

RETHINKING MEDIA DEVELOPMENT



A Report on the Media Map Project

By Mark Nelson, *World Bank Institute*
with Tara Susman-Peña, *Internews*

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ABOUT THE AUTHORS

Mark Nelson is lead specialist focusing on capacity development and aid effectiveness at the World Bank Institute (WBI). He has been involved in media development issues at the World Bank since 1996, when he helped launch a series of programs to support newly independent media in Central and Eastern Europe. Prior to working at WBI, Nelson spent more than a decade as a European diplomatic correspondent for the Wall Street Journal, based in Brussels, Berlin, and Paris. He covered the negotiations leading to the Maastricht Treaty, the fall of the Berlin Wall, the collapse of the Soviet Union and the war in Bosnia. From 1992 to 1993, while on leave from the Wall Street Journal, Nelson was a senior associate at the Carnegie Endowment for International Peace in Washington, where he co-directed a major study on U.S.-European relations and wrote extensively on the war in Bosnia-Herzegovina, among other subjects, for newspapers and scholarly journals.

Tara Susman-Peña is the director of research for Internews' Media Map Project. Before joining Internews in 2010, she worked in the audience insight and research department at NPR (National Public Radio), where she managed the online listener panel and qualitative research initiatives. Susman-Peña is a cultural anthropologist with experience in commercial market research focused on branding, product and service development, and communication strategy. Past clients have included companies from the media, technology, health, food, fashion, and automotive industries.

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While the conclusions reflected in the report are those of the authors, our analysis is based on the body of original research conducted for the Media Map Project (their names and work are detailed on page 3 of this paper). We are grateful to the researchers for the strong evidence base they have produced. We would also like to thank Craig Hammer and Deena Philage of the World Bank institute for their insightful feedback on the first draft.

CREDITS

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ABOUT THE MEDIA MAP PROJECT

The Media Map Project is a multifaceted two-year pilot research collaboration between Internews and the World Bank Institute, funded by the Bill & Melinda Gates Foundation. This report is a product of that research. The findings and conclusions contained within this report are those of the authors and do not necessarily reflect the positions or policies of the Bill & Melinda Gates Foundation, the World Bank or Internews.

The Media Map Project seeks to build a better understanding of the relationships between the media sector and economic development and governance. The research also examines donors' roles in supporting the media sector over time and provides an evidence base for their future decision-making about media support. Through research, public events, and the data made available on the project website for public use, the project aims to engage the development sector in greater understanding and exploration of the role of media and information in development. See www.MediaMapResource.org for more information.

The Media Map project was significantly strengthened and expanded by cooperation across a number of institutions. Work with the BBC Media Action (formerly BBC World Service Trust) and the Governance Network of the Development Action Committee of the Organization for Economic Cooperation and Development linked two of our country case studies, Peru and Mali, to broader work on domestic accountability. Both organizations helped bring media development into the aid effectiveness agenda, and lessons from aid effectiveness to our work on improving media development support. A group of masters' students from Columbia University produced a research paper on donor practices on Monitoring & Evaluation of their media development projects for a Capstone Workshop, while another group of masters' students tackled a range of research issues from gap analysis of the quantitative data, to political systems in Africa, to audience research analysis. The University of Cambridge conducted field research that made a Kenya case study possible, while an Annenberg COMPASS fellowship made possible the desk research of that case study. Urban Thought designed and built the website. The Jefferson Institute helped us develop a timeline of media development. The ABC of Australia funded an independent researcher to add a case study on Cambodia. Group M, The Wealth of Nations Index, and the Broadcasting Board of Governors all donated valuable data.

MEDIA MAP PROJECT TEAM

Mark Nelson, *World Bank Institute*

Tara Susman-Peña, *Internews*

Sanjukta Roy, *Internews and World Bank Institute*

Sankalpa Dashrath, *Internews*

SENIOR ADVISOR

Daniel Kaufmann, *Brookings Institution*

ADVISORY BOARD

Akin Jimoh, *Devcoms Network*

Becky Lentz, *Department of Art History and Communication Studies, McGill University*

Bella Mody, *Journalism and Mass Communication, University of Colorado*

Bettina Peters, *Global Forum for Media Development*

Bruce Girard, *Fundación Comunica*

Ethan Zuckerman, *Berkman Center for Internet & Society, Harvard University*

Fackson Banda, *UNESCO*

Gordana Jankovic, *Open Society Foundations*

James Deane, *BBC Media Action*

Leon Morse, *IREX*

Mark Koenig, *USAID*

Meg Gaydosik, *USAID*

Monroe Price, *Center for Global Communications Studies, Annenberg School for Communication, University of Pennsylvania*

Rana Sabbagh, *Arab Reporters for Investigative Journalism*

Roby Alampay, *InterAksyon.com, TV5*

Sasa Vucinic, *V Media Ventures*

Tasneem Ahmar, *Uks Media*

Tatiana Repkova, *Media Managers Club*

Ying Chan, *University of Hong Kong, Journalism and Media Studies Center*

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"Mapping Donor Decision Making on Media Development: An Overview of Current Monitoring and Evaluation Practice," Jason Alcorn, Amy Chen, Emma Gardner, and Hiro Matsumoto; Anya Schiffrin, Faculty Advisor, School of International and Public Affairs, Columbia University

"The Evaluation Imperative: Making the Case for Media as a Development Priority," Susan Abbott

LITERATURE REVIEWS AND BACKGROUND MATERIALS

"Overview Report: Measuring Media Development," Sanjukta Roy

"Review of Literature," Amelia Arsenault and Shawn Powers

"Review of Literature on Quantitative Data (matrix)," Sanjukta Roy

All papers will be available on the Media Map website, www.MediaMapResource.org. The website makes over 25 global datasets on the media sector publically accessible for exploration and download.

EXECUTIVE SUMMARY

No matter how you look at it, the effort to create strong and sustainable media in developing countries is making little progress over time. Fifty years of assistance by donors has yielded scattered patches of success, but too few countries are emerging with strong, independent and sustainable media institutions that can contribute to country growth and development. Of the \$129 billion that was spent by donors on international development in 2010, about 0.5% was specifically targeted at the media. And a closer look at the ways this approximately \$650 million was used yields a picture of haphazard and random approaches, poorly coordinated with broader reforms, and rarely led by the countries that are receiving assistance. In many developing countries, and particularly in the poorest ones, media development has been a slow and frustrating process. It is time to reexamine how media development is done.

This paper, which draws on a wide body of research produced under the two-year Media Map Project, looks at both the often unrecognized promise of media development and at some of the results of what donors have done. It argues for a fundamental change in the way that media development is approached. It examines some of the evidence assembled from seven country-level case studies, and from a variety of global indicators and data on the media sector. It analyzes both challenges and paradigms of success. It asks questions about what type of business models are appropriate at a time when all media is going through a massive change that threatens to upend the traditional way that the independent news media is financed. The paper draws three major conclusions and proposals for action that concern not only international donors, but developing country leaders and media development professionals:

Strengthening country leadership and ownership of media-development efforts: The international development community needs to spend less time training journalists and more time on efforts to build country level leadership for a strong and independent media as a key institution of development. This means longer-term programs, facilitating carefully planned and rigorous approaches to multi-stakeholder engagement, and South-South knowledge exchange led by local champions.

Integrating media reforms into countries' overall development agenda: Building broad consensus on the important role of the media is a job that will require concerted action not only by local governments, activists and opinion leaders but also donors and the major international organizations engaged in development. As shown by the successful cases, donors and partner countries need to work together to consider the media environment in governance and public sector reforms, in reforms of the business environment, and efforts to improve the judiciary and rule of law.

Expanding data, diagnostics and learning: Our work has also demonstrated how much we don't know about the media, particularly in the developing world. This lack of data and information about developing media markets is a significant barrier to building successful media enterprises, as well as an obstacle to donors and others who wish to support media development. New efforts should be made to expand data collection on the media in developing countries, and in particular, to help local media participants get access to data on audiences and advertising that are critical to building successful media enterprises.

INTRODUCTION

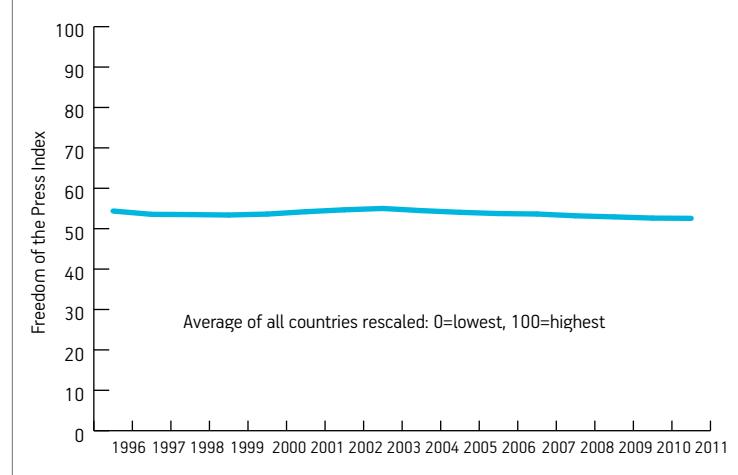
When it comes to suppressing people and maintaining power, dictators throughout the ages have learned that the media is crucial. Julius Caesar used the *Acta Diurna*, posted in the forum and other public places in ancient Rome, to inspire citizens with his military exploits. Stalin extended his grip on the Soviet Union not only through tight control on newspapers and other news media, but on films and the visual arts as well. More recently, Slobodan Milosevic in Serbia and perpetrators of the Rwandan genocide used the media to perpetrate highly effective terror. These and other dictators throughout history have deeply understood the transformational, multi-dimensional and sometimes devastating power of the media.

