5 hr 10 m	4 hr 50 m	7 hr 20 m	8 hr 40 m	260	310	290	440	520
9	"STB" Kyiv	9 hr 55 m	9 hr 45 m	4 hr 10 m	5 hr 00 m	5 hr 25 m	595	585	250	300	325
10	"Chernivtsi" Chernivtsi	3 hr 13 m	4 hr 55 m	4 hr 12 m	11 hr 18 m	11 hr 31 m	193	295	252	678	691
11	"Channel 34" Dnipropetrovs'k	5 hr 08 m	11 hr 57 m	8 hr 30 m	13 hr 05 m	13 hr 50 m	308	717	510	785	830
12	"Ukraina" Donetsk	8 hr 45 m	19 hr 05 m	22 hr 25 m	31 hr 15 m	11 hr 05 m	525	1145	1345	1875	665
13	"NIS TV" Mykolayiv	2 hr 20 m	5 hr 00 m	2 hr 00 m	5 hr 25 m	5 hr 25 m	140	300	120	325	325
14	"Chernomorska" Simferopol	3 hr 20 m	3 hr 13 m	5 hr 05 m	6 hr 10 m	10 hr 39 m	200	193	305	370	639
Total Score:		<i>72 hr 28 m</i>	<i>101 hr 01 m</i>	<i>104 hr 39 m</i>	<i>128 hr 33 m</i>	<i>114 hr 49 m</i>	<i>4,313</i>	<i>6,061</i>	<i>6,279</i>	<i>7,713</i>	<i>6,889</i>
Total Average Score:		5 hr 13 m (rounded)	7 hr 13 m (rounded)	7 hr 29 m (rounded)	9 hr 11 m (rounded)	8 hr 50 m (rounded)	308 (rounded)	433 (+41%) (rounded)	449 (+3.7%) (rounded)	551 (+22.7%) (rounded)	530 (-3.9%) (rounded)

*Averages are given with the exclusion of "Reporter" Odessa.

Print Quantity Scores: 2004, 2005, 2006, 2007 and 2008

#	PRINT QUANTITY Name of Print Media Outlet	2004 Average Score	2005 Average Score	2006 Average Score	2007 Average Score	2008 Average Score	2004 Average % of News Content	2005 Average % of News Content	2006 Average % of News Content	2007 Average % of News Content	2008 Average % of News Content
1	"MIG" Zaporizhzhya	3	2	2	3	4	72	64	69	71	81
2	"Nashe Vremya" Zaporizhzhya	4	4	2	2	3	81	83	70	69	71
3	"Slovo" Odessa	3	1	2	1	1	79	59	64	54	47
4	"Express" Lviv	3	4	2	3	3	75	85	65	70	70
5	"ObjektivNo," "Media Post" Kharkiv	3	4	2	3	0**	80	81	63	70	0**
6	"20 Khvylyn" (formerly "RIA Zhytomyr") Zhytomyr	4	2	3	3	3	83	62	73	70	70
7	"RIA Plus" Ternopil	4	4	4	4	4	84	89	81	84	82
8	"Ternopil's'ki Ogoloshennya" (formerly "Ternopil's'ka Gazeta") Ternopil	2	1	3	0*	2	62	55	78	11*	62
9	"Populyarnyye Vedomosti" Pavlograd	1	3	2	3	2	56	78	63	70	63
10	"OGO" Rivne	1	2	3	3	3	55	69	74	73	73
11	"Rivne Vechirne" Rivne	0	1	0	1	2	47	59	39	50	63
12	"Dancor" Sumy	2	4	3	3	4	61	81	71	79	82
Total Score:		30	32	28	29	31	835	865	810	760	764
Total Average Score:		2.5	2.7	2.3	2.6	2.8	70	72	68	69	69

Note: Performance Data Tables and Data Quality Assessments for Indicator 1.B can be found in Attachments B, C, and D.

*Averages are given with the exclusion of "Ternopil's'ki Ogoloshennya" Ternopil.

**Averages are given with the exclusion of "Media Post" Kharkiv.

Analysis:

Broadcast: While broadcast news quantity dropped this year, the small decrease is explained by a considerable drop-off of news production at only one station. Were this year's average to be calculated without this steep decline, the average quantity of news and information production would grow from 456 minutes a week in 2007 to 519 minutes in 2008 – a 14 percent increase, which would have well exceeded this year's targeted increase of 5 percent. But for many stations the increase was not significant or even stayed at the same level.

Sixty-nine percent or 9 of 13 of the surveyed stations increased total minutes of news and information programming from 2007. **Twenty three percent**, or 3 of 13, produced the same total minutes of news as in 2007. Only **eight percent**, or 1 station out of 13, dropped its total minutes of news and information programming. Overall, stations experienced an **average decrease of 3.9 percent**, or 21 weekly minutes. Compared to the 2007 average increase of 22.7 percent, this year's decrease of 3.9 was not a significant drop and, although did not reach the target of 5 percent,

The largest drop – of just more than 20 hours – occurred at “Ukraina” in Donetsk, from 31 hours 15 minutes to 11 hours and 5 minutes of weekly news and information production. This company was politically affiliated with former Prime Minister Victor Yanukovich and his Party of the Regions, and had been steadily increasing the quantity of its news production since 2004. The biggest jump occurred in 2005 when Yanukovich became Prime Minister and was a counter balance to President Yushenko. With the change of the political situation, however, the news production dropped appropriately. Yanukovich's coverage was not as imperative or as important after he lost his position in 2007 elections. As mentioned above in the quality section, Ukraina-Donetsk has been consulting with Polish journalists and trainers this past year and the news programming has improved. The station also participated for the first time in an Internews Ukraine training: “Effective Sales & Advertising.”

“Reporter” in Odessa stopped all news production to begin other television and studio production, and was not included in the 2008 average. Last year we reported that its owners were “planning to start a 24-hour news channel in the future,” but this year its reports are published and aired on the Internet and radio only.

The largest increase occurred at “Chernomorska” in Simferopol, with an increase of 58 percent, from 6 hours 10 minutes in 2007 to 10 hours and 39 minutes in 2008. In addition to several new informational programs this year, the station is broadcasting a bi-weekly investigative journalism program that is produced by U-Media partner Crimean Press and Information Center. Journalists were trained by RPDI, and the entire project is supported by the ACTION-MSI anti-corruption project. The station launched a series of investigative journalism and other informational projects this year.

Other television companies either increased the quantity of news because of better commercial and financial means or stayed at the 2007 level, invariably due to lack of money or interest.

Half of the surveyed stations were able to achieve increases in quantity without the decreases in quality. “Chernomorska's” quality only dropped slightly, by 9 percent, although its quantity of news increase was the highest this year. And “Ukraina”, despite its drop in quantity, considerably increased its quality – by 50 percent.

Print: This year the print news quantity increased somewhat. Only two of 11 newspapers decreased the percentage of news published in the papers.

The largest drop occurred at *Slovo* – from 54 percent to 47 – the result of the ownership situation with Kivalov that was explained above in the quality section.

Ternopolski Ogoloshennya showed huge growth – from 11 percent to 62 – after a redesign and restructure of its content. If last year it was the newspaper of classifieds with the addition of some news, now it looks like A4 magazine with a classified supplement. But it still needs more local news.

The increases at *Rivne Vechirne* -- 13 points: from 50 to 73 – and *MIG*, with 10 points: from 71 to 81, were due mainly to the efforts of both newspapers to fight with competitors. *Rivne Vechirne* is trying to mimic its major competitor, *OGO*, which increased its news percentage trying to attract readers with local and useful information. *MIG* is trying to improve its content while fighting a new free newspaper started last year in Zaporizhzhya -- *Ostrov Svobody* -- and trying to get ready before *Gazeta po-Zaporozhsky* will be launched in the city this year.

Indicator I.C: Outcome Indicator. The quality of news and information produced by partner media outlets meets consumer demand

Target:

The quality of news and information produced by partner media outlets has improved and meets consumer demand.

Methodology:

The independent market research firm Kiev International Institute of Sociology (KIIS) was contracted to conduct focus groups to assess the quality and availability of news and information programming in the six target cities designated for 2008: Kharkiv, Zaporizhzhya, Sumy, Lviv, Mykolayiv, and Ternopil. Twelve focus groups (two in each city) with participants aged 20 to 45 were conducted April 10 to 18, 2008.

Indicator Justification:

Outcome indicator. The focus groups provide qualitative data as to the nature and focus of consumer demand for news and information coverage and how local target partner media outlets are meeting that demand. The results are comparable during the five years of the project, although cities will alternate each year. Focus group research is a useful qualitative measurement, but caution must be exercised when drawing broad conclusions as the focus groups represent a small segment of society. Results cannot be used interchangeably with quantitative research.

