

Media Viability in Lebanon

Applying DW Akademie's
Media Viability Indicators (MVIs)



Made for minds.

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Content

- Executive summary** **6**

- 1. Introduction** **8**
 - 1.1 An overview of news media viability in Lebanon 10
 - 1.2 MVIs results for Lebanon 10
 - 1.3 Major obstacles to news media viability in Lebanon 10
 - 1.4 Underlying issues of news media viability in Lebanon 11

- 2. Applying DW Akademie’s Media Viability Indicators (MVIs)** **14**
 - 2.1 About the MVIs 15
 - 2.2 Methodology 16

- 3. Analysis of Lebanon’s media system according to the MVIs’ dimensions and sub-dimensions** **18**
 - 3.1 Politics 19
 - 3.2 Economics 21
 - 3.3 Community 24
 - 3.4 Technology 26
 - 3.5 Content and Expertise 27

- 4. Recommendations and considerations** **30**
 - 4.1 Potential steps towards reducing news market competition 31
 - 4.2 Increasing business capacities in Lebanese news industries 32
 - 4.3 Increasing journalism capacities in Lebanese news industries 33
 - 4.4 Increasing audience’s media literacy 34

- 5. Practitioner’s perspective and outlook** **36**

- The Media Viability Indicators (MVIs): Dimensions, sub-dimensions and key indicators** **40**

Executive summary

Lebanon faces severe impediments to news media viability. Applying DW Akademie's Media Viability Indicators (MVIs), this report assesses the financial sustainability as well as the quality of journalistic content and production in this politically and religiously diverse country. The data used for this report were collected in 2019 and thus do not take into account the more recent developments in Lebanon and the impacts of the COVID-19 pandemic. According to the media experts interviewed for this report, Lebanon scores low in four of the five dimensions of the MVIs: Politics, Economics, Community, and Content and Expertise. Only in the Technology dimension, does the Lebanese media landscape achieve higher scores with its sophisticated technological infrastructure and digital expertise.

DW Akademie's Media Viability Model



DW Akademie's Media Viability model centers around the media users having access to reliable, independent information. It widens the scope of traditional sustainability approaches and focuses on more than just the business models of individual media outlets.

3 levels: Organizations, networks and the overall environment (including markets, legal systems, politics, and technological infrastructure) are the relevant levels for Media Viability.

5 dimensions: Media Viability is about finding a stable balance between the aspects of politics and economics, the community, technology, and content.

The **biggest detriments** to news media viability in Lebanon include:

- The political partisanship of the media;
- A lack of sustainable business models for the media;
- An oversaturated and hypercompetitive media market resulting in lowered quality of content;
- Too little competition in the advertisement market, which is dominated by one advertising agency and big digital companies such as Google;
- Non-transparent media ownership and funding (including foreign direct funding);
- Problematic audience behaviours including the creation of "ideological bubbles" based on political or religious interests.

The results lead to the conclusion that news media viability in Lebanon can best be improved by working towards a less overcrowded media market, reducing foreign direct funding, establishing sustainable business models and more independent and free conditions for the production of quality news content.

Based on the report's findings, **the following strategies are recommended:**

- Better implementation of the law prohibiting foreign-direct financing of news media organizations, which would likely lead to some media outlets having to close down. To avoid the disappearance of diverse voices, airtime could be granted to them on the public service broadcasting (PSB) channels. The existing licensing regulations should be adapted to reduce the number of newly founded media in the market.
- Public service broadcasting channels should be strengthened as the potential backbone of efforts to rationalize the nation's news media markets and make high-quality, non-partisan, and editorially independent news available to the Lebanese audience. Their financial security and independence should be prioritized, for example, by introducing mandatory audience fees similar to Western European models. A non-partisan and nationally representative oversight board should be installed to ensure the PSB's independence and quality.
- A more competitive advertising market could significantly improve news media. A dedicated strategy needs to be developed in this area.
- Media development actors should prioritize business training and target both individual journalists and media managers and owners. Workshops should focus on capturing production-cost efficiencies.

- Media actors should be encouraged to tap into global and regional knowledge on successful business strategies and to build networks for sharing experiences and strategies with colleagues across the MENA region.
- Journalism associations should be strengthened to act as promoters of journalists' rights and provide a forum for debate on issues such as reliable salaries and freedom of expression in general. Existing journalism associations should be redeveloped into strong, active organizations. If this is not possible, new professional journalism associations should be founded and designed to be attractive to the new generation of journalists. In addition, the possibility of adapting laws to better tackle the issues of reliable salaries and freedom of expression should be explored.
- Workshops or trainings for media professionals should address conflict-sensitive reporting, search and content optimizations, social media productions, computer coding, media economics, change-management, and creativity, as well as audience psychology.
- Media literacy programmes should be promoted that specifically target specific social groups (including those traditionally neglected by such efforts) and that are designed to tackle local needs relevant in the 21st century media.

The final section of this very first MVI assessment discusses the potential and the limitations of the framework from a media development practitioner's perspective. The concrete recommendations of this pilot-study for Lebanon should be taken up with care: Undoubtedly the results offer an essential overview of potential approaches for improvement. In a next step, however,

a dedicated, participatory strategy process with different actors is needed to turn them into effective action on the ground. Overall, the study shows that the MVIs can be successfully applied and that assessments based on the indicators lead to new and relevant findings.

Based on the original idea of the MVIs, the framework should be applied in a flexible and tailor-made way, depending on the goals and requirements of a particular project. Smaller assessments can focus on very specific aspects of media viability or levels of enquiry. Larger projects could also include broader assessments and comparisons of the situation in different media landscapes. The MVIs may, in the future, also enable better evaluations, fact-based strategy developments as well as much needed communication and coordination processes between different actors on the ground as they offer a common language for the complex issue of media viability.



Lebanese journalists cover their mouths with tape in solidarity with colleagues imprisoned in Egypt.



1. Introduction



LEBANON

● Beirut

SYRIA

ISRAEL



1.1 An overview of news media viability in Lebanon

Lebanon's media system faces major obstacles to achieving a viable environment in which news media can flourish. There are many positive aspects in the country's media system, which support news media viability. But using DW Akademie's Media Viability Indicators (MVIs), Lebanese media experts score their country as being just over two-thirds of the way towards having a financially sustainable news industry that is editorially independent and produces high-quality journalism that serves society.

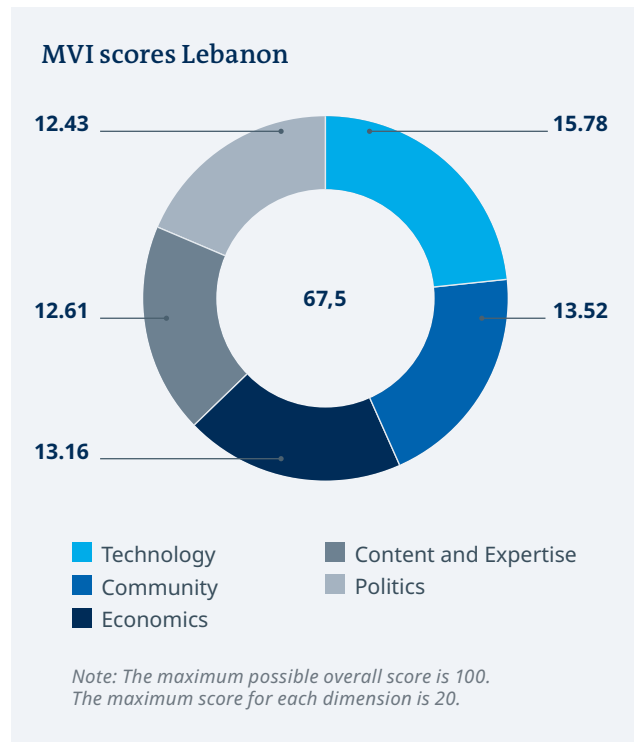
Lebanon is a country of 6.1 million people located in the MENA region. The World Bank describes its economy as "upper middle income." Lebanese society is religiously and politically diverse, with the Konrad Adenauer Foundation identifying 27 active political parties ahead of Lebanon's 2018 parliamentary elections that were further organized into various factions and coalitions. Having suffered a 15-year civil war that ended in 1990, the country was considered stable and the most economically and politically open in the Arab world at the time the research was conducted in early 2019. However, a number of events in 2020, including a sharp economic downturn, a devastating explosion in the Beirut harbor, and the Covid-19 pandemic have created significant political and social upheaval in the country.

Lebanon's media landscape is dense. At the time data were collected, there were nine national broadcast TV stations, five major national radio stations, and at least 10 daily national Arabic language newspapers, down from at least 14 in 2017. There also are French, English and Armenian-language national newspapers in the market.

1.2 MVIs results for Lebanon

Lebanon's technological infrastructure and digital expertise provide a solid foundation for news media viability, according to Lebanese media experts. Of the five societal dimensions considered critical by the MVIs to achieving 21st century news media viability, 'Technology' was the only one experts said posed no serious problems in Lebanon.

The dimension of 'Community' support for news media was seen as considerably weaker than 'Technology', followed by 'Economics', 'Content and Expertise' and 'Politics' in declining order. Although experts were able to identify strong elements that support news media viability and positive trends in each of the five Dimensions, the consensus as measured through the scoring of the MVIs was that the country has to overcome major challenges to achieve news media viability.



1.3 Major obstacles to news media viability in Lebanon

Significantly, many of the greatest challenges to media viability in Lebanon's news industries are structural. A few are related to Lebanon's status as one of the world's most politically and religiously diverse countries situated in a unique geopolitical location. But many of the issues Lebanese media experts say pose the biggest problems to news media viability in their country are not, in fact, unique to Lebanon. They are artifacts of the digital disruption challenging journalists and news organizations around the world. Lebanese media experts identified three major obstacles to viability for Lebanon's news media:

1. **Lebanon's national news media are highly politically partisan.** Nearly every major Arabic language newspaper and television channel is openly aligned with one of Lebanon's politicians, political parties, or with another Middle Eastern country, and the news organization serves as the mouthpiece for that interest. The only exceptions to partisan news outlets are the Public Service Broadcasting (PSB) radio and TV channels, which are owned and operated by Lebanon's government. Respondents were nearly unanimous in saying, however, that the PSBs have such tiny audiences that they are largely ignored by political actors and other players in Lebanon's news industries.
2. **Lebanon's news media do not have a financially sustainable business model.** According to the respondents in

this study, Lebanon's news organizations survive on direct financial subsidies from major donors, political parties or foreign states. Donors pay the costs of news production for a particular newspaper or broadcast channel in order to gain control of a communication platform in the most politically open country in the Arab world. The return on investment for these subsidies has been political, not economic.

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Most news organizations also get a small but important percentage of additional revenue from national and international advertising. Critically, distribution of advertising to Lebanese news organizations is controlled by an international advertising agency that dominates the advertising market across Lebanon and other countries in the MENA region. According to respondents, the agency historically has allocated advertising to Lebanon's news organizations on the basis of a pre-determined contract, rather than advertiser interest. This arrangement, which appears to be changing, made advertising revenue more predictable for news organizations. It also discouraged organizations from developing strong advertising sales departments or units devoted to developing diverse revenue sources.

The experts said Lebanon's news industries face a financial crisis because the existing revenue model is eroding from several different directions at once. Many long-time donors are cutting their subsidies to Lebanon's news organizations because of the changing political dynamics in the MENA region. At the same time, the fragmentation of the global advertising market is eating into advertising revenue.

As a result, Lebanon's news organizations are seeing financial resources collapse. Between late 2017 and early 2019, at least four of the country's 14 daily Arabic language newspapers closed. Perhaps more importantly, journalists at news organizations around the country are seeing salary cuts, if they are paid at all. This situation, according to the experts consulted for this project, has normalized journalistically unethical behavior in the profession.

3. The third factor experts considered a roadblock to news media viability in Lebanon is the Lebanese audience. Experts complained that Lebanese audiences create informa-

tion bubbles for themselves, consuming news only from the outlet that reinforces their own ideological perspective. Therefore, although the Lebanese news market offers a broad diversity of ideological perspectives, most citizens consume news from only one news outlet, to which they are intensely loyal. Respondents, however, also complained that Lebanese are unwilling to pay for news content, making it difficult for news organizations to monetize their audiences' loyalty through subscriptions.

1.4 Underlying issues of news media viability in Lebanon

Lebanon's news media market is hypercompetitive. An estimated 24 legacy news organizations produce national Arabic language news in a country of 6.1 million people. Although several newspapers have closed in recent years, the number of remaining legacy news media organizations in the market is financially unsustainable through either public funding or commercial business models. Further complicating the problem, an unknown number of digital native news startups have appeared. While these nascent digital news operations are a source of optimism for Lebanon's media experts in several respects, they add to an already crowded news and advertising market.