By contrast, more beneficent leaders of developing countries have been much slower to harness the potential of independent media to play a role in helping countries combat poverty, corruption and conflict. Even countries that have undertaken relatively ambitious governance and public sector reforms—Indonesia, Colombia, and Peru, for example, or the countries catapulted into a new world by the Arab Spring—have been slow to recognize a strengthened media sector as a major destination on the road ahead.

The media throughout much of the developing world is weak, often manipulated by partisan political or economic interests. Journalists rarely earn a living wage, and few media organizations manage to create true independence. Media freedoms, after making advances in Central and Eastern Europe after the fall of the Soviet Union in the early 1990s, have stagnated in the past decade, particularly in the poorest countries. At the global level, over the past 15 years, media freedoms have not advanced at all (see Fig. 1), producing a discouragingly flat line.

Even if many people accept that an independent, diverse and well-managed media can be an extraordinary force in building a well-governed and economically sustainable society, few countries have specifically targeted the media as one of the key institutions for overall development. National development plans or poverty reduction strategies rarely address in detail the policies or institutions needed at the country level to create a vibrant and sustainable media sector. And the subject of the media hardly ever comes up in the global discussions about

FIG. 1 NOT IMPROVING: PRESS FREEDOM IN THE WORLD¹



development policies and aid effectiveness. The word “media” does not appear even once in the eight-page Busan Outcome Document issued after the multi-year negotiations about global aid effectiveness concluded in South Korea in December 2011—despite a major push by global media organizations to be heard.

The case for media freedom and media development has been made by some of the world’s most prominent economists. Noble prizewinners Amartya Sen and Joseph Stiglitz have both

contributed to the abundance of evidence, along with many others. Sen pointed out that never in human history has there been a famine in a country with a free press and regular elections. Stiglitz outlined the critical role that information plays in the economy and the media's role in expanding the reach and reducing the costs of that information. Others have focused on its role in improving the performance of government by increasing accountability and exposing misuse of funds or the failure of government actions and policies. Paul Collier, writing about the poorest countries on earth in *The Bottom Billion*,² identified a free press as one of the few institutions or policies that might help wrench these countries out of poverty.

**FIG. 2 MEDIA ASSISTANCE, SELECTED DONORS, 2010
\$MILLIONS**

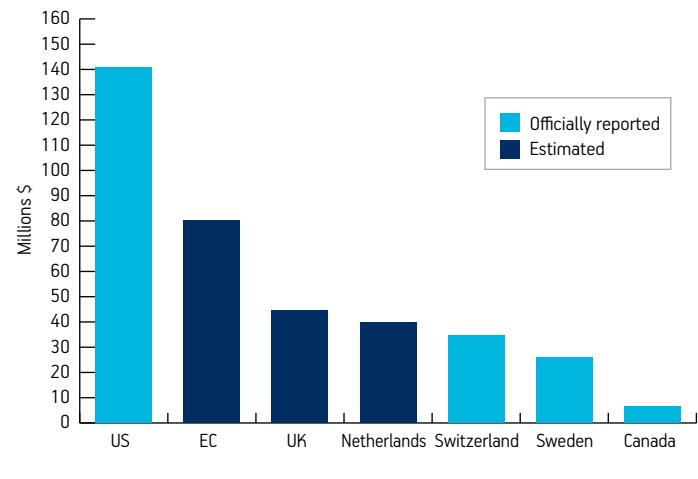
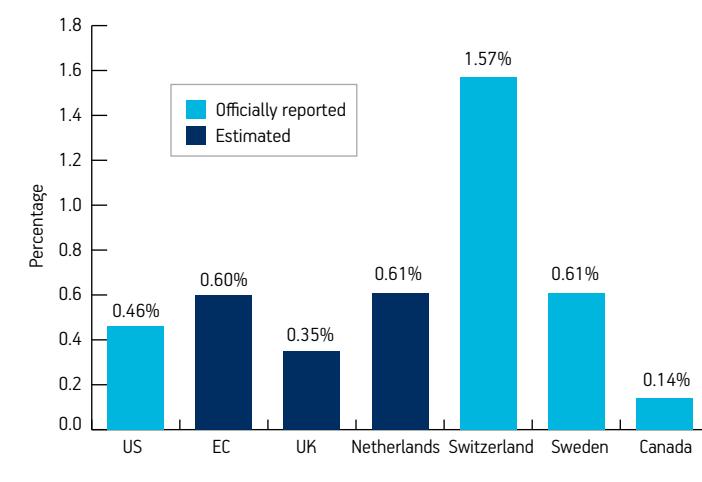


FIG. 3 MEDIA ASSISTANCE AS % OF TOTAL AID, 2010⁵



Of the \$129 billion that was spent by donors on international development in 2010, only about 0.5% of that was specifically targeted at the media, or about 50 cents for every \$100. Nevertheless, that adds up to \$645 million.³ And a closer look at the ways this money was used yields a picture of haphazard and random approaches, poorly coordinated with broader reforms, and rarely led by the countries that are receiving the assistance. Donors barely keep track of what they spend on media development, or how they spend it, and, judging by some of the methodologies used to address media weaknesses, learn little from past failures. No major donor or international development bank has instituted a systematic sector-level diagnostic process to determine the best approaches to media development in particular country contexts. Many decisions about investments in media development seem to be driven by political or foreign policy concerns—often using the media to get out donor-inspired messages—not because of the impact that the media might have on broader development.⁴

To be sure, external players have made major contributions to media development in a number of important ways, particularly in countries that are committed to overall reforms. The Center for International Media Assistance has contributed several important reports on this subject and has recently produced data that helps provide a better picture of how much donors are investing in media assistance (see Figs. 2-3). Donors and international NGOs have been working in the field of media development for at least 50 years, but especially over the last two decades since the fall of the Soviet Union. They have helped struggling media outlets to survive wars, aggressive governments and devastating business conditions. They have carried out training courses for journalists in basic newsroom skills, business and economics, and media ethics. They have supported better press laws and broadcast licensing regulations, and helped create media centers, local NGOs, associations, and professional networks. They have put together programs on internet security, mobile phones, social media, and media literacy. They have worked with government communicators to help improve how the government engages with the media and with the media to help them engage with government. Some of the seeds they have planted—like promoting transparency and access to information laws—have later blossomed into full-fledged, locally driven movements in countries like India, Mexico, and South Africa that have potentially enormous impact on development. But as we found through our examination of both global data and individual country studies, too much of this work has been done in a patchwork of one-off programs that fail to survive the departure of the donor.

The Media Map Project, a unique collaboration between In-

ternews and the World Bank Institute and funded by the Bill & Melinda Gates Foundation, set out to look at the question of what international donors are doing and the extent to which their approaches to media development and freedom have been adequate or effective. We have drawn on leading institutions and collaborators from around the world, along with individual scholars and activists from Africa, Asia and Latin America (see list of collaborators on p. 2-3). We have undertaken seven country case studies—Cambodia, Democratic Republic of Congo, Indonesia, Kenya, Mali, Peru and Ukraine—to examine the last two decades of media support at the country level. We have also assembled, made easily accessible and begun to analyze the most extensive catalogue of multi-country data on media with the hope that we can now begin to learn as much as possible from the existing evidence.

The findings of this project point in many ways to the vast amount of work that remains to be done, the gaps in our knowledge and the paucity of global data. The dearth of systematic tracking of spending or of evaluations of media development work means that few meaningful impact studies can be done. It also means that we are systematically failing to learn from our mistakes.

At the same time, the evidence gives us a treasure-trove of information about the nature and scope of outside interventions in the media sector. Freedom House has been tracking global media freedoms since 1989, with a quantitative index since 1994, and the Media Sustainability Index has begun to track—in 80 countries in Europe, Eurasia, the Middle East and Africa—the range of institutional factors that affect media de-

Our analysis of media development across the world shows serious shortcomings in one of the most important factors that lead to successful outcomes in development—country engagement and leadership in the process.

velopment. We were able to assemble a broad scenario of the amounts that donors are spending, and we looked at the constantly changing media environments across the world.