Data Source:

External. Kiev International Institute of Sociology focus group research.

Analysis:

KIIS Focus Group Findings:

The focus groups analyzed regional print, radio, and television media outlets that differ substantially in coverage area, frequency of publication, style, genre, broadcast technical parameters, hours of operation, and market size. Because of this variety, direct comparisons are not possible. Both U-media partner media and competitors were included in each discussion to provide a true, market-based analysis. Rankings were determined by the number of mentions accorded each topic.

Ranking/ Year	2004	2005	2006	2007	2008
1	Reliability	Reliability	Reliability/ Neutrality	Reliability	Reliability
2	Relevance	Promptness	Promptness	Promptness	Promptness
3	Diversity	Informative Value	Usefulness	Informative Value	Informative Value
4	Prompt Coverage	Accessibility	Professionalism / Attractiveness	Moderateness of Price	Quality of Presentation/

					Attractiveness
5	Professionalism	Professionalism, Interactivity and Education	Informative Value/ Presentation Style	Entertainment and Relaxation	Entertainment
6	Accuracy		Analytical Character	Actuality and Professionalism	Analytical / Educational Function
7	Communicability		Literacy		Moderateness of Price
8	Education				

2008 Rankings:

This is the last year of analysis. As in 2007, the year’s most important characteristics of the media were *reliability*, *promptness response*, and *informative value*. Most respondents placed all three characteristics at the top of their rankings, but reliability headed their lists.

#1 Reliability: For the fifth consecutive year, reliability or trustworthiness was chosen as the most important criterion for media. Respondents also described it as “veracity” or “objectivity.” Mostly due to the intensification of political confrontation, consumers doubt the reliability of information and know that mass media rely on the owners and lobby their interests. This is a huge step forward in the consumers’ understanding of the mechanisms that influence the work of mass media that they lacked five years ago.

#2 Prompt Response: Consumers see this characteristic as an essence or spirit of mass media, once information can be considered reliable. Prompt response has as much importance as reliability to them and is defined as presenting the actuality of news in its reporting. During four consecutive years promptness is considered to be the No. 2 characteristic of the media.

#3 Informative Value: After reliability and prompt response, respondents place emphasis on importance of news *content*. Respondents understand *informative value* as a quality of news report, exhaustiveness of description and absence of unimportant details. Important are richness of content, comprehensiveness, pithiness, significance or actuality, and diversity.

#4 Quality of Presentation/Attractiveness of a Material: In 2007 this position was taken by Moderateness of Price, although the year before consumers gave the No. 4 position to Professionalism/Attractiveness. This year Attractiveness became more important again and Moderateness of Price took the No. 8 position. Respondents understand the quality of presentation basing on a visual/sound design of an information product, its correctness, comprehensiveness and attractiveness of the language style, and journalist’s competence.

#5 Entertainment: This year this characteristic stayed at the same level as in 2007. Consumers mentioned this characteristic less often than entertaining and relaxation, which can be explained by the abundance of entertaining projects over trustworthiness, efficiency, actuality and attractiveness of news and information.

#6 Analytical/Educational Function: Analytical character of news has returned to the position it had in 2006. The participants have again mentioned educational function as an important one. This might be due to the abundance of entertaining projects in mass media that supersede more serious and classic functions.

#7 Moderateness of Price: This dropped from position No. 4 in 2007. In general, respondents did not complain about price, which might also be a result of the overall increase in inflation.

Consumers still want news of all levels on all topics. The majority of the respondents prefer television and newspapers to radio and the Internet. Central national television channels are the main information source for world and national events. Regional television and press are the main sources for local news, and radio and Internet are less popular among consumers looking for local information.

Mostly, consumers complain that they do not get enough information about local events. They say that the number of interesting programs is small; their presentation is boring and not attractive; and that the majority of local television channels are alike or have no personal character.

Regional press is less criticized. Local TV is more accessible but significant investments in the national television channels make regional companies look less presentable to the viewers and, although they have their own local niche, their slower development drives consumers away. Consumers switch to national channels and lose attention to local TV. This is especially true for the young audience, which pays a lot of attention to the attractiveness of presentation.

The quality of presentation is becoming more and more important: Mass media is diversifying and national media are becoming more attractive, which makes the local media appear to be at a “standstill,” looking “poor” and “faded,” and not meeting the growing requirements of a more knowledgeable audience.

The complete KIIS focus group report contains an overview of the focus group discussions with specific comments about each media outlet in each city. The positives and negatives of partner outlets are detailed alongside the characteristics of their competitors. These comments can provide invaluable information for both partner outlets and future U-Media partner media training projects. Information packaged in a CD containing all reports is distributed directly to regional partners and association members.

II. IMPROVED FINANCIAL VIABILITY OF TARGETED INDEPENDENT MEDIA OUTLETS

Intermediate Result 3.1.1: “Improved Financial Viability of Target Media Outlets”

Indicator II.A: Financial viability of targeted independent media outlets improves

Target:

Target media outlets become more profitable as a result of project training and support activities.

Methodology:

The Financial Viability Survey was designed to directly measure relative changes in the financial status of partner media outlets through questions about specific revenue and expense areas. This year we excluded broadcast media from the survey since last year only four broadcasters provided the data and the analysis could be neither comparable nor reliable. However, financial data was gathered from the print media outlets by the PMP manager from the same media outlets surveyed since 2004, which are members of industry associations and recipients of U-Media project training or consultations. Kyiv is excluded because it is not comparable to regional markets. Three out of 13 print media outlets refused to participate in 2008. One print media outlet no longer exists. When print media provided incomplete answers, the average result for that question category is based on the actual number of responses.

Data source:

Internal. Internews Network collected the Financial Viability Survey data and secured agreements with partner media outlets to provide accurate information. Analysis was provided by an Internews Network contractor.

Indicator Justification:

This is an outcome indicator to determine the financial health or growth of targeted partner media outlets. The data collected is current and precise, assuming that truthful and accurate information is divulged, and will be comparable on an annual basis. Several measurements were included to gain better insight into the business practices of media outlets. Revenue measurements include three key questions: total revenue, advertising revenue and “other” revenue. Expense measurements include annual percentages of capital investment and total payroll, along with a salary survey of a variety of positions. The salary survey is an indicator of whether or not the media sector’s compensation is comparable to that of other professional employment. If professional parity is not achieved, turnover and loss of talent to higher paying jobs in other sectors will continuously weaken the media sector.

**Annual Financial Viability Survey
Questionnaire and Response Averages**

2004, 2005, 2006, 2007&2008 Comparison			Print					Broadcast			
			2004	2005	2006	2007	2008	2004	2005	2006	2007
1	Percent of total annual revenue from advertising sales	%*	41%	57%	54%	49%	53%	72%	79%	86%	98%
2	Percent of total annual revenue from other sources	%	59%	43%	46%	51%	47%	28%	21%	14%	2%
3	Percent of total annual revenue spent on capital investments (equipment w/a useful life of 5 or more years)	%	14%	8%	7%	7%	5%	27%	20%	24%	31%
4	Total number of payroll employees	#	54	49	58	60	52	43	44	53	57
5	Percent of annual revenue spent on staff payroll	%	24%	22%	29%	26%	30%	26%	32%	35%	24%
6	Percent of annual revenue spent on freelance journalists or independent contractors	%	4%	5%	4%	3%	4%	14%	6%	7%	5%
7	Average monthly salary of payroll journalist	\$**	\$122	\$166	\$189	\$207	\$263	\$95	\$155	\$146	\$165
8	Average monthly salary of payroll anchor person (TV and radio) / deputy chief editor (newspaper)	\$	\$243	\$247	\$270	\$294	\$382	\$118	\$170	\$182	\$167
9	Average monthly salary of payroll cameraman (TV) / sound editor (radio) / leading or section journalist (newspaper)	\$	\$178	\$196	\$226	\$260	\$353	\$102	\$132	\$176	\$187
10	Average monthly salary of payroll graphic artist (TV) / production editor (radio) / production secretary or production manager (newspaper)	\$	\$145	\$224	\$233	\$272	\$407	\$119	\$95	\$192	\$250
11	Average monthly salary of payroll video (TV) / sound (radio) engineer / designer (newspaper)	\$	\$126	\$177	\$228	\$204	\$316	\$92	\$112	\$179	\$213
12	Average monthly salary of payroll advertising salesman	\$	\$159	\$217	\$234	\$303	\$420	\$212	\$239	\$198	\$357
13	Total annual revenue	\$									

			\$306,956	\$366,436	\$457,480	\$493,935	\$537,112	\$129,009	\$177,774	\$239,015	\$402,979
14	Does the company carry any private or commercial loans?	Yes /No	3/10	4/8	3/9	2/8	0/9	6/5	2/7	3/2	2/2
15	Has the company applied for a line of credit?	Yes /No	3/10	3/9	2/10	3/7	0/9	5/6	1/8	1/4	1/3
16	Is the company interested in securing a line of credit, if possible, for business development?	Yes /No	11/2	8/4	12/0	8/2	6/3	8/2	6/3	5/0	4/0

*Rounded to the nearest whole number

** Rounded to the nearest dollar

Analysis:

The 2008 survey averages financial figures for medium- to large-sized print media outlets. While it was originally planned to compare both individual outlets and the industry as a whole, and for broadcast media outlets as well, throughout the life of the monitoring, the difficulties with getting complete data make tracking individual outlets ineffective. A comparison of averages best illustrates changes in the overall media financial situation.