Most of the major obstacles to news media viability in Lebanon are rooted in the news market's ruinous competition. In the absence of revenue models that can protect editorial independence and support quality journalism, news organizations are forced to turn to alternative sources of funding in order to survive.

Lebanon's geopolitical position and complicated political landscape make its news organizations attractive platforms for political messaging.

Traditional economists argue that a hypercompetitive market will self-correct because as producers start to lose money, they will exit the market—a process that will continue until the number of competitors in the market is again sustainable given demand.

While that is true for consumer-product markets, it is not true in information markets. Information products, such as news products, have externality effects, meaning they create value beyond what the producer gains economically through direct sales. For news media owners, that externality value can come in many forms. A newspaper or TV channel can be used to promote the media owners' other businesses, influence elections or laws and regulations in ways that advantage the media owner, or simply improve the owners' celebrity or social standing.

The Lebanese news media industry's history of attracting financing from politicians, political parties and foreign states is direct evidence of the externality value of controlling a news



A man in a Beirut café is reading about the economic crisis in 2019 in the English newspaper The Daily Star.

platform. In Central and Eastern Europe, many countries' news markets became hypercompetitive after the collapse of the Eastern Bloc in 1989—and remain so to this day.

Hypercompetition in news markets negatively affects editorial independence and the quality of news content in a number of ways. Alternative sources of funding, such as those in Lebanon, destroy news organizations' editorial independence. Limited financial resources often mean news organizations cannot afford to hire and pay experienced professional journalists. That can result in normalizing professionally unethical behavior among journalists, either because journalists in the market lack professional education and training, or because of their economic needs.

Hypercompetition in news markets also produces ideologically partisan coverage; even in countries where news organizations are not receiving direct funding from political operatives as they do in Lebanon. From an economic standpoint, news content has commodity characteristics. That means different news organizations covering the same news story produce essentially the same content when following traditional journalism standards. For the audience, then, there is little difference between news sources. That makes it hard for individual news organizations to differentiate their content from their competitors' and develop a loyal, predictable, marketable audience.

In news markets where there is low-to-moderate competition, research shows news organizations produce higher quality news content and remain largely nonpartisan. Impartiality is

the surest way to avoid offending potential audience members, when you have few direct competitors for their attention. But as competition among news organizations increases, it becomes crucial for news organizations to stand out in the minds of potential readers, listeners and viewers. The least expensive way to achieve product differentiation is to stake out a partisan ideological position and use it to attract a narrower, but more loyal and predictable audience.

This began occurring in developed nations' news markets in the 1990s as cable and satellite technologies increased competition among television news networks. The economics underlying the phenomenon were described by Harold Hotelling in his 1929 "Theory of Optimal Location".

Using partisanship as a product differentiation strategy is particularly effective for news managers because of human psychology. The Lebanese experts interviewed in this project criticized their nation's news audiences for consuming only news reported from the partisan political viewpoint the reader or viewer already held.

In fact, however, this human tendency to avoid cognitively dissonant information was first described in 1957 by psychologist Leon Festinger. Simply put, most people avoid information that contradicts their existing beliefs or values, and seek out information that reinforces their beliefs. In the past decade, social media have amplified this human tendency. Its importance in shaping news content and encouraging social and political polarization has been witnessed around the world.

In summary, many of the biggest obstacles to achieving news media viability are the result of there being more news producers in Lebanon than the market can support. The growth of digital native news operations is likely to exacerbate the problem. Until competition among news organizations is reduced to sustainable levels, many of the other problems — partisanship, journalists' salaries, unethical behavior by journalists — are likely to remain unsolved.

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A secondary, but also serious problem lies in the structure of Lebanon's advertising markets. The problem with the advertising market is the opposite of the news market: there is too little competition. Experts said one company largely controls the distribution of advertising to Lebanon's legacy news organizations. On digital platforms, the tech giants Google and Facebook control most advertising distribution.

This advertising market structure gives the advertising distributors enormous power over Lebanese news media organizations. There also are other negative effects in terms of news media viability. Respondents reported that many Lebanese news organizations have not developed strong advertising sales departments or business units. That is because each news organization's advertising volume has been set by the advertising distributor, discouraging investment in sales departments and business development units.

Lebanese media experts argued that, at least partly because of these factors, the country's news media organizations lack the business structures and expertise they need to deal effectively with the changing news markets in Lebanon. Those deficits are, of course, more easily corrected than the structural problems in Lebanon's news markets that helped create them. But the increasingly precarious position of Lebanon's national news organizations makes it urgent that news executives and journalists find new paths towards viability.



2. Applying DW Akademie's Media Viability Indicators (MVIs)



2.1 About the MVIs

DW Akademie's Media Viability Indicators (MVIs) define news media viability as consisting of three components: The financial sustainability of the news media industry; the ability of news organizations to produce journalistic content in an editorially independent way based upon editorial staff members' professional news judgments; and the quality of the content of the journalism produced, as defined by international journalism organizations and media experts.

The MVIs are organized around five societal dimensions that research shows influence the quality and functioning of news media. Those dimensions are:

1. **Politics**, which includes the rule of law in a country, as well as the political, legal and regulatory regimes that affect media, free expression, and business operations.
2. **Economics**, which includes the overall strength of a country's economy; the financial sustainability and financial independence of the news media's business models; the structure and level of competition in the country's news markets; and the level of audience demand for news content and the audience's willingness to pay for quality journalism.
3. **Community**, which includes the level of social cohesion and media literacy in a society, the level of public trust in the news media and its credibility, the degree to which citizens are willing and able to participate in the journalistic process, and the ability of news organizations to access and use reliable data that can help them understand their audience's and the public's news needs and preferences.
4. **Technology**, which includes news media organizations' ability to access and afford basic and digital production and distribution technologies; the audience's ability to access and afford news distribution devices and technologies; the level of technological expertise available to news organizations; and the degree to which the country and news organizations protect the audience's digital privacy and other rights.
5. **Content and Expertise**, the quality of the journalism content produced by the country's news media and the quality of the national and international news content available in the country; the situation of journalists in the country and whether their expertise, pay and working conditions are supportive of quality, ethical journalism; the nature and transparency of media ownership of the country's news media organizations, and the business structures and business expertise those organizations have available to provide the resources necessary to support quality journalism.

What is "quality content"?

Any definition of 'quality news content' or 'quality journalism' is potentially **controversial**. Information economists have long recognized that one of the key characteristics of information products is that the relevance—and, therefore, **perception of quality—of any single piece of content will vary greatly from consumer to consumer.**

The Media Viability Indicators (MVIs) drew upon a number of sources to identify content elements generally considered by media experts around the world to represent 'quality' journalism.

Quality journalism is broadly defined as journalism that supports an informed citizenry; democratic self-governance; non-corrupt government, business, and social institutions; the rule of law; and strong economic performance that benefits all sectors of society.

Among international media experts, the characteristics of content and news organization behavior that reflect "quality" journalism include: international, national, and local news that is fact-based and demonstrates balance; fairness; accuracy; relevance; timeliness; believability; reliance on expert, authoritative and diverse sources; presentation of multiple points of view; comprehensiveness of coverage, and an avoidance of sensationalism. Coverage should have a primary focus on topics of importance to government, economics, and the community. News organizations should provide skilled investigative journalism on topics of international, national and local public interest. In addition to fact-based reporting, reporters should provide context and interpretation for new events; conflict-sensitive reporting; accurate coverage of different groups in society; coverage of stories of interest to different groups in society; coverage that places less emphasis on crime and more emphasis on coverage of issues and institutions; coverage that helps audiences develop common values and global awareness; and coverage that includes voices from the community and from women, minorities and underrepresented groups.

A full list of the MVI dimensions, sub-dimensions and key indicators can be found on [page 41](#).

The overall approach and different options for applying the MVIs are discussed in detail in "Measuring beyond Money" [↗ dw.com/downloads/53435462/dw-akademimedia-viability-indicators.pdf](https://dw.com/downloads/53435462/dw-akademimedia-viability-indicators.pdf) presenting the whole assessment framework.

2.2 Methodology

DW Akademie's MVIs were developed by a team of three multinational experts. The trio has extensive experience in media economics, media management, and media development on every continent but Australia. The project drew on various sources to develop the MVIs. These included previous indices of media sustainability, media development, and media freedom. The team also drew upon research conducted over the past 40 years in countries around the world on the factors influencing the financial success and sustainability of media organizations and the factors that influence the quality of journalism content produced by news media organizations. Finally, the development of the index drew upon the substantial personal experience of the project team members in managing newspaper and broadcast news organizations, conducting research on media viability, and working with journalists and media managers on media training and media development projects globally.

Lebanon was chosen as the site of the pilot test of the Media Viability Indicators because of the interest of the Maharat Foundation, DW Akademie's primary media development partner in Lebanon, in utilizing the MVIs in its own work. The Maharat Foundation selected all individuals to be interviewed during the pilot test, arranged the schedule of interviews, and handled all of the logistics on the ground. A total of 11 people were formally interviewed for the pilot test over five days. The interviewees represented a broad cross section of media experts in Lebanon. The interviewees included seven men and five women. An additional four men and one woman were engaged in informal discussions of media issues during the week, further supplementing and confirming the data that were systematically collected.

The individuals selected for the formal interviews represented a cross-section of the political, religious, demographic and professional diversity found in Lebanon's media community. Interviewees included both older and younger media professionals and experts. They represented broadcast news organizations, newspapers, and digital native news startups. Some interviewees had had experience working across multiple media sectors or for multiple news organizations. The interviewees included media owners and managing directors, senior journalists, media professors and educators, members of the NGO media community, and members of the Lebanese government working on political and legal issues affecting free expression and journalism. Interviewees included both Muslims and Christians, and members of a broad sampling of affiliations across Lebanon's diverse political spectrum.

A member of the project team from the United States conducted the interviews in the company of a member of the Maharat Foundation. The representatives of the Maharat Foundation who worked on the project provided introductions to each interviewee and background information about the person's expertise. They were present during each interview but otherwise did not participate in the actual discussions. Most interviews lasted between 90 minutes and two hours and all interviews were conducted in English. Most interviews were conducted in neutral locations such as restaurants and cafes, but senior media executives were interviewed in their own offices and one interview took place in the Maharat Foundation offices. All interviewees were promised confidentiality.

The interviews used a semi-standardized introductory script that was adjusted according to the information the interview subject had previously received during the recruitment process. The interview process was conducted using the struc-



Journalists in Beirut demonstrate for the release of imprisoned colleagues in Cairo.

tured interview form of the Media Viability Indicators. The interviewer read each sub-indicator and asked each respondent to assign a score of between 4 (That's the situation in Lebanon) and 1 (The situation in Lebanon is the opposite of that and it's a major obstacle to media viability) or 0 (not applicable in Lebanon) according to the respondent's personal understanding of how Lebanon performs on that factor in relationship to achieving news media viability. The respondents also were asked to explain why they chose their score, and the interviewer took extensive notes from those conversations. If, as a result of their further discussion of the issue, the respondent suggested an adjustment to the initial scoring, his or her final score for the sub-indicator was the one recorded.

Interviewees were encouraged to respond only to sub-indicators, indicators and dimensions about which they felt they were knowledgeable. Where the respondent's time permitted, interviewees were offered the opportunity to respond to indicators and sub-indicators across all of the dimensions. Where the respondent had time constraints, the interviewer consulted with the person about the dimensions and indicators that fell within their greatest personal expertise, and then focused the interview on those areas.