The overall picture is one of a lack of political commitment among developing countries to a robust domestic media sector, a lack of strategic focus among development agencies, and fragmented, poorly coordinated approaches among donors and external support networks to media development. It shows that even the most well-intentioned media development strategies are rarely integrated within broader policy reforms or coordinated within broader development plans. And despite many individual cases of successful media development interventions, our analysis shows serious shortcomings in one of the most important factors that lead to successful development outcomes—country engagement and leadership in the process. The evidence also suggests that despite not insignificant spending on media interventions, the international community has vastly underestimated the potential of the media as one of the catalytic sectors that could be unleashed to foster more successful overall development.

2

THE CASE FOR MEDIA DEVELOPMENT

At a time when the world is being transformed by mobile communications and social media, billions of people still live in countries where the production and distribution of vital information relies on a rickety, easily manipulated media infrastructure.

While internet cafes and mobile phones are spreading, the news business is in deep trouble. Producers of local and regional news, the people who go into towns and villages and investigate how decisions are made and how money is spent, are struggling to stay in business. Newspapers, which are typically the media that spend the most on original reporting and feed into other media like television and radio, are concentrated in the capitals, target the literate elite and are often subject to manipulation by politicians or partisan business interests. While social media has shown its power to foster revolution, it is only starting to be a tool that enables citizens to delve deeply into policy issues, constitutional debates or details about the best way to fix the public sector or health system.

In the poorest countries, such as those in Central Africa, radio, and particularly community radio, is the most important medium, providing people with critical information that helps improve their daily lives. As chronicled in the inspiring video documentary *Magic Radio*,⁶ the Central African country of Niger is just one of the “Bottom Billion” nations dotted with these weak but essential radio lifelines that inform, educate, hold governments accountable and provide the social glue that pulls a poverty-stricken people closer together.

Yet community radio stations remain as fragile as the nations that depend on them. Most scrape by in a hand-to-mouth existence that shows few signs of sustainability. Propped up by external donors, local contributors, and occasionally by a wealthy local business leader (who typically hopes to gain influence), these radio stations are many people’s main source for news and vital information. The newscast in one Benin-based community radio station that we visited consists of a selected read-out of the Cotonou newspaper headlines, translated throughout the day into a handful of local languages. From time to time, the entrepreneurial newscaster sends the station’s only reporter out on his motorbike, recorder in hand, to track down a local politician and quiz him on why the promised road is not

built or the community well is unrepaired. In these countries, news is made and delivered on a shoestring.

The entire system on which this information infrastructure depends is unambiguously fragile. Only a handful of the poorest countries have a single journalism school or program in a local university. The newspapers, on which many of the radio stations still rely for their local news, are typically struggling to survive. They are managed without even the most basic business data—the size of their own circulation base or the reach of their advertisements. They easily fall under the sway of anyone with money. The journalists are so poorly paid that many resort to extracting fees in exchange for positive stories (see Box A). Widespread training of journalists, one of the most frequent interventions of donor-funded programs, has not been enough to keep high-quality staff in the media, but rather created a steady flow of new personnel for banks, NGOs and other non-media organizations, where the pay is higher. Further, some 46 journalists were killed in the line of duty in 2011, all in developing or emerging economies.⁷ Needless to say, this is not the information infrastructure needed for constructing an end to poverty.

A stable and independent media could be an extraordinary force, not only in the poorest countries, but also in more promising developing countries that are struggling to create durable institutions that support economic and social development. Independent media helps generate discussions and debate about critical reforms, improving the quality of decisions and helping to strengthen consensus on the way forward. A free and independent media can draw attention to corruption, poor leadership and the guns and money that often impede change. And for donors, an independent media can help ensure that the money spent on overseas development assistance is used efficiently and follows good principles of aid effectiveness. “Media development aid creates the independent journalism that tells you whether all the other aid is being stolen,” Eric Newton of the Knight Founda-

tion said at the 2011 World Press Freedom Day celebrations in Washington, DC. "Just as freedom of expression supports all other freedom, media aid supports all other aid."

The World Bank and a growing list of donors have recently committed to strengthening transparency in their development work, releasing more information about their projects and programs and giving outsiders free access to the data about development. The World Bank not only opened up 50 years of development data, but has now completed the process of mapping its entire project portfolio on interactive geo-coded maps, so that citizens can look at their locality, click on data points and see the money that is supposed to be spent on their local development. Such transparency is an important building block for a sustainable media, which can help sift through the mountains of data and draw attention to major issues in ways that citizens can understand.

Yet the media in the developing world today too often fails to provide that sort of service to its public, and is often too weak to play a constructive role, or is controlled outright by the guys with guns and money. The incentives in the system are skewed to create a media for developing countries that is too often highly partisan, existing to support a particular economic, political or individual cause, rather than to serve readers or listeners.

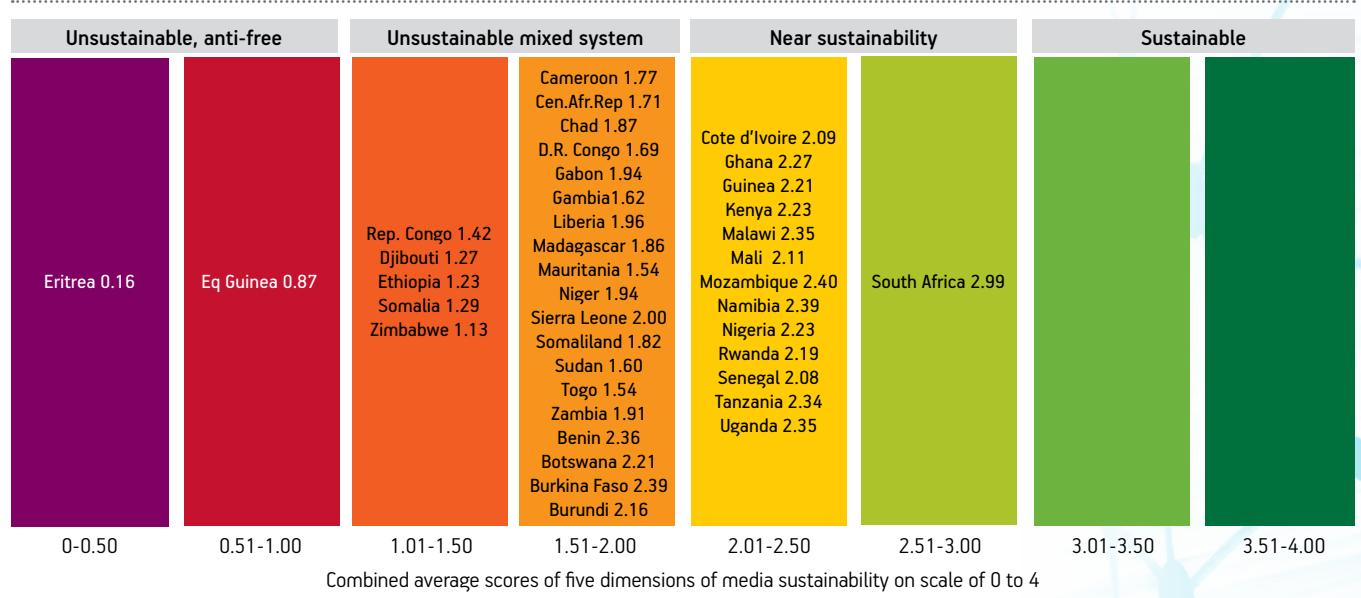
The Media Sustainability Index, which has begun to track the progress in media systems in critical developing areas of the world, shows the spotty progress towards creating effective media environments. In Africa, for example, looking at the combined scores from five overall dimensions of media sustainability—free speech, professional journalism, plurality of news sources, business management, and supporting institu-

BOX A. HOW JOURNALISTS SURVIVE IN THE DRC⁸

In the Democratic Republic of the Congo, the practice of *coupage* ("taking a cut") has turned journalists into mercenaries, offering coverage only to those who are willing to pay. Congolese journalist Didier Kébongo writes: "The journalists from the Congolese media pay themselves by producing information financed by their sources." Every journalist has a price, set by the market: \$10 to \$20 for a newspaper reporter, \$20 to \$30 for a radio journalist and \$50 to \$200 for coverage by a TV team (to be distributed among the journalist, cameraman, sound engineer and technician). These fees come on top of other expenses directly paid to the media managers for broadcasting favorable news. Interviewed for this project, the chief editor of a big newspaper in Kinshasa put it this way: "How can I refuse to sign and publish a piece drafted and brought to me by a political party when publishing that piece can bring me \$300, at the exact moment when my landlord threatens to throw me out and when my children have been expelled from school for not having paid school fees?"

tions—the MSI shows that most of the 40 nations in Africa that are covered by the index remain well below sustainability, with the lowest scores on business management and professional journalism. While such measures are inexact and intended to mainly show overall trends, they do suggest the great scale of the challenges that face the media sector in much of the developing world.