Media outlets still participate in this survey reluctantly. The PMP manager regularly reminded each outlet of its commitment, but some outlets refused to respond or to make clear reasons for not participating. Survey results were requested starting Jan.29 through April 15, with three of the original 13 print media outlets not responding or refusing to participate, and one closing down. While it was expected that media owners would be reluctant, given the tax, business, and political environment, difficulties in gathering this information are substantial.

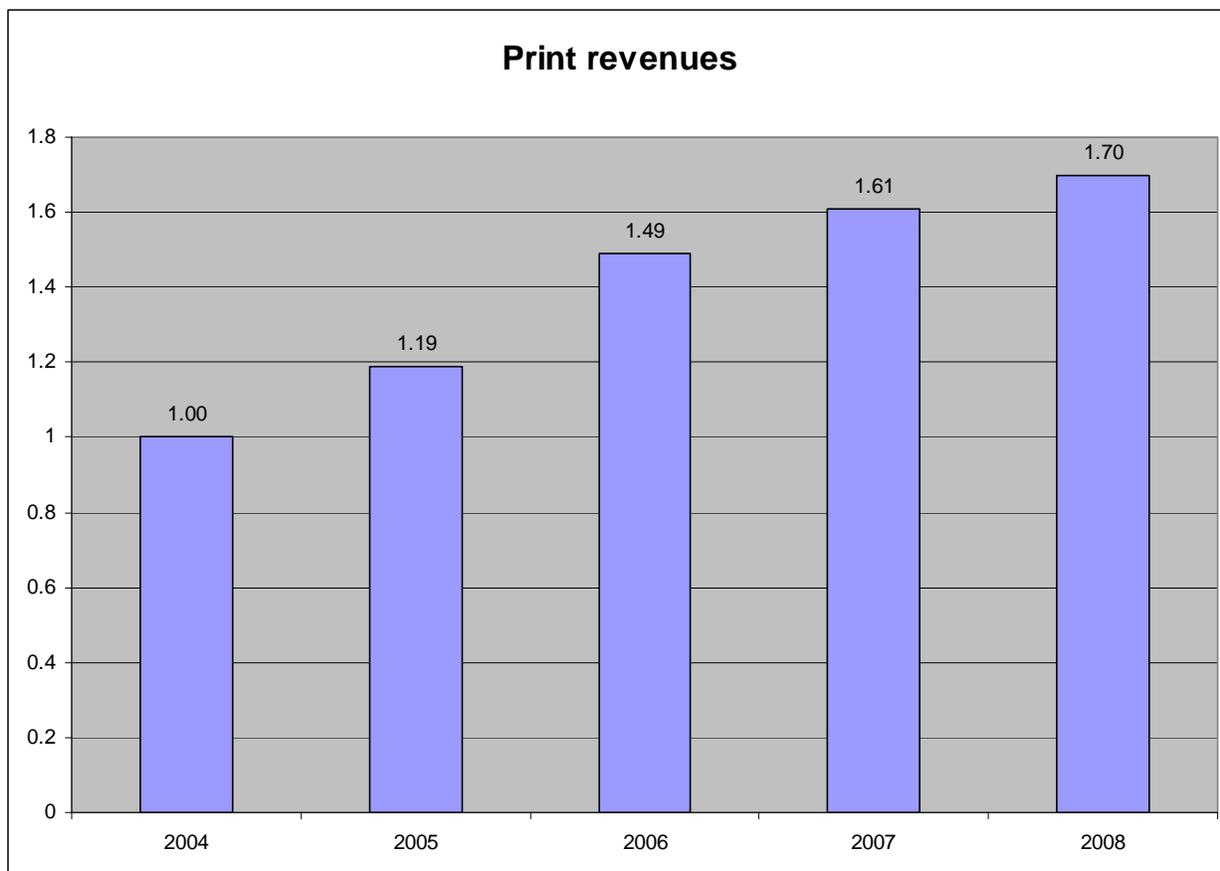
The preceding table summarizes the data each outlet was asked to supply, and providing averages for print media. The accuracy of the collected data depends on the candor and truthfulness of the media outlet's directors, commercial directors, or accountants who reported the information. Where outlets declined to answer specific questions, the average is based on the actual number of valid responses.

According to the State Statistics Committee of Ukraine, GDP in 2007 grew by 7.6 percent compared to 7.1 percent in 2006 (2.4 percent in 2005 and 12 percent in 2004). In 2007 the average inflation for consumer prices was 16.6 percent (9.5 percent in 2006 and 10.3 percent in 2005). Most surveyed media outlets exceeded GDP growth.

Average print revenue increased by 9 percent over 2007 -- with 81 percent reporting growth, 9.5 percent reporting decrease, and 9.5 percent the same level of revenue as in the previous year.

Key Findings:

Chart 1:



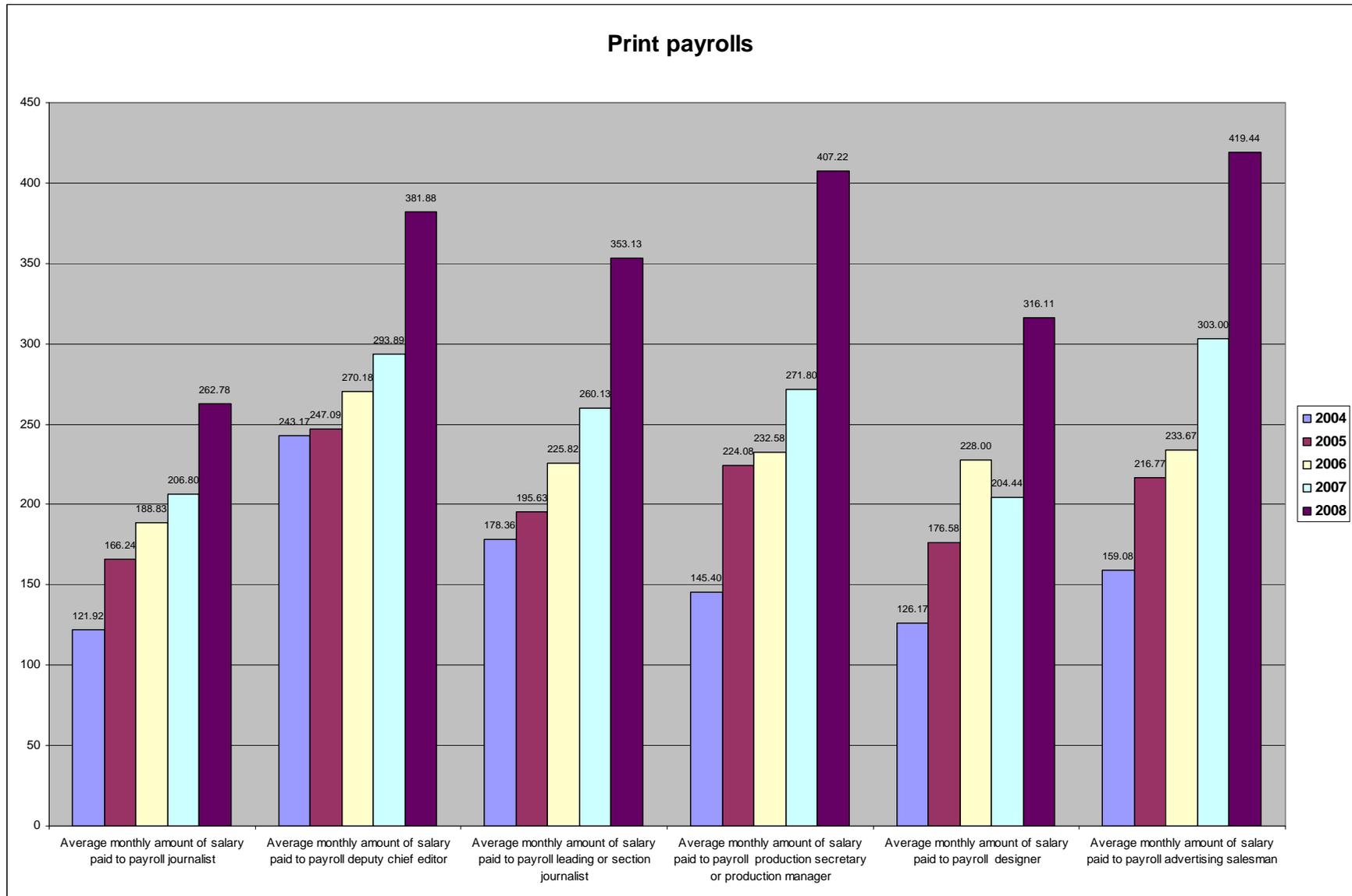
- *2008 print revenues experienced slightly less growth than previous years.*

Print payrolls (Chart 2) grew substantially during last year, especially for the sales persons and managers. This growth is not comparable to the growth of print revenues (Chart 1), but can be explained as a means to offset the deficit of experienced staff in the regions and migration of skilled managers to Kiev. National publishers that establish new projects in the regions with higher salaries also contribute to the trend of salary increases for local press professionals.