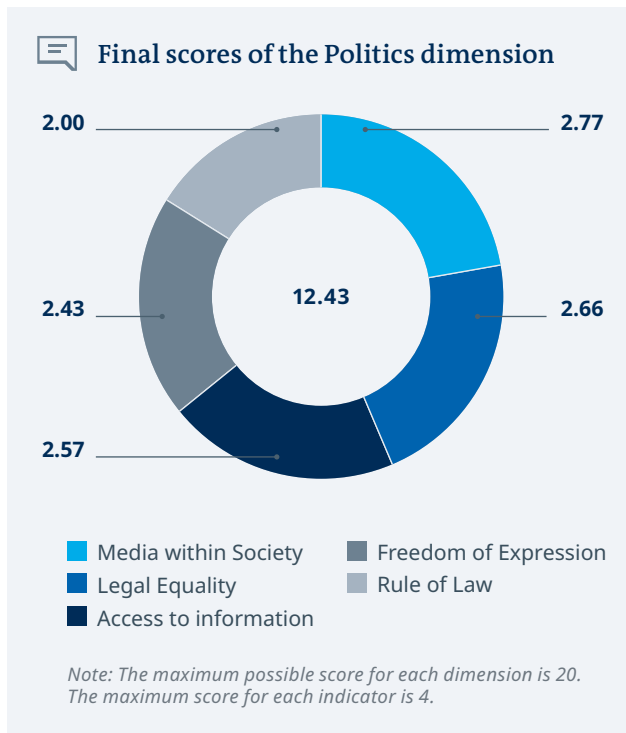
The number of responses to each sub-indicator in the study ranged from a minimum of three to a maximum of eight. Five sub-indicators—two related to the Rule of Law and three on globally comparative measures of the Lebanese economy—were scored using desk research from the World Justice Project, the World Bank, and the Nationmaster statistical website. Reports from Reporters Without Borders, the UNESCO report on Trends in the Safety of Journalists, and the Media Landscape Report for Lebanon from the European Journalism Centre were also consulted as corroborative sources against which to compare the information received during the interviews. The analyses in this report are based upon both the numerical scoring given by the respondents and a deeper analysis of their discussions of the factors affecting media viability in Lebanon.

The **detailed methodology** of the MVIs can be found here:
[➔ dw.com/downloads/53491005/mvimethodology.pdf](https://www.dw.com/downloads/53491005/mvimethodology.pdf)

3. Analysis of Lebanon's media system according to the MVI's dimensions and sub-dimensions



3.1 Politics



The legal and political structures necessary to support news media viability are growing stronger in Lebanon. At the time of data collection, the government recently passed a new open records law. Violence and intimidation against journalists are in decline. Journalists are generally respected—and even “feared” by those in government and politics.

These trends were an important positive indicator for the future of Lebanese media. A 2019 study by UK researchers François Nel and Coral Milburn found that the openness and stability of a country’s political system is an important predictor of news media performance. In 2019, the apparent trends in Lebanon were toward a political and legal system more supportive of independent journalism that boded well for those committed to strengthening the viability of Lebanon’s news media organizations. It is not yet clear what impact the events of 2020 may be having on those positive trends or whether any effects, if they occur, will be short or longer term.

While the trends were positive, the actual strength of the political environment surrounding media was less so. The World Justice Project’s 2019 Rule of Law Index ranked Lebanon 89th out of 126 countries, while noting that that represented an improvement of three places compared to the country’s previous global ranking. Lebanese media experts argued that the country lacks many laws which offer protection to media and journalists, enforcement is uneven, change is slow, and progress is

fragile and dependent on the success and stability of Lebanon’s complex political coalitions.

Those concerns were clearly represented in how the experts scored questions about Lebanon’s political environment as it relates to media viability. One expert suggested that to understand the political and legal structures in which Lebanese media operate, it is necessary to separately analyze three different aspects: 1) What laws and protections have been codified? 2) How frequently and consistently are those laws and protections enforced by the Lebanese government? And 3) What is the culture surrounding the exercise of media rights and protections, whether or not those rights are codified or enforced? Comments by the media experts consulted for this project suggest that, in fact, this is a useful framework for understanding the political dimension of news media viability in Lebanon.

Rule of Law / Freedom of Expression

Score: 2.00 / 2.43

Freedom of expression is protected by Lebanon’s Constitution, although the country’s laws carve out broadly defined exceptions, such as for national security. Citizens and the media are recognized as having greater freedom of expression than is found in most other countries in the MENA region, and experts say the complex web of competing political parties and their relationship to news media organizations provide some protection for those who wish to criticize the government. Observers say Lebanese citizens are willing to boldly speak their minds, and increasingly use social media to do so.

But the political reality is far from supportive of media viability. Enforcement of laws limiting free expression is inconsistent but occurs. In 2018, several citizens were arrested for critical posts made on social media, setting off public protests. Experts report that political parties and militias occasionally target those who exercise their rights to free expression, even when the state does not. Criminal statutes are occasionally used to prosecute journalists and citizens, although in most cases, unsuccessfully.

Nevertheless, often the goal of such prosecutions is intimidation rather than incarceration. Uncertainty about the strength of Lebanon’s free speech protections encourages self-censorship by journalists and citizens. Meanwhile, the highly partisan nature of Lebanon’s news media leads to organizational censorship of journalists’ reporting. Lebanese media experts observed that as a result of the uncertainties around the practice of freedom of expression, Lebanese journalists do not exercise their rights as fully as might be expected given the level of formal protection.

Defamation laws that protect journalists who report truthfully exist but, crucially, criticism of certain government authorities is not permissible. Experts also say that in the era of social me-

dia and citizen journalism, the current defamation laws need to be rewritten to clarify who they protect and under what circumstances.

Access to Information

Score: 2.57

One of the most positive developments in Lebanon's legal and regulatory environment was the passage of an open records law that took effect in 2017. Experts say that the implementation of the law has only just started, with many government agencies still unaware of its existence. Thus, rollout of the law has been slow. The majority of journalists are reportedly unaware of their new rights to seek and obtain access to government information or are uncertain of how to utilize it. NGOs in Lebanon are, however, trying to inform news organizations about the improved access to information and are organizing open records training sessions for journalists.

Government press conferences and hearings are largely open to news media organizations on a fair and equitable basis across news organizations. Direct access to government officials is more of a problem. Experts reported that under the recent coalition governments, journalists' access to government officials was more equitable and transparent than in the past. But there still is a tendency among some officials to be available to journalists they see as 'friendly' and less available to journalists whose views or employers are allied with the opposition.

Finally, Lebanon recently passed a whistle-blower protection law but experts said the country does not have shield laws allowing journalists to protect their confidential sources. Respondents said, however, that they knew of no instances when the government or law enforcement officials had tried to identify journalists' sources.

Legal Equality

Score: 2.66

Lebanese news media organizations operate in a legal and regulatory environment comparable to other industries. The regulatory system is generally supportive of private enterprise, and the taxes and business fees levied on news organizations are comparable to those for other industries. Regulations limiting media ownership concentration and foreign subsidies of news organization in Lebanon also exist but are largely unenforced. Experts say the level of media ownership concentration is much higher than it appears or is legally permitted because media ownership is often buried behind densely interconnected shell companies co-owned by extended networks of families and friends. Similarly, laws limiting foreign investment and financing of Lebanese news media are widely ignored. The majority of Lebanon's news organizations depend upon direct financial



subsidies for survival. In many cases, according to experts, those subsidies are provided by foreign governments or agents acting on their behalf. Foreign NGOs engaged in media development are permitted under existing regulations.

Lebanon's government also has copyright laws in place and there is some enforcement. In the digital era, taking and using content from competing news organizations without permission has become common, as has content sharing by audiences. Both developments undercut the ability of news organizations to generate revenue from the content they produce.

Media within Society

Score: 2.77

Lebanese media experts were not positive about the degree to which government officials and agencies respect and protect journalists. But there was general agreement that many aspects of the government-media relationship had improved in recent years. Lebanese news organizations and journalists gain some protection from the connections between media organizations and political parties. The diversity and competition between political groups and their media organs create a certain culture of mutual tolerance. Media-government relations are seen as having been reasonably good as of 2019, and journalists were said by respondents to be "respected" and, in some cases, "feared" by officials.

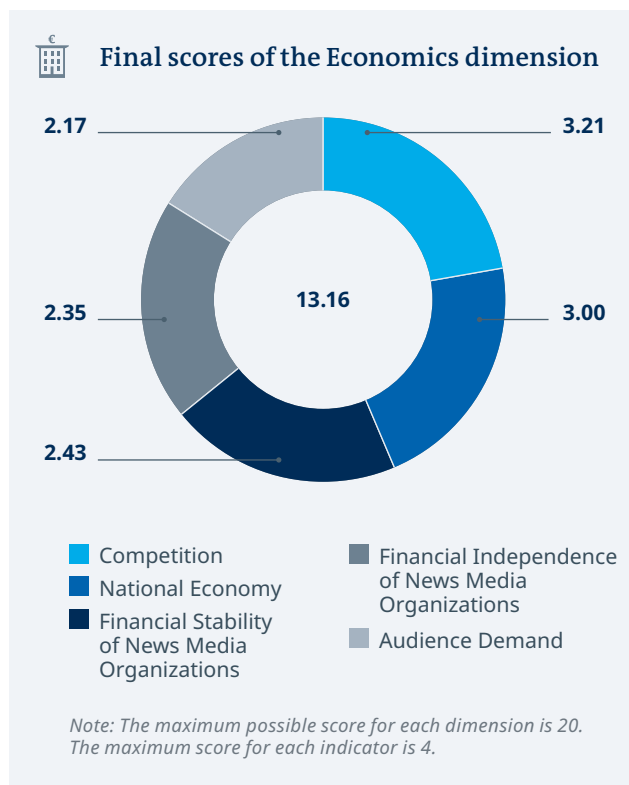
Respondents indicated that the dangers faced by Lebanese journalists had declined somewhat at the time of data collection as compared to past times in the country. In its Trends in the Safety of Journalists report, UNESCO reported that one journalist in Lebanon was killed between 2012 and 2016. According to respondents, journalists are rarely threatened directly by the government or its representatives. More common

are threats, attacks or attempts at intimidation by business executives, political groups or other non-state actors. Finally, in the digital age, in Lebanon as elsewhere, electronic armies increasingly mobilize to harass journalists in what one respondent described as “proxy wars”.

Lebanese journalists who are harmed as a result of their work have little expectation of justice. Respondents agreed that in the cases during this century where Lebanese journalists were killed or injured, law enforcement had made little effort to hold the culprits to account.

Finally, Lebanon has a well-established professional association for journalists, but few respondents felt that it was an effective advocate for Lebanese journalists’ rights and safety.

3.2 Economics



The current structural and economic conditions in Lebanon’s news media markets are incompatible with all three elements of media viability: financial sustainability, editorial independence, and quality news content. Although some of the economic challenges Lebanon’s news media face are related to the country’s singular geopolitical position, many are common to news media organizations around the world in this era of digital disruption. Importantly, while the structural problems in news media markets are serious, entrenched and growing, there also

are positive developments in the Lebanese media landscape that should not be overlooked.

The economic issues affecting the viability of Lebanon’s news media organizations are complex. But two structural issues in the country’s news media markets stand out as being major obstacles to achieving financial sustainability, editorial independence, and high-quality news content. The first is the excessive number of news organizations competing in Lebanon’s national news market. The second is the lack of competition in the advertising buying industry.

National Economy

Score: 3.00

Lebanon is a country of approximately 6 million people and is classified economically by the World Bank as being upper middle income. The World Bank’s estimate of 2017 Gross National Income (GNI) per capita, adjusted for Purchasing Power Parity (PPP) was U.S. \$14,350. That represents 75% of the world’s average.

Financial Stability of News Media Organizations

Score: 2.43

As is common to news media around the world, many, if not all, of Lebanon’s news organizations are facing declining revenues, according to experts. The newspaper sector has been particularly hard hit, with at least four of the country’s estimated 14 Arabic-language national newspapers closing since 2017. Even as Lebanon’s legacy news media struggle to maintain their financial footing, new competition from Digital Native News (DNN) organizations is emerging, although the viability of such organizations is questionable given current economic conditions. In addition, as is common worldwide, advertising revenues are shrinking as digital platforms draw off an increasing share of the advertising market.

One bright spot in the Lebanese news ecology is the emergence of DNNs providing local news and information in specific communities outside of Beirut. Historically, Lebanon’s media have operated almost entirely at the national level. Although most of the media experts consulted in this project were not aware of any local news media organizations in the country, a few reported the recent emergence of city-news sites in communities across Lebanon. These nascent DNNs are apparently using a combination of revenue models, which include selling advertising to local businesses—a development that would have positive implications not only for the viability of the DNNs, but also for the local economies in the cities these local news operations serve.

Financial Independence of News Media Organizations

Score: 2.35

The revenue model underpinning Lebanon's news media organizations is based on financial subsidies from outside actors. Each news organization gets its primary revenue from a different source, whether a political party or, in many cases, a foreign government. The subsidies come with the explicit expectation that the news organization receiving them will represent the political views and positions of its financial backer, effectively eliminating editorially independent political coverage from the Lebanese news media market.

Lebanon's news media have been able to attract large financial subsidies because of the country's geopolitical position. As one of the most politically open and diverse countries in the MENA region, Lebanon has served as a platform through which surrounding countries and political actors communicate to each other. For the financiers subsidizing Lebanese news media companies, the return on their investment has been political not economic. This, however, makes the stability of each news organization's financing subject to the political and economic needs and conditions of the specific backer. While news media organizations in the country can and do get capital from financial institutions, several respondents said traditional financing is often a vehicle for influencing media coverage.