FIG. 4 MEDIA SUSTAINABILITY INDEX FOR AFRICA, 2009.⁹



3

HOW DONORS CONTRIBUTE TO MEDIA DEVELOPMENT

The promise of media development has nonetheless been recognized and has contributed to development in a number of countries. It was seen clearly in the early days of transition in Central and Eastern Europe in the 1990s, when a group of countries moved from centrally planned statist economic systems to market-based systems. It was here that the donors and international media organizations pulled together and provided a necessary boost, and they got much of it right.

Countries like Poland closed down wheezing iron works and replaced them with highly competitive media companies, covering a breathtaking range of opinions and topics. From their newspapers and news broadcasts, the Poles learned what to do with the newfangled shares of privatized enterprises that arrived in the mail, representing their part of state-owned entities. They found the stock listings in new business sections of newspapers like *Rzeczpospolita*, which transformed itself from a communist mouthpiece into a highly respected and independent media organization. Donors and international media organizations supported this country-led process with effective and fairly well-coordinated action, ranging from policy advice to training in economics for a new generation of journalists and managers. *Rzeczpospolita*'s dramatic transformation reached a pinnacle in 2006 when it and Britain's *The Guardian* were voted as the best-designed newspapers in the world among 389 entries from 44 countries.¹⁰

Several things characterized this and other successful media outcomes in Central Europe. First, donors lined up behind country-driven change processes and took a systematic approach to overall governance and economic reforms, often guided by the requirements of European Union membership. In Poland, the first non-communist prime minister after World War II, Tadeusz Mazowiecki, announced unambiguously that the government would no longer own or control the media. While this created an immediate crisis for many existing media companies, it meant that a new generation of managers knew they had to act quickly and decisively to survive. They sought investors who could bring in the technology and training necessary to make the transition. Donors, the World Bank, and organizations

like Internews and the Open Society Institute among others also stepped in with a variety of interventions, from training to the highly successful loan programs of the Media Development Loan Fund. News organizations sent their most valued staff to training. Journalists responded eagerly to what they learned and immediately tested it in their newsrooms.

Throughout the transition, the World Bank and the European Union, advising Poland, the Czech Republic and other countries in the region, coupled guidance about public sector reforms with advice that supported the creation of institutions needed for a workable media sector, including help on transparency, access to information, monopoly regulations, broad-

While there were plenty of controversies—particularly surrounding the high level of foreign investment in the media—the overall result in much of Central Europe was significant public and private investment and an increasingly diverse and independent media sector that contributed to the emergence of other pluralistic and democratic institutions of economic and political governance.

cast spectra and other public sector “rules of the game.” While there were plenty of controversies—particularly surrounding the high level of foreign investment in the media—the overall result in much of Central Europe was significant public and private investment and an increasingly diverse and independent media sector that contributed to the emergence of other pluralistic and democratic institutions of economic and political governance.

As we found in the seven countries where we looked in detail at donor action over the last two decades, the focus and coordination that was seen in Central Europe is today quite rare (see Boxes B and C on Ukraine and Cambodia, for illustrative examples). International Media Support, the media donor coordinating platform of two dozen donors, said in its most recent report that media support today is anything but coordinated: “The heterogeneity of intentions by donors and implementing

organizations in the field of media has resulted in a variety of priorities and outputs, some without any sustainable or long-term perspective in place and without any anchor in the local medias’ agenda for development.”¹¹

Indeed, countries such as India that have been able to rely less on donors have probably made more sustainable progress. India has received relatively modest donor support over the years, but has maintained a strong focus on the enabling environment, and recently began a slow but progressive opening to foreign investors. India’s changes have been largely country-led and driven by strong civil society movements. Its 2005 right to information law is one of the world’s most ambitious, and has helped bolster a media industry that continues to expand at a rate faster than the Indian economy as a whole. Over the coming five years, India is projected to be one of the fastest-growing media and advertising markets in the world.¹²

4

DEVELOPING MEDIA CAPACITY

Unfortunately, most of the rest of the developing world has proved to be much more resistant to change than Poland in the 1990s or India in the last decade. In many developing countries, and particularly in the poorest ones, media development has been a slow and frustrating process. It is time to reexamine how media development is done. Inasmuch as media can help ensure the effectiveness of aid from donors, the field of media development can learn from the ongoing international debate on the most effective ways for outside agencies to support development. One facet of that debate, on so-called capacity development, is particularly relevant.

Capacity development is a broad concept that refers to “the ability of people, organizations and society as a whole to manage their affairs successfully.”¹³ It has evolved over the past years from a narrow preoccupation with training and technical assistance to include an understanding of a more multifaceted and complex process of change that affects not only individuals, but also organizations and broader social institutions like laws and policies. This broader understanding includes the enabling environment in which people and organizations operate, as well as the formal and informal norms and values that affect behaviors. The concept is also used to describe efforts to improve the performance and functioning of highly complex systems within countries and organizations. For the media, the enabling environment consists of not only the political will to build an open society and rigorous independent media institutions, but more specific laws on free speech, broadcasting regulations, and other such measures. In well-functioning media systems, supportive behaviors include a strong demand from the public for high-quality information, commitment by media to providing truthful, transparently verified information, a strong drive to defend the public interest, and social tolerance for a diversity of views.

One of the most important findings of capacity development analysis over the past few decades is instructive for media development: Supply-driven training programs and technical assistance rarely build capacity successfully.¹⁴ Capacity development requires an approach that is country-led and driven by local people who are determined to make change happen in

their local environment. While outsiders can help facilitate this process of change, the international development community has consistently overestimated its ability to build capacity in the absence of national commitment, local ownership and reasonably good governance.¹⁴ And nowhere has this overestimation been more evident than in the case of the media, which as we have seen has hardly advanced on a global basis when measured by press freedom scores.

One way to illustrate this understanding of capacity development is shown in Fig. 5 below, with the enabling environment on the Y-axis, and skills and resources on the X-axis. Moving from point A to point B might be considered capacity development, whereas moving along either the X-axis or the Y-axis alone is insufficient.

Many media interventions are focused mainly on the horizontal X-axis and most commonly consist of journalist training programs. In the seven case studies that we undertook as part of Media Map, journalist training programs were by far the most common intervention. Journalist training can be highly effective in an environment where journalists can practice their trade freely and where their managers are eager to improve the quality of their products. But in the absence of those conditions, training may help some individual journalists (often to find better paying jobs in other fields), but it rarely results in sustainable outcomes for the media sector as a whole. One recent study suggested that journalist training as a component of USAID-funded media development work has declined from over 80% in the 1990s to about 50% today.¹⁶ Though donor

BOX B. LESSONS FROM A UN RADIO PROJECT IN CAMBODIA

One of the major successes of the United Nations Transitional Authority in Cambodia, a \$3 million project called Radio UNTAC, is widely perceived to have been a success, but was abandoned before fulfilling its potential. Coupled with efforts to address the enabling environment, the project appeared to be a model that few others seem to attain. UNTAC addressed the media environment with media guidelines aimed at lifting legal restrictions and encouraging the operation of a free and responsible press, and launched a media association of all Cambodian journalists. Radio UNTAC began broadcasting in November 1992, with programs on voter registration and elections, human rights, and other aspects of the UNTAC mandate. The program distributed 346,000 radios. During the electoral campaign, broadcasts particularly emphasized ballot secrecy. In 1993, Radio UNTAC launched a live broadcasting news and features service that ran 15 hours a day.

UNTAC used opinion polls to determine the impact of the broadcasting and analyzed other Cambodian media, particularly covering the public positions of political parties, and Radio UNTAC broadcasting worked to correct misinformation and gaps in understanding in a politically neutral and balanced manner.

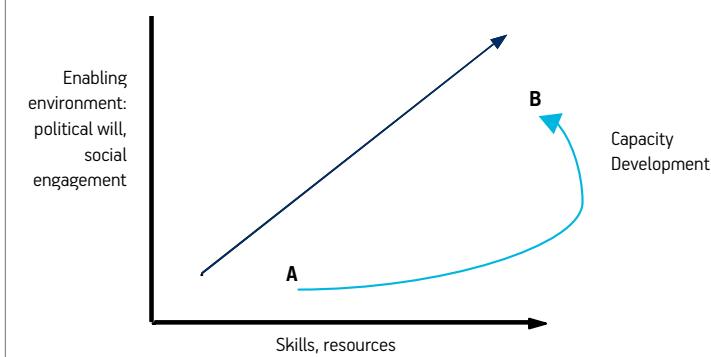
Radio UNTAC was widely perceived to be one of the successes of the UNTAC mission, and it contributed to a 90 percent voter turnout partly due to convincing people their vote was secret. Following the vote, however, Radio UNTAC closed down, and journalists returned to practicing partisan reporting. The legacy of Radio UNTAC remains largely in the impact that it had on individuals. For example, the NGO Equal Access reports that about two-thirds of its technicians are former Radio UNTAC staff. With hindsight, it appears that UNTAC missed a key window of opportunity in Cambodian history to support and maintain a neutral, balanced source of information that could have had a much broader, longer-term impact.

sponsored media projects over the past two decades have become increasingly attuned to the problems in the enabling environment, many of the activities still come down to training events as the key instrument of intervention, with few other well-funded efforts to affect the enabling factors for the media sector overall. The key message that comes from this analysis is that media development cannot be undertaken in isolation, and efforts to address political will and the supporting environment must be done simultaneously with the efforts to increase skills and resources to ensure that those new resources are put to effective use.