At the same time, some publishers explained that they wouldn't increase reporters' salaries by much because they receive payments for writing *jeansa* – so there is no need to take care of them.

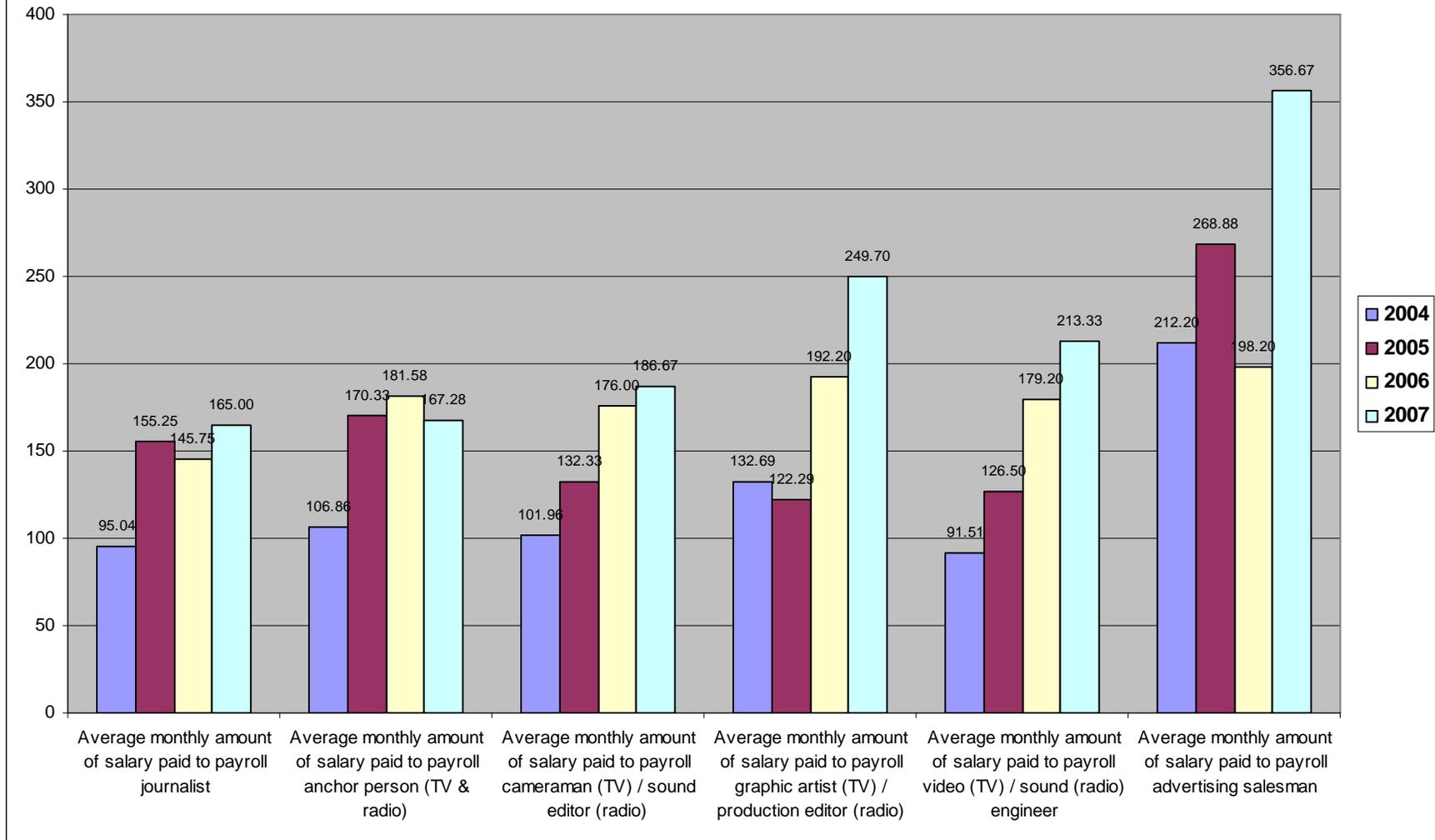
Print revenues were increasing as rapidly as they did in 2005-2006, despite the election campaign in summer 2007. The drop in the increase can be explained by two factors: Many politicians switched their election advertising to TV, and the growth of *jeansa* means that kind of advertising is hidden and not accounted for officially.

Chart 2:



- **Salaries for almost all media workers have increased each of the project's five years.**

Broadcast payrolls



- This chart does not include the 2008 data because broadcasters did not participate in the survey.

Indicator II B: Awareness of advertising costs and advantages of targeted media outlets

Target:

Media advertisers are more aware of the advantages of advertising in the local media and better understand how it can positively influence business. Increased and diversified advertising income will decrease media outlets' reliance on sponsorship or other forms of financial backing, giving them a stronger foundation for independence.

Methodology:

The Kiev International Institute for Sociology (KIIS) was contracted to develop an annual analytical report based on interviews with small- and medium-sized advertisers in five target cities. In 2004, 2006, and 2008, the cities are Kharkiv, Zaporizhzhya, Sumy, Lviv, and Zhytomyr. In 2005 and 2007, they are Dnipropetrovs'k, Mykolayiv, Chernivtsi, Simferopol, and Ternopil. The same advertisers are interviewed to track changes in each local market. KIIS uses the same questionnaire each year.

Indicator Justification:

This is a **contextual** indicator designed to assess the potential local advertising market and business environment for local media. Customer research explores the perceptions and concerns of current and potential media advertisers, measures the effectiveness of target media outlets' marketing strategies, and assesses the market potential of regional advertising. The interviews gain insight into the availability of advertising revenue, external forces that influence advertising decision-making and perceptions of the efficacy of local media advertising. The interviews also provide valuable information about the attributes of consumers and advertisers that partner media outlets should be trying to reach. Advertiser-supported media cannot flourish if their customers lack knowledge about effective advertising principles.

Data Source:

External. The Kiev International Institute of Sociology was contracted to conduct the interviews in five designated target cities (Kharkiv, Zaporizhzhya, Sumy, Lviv, and Zhytomyr). Twenty in-depth interviews took place between April and May 2008 with individual advertisers from a broad mix of enterprises (four in each city: two managers representing small businesses and two representing medium businesses). KIIS selected businesses ranging from small retail or service outlets to larger wholesale or manufacturing companies. Enterprise size was determined by number of employees, not annual revenue.

Analysis:

The KIIS questionnaire was designed to:

- assess advertisers' evaluation of regional media;
- determine which factors advertisers believe influence media popularity;
- determine which regional media are most often used for advertising; and
- assess the effectiveness of advertising on business performance.

Data from 2004, 2006 and 2008 offer more direct comparison because focus groups were held in the same cities. One major finding, however, is constant for all five years: an **absolute majority** of respondents **regard advertising in local media to be a positive influence on their businesses' growth and development.**

Key Findings:

- In all surveyed cities, respondents indicated regional media were deeply involved in the local advertising market and marked a significant growth of the advertising market and the growth of professionalism and creativity in implementing the advertising orders. This highly competitive market resulted in improved quality

and diversity of advertising services. However, respondents say that the present advertising level of the local mass media is not as high as the national one.