Lebanese media experts report that in the past few years, shifting political priorities among MENA nations and the growth of alternative digital communication platforms have reduced the subsidies Lebanese media organizations receive. This has greatly increased the financial pressure on Lebanese news organizations, reducing the resources they have available to hire and pay journalists and produce news. While money still floods in to news organizations during elections or to influence coverage about specific issues, respondents say that the size of subsidies has fallen and become less predictable in recent years.

A key outcome of Lebanon's subsidy-based revenue model is that the Lebanese news media market is characterized by a large number of highly partisan news organizations. This provides audiences with the opportunity to hear a full range of different perspectives on news events and policy proposals, so long as audiences invest the time in consuming news from multiple sources representing different political parties. It also creates an opportunity for quality journalism, so long as each news organization commits to monitoring and reporting corruption, if it occurs in any of the opposition parties. In reality, neither of these potential benefits are realized. Financial stress has reduced the resources Lebanese media organizations have to invest in investigative journalism or other resource-intensive reporting, even against their political opposition.

“For the financiers subsidizing Lebanese news media companies, the return on their investment has been political, not economic.”

Competition

Score: 3.21

In 2017, Lebanon had nine Arabic-language broadcast television channels, five national radio stations, and an estimated 14 Arabic-language national daily newspapers. All competing to attract news audiences and sell advertising.

According to Lebanese media experts, audiences are generally unwilling to pay directly for news content. Subscriptions are, therefore, not a potential source of revenue for news organizations. With advertising revenue declining because of digital competition, there are simply more news organizations in the market than can be sustained under revenue models that protect editorial independence. Unsurprisingly given these conditions, between 2017 and early 2019, several national newspapers in Lebanon closed. Local experts say that some surviving news organizations are struggling to pay their employees.

As the number of DNNs in Lebanon grows, the financial problems facing both legacy news organizations and new digital news sites will likely increase. Critically, the country's complex political landscape will almost certainly complicate any process—including simple economic failure—that threatens the range of political viewpoints being advocated by news media in the market. Given Lebanon's population size, economy, and political and cultural diversity, the number of news media organizations that would be financially sustainable under traditional commercial or public-service media business models would likely be smaller than the number of political groups seeking media representation. Thus, achieving a financially sustainable, editorially independent national news media industry will require significant restructuring of the current market in a way that would be acceptable across Lebanon's political coalitions.

A second factor affecting news media viability, according to Lebanese media experts, is the structure of the country's advertising market. The distribution of advertising is controlled by an advertising agency that exercises an almost monopolistic power over legacy news organizations' access to revenue from national and international advertising. The power of the agency to decide which news organizations receive advertising, and how much is placed in each outlet, is a clear obstacle to the financial stability and editorial independence of individual news organizations. Several respondents reported that a factor in the closure of one of Lebanon's major newspapers was a decline in advertising sales.



The high level of concentration in the advertising industry has other effects on news media viability. According to respondents, because typically news outlets receive a set contractually agreed amount of advertising from the agency, many do not have in-house sales departments or staff tasked with increasing the company's revenue. This lack of staffing limits their ability to develop alternative revenue sources as conditions in the Lebanese market change.

Normally, when market concentration in an industry threatens consumer welfare or other industries, governments address the problem through either regulation of the monopoly company or through anti-trust actions that break up the dominant company and open the market to competition.

In the case of Lebanon, if the advertising industry were to become competitive, news organizations would have to develop in-house sales departments staffed with people skilled at working with agencies and advertisers in selling and scheduling advertising to ensure maximum return for the advertiser. Ideally, those staff also would be tasked with developing new, diversified sources of revenue for their employers. But even so, the staff increases and related expenses would come as overall revenues are declining and advertising revenues are becoming less predictable. Government regulation of the advertising industry is even less likely to be effective. Commercial advertisers seek the greatest financial return on each advertising dollar spent. They accomplish that by placing their ads in media that reach the audiences most likely to buy the product they're advertising. Government regulation of advertising distribution among Lebanon's traditional news outlets would make advertising less effective for advertisers. That would likely hasten advertisers' flight from legacy news media companies to digital platforms.

Audience Demand

Score: 2.17

As regards to the audience, Lebanese media experts were unanimous in saying most Lebanese consume only those media channels that represent and reinforce their own political beliefs, reinforcing personal information bubbles.

This human tendency to avoid information that is dissonant with one's own opinions was first recognized in 1957 by psychologist Leon Festinger. It has become a question of increasing concern in the era of social media, which allows users to limit the information they receive to whatever they personally select. Because audiences avoid "cognitive dissonance," political partisanship is an effective product-differentiation strategy for news media organizations, one likely to increase audience members' loyalty to a media brand. But as has been widely recognized, it also appears to increase social and political polarization among news audiences.

Interestingly, according to respondents, the least partisan sources of Arabic-language news in the country are the government-owned Public Service Broadcasting (PSB) television and radio channels. Because they are owned and operated by a carefully constructed multi-party coalition government, observers say the channels strive to cover news from as neutral a viewpoint as possible. Unfortunately, respondents said the PSBs are badly underfunded, and the non-partisan nature of the news they offer attracts such small audiences that most politicians and media observers consider them to be largely irrelevant in the country's news media landscape.

While direct financial subsidies provide the backbone of Lebanese news media's revenue, advertising, too, is a critical source of funds. As is true around the world, Lebanese news media face declining advertising revenue thanks to new competition from digital platforms that help advertisers better target individual audience members. The two major advertising platforms, Google and Facebook, reportedly siphon off most revenue generated by advertisers trying to reach Lebanon's digital audiences. Finally, for Lebanese news media organizations, a major obstacle to financial self-sufficiency is the structure of Lebanon's advertising market.

Trends in the Lebanese News Media Market

Lebanese news media organizations are beginning to explore alternative revenue sources. Media experts reported that digital news sites are beginning to sell advertising to small local businesses—a source of potential advertisers largely untapped by the country's dominant national news organizations. Other digital news startups are partnering with various types of digital information businesses. The key to this model is that an organization seeks not just to diversify its sources of reve-

nue, but also to capture production synergies in information gathering, marketing, and technology across all lines of business, including the news operation.

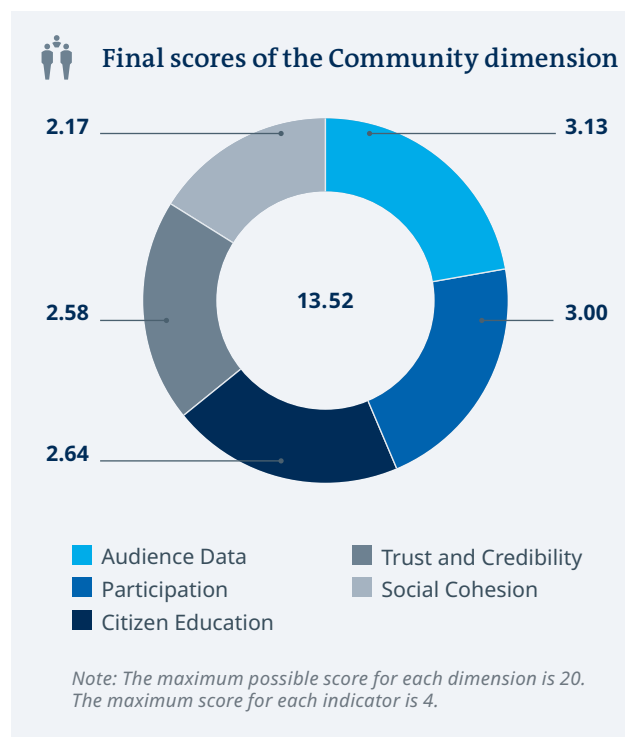
But efforts to find alternative revenue models have been mixed, at best. Some respondents reported the news organizations for which they had worked had been slow to recognize the need to diversify their business models, and that those in the organization who had championed change had faced strong internal resistance. This is a common problem in news organizations worldwide. Research shows journalists strongly resist organizational changes they think may undermine their professional autonomy or reputations.

Lebanese news organizations have been equally slow to adopt new strategies to reduce the costs of news production. Lebanese media experts say that at least partly because of the highly partisan nature of the country's news, there have been few attempts among news organizations to pool reporting resources or collaborate on major projects.

There are a few bright spots in the economic landscape of Lebanon's news media. Despite the difficult economic conditions facing established legacy news media organizations, small and medium-sized DNNs have been launching in large numbers. While it is hard to predict the long-term survival rate for such enterprises, media experts say at least some appear to be finding new content niches—including local news—and establishing footholds. Observers say that while some of the new DNNs are trading influence for subsidies, others are finding alternative sources of revenue, such as advertising from small, local businesses or businesses that want to reach the large Lebanese expat population.

Finally, despite the many disruptions the digital era has created for news organizations around the world, Lebanon appears to have avoided at least one problem so far. Digital ad fraud and other forms of cyber-attacks on media financial operations are as yet largely unknown in the market, according to observers. "We're too small to attract that kind of attention."

3.3 Community



The Community dimension of the Media Viability Indicators measures the audience's attitudes towards, and relationship with, the nation's news media. In an era when audiences have nearly unlimited media choices and the power to control their own consumption, the audiences' attitudes towards journalists and their relationships to individual news media organizations are increasingly important factors in viability.

Audiences, in their role as citizens, shape the political environment in which news media organizations operate. The size, influence and purchasing power of a news organization's audience determine which, if any, advertisers or politicians are willing to pay to reach those individuals. Finally, in an era when news media audiences and advertising markets are fragmenting, audience loyalty to a media brand is becoming almost as important to financial sustainability as audience size.

Citizen Education

Score: 2.64

Media literacy programs are available in some Lebanese schools and universities, but the majority of the experts consulted said media literacy is generally not high. At least one expert thought personal experience with social media was helping improve media literacy among Lebanese, but most experts were convinced that Lebanese audiences' evaluations of whether reporting was "true" and "accurate" was determined by their partisanship.

Social Cohesion

Score: 2.17

When Lebanese media experts discuss news media-community relations in Lebanon, they have one overwhelming concern: the highly partisan nature of Lebanon's news media organizations and how Lebanese audiences use that feature to construct their own airtight information bubbles. Discussion of nearly every measure of the public's attitudes toward journalism in Lebanon centered on how political partisanship distorts news media-community relationships.

The highly partisan nature of Lebanon's news media both reflects, and has been created by, the country's complex political landscape, which is characterized by a large number of political parties with very disparate priorities and goals. When asked whether "Most citizens have enough shared values to permit the peaceful political negotiation of policy and social issues," one respondent eloquently characterized the situation:

"They have divided the cake according to a fair division, so they feel their values are accepted and acknowledged, even if their values are not shared. The space for shared values is very small, but the space for conflicting values to coexist is large."

Another participant noted that the country's long civil war has "inoculated us against violence," adding "we know how much we have to lose from conflict."

“Lebanese media experts say news organizations rarely tap into the expertise of their audiences or the content they produce.”

Nevertheless, the deeply divided nature of Lebanon's society combined with an overpopulated media market funded by political actors makes newspapers and television news programs ideological echo chambers. That, combined with the human tendency to avoid information that challenges preexisting beliefs, reinforces the centrifugal effects of news reporting on Lebanese society.

Trust and Credibility

Score: 2.58

The experts largely agreed that the public's trust in the media was at least as high or higher than their trust in government and other social institutions. But even that bright spot was a reflection of ingrained partisanship. One respondent said trust in journalism was higher than trust in government, but only because trust in government was so low. Others said that the public's trust in media mostly reflected a willingness to believe whatever the partisan news outlet of their choice told them.

Evaluations of audience loyalty to their chosen news organizations were similar. Respondents said that Lebanese audiences are fiercely loyal to their chosen partisan news purveyors but only to a point. Loyalty to the news organization does not extend to willingness to pay for its content—a willingness that recent research has shown is increasingly key to news media viability. Nor does it extend to taking to the streets to defend journalists' rights to free expression. Lebanese audiences are easily roused to defend their favored journalists and news organizations, according to respondents, but mostly through online outrage. More discouraging, the outrage usually reflects anger over attacks based on political differences, rather than a defense of the institution of journalism and its role in society.

Participation

Score: 3.00

If the Lebanese audience's support for journalism is qualified, the news industry's willingness to engage with that audience is equally so. Lebanon is a technologically sophisticated country and its population is digitally active. But Lebanese media experts say news organizations rarely tap into the expertise of their audiences or the content they produce.

Some news organizations offer opportunities for audiences to comment on platforms they administer, but most audience feedback appears to take place on social media. Resource issues play a role in news organizations' low level of engagement with their audiences, given the need to filter public comments for accuracy and offensiveness. However, respondents also acknowledged that journalists tended to prefer official sources rather than information gathered from the public.

