INTRODUCTION

Market reform, rebuilding trust, and digital regulation and innovation were key themes to emerge from a series of consultations on media viability in Namibia, Tunisia, and Lebanon organised early this year. GFMD has released three country reports that bring together policy recommendations for supporting independent media in these countries.

The consultations built upon the previous UNESCO policy brief titled Finding the funds for journalism to thrive: policy options to support media viability, along with other relevant reports and literature. The goal was to stress-test and contextualise global policy recommendations.

Stakeholders and representatives from local media, media development organisations, policymakers and donors came together in each country to identify which of the policy options were most applicable in their circumstances as well as how the wider media support sector could collaborate to advocate or jointly work towards them.

The locally-led consultations were facilitated by Global Forum for Media Development (GFMD) in partnership with UNESCO's International Programme for the Development of Communication (IPDC) and local implementing partners:

- Lebanon: Maharat Foundation and Samir Kassir Foundation
- Namibia: Editors' Forum of Namibia and Namibia Media Trust
- Tunisia: Al Khatt, Pamt2 and Pencils Consulting

The consultations were built upon previous IPDC-supported conversations in ten countries (including these three) and a UNESCO policy brief.

In its World Trends in Freedom of Expression and Media Development: Global Report 2021/2022, UNESCO argues that "media viability requires that the 'overall economic and business environment provide conditions conducive for independent media,' together with a political and social environment that enables journalism to perform its role as a public good." Industry-wide conversations have further identified the many factors that can impact on media viability, moving beyond the financial, to include considerations of political stability, legislative and regulatory environments, digital transformation and technology, as well as public and communities, clearly outlined in Deutsche Welle Akademie's Media Viability Indicators.

The national-level consultations have provided valuable bottom-up insights into 'lived experiences'. The process of working with local partners to determine the prioritisation of recommendations from recent research and policy papers for comprehensive national consultations underscores the effectiveness of this approach in guiding discussions on local media viability.

These collaborative meetings play a crucial role in empowering local policy knowledge networks and expertise, thereby supporting media viability policies that are grounded in the local context and incorporate the perspectives of all stakeholders.

The process of working with local partners to decide which recommendations from recent research and policy papers should be prioritised for in-depth national consultations demonstrates that this format provides a clear framework from which consultations on local media viability can be led.

Considering the implications of political context is also essential when developing locally driven approaches to media viability. In many instances, meaningful and supportive legislative reforms are unlikely to materialise in the near to medium term. Moreover, opportunities for diversified commercial revenue, online payment systems, or paid subscriptions are severely limited in certain cases. Therefore, media stakeholders need to be realistic about incorporating normative actions into their strategies for supporting local media viability, prior to designing and implementing them.

That is not to say that long-term goals are not needed. Policymakers, both local and international, have a role to play in providing sustained support for media viability. Nonetheless, if locally driven consultations aim to define practical actions, they must also clarify how and when these actions can lead to tangible change.

Lebanon

The Lebanon consultations took place on 18 January 2023 in collaboration with the UNESCO's Beirut office were led by local CSOs, Samir Kassir Foundation and Maharat Foundation, both of whom had previously published a number of studies on media viability in Lebanon which were presented to participants in the consultation in addition to the work on media viability by UNESCO. Two roundtables were held: one on media viability, challenges, and opportunities, and the second, on the role of non-media stakeholders including donors, Big Tech, and the public sector. The case of Lebanon is very specific in that the media ecosystem, albeit small, is fairly established and sophisticated; the economic crisis in the country in recent years, however, has created substantial challenges. A number of projects and reports have already focused on the context for media viability and are contributing to wider industry debates.

During Roundtable 1, the discussion focused on the importance of developing holistic approaches to media viability which involve multiple stakeholder groups, including the state, public and private media, mainstream and alternative media, the private sector, and the technology giants. The Ministry of Information discussed its role in supporting legal reforms, fighting disinformation and access to information. However, it has been limited in its financial support to the media, fuelling a competitive media environment which is largely reliant on donors for funding. As the media in Lebanon are seen as politicised, funded by, and affiliated to many different political parties, donor support was focused on small independent or alternative media platforms rather than on the wider media landscape, including the public media. The lack of access to Lebanon's small advertisement market was also seen as an obstacle to media viability and the ongoing economic crisis was seeing a shortage of skills and creative talent, driven by the economic crisis and subsequent emigration, and failing education systems.

Recommendations from the first roundtable focused on calling for the Lebanese state should work with civil society to develop a more enabling legal and regulatory environment:

- Media laws should be in line with international standards including decriminalising defamation and blasphemy.
- Reforming media laws should be complemented with collaboration with international organisations and civil society actors to immediately take steps to ensure physical, digital, and psychological safety as well as the protection of journalists.
- The Lebanese state was also called upon to create a favourable taxation environment which can provide financial incentives for media organisations.

The second roundtable was an open discussion between donors, media support organisations, media organisations, tech industry representatives, and government institutions. There was a discussion around donor agendas and grant programmes which needed to be more needs-driven and speak to the conditions of the media. Better coordination and dialogue between donors were seen as key priorities. It was also recommended that local media actors be more involved in identifying their priorities and communicating them directly with donors.

Specifically donors, media support organisations were asked to:

• Provide small, independent, and alternative media with long-term and stable, pluriannual funding.
• Work with Lebanese media and CSOs to exert pressure on the Lebanese state to adopt the necessary reforms needed to foster an enabling environment for independent journalism and freedom of expression.
• Ensure better partnerships amongst stakeholders in order to arrive at a common understanding of media viability for Lebanon. This needs to be supported with greater investment in networking, coalition-building, and collaboration between media, CSOs, media development agencies, donors, and government.
• Consider how they can provide relevant targeted financial support to the media industry and to journalists themselves.
• Provide support for Lebanese CSOs to increase their ability to carry out policy and advocacy activities to advance and raise the profile of media viability and ensure that the necessary policy recommendations and reforms are implemented.