- In 2004, for most advertisers, the most popular mass media were television, radio, and newspapers, in that order. In a complete reversal, the 2005 respondents chose newspapers, radio, and television. In 2006, 2007 and 2008, they chose, in order: television, newspapers, and radio. However, this year in two cities the situation looked different. In Lviv radio was more popular than newspapers and television and, on the contrary, in Zhytomyr television ceded positions to both newspapers and radio.
- Television is mostly chosen for image advertising. Local TV wins popularity because it spreads information about local events first of all.
- Local radio cedes position to the national radio, and advertisers prefer local advertising spots of national radio stations. Only local radio in Lviv makes an exception.
- Advertisers are able to distinguish between different kinds of mass media, whether they are mostly news, analysis, entertainment, or tabloid – or a combination of any of these. This is a big step in awareness compared to the beginning of this survey.
- The popularity of local mass media is determined by local news, objectivity and efficiency of information, and coverage (transmission area and circulation).
- In 2006 and 2007 newspapers were considered best for placing day-to-day product or event advertising, and television was mostly used for image advertising – a change from 2004 and 2005. Newspapers are mostly selected to provide detailed and very informative advertising. Like 2007, the majority of businesses still prefer to place advertising in the press.
- Internet advertising has grown noticeably, especially in corporate websites, brand websites, Internet advertising banners and participation in Internet forums. In general, advertisers now more and more use the Internet not only as an informational but also an advertising and business development tool. Small- and medium-sized businesses have established web pages, distribute e-mail newsletters and use regional and national portals for advertising.
- Advertisers become more knowledgeable and track and monitor effectiveness of the advertising. This mostly related to middle-scale enterprises managers who monitor and measure concrete indexes, while managers of small businesses mostly rely on the subjective evaluation of the advertising results.
- Advertisers simultaneously place advertisements in several different types of media outlets. As before, advertising in the print editions prevails due to moderate prices and the opportunity to provide more information on products. Respondents did note that prices went up for all types of ads during the past year.
- Respondents reported no serious difficulties with placing advertising in local media outlets. They mentioned technical problems and minor misunderstandings. Mostly, they were happy with solving the conflicts by receiving compensation or discounts, or additional, replacement ads. Advertisers try to establish a good and solid working relationship with local media, to avoid future problems or misconceptions.

The majority of advertisers are confident that advertising has had a positive influence on business. They mentioned that advertising not only increased the number of consumers but also had a positive impact on their relations with partners.

III. IMPROVED LEGAL OPERATING ENVIRONMENT FOR MEDIA OUTLETS

Intermediate Result 3.1.2: “Improved Legal Operating Environment for Media Outlets”

Indicator III.A: Assess the awareness of the legal rights and responsibilities of journalists and media owners

Target:

Increased awareness of the legal rights and responsibilities of journalists and media owners.

Methodology and Scoring:

Independent research firm GfK-USM was contracted to administer and compile results of the “Annual Survey of Media Owners and Journalists on Their Rights and Responsibilities.” A comprehensive questionnaire was developed by U-Media legal professionals regarding nine media legal concepts: defamation, invasion of privacy, advertising, television and radio, copyright, access to information, moral damages, corrections and defenses. In 2008, these same topics were addressed, but questions were phrased differently to assess depth of knowledge. GfK-USM conducted 125 interviews from May 1 to May 15, 2008 with at least four regional print and four regional broadcast media managers and/or journalists in each of 15 U-Media partner cities. The same individuals from the same media outlets as in 2004, 2005, 2006 and in 2007 were interviewed in 2008. When this was not possible, a person in a similar position was interviewed at the same media organization. Scoring of individual responses was completed by the U-Media Legal Advisory Board based on the following 1 – 10 scale:

- 1-2 Respondent shows no real awareness of the subject, response is an incorrect guess or an admission of no knowledge.
- 3-4 Respondent understands the question, but doesn't know the answer or answers incorrectly.
- 5-6 Respondent understands the question, and answers distorted or only partially correctly.
- 7-8 Respondent understands the question and answers correctly, with some exceptions.
- 9-10 Respondent understands the question and answers correctly, or nearly correctly.

Final tabulation of score results, along with analysis and recommendations for project management, was performed by GfK-USM.

Indicator Justification:

The survey provides a measurement of relative change of legal awareness using a constant sample of interviewees throughout the life of the project. Interviewees are asked several different questions concerning each legal concept throughout the life of the project. This ensures that the respondents show their understanding of basic legal concepts critical to the operation of independent media and have not simply memorized answers to specific survey questions.

External factors to be considered when evaluating results:

New legislation or regulations could be enacted that complicate the legal environment and may impact indicator results.

Data Source:

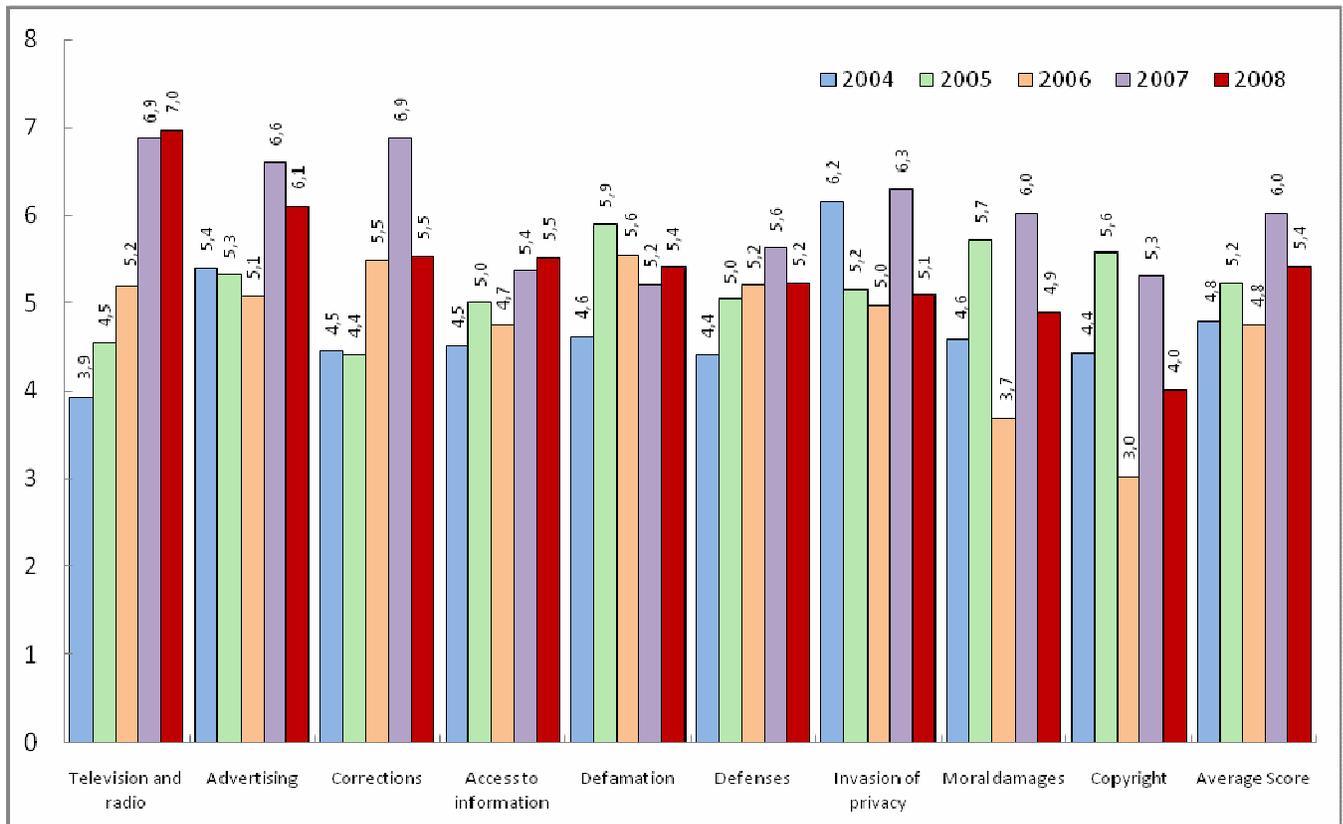
External and internal. Independent research firm GfK-USM administered the survey and compiled results. U-Media legal professionals scored the results.

Combined Broadcast and Print Legal Awareness

Assess the Awareness of Legal Rights and Responsibilities of Media Owners and Journalists

**Chart 5: GfK-USM Annual Survey of Legal Rights and Responsibilities Awareness
2004, 2005, 2006, 2007 and 2008 Comparison**

Change in legal awareness in total sample:



Analysis:

The fifth wave survey demonstrated a lower awareness of legal rights and responsibilities among Internews' regional partner media, both journalists and managers, in 2008. The year's overall average score decreased to 5.4 from 6.0 in 2007. While higher than the 4.8 in 2006, 5.2 in 2005 and 4.8 in 2004, the 2008 average score is not satisfactory. While it means that the respondents understand the legal concepts involved in the questions, and have an idea of the correct answers, their answers are distorted or only partially correct. This indicates that Ukraine's journalists and media managers still have difficulty mastering the practical application of laws directly involved in their everyday work lives.