Attempts to affect the enabling environment (on the Y-axis) are much less common because they are more costly, time-consuming and complicated. Such interventions generally require a longer and more comprehensive engagement not only with the media, but also with a broader cross-section of political leaders, civil society institutions, and other stakeholders who affect the environment in which the media operates. Making change in those systems must be led by committed individuals and organizations within the country. Donors need to coordinate their efforts and seek local champions to lead the process. Outsiders can still play a key role by helping to facilitate this process, using their convening power to engage the

government, and through South-South knowledge exchange, bringing local players in contact with peers from other countries that have undergone similar reforms. Learning programs that focus on this broader process of change, including participants from all the key sectors, can also be helpful, as can professional networks and associations that help set standards and build professional competencies.¹⁷

FIG. 5 CAPACITY DEVELOPMENT = SKILLS + WILL, THOUGH THE PATH IS RARELY LINEAR



One of the key problems in media development is the weak or nonexistent analysis done before and after interventions take place. Work carried out for this report shows that few donors actually conduct systematic diagnostics to understand the broader underlying problems that affect the media. So they intervene, with all good intentions, and usually try to fix the most obvious problem—in the case of media, that is the poor journalism that emerges from weak media organizations. And while donors have increased the use of monitoring and evaluation, they have not used the findings from these studies to

improve the design of future interventions. Through interviews with media development donors, experts, and implementers, we examined major donor perspectives on monitoring and evaluation (M&E) and how donor agencies incorporate evaluations into their funding decisions, if at all. We found that nearly 80 percent of interviewees describe an increased emphasis on M&E over the past 20 years. At the same time, however, we found little evidence that M&E was changing the landscape of funding decisions, other than the now ubiquitous requirement to provide some sort of M&E component to project proposals.

BOX C. FAILING TO STAY THE COURSE IN UKRAINE

Although multiple Ukrainian media outlets existed in the days of Soviet Union, local media functioned largely as a channel for communicating decisions of the regional and local governments, and, like all Soviet media, it was controlled from the top down. Thus, when the media became independent after 1991, many newspapers and magazines struggled and failed to become economically and politically independent, and then vanished. Many stopped functioning simply because they lacked experienced managers and journalists.

Donors stepped in at a critical time and gave much needed support during the transition. They helped create respected freedom of speech movements and “media watch” organizations such as Telekritika. They even established several well-regarded media outlets, such as STB TV, that remain successful to this day. STB TV is widely recognized as one of the most balanced TV channels in the country, an example of a donor-funded project that managed to build enough capacity to later become an independent business while retaining its high quality and independence.

During the last few years, however, donor support for media development in Ukraine has significantly decreased, becoming less focused and effective. The lack of careful diagnostics of the media environment led donors to support initiatives that later failed because of inappropriate legal foundations or other such issues. For example, by establishing numerous media outlets as non-governmental organizations—which under Ukrainian law cannot generate income—the donors virtually assured that many of these initiatives would collapse when the donors pulled out. Under local law, these NGOs cannot sell their seminars, training services, expertise or books. Donor support is therefore the main source of income for these organizations.

As a result, many of the NGO organizations that were active in Ukraine in the beginning of 2000s had practically disappeared from the scene by the end of the decade. Of the surviving organizations, even those that the donors identify as having strong organizational structures identified their main challenge as a lack of well-prepared business media managers and business personnel.

TOO HOT TO TOUCH? WHY HAVEN'T DONORS DONE MORE?

Support for media development presents a number of conundrums for the international community. If the media is primarily a private sector activity, shouldn't private investors take care of it? What is the role of the donors, anyway?

Because much of the media in developing countries has failed to find an economically sustainable and independent business model, it is often financed and controlled by partisan economic or political interests. Even independently financed media is often seen as purely oppositional and biased against the power structure. Leaders of weak regimes and fragile states, many of which are struggling to overcome conflict or deep-seated political divisions, argue that allowing dissent in the media just makes things worse. Intervening to support such media is complex and liable to be seen as interfering in politics. Many governments of developing countries resist the efforts of local advocates as well as donors and international organizations to intervene in the media sector; others allow it, but do little to engage constructively to help build a broader movement that would improve outcomes.

The news media operates within an intricate web of government and non-governmental systems that require both private initiative and a well-functioning public sector. To foster a media that serves the interests of society, countries need broadly accepted and well-understood rules of the game—on the freedom to speak, publish and distribute; on fair competition and access to broadcast spectra, for example; or rules to ensure that all citizens have access to information. It also helps to have some degree of consensus on the role and scope of government power.

The proper functioning of these systems also arguably requires values within the media itself such as commitment to public service and to truth-telling, and transparency and good ethics in its own behavior, especially for media that operate as profit-making enterprises. Some of these practices and behaviors may take many years to cultivate and may emerge at different times depending on the context. But it seems clear that the societal and economic demand for accurate information,

allowed to flourish, can be a powerful driver of an effective and sustainable media.

Despite the complexity of the media sector, a growing chorus of voices has started to build a case for supporting media as a critical component of development. Former World Bank President James Wolfensohn raised the profile of media development work, arguing that it was a vital economic and development issue. "A free press not only serves as an outlet for expression, but it also provides a source of accountability, a vehicle for civic participation, and a check on official corruption. A free press also helps build stronger and more effective institutions," Wolfensohn said in remarks to mark World Press Freedom Day in 2004.¹⁸

Since that time, the World Bank has supported the development of independent media through a growing array of instruments and interventions, and countries are increasingly open to such work. Much could be done to integrate media development more centrally in country-led development programs. Even though the Bank's charter prevents it from intervening in politics, the growing understanding of the media as a critical institution for a working economic system has left an opening for the Bank to use both lending and non-lending instruments, technical assistance and other tools. Various types of media work have taken place for at least 15 years, though at a relatively small scale. The World Bank Institute, the learning and capacity development arm of the World Bank, is integrating its work on media with its overall support to open and transparent governance, recognizing that one of the key issues for success is societal engagement and local ownership of development programs.

A more deliberate and effective approach by the World Bank would also include rigorous, country-led diagnostics of the overall governance and media environments, as well as mea-

BOX D. SIGNS OF PROGRESS IN CAMBODIA?

In Cambodia, as in China and certain other Asian nations, the road to an independent media has been bumpy. Yet efforts supported by the Australian aid agency AusAID are helping citizens gain access to information and hold local authorities to account. In Battambang, we observed a live radio talkback program that regularly featured local officials and NGO employees discussing a topic of daily life relevant to the local community. Despite Cambodians' cultural reticence to question authority, they participate actively in these talkback shows, as callers are assured anonymity, and the radio station has built community trust over time. During our visit, calls came in to one of two mobile phones that the station used to field calls. The station then called participants back so that they would not have to pay for the call. The topic of the day was gang activity, and a local police officer participated on the show. He gave his own mobile phone number out on the air, and as he left the recording studio, he was already answering calls from concerned citizens.

sures to ensure transparency and effective media institutions as part of all public sector reform programs. This approach could include interventions ranging from South-South learning and support to regional and global media advocacy networks to investments in the news media by the Bank's private sector arm, the International Finance Cooperation. The Bank could also use its convening power to bring governments and other players to the table to help ensure better leadership and co-ordination.