Research shows this reluctance to value the audience's knowledge and expertise about the social and political issues affecting their daily lives is a global phenomenon grounded in the professional culture of journalism. One respondent acknowledged that her organization had not "capitalized enough on the ability to communicate" with its audiences. She noted that even when the newsroom had tried to do so, the editor assigned a junior staff member to monitor social media for feedback and possible stories, feeling that a senior, highly paid journalist was better used elsewhere. The digital specialist lacked the experience and organizational power to successfully move story ideas into the main news budget, dooming the effort to failure from the start.

"The social media person is now your first point of contact with the audience. They need to be senior enough and skilled enough to maximize that contact," she said. Some news organizations appear to be starting to incorporate small amounts of user-generated content into their news, in an effort to extend newsgathering resources. Success in attracting user-generated content depends on making it clear to the audience that the

organization is open to receiving contributions. Most news organizations remain cautious about using citizen contributions, however, out of fear of being fed disinformation and the reputational damage that could result.

Audience Data

Score: 3.13

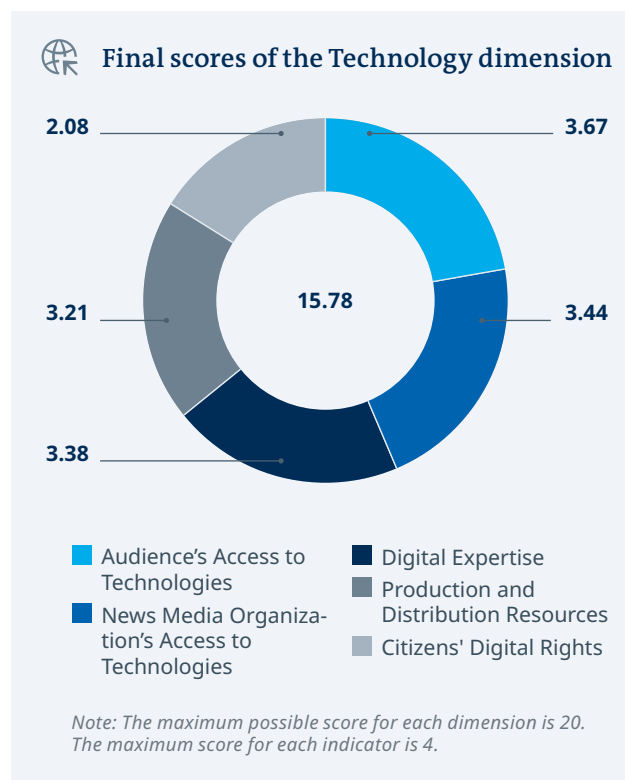
In an era of hyper competition for audience attention, news organizations around the world are turning to media analytics to better understand their readers, listeners, and viewers. Partisanship affects Lebanese news organizations' ability to do even that.

Media experts say audience data are available in Lebanon and have been widely used by broadcasters. The reliability and validity of the data are, however, contested, with accusations that the results have been tainted in the past by political partisanship and bribery. Thus, trust in the quality of the audience data varies widely, a reality reflected in the views of the experts interviewed.

Additionally, as has been true in the news industry generally worldwide, broadcasters have used audience data and other forms of audience research, whereas historically print organisations have not.

Respondents said news organizations in Lebanon are becoming interested in media analytics. They believe enough individuals skilled in data analytics will be available to meet the news industries' needs as demand for specialists grows.

3.4 Technology



Lebanon's technological infrastructure and access to digital expertise are supportive of news media viability. Of the five environmental dimensions affecting news media viability in the 21st century, Lebanese experts ranked Technology as the area where the country's performance is strongest. Only citizens' digital rights were identified as a significant problem in the technology dimension.

Production and Distribution Resources

Score: 3.21

The basic resources needed for news production and distribution, including digital technologies, are readily available in Lebanon or surrounding countries at affordable prices. Media companies access technologies on the open market without government interference. The only problem experts noted was that the country has a long-standing problem with the reliability of its electrical grid. But most businesses in the country, including news media organizations, have long since installed their own generators, so electrical disruptions do not interfere with production.

News Media Organization's Access to Technologies

Score: 3.44

Digital infrastructure also is widely installed, although according to respondents not all areas of the country have the fiber optic cabling necessary to deliver high-speed Internet service. The country has access to several different trustworthy digital payment systems, but few news organizations use them. The reason is not lack of public trust, according to respondents but, rather, lack of public willingness to pay for news.

Access to media distribution systems such as news kiosks and the Internet is also considered to be generally equitable and apolitical. There have been instances when online reporting on topics considered politically taboo or links to sites in Israel have been shut down, according to respondents. It has not always been clear whether government agencies or other non-state actors, such as political parties or independent groups, were responsible for such censorship.

Audience's Access to Technologies

Score: 3.67

Audiences in Lebanon are digitally sophisticated, and Internet and mobile penetration rates are high. The price of receiver technologies such as television and radio sets and mobile phones is not seen as a problem for the population. In contrast, Lebanon's mobile data rates are reportedly very steep compared with other countries. Discount packages are available for students, for members of Lebanon's large refugee populations, and for other disadvantaged groups. The price of data does not yet appear to be dampening demand for digital content.

Digital Expertise

Score: 3.38

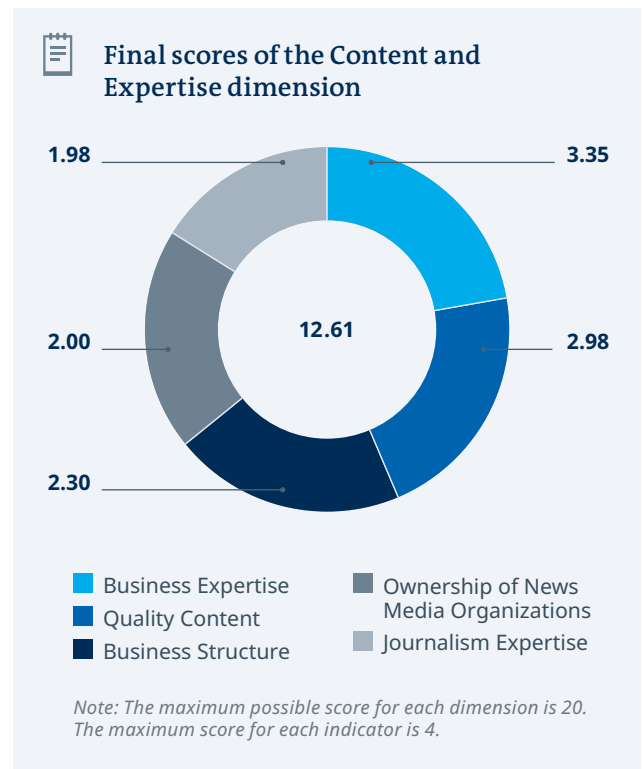
News media organizations are generally seen as already having the digital expertise they need in-house or otherwise available at costs they can afford. Access to digital expertise is not seen as a problem for news organization viability, although one respondent noted that keeping up with the rapidly changing field requires occasional travel outside of Lebanon to access training. Respondents said that while attempts in Lebanon to use digital technology to censor or filter content were rare, journalists have had few problems defeating those attempts when they have occurred. Respondents noted that in some areas, such as optimizing news content for digital discovery and marketing, there was room for improvement among journalists, and that smaller news organizations would probably benefit from programs to enhance their technological skills. In general, however, the level of technological expertise among Lebanese journalists and news organizations is supportive of news media viability.

Citizens' Digital Rights

Score: 2.08

The one area in the technological environment that experts saw as a problem for news media viability was citizens' digital rights. Online users cannot be confident in their data privacy and security and operate in the knowledge that their activities may be subject to surveillance. Citizens have been called before authorities to account for their online activities. Legal repercussions in such cases are rarely more than what one respondent called "a slap on the hand." But the purpose of such actions is clearly to intimidate journalists and individuals, a strategy that has a chilling effect on reporting and free speech through self-censorship.

3.5 Content and Expertise



The Media Viability Indicators measure news media viability along two content dimensions: Editorial independence and the quality of the journalism produced as judged against widely accepted international standards. Lebanese media experts rate the current performance of the country's news media low on both standards. Of particular concern is the partisanship of the national news media, the low pay received by journalists, and the lack of transparency in news media ownership and business structures.

When asked to score news organizations' competencies and the quality of the content they produce, the Lebanese experts consulted rated both as poor and a significant problem for the country's news media viability. Indeed, the content dimension was ranked as being a bigger hurdle in achieving news media viability than anything except the country's political dimension. But the experts also noted that because of the openness of Lebanese society, the overall quality of news content available to the public is better than the quality of the content supplied by the Lebanese news media alone. Indeed, the experts identified a number of areas of excellence in the news content available to Lebanese news audiences, as well as areas where improvement is both needed and possible.

Quality Content

Score: 2.98

Lebanon's media experts criticize the quality of the country's news media content because of its structured partisanship. Some note that a few news organizations strive to produce quality news on subjects not relating to the source of their own funding. But no single Lebanese news organization is seen as routinely producing outstanding journalism that is non-corrupt, non-partisan and serves the public interest.

Respondents also criticized the lack of transparency around the connections between content and funding. One respondent argued that virtually all news reporting in Lebanese news organizations could be considered "native advertising" because news organizations' sources of funding influence their coverage of so many topics including politics, religion, economics, international affairs, and issues shaped by any of those factors. But respondents also argued that native advertising of commercial products also is creeping into Lebanese news content, often without being clearly indicated as such to the audience. Another area of content identified as a problem, in terms of quality, is access to information that reflects the perspectives of minority and marginalized groups in society. Lebanese audiences have some access to such content, but there are enough concerns that experts rank it as being a problem for news media viability. The partisan-nature of news content means that audiences must be willing to consume news from multiple news sources in order to encounter the perspectives of minority and marginalized groups. Additionally, cultural taboos around coverage of some marginalized groups still persist.

There are, however, areas of excellence in the news content available to Lebanese audiences. Lebanese audiences have open access to international and national news sources through the Internet, making it possible for them to access high quality journalism from around the world. The timeliness of news access is outstanding, with real-time information available from multiple sources as events occur. Minority groups in Lebanon have news media available to them in their own languages

and, indeed, there also are news outlets that produce news in French and English. Some respondents argued the foreign-language media in Lebanon often produce higher-quality content than the Arabic language media because of having non-political funding sources and more editorial independence.

Evaluation of the quality of the local news available to Lebanese audiences was more varied across the respondents. Most said they were unaware of a local news sector in Lebanon. Historically, the news industry has operated almost entirely at the national level, with few journalists covering local government and community issues in cities like Tripoli and Tyre. But in the Internet age, that appears to be changing. At least three respondents were aware of a vibrant new niche in local news coverage springing up as digital native news organizations, funded at least in part by advertising sales to local businesses. While the phenomenon is a fairly new part of the Lebanese media ecology, the perception is that these new organizations are producing high-quality journalism for their local markets.

Journalism Expertise

Score: 1.98

The current situation of journalists in Lebanon is a major obstacle to news media viability. According to both the respondents in this study and international media development NGOs, the pay scale for professional journalists in Lebanon is intolerably low and journalists in many organizations are paid irregularly, if at all. In some news organizations, journalists go months without receiving a paycheck. By all accounts, because of the pay situation, journalistically unethical behavior has become normalized, with many journalists working as consultants or spokespersons for the politicians or political parties they cover. Bribery, according to respondents, is common. Journalists often promote themselves by promoting their close relationships and personal friendships with people in power, instead of maintaining the personal distance from their subjects required for critical reporting. Declining financial resources are blamed for the critically low levels of pay for journalists in Lebanon. However, the situation is not entirely new, and the lack of distance between journalists and politicians and political parties reflects, in part, the revenue model used by the industry.

Data on the stability of journalism jobs in Lebanon are not available. With the closure of several major newspapers in the past 18 months, it is clear that the number of jobs available in the legacy newspaper sector is declining. Reductions in the financial support relied upon by TV stations have also forced staff cuts in some newsrooms. Yet at the same time, digital native news startups are flourishing, and the country is seeing the birth of a digital local news sector. Therefore, the overall status of employment growth or loss in the industry is unclear. There is also debate about the strength of the labor pipeline feeding the news industries in Lebanon. By all accounts, Lebanon has a

sufficient number of university and professional training programs in journalism, mass communication and related subjects to supply the news industries' labor needs. There are questions about the extent to which those programs are adequately preparing students with the knowledge and skills required in 21st century newsrooms. In a debate echoed around the world, respondents from journalism programs in universities and respondents from the news industries had markedly different views as to whether journalism education and training programs were able to "supply the needs" society has for professionally prepared journalists.