The highest scores were for legal concepts involving Television/Radio and Advertising. Indeed, radio and television had an overall score of 7.0 – the highest in the survey. It is the only question for which the respondents understood the question and answered it correctly, with some exceptions. Indeed, legal knowledge among broadcasters was higher (5.7) than for print media (4.8). Kyiv, which scored below average on most subjects, scored a 7.0 in TV/Radio, probably because Kyiv-based broadcasters include all the national networks, which

presumably hire staff with a certain level of sophistication. Advertising was close behind with an average score of 6.1.

The highest decreases in knowledge of specific subject matter occurred in: corrections, invasion of privacy, moral damages and copyright.

Only three cities showed an increase in legal awareness: Ternopil, Odessa and Zaporizhzhya. Indeed, the Ternopil survey answers resembled direct quotes taken from legislation – which demonstrates that the respondent knew what to look for and where to find it. The remaining 12 surveyed cities all showed decreases in legal knowledge. The highest decreases compared to 2007 were in the cities of Pavlograd, Chernivtsi, Rivne, Lviv, Kyiv, Dnipropetrovsk and Sumy.

Dnipropetrovsk showed a particularly steep decline, from 6.0 in 2007 to 4.2 in 2008. The decline is even more dramatic when compared to 2004, when the city led all the others with a score of 6.7. The reasons may be due to the fact that in 2004, Dnipropetrovsk was still reaping the benefits of a very strong legal department in their Union of Journalists. Scores dropped dramatically when the department’s head left to work for the IREX-U-Media Legal Defense and Education Program (LDEP) in Kiev. But a similarly steep decrease in Rivne, from 6.6 in 2007 to 5.2 in 2008, cannot be explained except by looking at the overall reasons for the decline in legal awareness.

The reasons for the overall decreases are beyond the scope of this analysis. But notably, it coincides almost exactly with the end, in 2007, of legal training seminars that the LDEP held for regional media. For budgetary reasons, the number of training seminars was radically reduced in 2006 and those that occurred were largely focused on parliamentary elections rather than the basic legal issues addressed in the surveys.

Indicator III.B: Media Legal Advisory Board - Panel Review

(based on the IREX Media Sustainability Index)

Target:

Improved legal and regulatory environment that allows media outlets to operate in a free and fair market environment.

Methodology and Scoring:

This is a context indicator based on an in-depth, directed panel discussion among members of U-Media Project partners and associated lawyers. The nine-person panel reviewed questions based on “Objective 1: Free Speech” indicators contained in the IREX MSI (Media Sustainability Index). The topical agenda below guided the panel in the discussion of current legislative and judicial issues associated with each discussion topic. Panel members are designated by position rather than specifically named individuals to account for personnel changes during the life of the five-year project, as any new participant would be able to respond from approximately the same vantage point as his or her predecessor. The Media Legal Advisory Board met for discussion on December 7, 2007.

Each discussion topic is given a score by each panel member according to the following system:

- 0 *The country does not correspond to the demands of the indicator; the government or public forces can have an active oppositional position toward its implementation.*
- 1 *The country minimally responds to the aspects of the indicator; the forces may not be active and oppositional toward its implementation, but the business environment may not support it, and the government and professionals do not fully or actively support the changes.*
- 2 *The country began to respond to many aspects of the indicator, but progress is too recent to make conclusions or still depends on the current government or political forces.*

- 3 *The country responds to the majority of aspects of the indicator, and its implementation is held during several years and/or through the changes in the government that indicates a certain stability.*
- 4 *The country responds to the aspects of the indicator; the indicator stayed stable despite frequent changes in the government, economy, public opinion, and/or public agreements*

The simple average is composed of an average of all indicators to get a unique and general score for each of the characteristics. The IREX MSI interprets the average scores as follows:

- 3-4: stable and free media
 2-3: independent media that approach stability
 1-2: should make considerable progress; the society and/or the government do not provide full support to the media
 0-1: the country responds to a small number of indicators and the government/society stand actively against the changes

Indicator Justification:

This panel review is designed to measure the impact of a variety of project inputs aimed at improving the legal environment. The results of this indicator also orient project staff and core partners to current and pertinent legal issues affecting the development of a free and independent media. The data presented is current and precise, as the panel is composed of a variety of experts and professionals working in Ukraine.

Data Source:

Internal and external. U-Media lawyers and other legal professionals participate in a panel discussion at the beginning of each year and score the topics for the preceding year, which are then averaged into one score.

Legal and Regulatory Environment – Media Legal Panel

**Assess the Legal and Regulatory Environment in which Media Operate
 2003 Baseline, 2004, 2005, 2006 and 2007 Comparison ***

Discussion Topics		Average Score				
		2003	2004	2005	2006	2007
1	Legal protections for free speech exist. Those legal protections are enforced.	1.9	1.3	2.1	1.9	1.7
2	Licensing of broadcast media (not including the Internet) is fair, competitive and apolitical.	1.1	0.8	0.9	1	0.7
3	Market entry and tax structure for media is fair and comparable to other industries.	1.8	2.1	2.8	2.7	2.5
4	Crimes against journalists and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.	0.7	0.9	1.2	1.2	1.2
5	State or public media (including communal media outlets) do not receive preferential treatment and law guarantees editorial independence.	0.8	1	1.1	0.7	0.7
6	Libel is a civil law issue; public officials are held to higher standards, and in cases involving them, actual malice of journalists or media should be proven.	2.6	1.9	2.5	2.1	1.7
7	Public information is easily accessible; right of					

	access to information is equally enforced for all media and journalists.	1.4	1	1.6	1.6	1.2
8	Entry into the journalism profession is free and government imposes no licensing, restrictions or special rights for journalists.	2.6	3.5	3.8	3.5	3.3
9	Election law and other legislation ensure that the rights of media, candidates and the public are balanced.	N/A	1.7	1.6	1.8	1.6
Average Score:		1.6	1.6	2	1.8	1.6

- Please note that the legal panel assesses the legal situation in the PRECEDING year (i.e., the 2008 report is an assessment of 2007).

Analysis:

From an all time high of 2.0 in the heady days following the Orange Revolution in 2005, the average score at the end of five years is exactly the same as it was in Kuchma-era 2003 – 1.6, representing a decrease of 0.2 from 2006’s 1.8. The scores on all discussion topics decreased except for two, where they remained the same as in 2006, and the panel noted that the situation had either worsened or remained unchanged since the previous year.

Despite having fairly good media legislation, the panel noted that actual legal practice leaves much to be desired. As one participant said in the context of election law: “[E]verything here is not decided according to laws, but according to political will and political deals. That is at the root of everything that’s wrong.”

Despite gains in libel law practice in previous years, when judges adjudicating media cases were regularly trained, damage awards for defamation cases increased “because [judges] want to protect plaintiffs” who are public officials and public figures. While Kyiv judges recognize the protections of the European Convention, regional courts are much more resistant.

The National Council on Radio and Television has become a totally politicized organ that is no longer balanced between opposition and pro-presidential members. Now, it is skewed in the president’s favor, and makes its decisions in a non-transparent manner. A recent example was in digital conversion, when most of the licenses were awarded to completely unknown companies with no experience in broadcasting. None of the major national networks won licenses.

Notwithstanding lip service to the idea of “destatization” of municipal newspapers and the transformation of state-owned television into public TV, state media continue to receive subsidies. A new recommendation from the national security council (and signed by the president) seems to suggest that the central government rather than municipalities will be funding “socially significant” publications. Municipal media workers also receive generous pensions compared to independent media. Independent editors among municipal media remain a great rarity.

The panel could not recall a single case of someone being prosecuted and tried for crimes against a journalist, which has a specific article (Art. 171) in the criminal code. But judges find it hard to accept that as a discrete crime and, if crimes are prosecuted, the acts are more likely to be qualified as hooliganism – which is better than nothing, but weakens Art. 171’s deterrent effect. The case of Georgi Gongadze remains unsolved and its investigation, though still open, has become something of a farce.

The election law remains flawed in setting a strict timetable that allows political advertising at a time long after actual campaigning has begun, which forces candidates and parties to resort to “grey technologies” to get their message out and the shadow economy to pay for it.

A more detailed summary of the discussion topics is provided below.

Summary of Media Legal Advisory Board Discussion 2007

By Mary Mycio, Consultant

1. **Legal/social protections for free speech exist and are enforced in practice.** The score decreased – 2006 was 1.9 and this year, 2007 – 1.7.

The situation worsened marginally over the past year. Ukraine has fairly good legislation protecting freedom of speech, including the European Convention and its application, but actual legal practice leaves much to be desired. In Kyiv, tendencies are mostly positive. Judges know the European Convention – more or less – and apply it when adjudicating cases.

But things are worse in the regions. In Kharkiv, for example, judges have a negative view of the Convention – they either know nothing about it, or very little. Even if lawyers argue for its application, the judges are psychologically unprepared to do it. If they want to protect journalists, they find a way to apply Ukrainian law or find a procedural rationale to protect free speech, rather than apply the Convention.