The so-called Asian model presents a slightly different problem for outside donors and supporters of media development. A number of Asian countries like Singapore and China have maintained tightly controlled media sectors, and argue that the so-called Western model of free speech is not appropriate for their countries. They have allowed a media sector to evolve with certain limits on the level of open criticism of the government,

while at the same time resolutely resisting external influence in the sector. Modern Singapore's founding father, Lee Kwan Yew, devotes an entire chapter in his book on the Singapore story to his attitude towards the media, and particularly to the restrictions he placed on foreign media circulating in Singapore. He argued for the right to maintain government secrets and to prevent the media from publishing "irresponsible or biased" reports. What he called the "U.S. model" was not valid for his country or other parts of Asia, he said. "A partisan press helped Filipino politicians to flood the marketplace of ideas with junk," he wrote, "and confused and befuddled the people so that they could not see what their vital interests were in a developing country."¹⁹

China has adopted a similar stance, though the recent history of the media in China suggests a gradual and selective opening of the sector over time. At number 184 out of 196 countries, China ranks near the bottom in Freedom House's 2011 media freedom list, and censorship of the internet and imprisonment of journalists continues there. At the same time, journalists and scholars say the Chinese media is increasingly allowed to report on certain subjects such as business activity and even corruption of local—though not national—authorities. The media sector has also been undergoing a process of reform, commercialization, competition and massive investment. And China is one of the countries most likely to see strong growth in its advertising market over the coming decade (see Fig. 6, below), creating fuel for a competitive if not exactly independent media sector.²⁰

Overall, the so-called Asian model does little to contradict the value of high-quality information for a developing society. This model may suggest a variety of pathways and rhythms to reach an ideal result, but Chinese analysts seem to agree that the country will have to continue progressively opening its media sector for China to maintain its economic growth. In the meantime, much Chinese commentary on the media industry has focused on the shortcomings of the "Western" media, which it sees as controlled by a small number of overly powerful tycoons, and hardly a model to imitate. "Isn't it surprising the almighty media in the U.S. didn't get wind of the global financial crisis, created by greedy tycoons and their executives, let alone suggest precautionary measures?" the *China Daily* wrote in December 2011.²¹

A QUESTION OF BUSINESS MODELS

It is not just the *China Daily* that is unimpressed with many of the so-called “models” for a free and independent media. Indeed, the media in the developed world is going through wrenching changes, along with the virtual collapse of the dominant funding approach that was used by most major media organizations. For most of the 20th century, independent media organizations grew by selling advertising and subscriptions. This revenue allowed the media companies to invest in independent news gathering, reporting and investigative journalism. Because that revenue was spread over a variety of advertisers, no one company was able to overly influence the news gathering process. While the system was never perfect, many news organizations managed to build successful businesses, editorially independent from funding sources.

With the advent of the internet, however, and growing concentration of the media in a relatively small number of giant corporations, that model began to crumble. Most news organizations relied on their existing funding model to make their highly valuable content freely available on their websites, helping to propel the likes of Google and Yahoo, which thrived on the free content, all the while taking away advertising from the newspapers and other media that were producing that content. Today, as even more advertising moves to internet search engines and mobile devices, many media market analysts predict the eventual collapse of the advertising-supported news gathering model. The *New York Times* and the *Wall Street Journal* now both require regular online users to pay subscription fees, but other less globally known organizations have resisted such fees, fearing that charging users will drive them away. While it seems likely that the internet and mobile devices will become the delivery method of choice for most media, it remains to be seen how the news gathering function will be financed.

Such problems in major Western news organizations have raised questions about what kind of business models donors should be supporting in developing countries. Will advertising revenues still provide a path for the growth of strong, independent media? Or will the news media need to be supported through government or other types of subsidies? Developed countries have managed to find ways to subsidize high-quality media systems—the BBC and many other public news broadcasters in Europe as well as National Public Radio in the U.S.

BOX E. A SEARCH FOR NEW BUSINESS MODELS

A flurry of policy reports have recently explored different business models for media in developing markets, and analyzed what donors have done.

One report found “a consistent mismatch between the needs of media in emerging and developing markets and the type of assistance they receive, suggesting that the media assistance provided to these countries over the past two years was in fact better suited for more advanced economies. Development strategies need to pay closer attention to country and regional indicators, as well as local perspectives and knowledge. One major requirement for achieving press freedom and development goals may well be promoting a sophisticated understanding of local markets and the development of specific media business skills.” —Anne Nelson et al, *Financially Viable Media in Emerging and Developing Markets*, WAN-IFRA, Paris, May 2011, p. 7

“No one business model can be expected to work across the vast spectrum of cultures, countries, and companies. In even the smallest, poorest, and most marginalized areas, the ability to think through new business models and create revenue streams—some of which will certainly still be based on advertising and subscriptions—is vital to the success of independent news media.” —Michelle J. Foster, “Matching the market and the model: The business of independent news media,” CIMA, Washington, D.C., August 2011, p. 13

survive with a combination of public and private funding. But it is unclear whether such approaches will work well in developing countries, which rarely have the institutional independence to resist the pressure that usually comes with government money.²²

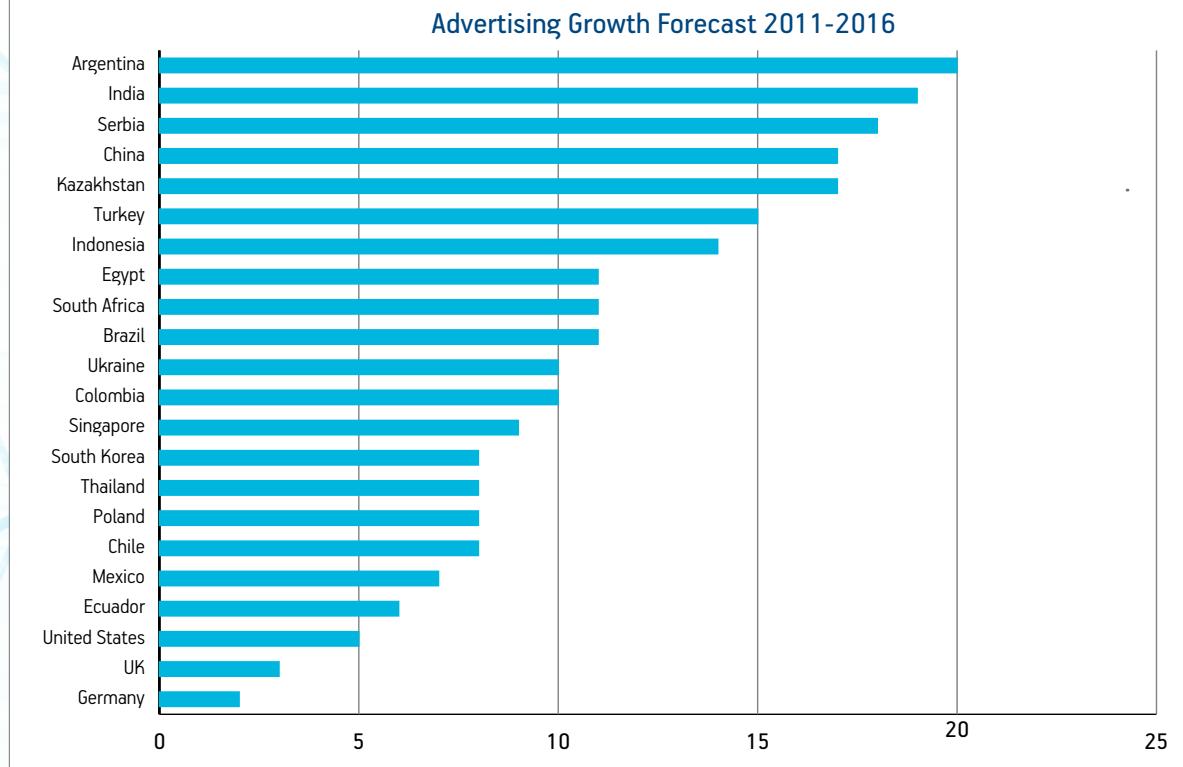
Our work suggests that developing country media still have significant room for growth by increasing advertising to become a major part of the revenue mix. Advertising is growing rapidly in many emerging market economies and is projected to expand even more quickly over the coming five years (see Fig. 6). While new platforms such as the internet and mobile phones are poised to capture a big piece of this growth, Magnaglobal and other forecasting firms see the increase in traditional news media advertising—already strong in China, India, the Middle East and much of Latin America—continuing into the near future.

Some donors are also supporting hybrid models in the hope that it will spur innovation. That trend, along with market-driven experimentation, suggests that new independent media business

models will evolve. Among the solutions seen in one recent review of new models were investigative journalism centers funded by donors; online media with outside investment and debt financing; and experimental cell phone-based reporting trying new fee-based models.²³ Non-profit investigative reporting organizations like ProPublica,²⁴ and jointly financed reporting ventures where two or more organizations pool resources to undertake costly investigations, may also play an important role in the future of the news media.

Such trends make it all the more important for developing countries to improve the enabling environment for independent media—both the formal laws and the everyday practices by media practitioners—so that emerging media can stay on top of the continuing evolution, particularly as new business models emerge. The developments also argue for South-South exchanges so that innovations in one part of the world can help inform practitioners in other parts of the world who are facing similar challenges.

FIG. 6 FIVE-YEAR ADVERTISING GROWTH FORECAST IN PERCENT FROM ALL SOURCES INCLUDING INTERNET, BROADCAST, NEWSPAPERS AND OTHER.²⁵



CONCLUSION: THREE AREAS FOR COLLECTIVE ACTION

The findings of the Media Map Project suggest a number of ways that the international development community might obtain better results from media development, helping to realize the full potential that media offers to help countries combat poverty, poor governance and corruption.

Some of the conclusions apply to developing countries and local activists, since it is they who will need to take the lead in building media systems that work in their context. Other recommendations apply to international donors, the international organizations that fund media development and the international media NGOs that implement these projects. Still others pertain to media advocacy groups, who have an important role in raising awareness and helping to spread lessons about successful media development activities around the world. Overall, however, all of these conclusions require collective action. Indeed, it is one of the key findings of this work that a lack of collective action is at the heart of disappointing progress in media development.