“The business expertise needed to find a new path forward to media viability is readily available in the country.”

Ownership of News Media Organizations

Score: 2.00

Respondents were nearly unanimous in identifying news media ownership structures as being a major obstacle to achieving news media viability. There was some disagreement over the level of transparency in news media ownership, which reflected differences in views on what passes for "transparent." On the surface, news media ownership appears to be transparent in Lebanon. Records listing news organization ownership are available. Several respondents said something along the lines of "everyone one knows who owns the different media." But the issues that concerned respondents bubble below that surface-level transparency.

According to respondents, many news organizations are owned by families or political leaders. In some cases, shell companies and networks of friends and distant family relations, who are passed off as shareholders, obscure the company's actual control. An issue at least as important as ownership is the question of who funds the news organization. According to several respondents, the biggest obstacle to media viability is less the transparency of ownership and more the question of who is providing the owners with the money to keep the news organization running. In short, most news organizations in Lebanon are tied to powerful government, political or business interests, and the journalists working for them have little editorial independence.

Business Structure

Score: 2.30

The problems in the ownership and financial structures of Lebanon's news media also influence the business structures through which news organizations operate. As one respondent said, "the money came in suitcases," adding that under such business models, news opera-

tions were profitable before they ever started reporting. Today, given the changing political landscape of the MENA region and the changing economic landscape of news industries, Lebanon's news media organizations need a new approach. The majority of respondents felt that lack of functional business structures in media management was a major obstacle to news media viability in the country. Among the needs identified were robust business and finance plans that employees were trained to implement; coherent strategies for managing news organizations through the changing media environment; greater structure and consistency in business relationships with clients; and the development of in-house teams capable of generating revenue from credible and ethical sources. As one respondent said, "we don't look at journalism as a business. It has always been a platform for ideological points of view and the party."

Nevertheless, respondents reported that the industry is making some progress in these areas. Leading the way are the hundreds of Digital Native News startups in the country, which are reportedly much more likely than legacy news media to operate under traditional business plans. Another area where Lebanese news media appear to be changing is in networking between organizations. Historically, newsrooms have rarely collaborated on joint reporting projects or pooled resources, at least in part because of the underlying issues of political partisanship. In the past few years, however, there have been instances where news organizations have crossed ideological lines to share expertise or aid each other.

Business Expertise

Score: 3.35

On a brighter note, Lebanon's media experts were confident that the business expertise needed to find a new path forward to media viability is readily available in the country. They also believed that many news organizations are willing to tap that expertise wherever they can find it—including among women and minority groups. Unfortunately, a major obstacle to change is the lack of the financial resources required to hire the experts who could rethink news organizations' strategies and operations. Another challenge is convincing those in senior positions in news organizations that there is a need to think and operate differently. Respondents said that some news organizations are not yet trying to monetize content across multiple platforms. Others said newsrooms and journalists usually struggle trying to innovate with new types of content and processes. Multiple respondents said most of the news organizations with which they were familiar lacked a strategic vision for dealing with the changing Lebanese environment for news media. There is no sense of how to even begin imagining a path to news organization viability. But it was clear to the experts interviewed for this project that finding such a path is increasingly urgent.

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4. Recommendations and considerations

What is certain is that depending on market economics to rationalize news competition will not be successful in any reasonable period of time, because of the externality value of owning news platforms. Central and Eastern European countries have been the global poster children for hypercompetitive news media markets for 30 years and counting, at this writing.

In Lebanon, the problem will be further complicated by the diverse, complex nature of the country's political landscape, the strong financial connections between political actors and news media companies, and the historic role news organizations have played as mouthpieces for political parties and other actors.

Additionally, the launch of digital native news and information sites is likely to only increase the effects of hypercompetition on Lebanon's news industries in coming years.

There are, however, steps towards achieving financially sustainable news markets that could be considered in Lebanon. Additionally, there are ways to support greater financial and journalistic capacity in individual news organizations and across the industry as a whole.

4.1 Potential steps towards reducing news market competition

- Lebanon has a law prohibiting foreign direct financing of news media organizations. The law is widely and universally flouted, and the state makes no attempt to enforce it. A first step towards reducing the number of privately owned news media organizations in the Lebanese market would be for the state to begin enforcing the existing law against foreign subsidies in a way that is completely transparent and equitable across all companies and owners. This would mean enforcing it even where owners are powerful Lebanese politicians or political party leaders;
- Some news organizations almost certainly would fail sooner than others if this strategy were implemented. Because each news organization currently represents a particular political party or interest, this could be politically destabilizing;
- To prevent news organizational failures from shutting out political voices and viewpoints as the news market reorganizes, the state could use its PSB channels to provide news space and airtime for the parties that otherwise are losing their platforms;
- The PSB channels could be used to establish a channel sharing arrangement, an approach often used to launch new cable networks. The PSBs would maintain their own existing nonpartisan news programs. However, the remainder of the broadcast day could be given in blocks to the domestic political parties that have lost their individual newspapers

or news channels because of strengthened enforcement of media subsidy laws. Those parties or groups would be permitted to program their respective time blocks as they saw fit, within the standard limits of Lebanese content regulations. Because different dayparts have different audience potential, the dayparts assigned to different parties could be placed on a standardized rotation to prevent perceptions of favoritism;

“Those interested in media viability in Lebanon should focus on strengthening the financial stability, resources, and professional capacities of the PSBs.

- Lebanon's PSB channels should be seen as the potential backbone of efforts to rationalize the nation's news media markets and make high-quality, nonpartisan, editorially independent news available to the Lebanese audience. The channels already are less partisan than their commercial counterparts, at least partly because of their sensitivity to the coalition nature of the government that funds them. Experts describe them as being financially vulnerable, with few resources available to produce quality journalism. Although Lebanese citizens are reportedly strong defenders of the PSBs, their audiences are small;
- Those interested in media viability in Lebanon should focus on strengthening the financial stability, resources, and professional capacities of the PSBs. As publicly owned media organizations, it will be easier for media experts to effect change through the PSBs than through privately owned news organizations;
- Lebanon's PSBs should be governed by an oversight board modeled on those used in Western Europe to ensure that the organizations are protected from direct government interference, while being inclusive and reflective of the diversity of perspectives and interests in society;
- Lebanon's government is facing financial shortfalls. Therefore, increased funding for the PSBs should come through implementation of, or increases in, a mandatory, universal set-use fee on citizens, such as is used in Western Europe. This would increase the PSBs' financial resources, while ensuring that citizens do, in fact, start paying for the news content they both need and use. It should be seen as the equivalent of the mobile data rates users pay for digital content;
- Both television channels and newspapers are licensed in Lebanon. Lawmakers should begin exploring how the media licensing process might be used to reduce the number of media organizations in the market to a sustainable level. Whatever process is used, it necessarily

would need to be fair, transparent, free of political or personal favoritism, and based on some defensible measure of positive performance. Where a news organization does not fail economically of its own accord, if the state withdraws that license from the market, appropriate financial compensation for owners should be considered;

- A different factor affecting the financial sustainability of Lebanon's legacy media organizations is the lack of competition in the country's advertising market. A single major advertising agency controls distribution of the majority of national and international advertising in Lebanon. The power of the agency to decide which news organizations receive advertising, and how much is placed in each outlet, is a clear obstacle to the financial stability and editorial independence of individual news organizations. Digital Native News organizations face similar issues in Google and Facebook's control over the distribution of, and revenue from most advertising on digital platforms;
- Governments usually address market concentration that threatens consumer welfare or the independence of another industry either by breaking up the dominant company through antitrust actions, or by directly regulating the company to prevent predatory behavior and ensure reasonable pricing. In the case of advertising market concentration in the 21st century, neither approach would guarantee success but should be explored;
- If the advertising agency business were to become competitive, news organizations would have to increase their sales and business development staffs so as to be able to work with multiple agencies and advertisers. The staff increases and related expenses would come at the same time advertising revenues are declining because the increased supply of advertising space is fragmenting advertising placements;
- If the total number of news organizations in the Lebanese market declined at the same time advertising distribution became more competitive, each news organization's increased advertising share might provide some offset for the increased business expenses associated with selling that advertising;
- Government regulation of advertising distribution in Lebanon would be unlikely to be effective. Commercial advertisers seek the greatest financial return on each advertising dollar spent and place ads around content that reaches the audiences most likely to buy the advertised product. Government regulation of advertising distribution would make advertising less effective for advertisers. That probably would hasten advertisers' flight from legacy news media companies to digital platforms, which already provide advertisers with better individual consumer targeting and audience metrics.

4.2 Increasing Business Capacities in Lebanese News Industries

Many, if not most, of the obstacles to media viability faced by Lebanon's news organizations are faced by news organizations around the world. Most, although not all, of the issues with editorial independence and content quality in Lebanese news outlets have their roots in business and resource issues.

“Most, although not all, of the issues with editorial independence and content quality in Lebanese news outlets have their roots in business and resource issues.

Thus, improving the internal business structures and expertise of Lebanon's news organizations is a critical step towards realizing all aspects of viability. Possible strategies for increasing business capacity among Lebanon's news industries include:

- NGOs should consider prioritizing business training over traditional journalism training workshops, when considering their own resource allocations;
- Target media owners and senior managers for training and workshops, even more than staff members. Strategize how to gain senior management participation in every training program offered. Research repeatedly shows that training low- and mid-level staff members to think differently or work differently has little long-term effects on organizational behavior. Senior managers who have not been exposed to the new ideas or techniques almost invariably reassert the traditional way of doing things, rendering the training efforts for low- and mid-level staff members largely useless;
- Explore the development of a part-time, low-residency/partly online, low or no-cost, media MBA or other form of media business training course for Lebanese media professionals. It may or may not need to lead to a formal degree, depending on the expectations of potential participants;
- The economics underlying media and information products, in general, and news content, specifically, are not the same as the economics underlying consumer products. Information economics dictate approaches to business strategies and tactics that differ from those used by consumer products companies. For that reason, a standard MBA or business education program is not sufficient preparation for media managers;
- Some elements of a standard MBA program – accounting, marketing, digital marketing, business and financial plan development – should be part of the program, but other elements should be tailored for the special dynamics of news media markets;

- Develop workshops for Lebanese media professionals that tap current and ongoing global research and professional expertise on media business issues. The workshops should focus on best business strategies and practices for advertising sales and placement; the use and application of media analytics for content management, sales and marketing; digital product development, launch and marketing; organizational structuring; managing for creativity, entrepreneurship and intrapreneurship, etc.;
- Consider offering these workshops onsite at media organizations as brownbag lunches, coffee hours or cocktail hours. The highly partisan and competitive nature of Lebanon's media may make it difficult to attract competitors to a shared workshop on business strategy and practice. Increased convenience and decreased rivalry might increase participation and effectiveness;
- Develop workshops on capturing production cost efficiencies. In media viability discussions, the focus usually is on finding revenue. While that is critical, of course, the other half of financial sustainability is cost control. Research on business management in the 21st century shows that developing business networks of different types can be a key factor in financial success;
- Lebanese media organizations do not appear to be effectively tapping even the low-hanging fruit of resource sharing: joint, multiorganizational reporting projects; using each other's journalists as guests, panelists, interviewees, columnists, and other sources of expertise, content and insight; tapping the audience and user-generated content for expertise and content; monitoring and using the ideas, themes and memes on Social Media; developing affiliated businesses that use the type of content and information generated by a newsroom — or, conversely, partnering with businesses that produce products that can supplement news products and services; selling unused capacity to other news organizations or businesses, etc.;
- Develop networks both within Lebanon and across the MENA region for sharing ideas, experiences, and expertise regarding media business problems. Again, most problems in the industry today are shared problems. Particularly where companies are not direct competitors, there will be benefit in joint brainstorming of solutions;
- Take media business training programs to journalists, as well as managers and staff members working in sales, marketing and other business departments in news organizations. For news organizations to successfully negotiate their changing business environments, it is critical that the journalists who work in them are educated in news media economics and media business fundamentals. Research shows that globally, journalists are often the strongest source of resistance

to change in news organizations – particularly changes designed to improve content marketing, responsiveness to audiences, and other organizational business practices. Most journalism education programs don't include courses in media economics or management, leaving most journalists with almost no understanding of the organizations and industry within which they work. Lebanese media experts confirmed personal experiences of failure when trying to sponsor market-oriented changes in the news organizations for which they worked, because of change resistance among journalists and editors.