One participant said that judges apply Ukrainian law, ignoring the Convention, because they want to protect plaintiffs. “After all, who are the plaintiffs in defamation cases? Mostly, these are public officials and public figures...and courts want to protect them.”

Another problematic tendency is that when a criminal event happens, some courts have taken the position that journalists can’t cover those events until the courts establish the facts.

2. **Licensing of electronic media is fair, competitive and apolitical.** The score decreased from 1.0 in 2006 to 0.7 in 2007.

The situation worsened since last year, though there has been an increase in complaints about the National Council on Radio and Television about discrimination in licensing. The Council has turned into a totally politicized organ, which operates under principles that didn’t exist in the days of Leonid Kuchma. In those days, there was some kind of balance on the Council of pro-presidential and opposition members. “Today there is a majority of 5-6 members that make the ‘necessary’ decisions.” Procedures have become more complicated, for example in renewing licenses, and the criteria by which the Council issues licenses is opaque.

In the future transfer to digital TV, market participants are not informed about the possible risks, especially the danger that local broadcasters will be pushed out.

3. **Market entry and tax structure for media is fair and comparable to other industries.** The score decreased from 2.7 in 2006 to 2.5 in 2007.

There is no discrimination against the media industry compared to other industries. Everyone labors under the same “abnormal” tax code. But media is subject to a few specific market issues, such as the Anti-Monopoly Committee’s failure to investigate Inter-Reklama’s monopoly on the advertising business or the unfair competition that results from government financing of state and municipal media.

4. **Crimes against journalists are prosecuted vigorously, but occurrences of such crimes are rare.** This score remained the same as in 2006 at 1.2.

The situation has not improved. In the last year, there was not a single case the panel could recall in which someone was prosecuted and tried for crimes against journalists.

One specific problem is that no one has been prosecuted under Art. 171 of the Criminal Code (interfering with the work of a journalist). Police investigators and prosecutors have no idea of what the crime is, even in obvious cases when politicians scuffled with film crews, breaking cameras. In Dnipropetrovs'k, the new head of the city council went to a municipal raion newspaper and told the editor to bring her the newspaper before printing, ostensibly for grammatical correction, but in fact, she was censoring the paper. In that case, the procurator actually did file charges and the case is in court. There is no decision yet, but the judge seems more inclined to protect the official than the newspaper.

It is difficult for judges to accept the discrete criminalization of interfering with journalists and find it easier to qualify acts of interference as hooliganism, a crime that has a long history and practice. While prosecuting people who interfere with journalists for other crimes, such as hooliganism or property damage, is better than nothing, the unwillingness to prosecute specifically under Art. 171's weakens its deterrent impact. At least in part, this is a result of the weak law enforcement system. In Kyiv, turnover is very high. Few people work there for more than a year.

5. State or public media do not receive preferential treatment and law guarantees editorial independence. This score also remained the same as in 2006 at 0.7.

The situation has not changed much. Despite two years of activity surrounding destatization of municipal media and the creation of public broadcasting, nothing has come of it. Editors of state media felt dependent in the past and continue to do so today. An independent editor is a great rarity. In Kiev, matters have worsened. There is no editorial independence at all. The National Television Company of Ukraine (UT-1) is completely dependent on budgetary subsidies. This leads to editorial dependence. The state and municipal channels are privileged in receiving budgetary funding, and their journalists are considered government workers, which also has privileges.

In the regions, matters are more mixed. In Kharkiv, there is no editorial independence at all. Some municipal TV stations are doing quite well, but smaller companies can find it a struggle and this year, many companies' directors were replaced. When, by law, a government organ must approve the director of a municipal media outlet, it is impossible to talk about independence.

But the advertising market is developing dynamically and the poor quality municipal media are playing a lesser role and may wither away. In 2002, government funding in the media accounted for one-third of the market. Today, it is less than 7 percent.

6. Libel is a civil law issue; public officials are held to higher standards, and the offended party must prove falsity and malice. The score decreased from 2.1 in 2006 to 1.7 in 2007.

Despite positive legislation, and decriminalized libel, civil court practice worsened over the last year. While there have always been defamation lawsuits, this year there were many decisions in favor of public officials and public figures and a tendency towards increasing the amount of damages they were awarded. Damages were the equivalent of \$10,000, for example, but these are very large sums for journalists to pay.

7. Public information is easily accessible; right of access to information is equally enforced for all media and journalists. This score decreased from 1.6 in 2006 to 1.2 in 2007.

Access to information is available on paper, but not in practice and depends on the institution being asked. Access to local and municipal government decisions and draft decisions can be very difficult to obtain, which

limits the people who can meaningfully take part in discussions. The Kyiv city administration is especially closed. The parliamentary website is sometimes misleading, because the legislation posted on the site can differ from what was actually adopted.

While there is a law on access to information, it is flawed. But a draft law on access to information has been knocking around the Ministry of Justice and various committees for some time, during which its original intent is being malformed and it is acquiring dangerous amendments.

An additional problem arises with the Law on Access to Court Decisions. On the one hand, there is a public interest in access to these decisions. On the other, the state has a duty to protect individuals' private and personal data, which is often revealed in the course of court proceedings. There need to be amendments made to all the legal codes so that the public has access to court information while the privacy of the people involved in court proceedings is protected.

8. Entry into the journalism profession is free and government imposes no licensing, restrictions or special rights for journalists. Decrease from 3.5 in 2006 to 3.3 in 2007.

Entry into the journalism profession is free. No licensing is required. But there have been problems when journalists apply for credentials and must prove they are journalists. That can also happen in court. In once case, when a journalist was the defendant in a lawsuit, the judge required documents to prove he was a journalist.

9. Election law and other legislation ensure a fair balance of rights for candidates, mass media and the public. Decrease from 1.8 in 2006 to 1.6 in 2007.

Election laws tend to favor the candidates to the detriment of the media and the public.

The pre-term elections once again showed the problem in the election law, which restricts political campaigning and advertising to “subjects of the electoral process” and imposes a finite time window for when such campaigning may begin. Since the actual political campaigns begin long before the legal calendar says they should, candidates and parties are forced to resort to “grey technologies” to get their message out.

Some political forces continued to exploit divisions in Ukraine over ethnicity and language, without any reaction on the part of the authorities – even though the election law makes fanning ethnic hatred illegal. But because the pre-term election was the product of some kind of deal and a balance of different political forces, the authorities who control such content took a back seat since any efforts to prosecute violators would have been perceived as politically motivated. “Those authorities also became hostages of the fact that everything here is not decided according to laws, but according to political will and political deals. That is at the root of everything that’s wrong.”

Overall score decreased from 1.8 in 2006 to 1.6 in 2007.

ATTACHMENT A – Parallel Broadcast and Print Quality Checklists

BROADCAST EDITORIAL AND TECHNICAL QUALITY REVIEW CHECKLISTS

Point Value: 4 pts. = always; 3 pts. = usually; 2 pts = sometimes; 1 pt = rarely; 0 = never

TECHNICAL EXPERTISE (20 percent)

- 1 Video is steady – tripod is used when necessary
- 2 Few zooms/pans and used appropriately; good framing, no microphone in frame
- 3 Good audio quality/use microphone
- 4 Use natural sound
- 5 Video quality is good – camera is white balanced and shots are in focus

VISUAL/AUDITORY IMPRESSION (20 percent)

- 6 Short, 1-2 minute news stories
- 7 Video is not used twice
- 8 Normal accessible language; good diction, not too fast or slow
- 9 Video corresponds to audio and track
- 10 There is an anchor

SUBJECT MATTER (60 percent)

- 11 Fact based reporting- no commentary
- 12 Personalized story- reports show how events affect people's everyday lives (street level reporting)
- 13 Reports are balanced and reflect different viewpoints
- 14 Interviewees are appropriate for the subject matter
- 15 Reports answer the basic questions: Who? What? When? Where? How?
- 16 Location and text of stand-ups relate to the subject matter
- 17 Reports answer the question – Why is this important?
- 18 More than 5 different stories are used
- 19 Station cooperates with other stations- news from other regions is used
- 20 Logical beginning and end of report, sequencing of story
- 21 News not mainly on government actions/pressers/crime
- 22 Sources of information are appropriately identified
- 23 Reports on official information (pressers, etc.) include other elements – the story is not just about a press conference
- 24 Political and other advertisements are clearly identified and not mixed with news
- 25 The news is broadcast live or live reporting is used.