Country leadership and ownership

Few countries have successfully implemented major reforms without significant national leadership and broad-based support from citizens, parliament, the private sector and other important actors in society. Many developing countries need a more open and sustained debate about how a successful media could help them achieve their development objectives through improved flow of information, stronger accountability and exposure of corruption. Most importantly, generating a discussion about the role of the media is the key to building ownership and responsibility for the necessary policies and to ensure that countries get the high-quality media they deserve.

South African President Jacob Zuma, who has not always enjoyed an easy relationship with media, nonetheless has in one aspect followed in the footsteps of modern South Africa's founding father, Nelson Mandela, who helped lay the foundations for a strong and free media. Speaking to the National Editors Forum in 2009, President Zuma said he supported a free, but responsible media. "Today we look to these journalists

and to the media in general as a vital partner in strengthening our democracy and promoting the rights for which our people fought....As a country, we need journalists who are dedicated to their craft and to their audience. We seek reporting that is credible and honest and informative. We seek comment and analysis that challenges us and provides fresh insight into our world and the challenges we face. This is a challenge that is seemingly difficult in an ever-changing world, and in an industry that is undergoing major changes." The same National Editors Forum is now calling on President Zuma to stop the Protection of State Information Bill, which was passed by parliament in November 2011 and seen as a major setback to South Africa's previous leadership on transparency and governance issues.

Outsiders have paid too little attention to the need for the local public to take ownership of the process of media development, often assuming they can push countries to improve their media even when there is no domestic demand for change. This helps reinforce the belief in many countries that the media is by definition part of the political opposition, rather than a critical building block of a sustainable society. Countries certainly need media that can criticize government and decision-makers, but they also need media that can provide informed discussion and even help build consensus for reforms.

For independent media to thrive, such consensus must be developed on policy matters including access to information, transparency and the value of airing a diversity of views. This shared understanding can lay a firmer foundation for a culture of truth-telling and fact-driven policymaking, in turn creating the demand for high-quality media. A strong national consensus on media can also help set the standards under which the media itself operate, creating competition for quality information, rather than sensationalism, rumors and other media practices that flourish when the media is weak or manipulated by its paymasters. Helping citizens understand what types of in-



"Today we look to these journalists and to the media in general as a vital partner in strengthening our democracy and promoting the rights for which our people fought.... As a country, we need journalists who are dedicated to their craft and to their audience. We seek reporting that is credible and honest and informative. We seek comment and analysis that challenges us and provides fresh insight into our world and the challenges we face. This is a challenge that is seemingly difficult in an ever-changing world, and in an industry that is undergoing major changes."

—South African President Jacob Zuma, 2009.

formation should be at their disposal could create demand for quality coverage of government, the economy and the private sector, and would help educate the public about the choices they have to make to achieve sustainable development. In turn, growing citizen participation in the news-gathering and distribution process through social media can also enhance the quality and relevance of the news and information available to the public.

Integrating media reforms into countries' overall development agendas

Building broad consensus on the important role of the media will require concerted action not only by local governments, activists and opinion leaders, but also donors and major international organizations like the World Bank. The success of media development in Central Europe and the progress that is being made in some countries in Africa, Latin America and elsewhere, has flowed from donors and partner countries working together. In reforms of the public sector, the judiciary and rule of law, and in implementing legislative instruments like access to information laws as well as fair competition and broadcasting regulations, it is vital to coordinate and consider how this will impact the media sector.

There is need for a more comprehensive approach that involves not just journalists, but media managers and key people outside the media. These include government officials and leaders, parliamentarians, and leaders of non-governmental organizations. Networks, particularly professional networks that help journalists and other practitioners gain exposure to professionals from other countries, can be a powerful channel for building stronger commitment to reforms. Media experts in Ukraine have frequently looked to Poland as a model for how

they could reform their system, and sought Polish expertise in building consensus for reforms. South Africa, Chile, India and other successful reformers have a critical role to play not only in continuing to strengthen their own media environments, but also in setting an example and sharing knowledge with other emerging nations.

While integrating into the overall development agenda, donors need to think carefully about the incentives they use and practices they encourage. In particular, it is important that donors not confuse development communications with media development. Communicating on key aspects of development can be a vital, even life-saving activity, helping people to learn about important development issues such as health or critical economic issues. Disseminating messages on how to prevent HIV infections, for example, or the health benefit of simple hand washing, have been staples of radio programs in developing countries for many years and have proven highly effective in helping people learn new approaches to daily routines and change behaviors.²⁶

At the same time, trying to foster "news" coverage of favorite donor themes through direct payments, or even offering expenses-paid training events to journalists, is a less virtuous business. Many donors pay per-diems for journalists to come to training events, ensuring strong attendance, but doing little to foster ideal ethical and independent practices, and unwittingly reinforcing expectations that reporters should be paid for their stories. "Some donors are as bad as our politicians," said one journalist who attended a World Bank anti-corruption workshop in Senegal in 2009. He said the top politicians in his West African country used payments, political pressure and even threats to get journalists to stay in line and give positive coverage. Supporting development of a media sector that more closely serves the public interest can foster coverage of critical subjects of interest to readers and listeners, and help instill more reputable practices.

As seen in Central Europe, a country with a commitment to broad-based reform generates demand for verifiable information. As countries generate new economic activity, new businesses enter the marketplace, seeking information about fresh opportunities, changing laws and regulations and the effects of new policies. Citizens, businesspeople and investors turn to the media to learn about these changes; media that are able to provide credible information can begin to thrive. In such a scenario, donor action to support the media can be especially effective, and simple training programs may be all that is needed. Without such demand, however, donors should diagnose the local media environment to determine most effective interventions, carefully abiding by a “do-no-harm” philosophy, and seeking approaches that can help stimulate demand.

At the Fourth High Level Forum on Aid Effectiveness that concluded in December 2011 in Busan, South Korea, 80 developed and developing countries agreed to a New Global Partnership on Development. A major aim of that partnership is to shift the focus of development activities to the country level, and to support country-led “compacts” that would focus on local priorities. Even though media got short shrift in the proceedings, media development activists will have an opportunity to make the case for media as a key focus of country-led development. The aim should not be to fund media enterprises directly but to build the political, institutional, legal and business foundations for a professional and vigorous media.

Expanding Data, Diagnostics and Learning

While gathering and analyzing the best available data on media development, our work has also demonstrated how much we don’t know about the media, particularly in the developing world. This lack of data and information about emerging and especially developing media markets is a significant barrier to building successful media enterprises and supporting media development and reforms.

Much of the literature on media development has used press freedom as the proxy for progress in media development. While press freedom may very well be the key indicator for a nation’s commitment to the values of a pluralistic, open society, it may not always be the best indicator for tracking and measuring change in the media sector, and is just one piece of a complex system.

For countries making the transition from a highly controlled and poorly performing press, it may be helpful to focus on a wider array of factors, such as those included in the MSI, as a more

practical way to make progress. Freedom of the press without professionalism can lead to excess, to a press that sells influence rather than news, resulting in setbacks for the cause of independent media. Instead of focusing exclusively on freedom, attention to building a stronger enabling environment—as well as sector-specific issues like media management, editorial quality and supporting institutions—may be a more effective approach to getting results in some of the lagging countries.

Mali, for example, has the highest level of press freedom in Africa, a region where a minority of countries has free press. The legal framework for media protects pluralism and freedom of expression. But Mali is also an example of the limits of press freedom and how such freedom does not automatically translate into a sustainable media sector that provides reliable, relevant information to the public. The sector suffers from low levels of journalistic and management professionalism, poor institutional infrastructure and low investment in the media sector. Journalists lack key skills (not a single university-level journalism school exists), suffer poor working conditions, and earn salaries close to minimum wage. This means both that most journalists have only the equivalent of a high school education, and that journalists are vulnerable to accepting bribes simply to survive. Libel is still punishable as a criminal offense, which means that journalists tend to self-censor in order to protect themselves.

To better understand countries like Mali, beyond measuring the freedom of the press, we need a much more serious approach to collecting local sector-level data on the media that can help policy makers, potential investors in media concerns, and media managers. Media companies in developing countries desperately need information about their audiences and advertising markets. These are key management tools. Yet the firms that collect and sell such data have not found it profitable to study the least developed countries, though they have gradually expanded into promising emerging markets. Donors could support such processes, including projects that help media managers understand how to use this kind of data, until market forces are stronger.

Donors and investors could also stimulate better media by investing in audience research and making existing data more available to researchers. Both the UK and the US governments have spent millions of dollars on such research over the years, mainly to track the impact of broadcast initiatives like Radio Free Europe and the BBC, but none of this data is freely available.