4.3 Increasing journalism capacities in Lebanese news industries

The most obvious problem related to the professional capacity of Lebanese journalists is financial. Journalists are widely underpaid – or not regularly paid at all. This has contributed to professionally unethical behavior of many kinds, which Lebanese media experts say is pervasive across the industry. Low salaries and employment instability also will have long-term effects on Lebanon's journalism quality by encouraging talented individuals to avoid the field in favor of more stable professions. In economic terms, a news story is a "talent good," meaning that its quality is almost wholly determined by the intelligence, education, knowledge, perspective, and talent of the individual or individuals who produce it. If a country's best and brightest no longer see journalism as an attractive career, the quality of the journalism available to citizens will decline.

“Low salaries and employment instability also will have long-term effects on Lebanon's journalism quality by encouraging talented individuals to avoid the field in favor of more stable professions.

The pervasiveness of professionally unethical behavior among Lebanon's news organizations suggests Lebanese journalists do not share a strong professional culture. A professional culture exists where individuals working in a field that requires autonomy and independent judgment are expected to have completed some form of professional education and training that gives them shared knowledge and skill sets, a strong commitment to the field's "mission," and a carefully defined code of ethics to which members of the profession commit. Members of professions such as doctors, lawyers and journalists are considered to have a strong professional culture when they define themselves primarily by their membership in their profession. Their highest loyalty is to the profession and its mission, rather than to the specific organization for which they work.

Although salaries and layoffs are the most pressing issues among Lebanon's journalists, media experts identified other areas where journalism capacities might be enhanced. Possible strategies for addressing these issues include:

- Media associations representing journalists are permitted in Lebanon. Respondents were unanimous in saying that existing associations are largely ineffective. The reasons proposed for their lack of effectiveness varied, but included traditional, entrenched and ineffective leadership; partisan divides among journalists that hinder cooperation; and lack of participation by younger journalists;
- Focus on either redeveloping existing journalism associations into strong, active organizations or on starting new journalism professional associations to replace the existing ones;
- Focus on recruiting young journalists to membership. Priority issues should be organizing to fight for reasonable, dependable salaries; improving the professional culture of journalism and commitment to professional ethics; lobbying for a stronger political climate supporting journalism and free expression; and combatting efforts to intimidate individual journalists;
- If efforts to build the strength and effectiveness of journalism associations succeed, those associations can become a locus of efforts to build journalism capacity;
- Explore the potential for legislation setting minimum pay scales and payment practices of news organizations or industry in general;
- Provide workshops and ongoing training opportunities in the following areas. As noted above, it is critical to get editors and senior newsroom managers to participate in these training efforts. Otherwise, the training will have little actual impact on newsroom practice;
 - Teach conflict-sensitive reporting to journalists and editors;
 - Teach multi-format, multi-platform content skills across journalists working in all media sectors;
 - Offer workshops on search optimization, content optimization, content discovery, content marketing, and social media marketing for journalists and newsrooms;
 - Offer workshops on best practices for integrating social media content, themes and memes into news budgets and news stories;
 - Teach basic computer coding to journalists who do not yet have those skills;

- Offer workshops on media economics, media management, and global media industry trends, so journalists have a basic understanding of the industry in which they work and how they contribute to organizational success—and failure;

- Offer creativity training and change management training to both journalists and editors;

- Provide workshops on audience psychology, audience dynamics and media analytics to encourage journalists to understand and engage their audiences. In the 21st century, audiences control content consumption—not media organizations. News organizations and journalists may dislike that new reality, but they ignore it at their peril.

4.4 Increasing audience's media literacy

Lebanon's media experts were unanimous in decrying the tendency of Lebanese audiences to consume politically partisan content and to reject less partisan content, such as that produced by Lebanon's Public Service Broadcast channels. They were concerned by three specific issues: audience members' preference for content that confirmed their preheld beliefs and views; rejection of facts and information that challenge preheld beliefs or that originate from "opposition" sources; the willingness of many individuals to attack, at least in online forums, those with whom they disagree or see as "opposition."

“Lebanon's media experts were unanimous in decrying the tendency of Lebanese audiences to consume politically partisan content and to reject less partisan content.”

In truth, these are trends in audience behavior worldwide. As competition in news media markets began increasing in the 1990s with the global expansion of cable networks, news media organizations began to differentiate themselves from one another by staking out ideological positions and reporting news from a single perspective. Because of basic human psychology, partisanship has proven to be a highly effective news product differentiation strategy. The advent of digital news sites and social media now enable audiences to confine themselves to information echo chambers fine-tuned to precisely confirm their personal views. They also enable individuals to engage in peer mobilization and online attacks on those with whom they disagree in ways that were not possible before the Internet era.

The polarizing effect this has had on politics and societies around the world is well recognized. Given that the roots of the problem are in human psychology, no expert has yet proposed

an effective solution. Possible strategies for addressing these issues include:

- Lebanese media experts reported that Lebanon has media literacy programs in place and that emphasis on media literacy is increasing. Build on existing programs;
- Lobby for media and information literacy programs to be included in school curricula beginning in primary school and continuing throughout the educational process. Information literacy programs differ from media literacy programs in that they focus on teaching people: to know what information they need to solve a problem; find the information they need; evaluate the source of the information; evaluate the truth and accuracy of the information; be able to analyze, interpret and evaluate the information relative to the problem they are trying to solve; be able to apply the information to the problem; be able to communicate the information and the solution efficiently and effectively to an audience;
- Offer media and information literacy programs for adults. Creativity in shaping the appeal will be necessary to attract adult participants;
- Teach social media literacy in both school and community programs;
- Offer conflict resolution and negotiation skills both in school curricula and community workshops;
- Offer diversity and sensitivity training both in school curricula and community workshops;
- Work with criminal justice and social services agencies to increase the use of mandated training in the skills outlined above as part of the sentences offenders receive for threatening or attacking those with whom they disagree.

5. Practitioner's perspective and outlook



As this is the very first Media Viability Indicators (MVI) assessment, piloting the new framework for measuring media viability, it is important to reflect on the potential but also on the limitations. Hence, in this last section we discuss the following questions: What do the results presented here mean for media development in practice and how can they be translated into concrete next steps for this quickly advancing field?

The MVI assessment for Lebanon, as written by Ann Hollifield in collaboration with Maharat Foundation, ends in the preceding chapter 4 with specific recommendations and considerations for Lebanon. At DW Akademie, we are convinced that the relevance of this assessment goes beyond that of a dedicated country study. It presents the very first empirical study based on the MVIs, and we think that it has the potential to have an influence on the future of media development in general.

The MVIs were welcomed with enthusiasm by the expert community following their publication in 2020. At a time when the discussion about the survival of quality media is omnipresent but the systematic fact-based strategies to deal with this massive problem are limited, media development practitioners are seeking new innovative avenues, thorough assessment methods and conceptual orientation. In this context, the MVI framework has huge potential for effective and coordinated media development work, and can be used in different ways.

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The MVIs may help to focus the attention and information gathering on a particular aspect or a particular level (media outlet, networks etc.) in the media system, but they can also be used more broadly to give a systematic overview of the status of the viability of a media ecosystem. The indicators can be used to analyze and interrelate many different aspects of media economics and management, survival of reliable and relevant news in the public sphere as well as audience trust. Furthermore, the MVIs can provide media development practitioners and their partners with an overview of relevant questions or areas to be considered. A new form of strategic common ground and decision making is possible based on these assessments.

International organizations, among them BBC Media Action, Free Press Unlimited (FPU) and Internews, but also regional and national actors like the Media Institute of Southern Africa (MISA) and the Somaliland Journalists Association (SOLJA) have over the past year started to tentatively use the MVIs for their purposes: to assess the situation in selected countries, to focus on the situation of particular media actors like community media, to better understand the complex issue of media viability as a whole, or to develop better Theories of Change and logframes.

DW Akademie has in the past years systematically built up its media viability projects in the Global South, with funding from

the German Ministry for Economic Cooperation and Development. However, the financial resources for this pilot project applying the MVIs in Lebanon were comparatively limited and so, therefore, was its methodology. The first aim was to test the practical assessment of the MVIs, to check for gaps and redundancies in the framework and to evaluate the quality of the results. The MVI assessment in Lebanon was, therefore, not part of a larger strategy development process. The work of the author consisted mainly of expert interviews in the country as well as desk research. The interview partners were carefully chosen by media development experts on the ground (Maharat Foundation) and the interviews were well prepared, focused and covered all indicators of the MVI framework.

The result marks a milestone – as this study provides a proof of principle: It shows that the MVIs can be successfully applied and that they lead to new and relevant findings. They are more than just an abstract set of indicators. They provide for a systematic guideline for thorough assessment, empirical approaches, and – most importantly – a sound basis for effective media development work in practice.

The concrete results of this study, however, have their limitations. They should be understood as a first step towards a new, dedicated media viability strategy for Lebanon. A major effort in consultative, participatory work with different actors on the ground remains to be undertaken. For example, the recommendation to strengthen public service broadcasting would need to be further explored – as part of a strategy-building process with different partners, expert-consultants, and stakeholders. The question needs to be asked whether public service media really is a realistic option in Lebanon and whether there is enough energy for change in the country to tackle the challenges involved in this process. The same holds true for two other big fields that were identified: changes in legislation and the advertising market. The MVI assessment has put these issues on the table and specified them, but further systematic and strategic work is needed to decide on concrete and impactful steps in these areas.

Another crucial factor for the use of MVI assessments is time. Not only should the time required to do the research, and analyze and communicate the results be considered, but also the time needed for the next steps: in particular to translate these results and recommendations into meaningful action on the ground. It goes without saying that in a 3-year project with a preparatory phase, a lot more can be planned and put into action than in a one-year intervention. In the latter, the potential contribution of the MVIs might be rather modest, unless research can be conducted before the official start of the project. So there is also the risk that the opportunities the MVIs offer may not be used well enough. If a formative study takes too long, the project managers might be inclined to ignore it and run their interventions without the opportunity to take deeper insights and new options into account.

That said, the potential of the MVIs is undoubtedly there. And the assessments can be carried out in many forms: The MVIs can be considered a set of filigree evaluation questions that lead to relevant analyses and learnings. In-depth scholarly economic research with complex methodological designs is also possible. And broad and regular assessments of different media landscapes could be planned, including a scoring system that could help track changes in different areas.

The MVIs can be used as orientation points for practical strategic planning. They can allow media development organizations and their partners to find a common language and agree on goals and actions that they want to pursue together. Also, as part of a process of country coordination, different media development actors could agree on the current status of a media landscape. Based on this, a new form of strategic task division and cooperation could become possible in the area of media viability, beyond just exchanging notes at a distance on isolated projects and interventions.

In that sense, this first MVI assessment study delivers a second proof of principle: The MVIs allow for in-depth research, media systems evaluations and fact-based strategy development to bring people together to work in coordination on very specific and local aspects of a global problem.

Often, publications of this kind end by stating that further research is needed. But in this case, this is certainly not all. The potential of the MVIs must be further used and explored by the media development community for the good of viable media ecosystems and quality journalism.

So let's say: Further application in media development practice is needed.

Jan Lublinski, Laura Moore

We would like to thank Maharat Foundation for their support with this study, which included selecting all of the individuals to be interviewed during the pilot test, arranging the schedule of interviews, and handling the logistics on the ground.



The Media Viability Indicators (MVIs): Dimensions, sub-dimensions and key indicators

POLITICS

The politics dimension refers to a country's political and legal frameworks, both national and local, that affect the news media sector. It also relates to the extent news media are influenced and controlled by the government, and whether this has an impact on their diversity of views.

Rule of Law

- 1 Government actions are determined by laws that are fairly applied and enforced.**
 - 1.1 Government is based on the principle that citizens have the right of active participation in, and oversight of, the government.
 - 1.2 The country has an independent judiciary that applies laws and judgments impartially to businesses and individuals.

Freedom of Expression

- 2 The country has a strong legal framework supporting freedom of expression.**
 - 2.1 Laws establishing rights to free expression are enforced on all platforms.
 - 2.2 Criminal and civil statutes and actions are not used to silence or intimidate journalists, news organizations, or citizens providing fair and accurate coverage and commentary.
 - 2.3 Libel and slander laws are limited as much as possible and provide protection for journalists and citizens who have reported or spoken truthfully.
 - 2.4 Licensing and visas are not used to control journalists or limit news media organizations' access to information.

Access to Information

- 3 Citizens and journalists can access public information.**
 - 3.1 Government officials are available to provide information to news media organizations on a fair and equitable basis.
 - 3.2 Governmental meetings, hearings, and press conferences are open to news media organizations and citizens on a fair and equitable basis.
 - 3.3 Government documents and data are available to news media organizations and citizens on a fair and equitable basis.
 - 3.4 There are laws allowing journalists to protect their sources.