Total possible point score per station: 100 (100 percent)

PRINT EDITORIAL AND TECHNICAL QUALITY REVIEW CHECKLISTS

Point Value: 4 pts. = always; 3 pts. = usually; 2 pts = sometimes; 1 pt.= rarely; 0 = never

PRINT CONTENT REVIEW CHECKLIST (67 percent)

- 1 Headlines are informative and interesting
- 2 Articles include representation of more than one point of view
- 3 The writing is easy to read, rather than academic or overly literary. The emphasis is on transmission of information rather than literary style.
- 4 Length of articles is appropriate for importance of topic and value of information.
- 5 Experts provide commentary within articles or those involved in an issue, rather than by the journalist.
- 6 News and feature photos convey information and are of appropriate size.
- 7 Photo captions are used consistently and are informative.
- 8 National or other articles are localized to make them interesting and useful to local readers.
- 9 Articles answer the basic questions of who, what, where, when, why, how, how much.
- 10 Sources of information are clearly identified.
- 11 Paper uses informational graphics to convey statistical and other types of information.
- 12 Stories on crime and government are not preponderant.
- 13 The sources of information go beyond press releases, press conferences and police reports.
- 14 News articles and advertisements can be clearly and easily differentiated.

TECHNICAL QUALITY – LAYOUT AND DESIGN (33 percent)

- 15 Paper has a distinct style and appearance that would make it easy to find on the newsstand.
- 16 There is an index to help readers find what they want.
- 17 Printing and paper quality are high.
- 18 Typefaces are consistent and reliable.
- 19 News and feature photos are large enough to interpret easily.
- 20 Presentation of different topics of information, including ads, is logical, so that readers can easily find what they want.
- 21 Advertisements are placed logically, and are easy to find and read.

Total possible point score per outlet: 84, corresponding to 100 percent

ATTACHMENT B – Performance Data Table

Input baselines and targets for the life of the SO for each SO and IR indicator. Modify the table to include additional indicators and years as needed.

SO or IR	Results Statement	Indicator	Unit of Measure	Dis-aggregation	Base-line Year	Base-line Value	2005 Target	2005 Actual	2006 Target	2006 Actual	2007 Target	2007 Actual	2008 Target	2008 Actual
SO 3	Citizenry increasingly engaged in promoting their interests and rights for a more democratic, market oriented Ukraine.				2004									
IR 3.1		Increased availability of quality information produced by target outlets.												
Sub IR 3.1-A			Measure the technical and editorial Quality of news produced by partner outlets according to standardized checklist.	Print and Broadcast	2004	Base-line Value 61*	2005 Target + 4 percent 63*	2005 Actual no change 61	2006 Target + 0 percent 61	2006 Actual - 10 percent 55	2007 Target + 2 percent 56	2007 Actual + 10.7 percent 62	2008 Target +2 percent 63	2008 Actual +4 Percent 64,5
Sub IR 3.1-B			Measure the Quantity of news and information produced by partner media outlets.	Print	2004	Base-line Value 70	2005 Target + 2 percent 71	2005 Actual + 3 percent 72	2006 Target + 1 percent 73	2006 Actual - 7 percent 68	2007 Target + 1 percent 69	2007 Actual + 1 percent 69	2008 Target +1 percent 70	2008 Actual +0 percent 69
Sub IR 3.1-B			Measure the Quantity of news and information produced by partner media outlets	Broad-cast	2004	Base-line Value 308	2005 Target + 2 percent 314	2005 Actual + 41 percent 433	2006 Target + 0 percent 433	2006 Actual + 3.7 percent 449	2007 Target + 1 percent 453	2007 Actual + 22.7 percent 551	2008 Target +5 percent 579	2008 Actual -3.9 Percent 530

* Calculation for average quality baseline score in 2004 report was incorrect. Both 2004 baseline and 2005 targets are corrected in this report.

ATTACHMENT C – Performance Indicator Reference Sheet

Performance Indicator Reference Sheet
<p>Strategic Objective: 3.0 Citizenry increasingly engaged in promoting their interests and rights for a more democratic, market oriented Ukraine.</p> <p>Intermediate Result: 3.1 Increased availability of quality information produced by target outlets.</p> <p>Indicator: 3.1-B Measure the quantity of news and information produced by partner outlets according to constant criteria.</p>
DESCRIPTION
<p>Precise Definition(s): The measurement of the amount or quantity of news and information produced by print and broadcast news outlets according to standardized tests appropriate to each media.</p> <p>Unit of Measure: Print media will be measured by the percentage of editorial print space devoted to news and information; Broadcast media will be measured by the number of minutes of news and information broadcasting produced weekly.</p> <p>Disaggregated by: Print and Broadcast</p> <p>Justification/Management Utility: U-Media project works with partner media outlets to improve the quantity of news and information produced. This performance indicator was developed to directly measure improvement in quantity of news produced by partner outlets according to constant, quantifiable criteria.</p>
PLAN FOR DATA ACQUISITION BY USAID
<p>Data Collection Method: Internews Network and IREX gathered broadcast news tapes and published newspapers produced during April 2006 for analysis.</p> <p>Method of Acquisition by USAID: U-Media project provides data and analysis to USAID in an annual Performance Monitoring Report.</p> <p>Data Source(s): U-Media partner media outlets provide tapes/copies of news broadcasted/published for review. U-Media project staff will analyze and report on performance to USAID in September of each project year.</p> <p>Frequency/Timing of Data Acquisition: All broadcast/published news analyzed for the baseline report was produced in April and May of 2004. Data acquisition for subsequent performance reports will be collected annually, during the months of April and May.</p> <p>Estimated Cost of Data Acquisition: Costs for data acquisition/analysis are included in U-Media project award budget.</p> <p>Responsible Individual(s) at USAID: Victoria Marchenko, CTO, USAID Mission for Ukraine, Belarus and Moldova</p>
DATA QUALITY ISSUES
<p>Date of Initial Data Quality Assessment: June 2004</p> <p>Known Data Limitations and Significance (if any): Data gathered for this indicator is valid, reliable, and precise.</p> <p>Actions Taken or Planned to Address Data Limitations:</p> <p>Date of Future Data Quality Assessments: April 2005, 2006, 2007 and 2008.</p> <p>Procedures for Future Data Quality Assessments: Collection of U-Media partner media outlet news production.</p>
PLAN FOR DATA ANALYSIS, REVIEW, & REPORTING
<p>Data Analysis: Data will be analyzed in June/July of each project year by the U-Media project staff including Internews Ukraine, IREX and an analysis consultant.</p> <p>Presentation of Data: Data will be presented by September 1st of each project year in a Performance Report submitted by the U-Media project staff.</p> <p>Review of Data: Annually, in September.</p> <p>Reporting of Data: Annually, by September 31.</p>
OTHER NOTES
<p>Notes on Baselines/Targets: Project launch was October 2003 – baseline data was collected April/May 2004. Scores for Print and Broadcast are reported separately as it is not valid to combine the scores.</p> <p>Location of Data Storage: Internews Network retains all data and news production used for performance reporting purposes.</p>
THIS SHEET LAST UPDATED ON: 11/1/2006

ATTACHMENT D – Data Quality Assessments for AR Indicators

AR DATA QUALITY ASSESSMENT, conducted by Internews Network August 2006	
Based ADS quality standards	
Strategic Objective 3.0: Citizenry increasingly engaged in promoting their interests and rights for a more democratic, market oriented Ukraine.	
Intermediate Result 3.1: Increased availability of quality information produced by target outlets.	
INDICATOR: 3.1-A: The quality of news and information produced by target outlets has increased.	
CRITERIA FOR DATA QUALITY	ASSESSMENT
VALIDITY	Data collected for this indicator is reasonably valid. Industry professionals review videotapes of broadcast production and print copy against standard checklists.
RELIABILITY	Complete reliability cannot be achieved since this is a qualitative indicator. There is a potential lack of consistency, since the industry professionals rating news production can potentially change each year.
TIMELINESS	Data is collected annually and is current at the time of report.
INTEGRITY	As long as the review team is relatively constant and the constant checklists are used to measure news quality, the potential for error and subjectivity is minimized.
PRECISION	There are no issues relating to data precision that are not minimized by use of standard checklists and constant review team as much as possible.

AR DATA QUALITY ASSESSMENT, conducted by Internews Network August 2006	
Based ADS quality standards	
Strategic Objective 3.0: Citizenry increasingly engaged in promoting their interests and rights for a more democratic, market oriented Ukraine.	
Intermediate Result 3.1: Increased availability of quality information produced by target outlets.	
INDICATOR: 3.1-B: The quantity of news and information produced by target outlets has increased.	
CRITERIA FOR DATA QUALITY	ASSESSMENT
VALIDITY	Data collected for this indicator is valid. Videotapes of broadcast production and print copy are measured using a constant formula. The data can be readily verified.
RELIABILITY	The data is completely reliable. This is a quantitative indicator.
TIMELINESS	Data is collected annually and is current at the time of report.
INTEGRITY	The potential for data measurement error is minimal.
PRECISION	There are no issues relating to data precision.