The World Association of Newspapers and News Publishers (WAN-IFRA) and other such industry groups have also been instrumental over the past two decades in producing data on a



growing number of countries, and shining light on emerging and developing country media markets. WAN-IFRA's annual *World Press Trends* analyzes an important set of indicators for media markets such as advertising, online news production and readership, circulation, and many other critical issues. It has expanded to cover a growing list of developing countries over the years; indeed a country's appearance in *World Press Trends* is one key sign that investors are starting to notice that country's media market is stabilizing. The need to gather such data and expand it to developing countries, along with other pioneering efforts like the MSI, could go a long way to illuminating the black hole of data on the media sector in the poor areas of the world.

An agenda for action

The work of the Media Map Project has drawn attention to both the promise and the complexities of supporting media development. It has noted the critical importance of the work that has been done by the international media development community and the progress that some countries have made. But it has also shown the shortcomings the status quo, particularly for the poorest countries, which have the most to gain from better media but the furthest to go in developing it.

An abundance of evidence suggests that creating stable and effective media enterprises is a core challenge of development, one that cuts across sectors, reaching up and down through societies and helping development reach deep into communities. Promoting vigorous and independent media needs to be one of the fundamental constituents of development strate-

gies. Weak or flawed media is too often seen as a sideshow or an annoyance, not important enough to warrant a rigorous, mainstreamed effort.

As a result, the piecemeal approaches to media development to date are not getting visible or sustainable results, at least when viewed at the global level. Some may be helping, but the international community needs to fundamentally rethink its approaches and better coordinate its work to generate more effective and far-reaching solutions. This means a new approach to media development that is broader than the narrow, sector-level interventions of the past, integrated with other development programs that can help create stronger supporting institutions for the media.

One message that comes through loud and clear is this: Country-level demand and leadership are critical to changing the flat line that opens this report to an upward slope. Countries and their international partners need to focus on building broad domestic support and buy-in for a vigorous, independent and economically successful media sector that has a mandate to serve its audience as a source of truthful information. This will require integrating a better understanding of the needs of such a media into development plans and into the new institutions that developing countries are building. It will require high-level leadership and strong technical support from outsiders and from other countries in the South that are making more progress. And as the recent battle over the state secrets act in South Africa illustrates, it will also require constant vigilance from local activists who will have to continue to fight for their hard-won freedoms long after the donors are gone.

NOTES

¹Data from Freedom House Freedom of the Press Index. Freedom House scales its ratings from 0 (best) to 100 (worst). We have rescaled the scores for the graphs in this report so that 0 is worst and 100 is best, to make the graph more intuitively understandable.

²*The Bottom Billion: Why the Poorest Countries are Failing and What Can Be Done About It*, 2007.

³This estimate is based on Official Development Assistance data from the Organization for Economic Cooperation and Development (See www.oecd.org/dac/stats/data) as well as examination of more detailed studies compiled by CIMA, see note 5 below.

⁴For a review of the often politically-driven spending on media and free expression assistance, see Anne Nelson, "Funding Free Expression: Perceptions and Reality in a Changing Landscape," Center for International Media Assistance, 2011.

⁵Charts for figures 2-3 produced using data on European donors from the Center for International Media Assistance's updated report, "Empowering Independent Media," (forthcoming). Data on U.S. investment from Laura Mottaz, "U.S. Funding for Media Development," Center for International Media Assistance, December 2010. Data for total aid investment used for chart 3 from OECD DAC.

Mary Myers, who put together figures on donor spending for the forthcoming CIMA report, notes that "these figures were arrived by a combination of methodologies, as follows:

EC (European Commission): This is an estimated figure for media assistance via European Commission institutions and mechanisms such as the Directorate General for Development (DG DEV), EuropeAid Co-Operation Office (AIDCO), External Relation (RELEX), Information Society and Media (INFSO), European Association for Cooperation (EAC). \$80m in FY 2009/10 is an 'educated guess' arrived by taking the total expenditure enumerated by the Ringgaard study which identified 42 media projects in Africa funded by EU institutions amounting to a total spend in 2009 of €31.29m (\$46.32m USD) and extrapolating up for the rest of the world.

UK (United Kingdom): This is an estimated figure for media assistance from the UK's Department for International Development (DFID) and excludes UK Foreign and Commonwealth Office funding (which is thought to be substantially lower). This total figure of \$44.5m USD is based on a trawl through officially reported data on DFID's website to identify all media-assistance projects. This search identified 46 projects judged to be media-support initiatives, most of which are multi-year projects. Averages are found by taking a 'snap shot' of funding for the FY 2009/2010; thus, for e.g., DFID total funding for the BBC's WSTrust's Policy and Research program over 5.5 years was divided by 5.5 to arrive at an indicative average annual figure. Projects in this whole data set range from typical media-development projects such as capacity-building for Iraqi journalists, to using media as a tool for conveying development messages, such as a football-based TV soap opera around gender-based violence, implemented by Search for Common Ground.

Netherlands: This is an estimated figure of \$39.8m USD, based on correspondence with Wouter Biesterbos, Senior Policy Officer, Good Governance Division at the Netherlands Ministry of Foreign Affairs in April 2011. It includes both media-support and spending on the development of ICTs, notably via a large grant to IICD (International Institute for Communication and Development IICD) which helps developing countries formulate ICT policies and applications in different sectors, ranging from health, education, and good governance to rural development. The Dutch Co-financing Program (CFP) contribution over four years (2011-2015) amounts to €40 million for this project alone. The total figure given here, of \$39.8m USD, is a 'guesstimate' of the share of project budgets allocated to media components, and is not official. For example, in most cases we have guessed that the media component allocated within this project is a third of total spend - but this may be over-generous.

Switzerland and Canada are all figures publicly reported on the donors' websites and/or obtained through correspondence with the relevant desk officers. See the forthcoming updated CIMA report for details.

Sweden - this is a figure provided by senior conflict and media adviser, Pia Hallonsten from Swedish International Development Assistance (Sida) for 2010."

⁶*Magic Radio*, a film by Stephanie Barbey and Luc Peter, Intermezzo Films, SA, 2007.

⁷Data collected by the Committee to Protect Journalists, see <http://cpj.org/killed/2011/> (accessed 25 January 2012).

⁸The materials in text boxes A-C was adapted directly from the country case study reports.

⁹Source <http://www.irex.org/msi>.

¹⁰See <http://www.guardian.co.uk/media/2006/feb/21/theguardian.pressandpublishing> (accessed 12 January 2012).

¹¹International Media Support, "Partnerships in Progress," report of the International Media Partnerships Meeting, November, 2010.

¹²See Figure 6. See also, PricewaterhouseCoopers, "The Indian Entertainment and Media Industry: Unraveling the Potential," 2006.

¹³OECD/DAC, 2006. "The Challenge of Capacity Development: Working Towards Good Practice." Paris, OECD, p. 12.

¹⁴For the most recent views, research and findings on capacity development see www.lencd.org or <http://www.capacity-development.org>.

¹⁵World Bank Task Force on Capacity Development in Africa, 2005. *Building Effective States—Forging Engaged Societies*. Washington, DC, World Bank, p. 25.

¹⁶Laura Mottaz, "U.S. Government Funding for Media Development," Center for International Media Assistance, December, 2010.

¹⁷Media development stakeholders have begun some processes of sharing learning through the Salzburg Seminars and the Global Forum for Media Development. These initiatives are very important and should be continued, expanded, and mainstreamed into broader development conversations.

¹⁸James D. Wolfensohn, *Voice for the World's Poor: Selected Speeches and Writings of World Bank President James D. Wolfensohn, 1995-2005*, World Bank Publications, 2005, p. 461.

¹⁹Lee Kuan Yew, *From Third World to First: The Singapore Story: 1965-2000*, New York, 2000, p. 194.

²⁰Council on Foreign Relations, "Media Censorship in China." Updated March 7, 2011. Accessible at <http://www.cfr.org>.

²¹See http://www.chinadaily.com.cn/cndy/2011-12/27/content_14332076. Accessed 1/2/2012.

²²See the OECD report "The Evolution of News and the Internet" (Working Party on the Information Economy), 2010.

²³Michelle J. Foster, "Matching the market and the model: The business of independent news media," CIMA, Washington, D.C., August 2011, p. 15.

²⁴See <http://www.propublica.org>.

²⁵Source: Magnaglobal, 2011 Advertising Forecast. Accessed 10 January 2011 at <http://www.neoadvertising.com/ch/wp-content/uploads/2011/06/2011-MAGNAGLOBAL-Advertising-Forecast-Abbreviated.pdf>

²⁶For a colorful illustration of using radio to spread good health messages, see *Magic Radio*, Ibid.



Internews Administrative Headquarters

PO Box 4448
Arcata, CA 95518 USA
+1 707 826-2030

Internews Washington, DC Office

1640 Rhode Island Ave. NW Suite 700
Washington, DC 20036 USA
+1 202 833-5740

www.internews.org
info@internews.org
www.facebook.com/internews
www.twitter.com/internews

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