Legal Equality

- 4 Laws and regulations affecting news media organizations are comparable to those applied to other industries and are impartially enforced.**
 - 4.1 The general business environment (legal, regulatory, taxation) is supportive of private media enterprise.
 - 4.2 Laws that limit concentration, monopolies, and cross-ownership of news media organizations are impartially enforced.
 - 4.3 Government taxes and fees for news media organizations—such as broadcast license fees, newspaper registration, fees for establishing an ISP, taxes, etc.—are reasonable, comparable to those of other industries, and impartially applied.
 - 4.4 Foreign investment or foreign donor support for private news media organizations is permitted under reasonable regulations and restrictions.
 - 4.5 Copyright and intellectual property laws exist and are enforced, enabling news media organizations to profit from the original content and associated profits they create.

Media within Society

- 5 Relations between government and news media organizations are mutually respectful and professional.**
 - 5.1 Governments and their agents respect the societal role of news media organizations, and the relations are professional even during times of high tension.
 - 5.2 Government officials and politicians do not directly or indirectly threaten journalists as the result of their reporting.

- 5.3 Journalists do not frequently face physical threats and dangers as a result of their reporting.
- 5.4 Individuals or organizations that threaten or injure journalists face criminal prosecution and severe penalties.
- 5.5 Professional associations that advocate for journalists' rights and safety are allowed to operate.



ECONOMICS

The economic dimension relates to economic and financial aspects of the media market, news media organizations and their audiences.

National Economy

- 6 The national economy is strong enough to make news media organizations financially viable.**
 - 6.1 The economy produces enough consumer goods to create a strong advertising market.
 - 6.2 Household income levels are high enough to support a strong advertising market.
 - 6.3 The majority of citizens can afford to buy news media products and services.

Financial Stability of News Media Organizations

- 7 News media organizations are financially stable.**
 - 7.1 National news media organizations consistently break even or achieve profits/surpluses.
 - 7.2 Local news media organizations consistently break even or achieve profits/surpluses.
 - 7.3 News media organizations are able to develop diverse sources of revenue.
 - 7.4 National news media organizations' share of the advertising market provides a dependable revenue stream.
 - 7.5 Local news media organizations' share of the advertising market provides a dependable revenue stream.
 - 7.6 Digital and online advertising are not controlled by third party digital platforms. News media organizations can generate revenue from their own digital and online content.
 - 7.7 Ad fraud does not siphon off large portions of news media organizations' digital ad revenues.
 - 7.8 The majority of non-PSB news media organizations operate without direct subsidies (from the government or donors).

Financial Independence of News Media Organizations

- 8 News media organizations' sources of capital do not constrain their editorial independence.**
 - 8.1 News media organizations have access to the capital they need from credible institutional sources.
 - 8.2 Subsidies for news media organizations are distributed in a fair and transparent manner that is determined by law.
 - 8.3 Foreign organizations do not play a major role in supporting news media organizations, either financially or through content subsidies.
 - 8.4 Government advertising is distributed among news media organizations in a fair and transparent manner that is not used to constrain editorial independence.
 - 8.5 There is competition among advertising agencies in the market so that commercial advertising is not available to news media organizations only through a monopoly or near-monopoly distributor.
 - 8.6 News media organizations that receive subsidies remain editorially independent from donors.
 - 8.7 State-owned or funded news media organizations are protected from interference in editorial content by laws and independent governing bodies.
 - 8.8 National news media organizations have enough diversity in advertising clients that editorial independence is not at risk.
 - 8.9 Local news media organizations have enough diversity in advertising clients that editorial independence is not at risk.
 - 8.10 News media organizations' use of revenue sources, including native advertising and other forms of paid content, is transparent and does not affect the independence of editorial content.

Competition**9 Moderate competition among news media organizations exists, allowing for quality journalism.**

- 9.1 Moderate economic competition exists among news media organizations.
- 9.2 Small and medium-sized news media organizations can survive.
- 9.3 Levels of market entry and exit of national news media organizations is relatively stable from year to year.
- 9.4 Levels of market entry and exit of local news media organizations is relatively stable from year to year.

Audience Demand**10 Audience demand for quality journalism content supports a strong news media industry.**

- 10.1 News media organizations' audiences are big enough to attract advertising.
- 10.2 Publicly funded news media organizations' audiences are big enough to justify continued public financing.
- 10.3 News media organizations' audiences are attractive to potential advertisers.
- 10.4 Audiences value quality journalism content enough to be willing to pay for it.

**COMMUNITY**

The community dimension considers aspects related to the media outlet's audience, such as its capacities and values, as well as its relationships with media outlets themselves—its level of trust, emotional attachment, and participation.

Media and Information Literacy (MIL)**11 Citizens are able to consume and evaluate the quality of news and information content across multiple platforms.**

- 11.1 Citizen education across the nation fosters critical thinking of news media content and the forces that shape it.
- 11.2 Citizens across all population groups are able to evaluate information about sources and decide about the truth and validity of content.

Social Cohesion**12 Society is generally cohesive and peaceful, with the majority of citizens sharing accepted political and social values across diverse ethnicities, political, and religious affiliations.**

- 12.1 Most citizens have enough shared values to permit the peaceful political negotiation of policy and social issues.
- 12.2 The majority of citizens consume either news that impartially covers issues and reflects multiple perspectives, or multiple news media sources across different perspectives.

Trust and Credibility**13 Citizens have a generally high level of confidence in the credibility of news media organizations and their content.**

- 13.1 News media organizations are viewed as an ally of citizens in the effort to secure fair, equitable, and non-corrupt governments and corporations, as well as human rights.
- 13.2 Public trust in the accuracy and fairness of news media content is high.
- 13.3 The public's opinion of news media organizations and journalists is in line with, or slightly higher than, public opinion regarding government and other social institutions.
- 13.4 The public demonstrates loyalty to the news media organizations that serve them.
- 13.5 In confrontations with authorities, journalists and news media organizations can count on the public to support them over the authorities.

Participation**14 Citizens contribute to the content produced and distributed by news media organizations.**

- 14.1 News media organizations provide platforms where citizens can comment, discuss, correct, and elaborate on content.

- 14.2 News media content is shared and viewed by a majority of the population active on social media and sparks public debate (including social media trends picked up by news media outlets).
- 14.3 News media organizations are willing and able to collaborate with citizen journalists to expand newsgathering resources and diversity of perspectives.
- 14.4 Citizens contribute news and information to their communities or local news organizations.

Audience Data

- 15 News media organizations have regular access to reliable data about audiences and their media uses.**
- 15.1 News media organizations are able to access reliable audience data.
- 15.2 News media organizations have staff members skilled at analyzing and interpreting audience data and deriving actionable insights from it.



TECHNOLOGY

The technology dimension looks primarily at access to production and distribution resources and technologies, as well as news media organizations' expertise to optimize their use. Another crucial aspect in this dimension are citizens' digital rights.

Access to Production and Distribution Resources

- 16 News media organizations have access to the necessary production and distribution resources.**
- 16.1 The physical resources needed to produce and distribute content are available and affordable (e.g., electricity, newsprint, production equipment, distribution systems, etc.)
- 16.2 News media organizations can access and afford the digital technologies required for digital news content production and distribution.
- 16.3 The infrastructure makes news content technologically accessible to citizens across the country on all major platforms, regardless of where the citizen lives.
- 16.4 Trustworthy digital payment systems are available.

News Media Organizations' Access to Technologies

- 17 News media organizations' access to production and distribution technologies is fair and apolitical.**
- 17.1 News media organizations' access to the physical equipment needed to produce news and information content is fair and apolitical.
- 17.2 Access to news media distribution channels is fair and apolitical (e.g., kiosks, transmitters, cable, Internet, mobile, etc.)
- 17.3 News media organizations have equitable and affordable access to digital distribution networks.

Audience Access to Technologies

- 18 Citizens can access and afford the technologies over which news media content is distributed.**
- 18.1 The price of receiver technologies is affordable for audiences so that a majority of people can access news media content and participate in communication (e.g., televisions, radios, computers, cell phones, print and delivery costs, etc.)
- 18.2 Network access and data rates for (mobile) Internet are affordable so that the majority of people can access digital news media content and participate in communication.

Digital Expertise

- 19 News media organizations have the technological expertise to optimize their use of digital production, distribution, and management technologies.**
- 19.1 News media organizations have the expertise available to install, optimize, maintain, and update the technological systems required for digital content production and distribution.
- 19.2 News media organizations and journalists have the capacity (skills, financial means, strategic networks) to circumvent censorship measures where online censorship, blocking, or filtering of journalistic content occurs.

- 19.3 News media organizations have the cyber security expertise to protect their organizations, audiences, and clients against cyberattacks (e.g., denial of service attacks, website spoofing, planting of false content into Content Management Systems, ad fraud, deep faking of content, data breaches, etc.).
- 19.4 Journalists have the expertise and technologies required to optimize content discovery and marketing.

Citizens' Digital Rights

- 20 **The government, news media organizations, and private companies respect citizens' digital rights, allowing them to communicate freely and safely online.**
- 20.1 Government authorities or private companies do not interfere with digital communications in potentially threatening ways (e.g., Internet shutdowns, social media taxes, or license fees for bloggers).
- 20.2 Users enjoy privacy and data security, allowing them to communicate freely and without surveillance.



CONTENT AND EXPERTISE

The content and expertise dimension focuses on the journalistic side of the endeavor, from media practitioners' expertise to the content they produce. This dimension also looks at the structure and ownership of news media organizations.

Quality Content

- 21 **Citizens have access to quality news media content.**
- 21.1 Major news media organizations adhere to the standard of non-partisan reporting.
- 21.2 Citizens have access to national and international news media content that meets international standards for quality news media content.
- 21.3 Citizens have access to local news media content that meets international standards for quality news media content.
- 21.4 Citizens have timely access to information about important events.
- 21.5 Citizens have access to accurate information about minority and marginalized groups in society that reflects the perspectives of those groups.
- 21.6 Citizens have access to news media in different languages, including minority languages.
- 21.7 Citizens have access to news media content from multiple local, regional, national, and international sources.
- 21.8 Native advertising and other forms of paid content are clearly indicated as such.

Journalism Expertise

- 22 **News media organizations have the necessary structures as well as professionally educated and trained journalists to produce high quality content that meets international standards.**
- 22.1 News media organizations pay journalists high enough wages to attract and retain qualified journalists.
- 22.2 News media organizations pay journalists high enough wages to discourage journalistically unethical behavior.
- 22.3 There are professional journalism education and training programs available to supply the needs of news media organizations and communities.
- 22.4 The number of journalists in each national news media industry sector is relatively stable over time.
- 22.5 The number of journalists in each local news media industry sector is relatively stable over time.

Ownership of news media organizations

- 23 **Ownership of news media organizations is transparent and does not prevent diversity of perspectives or quality content.**
- 23.1 News media ownership is not concentrated in the hands of the state or a few companies or families.
- 23.2 The nature and structure of news media ownership is transparent.
- 23.3 News media owners are not tied to government or other powerful interests.
- 23.4 News media owners generally respect the editorial independence of their staff, refraining from interfering in content due to personal or corporate interests or views.

Business Structure

24 News media organizations have the structures to be viable.

- 24.1 News media organizations are governed with the business, financial, and managerial ability to effectively oversee their strategies and operations.
- 24.2 News media organizations are committed to the production of quality content.
- 24.3 News media organizations have sound business and finance plans that employees are familiar with and able to implement.
- 24.4 News media organizations have an organizational entity (department or person) that dedicates most of its working time to the generation of revenue.
- 24.5 News media organizations have written documents that specify and standardize the general terms and conditions under which advertising and other services used to gain revenue are provided (including price lists, contracts, etc.).
- 24.6 News media organizations have rules or procedures to separate editorial and advertising functions to maintain editorial independence from business pressures.
- 24.7 News media organizations have established strategic networks to share content, expertise, and other resources.
- 24.8 News media organizations have established mutual aid arrangements to support viability in the event of natural disaster or authoritarian suppression.

Business Expertise

25 News media organizations have the personnel and expertise to be strategically and financially viable.

- 25.1 News media organizations are able to hire staff, including women and marginalized groups, with management knowledge and skills (finance, marketing, sales, etc.).
- 25.2 The employees in advertising and sales, including women and marginalized groups, have received vocational or academic training.
- 25.3 News media organizations are able to hire staff, including women and marginalized groups, with the technical knowledge and skills to keep the organization current with digital and technological change.
- 25.4 News media organizations have the expertise to monetize content across multiple platforms.
- 25.5 News media organizations have the expertise to enable the organization and its journalists to innovate content and processes.

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