For the full report on the Lebanon consultations see: English

Namibia

A national consultation was held in Windhoek on February 10th, 2023, hosted by the Namibia Media Trust (NMT), in partnership with the Editors' Forum of Namibia (EFN). The roundtables were attended by 20 local private and public media representatives, academics, and donor representatives who are active in Namibia.
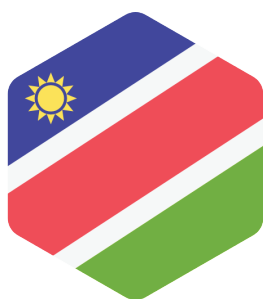
While Namibia is seen as a diverse and relatively free environment for the media, one where power is held to account by critical journalism, recent trends have placed cumulative economic constraints on the media. The main challenges emerging from consultations were changes in newsroom operations, advertising trends, and audience consumption habits as a result of digitalisation combined with the effects of the Covid-19 pandemic.

Participants reported a sense that public bodies which play a role in the media ecosystem, such as the Namibian Broadcasting Corporation (NBC), the Ministry of Information and Communication Technology (MICT), and the Communications Regulatory Authority, (CRAN), are disconnected from the realities for the media on the ground.

The recommendations that arose from the Namibia consultation built upon a discussion paper on media viability that brought together findings from a number of studies on media viability and Namibian media and was circulated to stakeholders in advance.

• The Namibian state is asked to consider relevant measures and regulations for big tech companies in collaboration with the Communications Regulatory Authority of Namibia, the Ministry of Information and Communication Technology, CRAN, and other government stakeholders, at the very least to ensure equitable revenue sharing. It should look into revising the Communications Amendment Act, 2020 (Act No. 6 of 2020) which makes provision for the imposition of a universal service levy that will operationalise a Universal Service Fund for the media and designate the media as a public service to encourage the promotion of the viability of journalism and the media industry.
• Media should work with Namibia's relevant public bodies and international advocacy groups to argue for regional solutions to address the challenges posed by emerging technologies and digitisation to both legacy and independent media. This should be placed in the context of wider efforts to promote democracy and economic development across the African continent.
• Donors are asked to support an active dialogue around the role of Big Tech at a sub-regional, continental, or even international level and invest in the development of a model for community media

which can be transferred to national, traditional mainstream media where a synergised ecosystem between the media and its audiences exists.

- As Namibian media develop new business models to adapt to this context and the intense competition for advertising in the country's relatively small advertising market independent media need to be more organised, coherent, and proactive. In order to compete with the growing number of avenues available to advertisers, Namibian media need to demonstrate their value but at the same time come together to make a bigger picture case that advertising with independent media is an investment in accountability, transparency, and democratic governance which is essential for the economic prosperity of the country.

> For the full report on the Namibia consultations see: English

Tunisia

Tunisian CSO, Al Khatt Foundation, together with UNESCO Tunis and PAM2TEU - an EU-funded media support programme - held an event on the 24th January 2023 bringing together a range of stakeholders in the media to discuss the topic of media viability in Tunisia.

The economic and political context were key discussion points at the event which brought together media organisations, journalists, local and international media development organisations with academics and donors. The safety of journalists, as well as trust in media, were seen to be paramount conditions in Tunisia which are impacting the possibilities for media viability.

As with Lebanon and Namibia, the meeting focused on developing actionable recommendations and next steps which are relevant to the specific context of Tunisia. The discussions built upon a set of recommendations from previous work by various media development

organisations, including the GFMD, UNESCO and DWA, on media viability.

The overall conditions for the media, including the safety of journalists, diversifying and identifying innovative business models and improving management systems and structural conditions were discussed as clear challenges.

The importance of better dialogue and stronger partnerships was a common theme throughout the consultation. This was demonstrated by calls for the development of a national action plan involving all stakeholders based on the five key recommendations to improve media viability that were made during the consultation:

1. Reform the media market by collecting data around media consumption habits and audiences through legal reform and economic regulation, developing new public policies, and restoring public trust in the media.
2. Restructure the advertising market by better measuring the audience, reassessing the advertising value chain, reconsidering the relationship between media and advertisers and reconsidering how public advertising money is allocated.
3. Support Tunisian media to come to terms and embrace digital transformation, while at the same time ensuring that Tunisian media do not continue to be on the periphery of discussions on internet governance and digital regulation.
4. Align donor funding with local issues to ensure that the media support the interests of their local community.
5. Incentivise talent retention, capacities and skills related to economic and managerial issues, in particular to media management and the challenge of existing business models.

> For the full report on the Tunisia consultations see: English / French
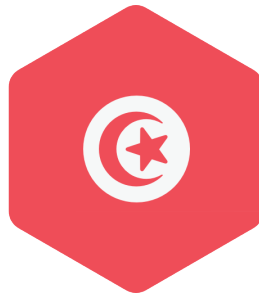
Key Findings

In all cases, the need for better coordination and collaboration across the sector was emphasised.

The challenges brought about by an unregulated approach to the advertising market and private sector were also shared across the three countries. There was a demonstrable need to develop responses to digital innovation and change and its effect on the media industry. It is clear from the three country studies that local mainstream and traditional media are less than sophisticated in terms of digital advancements and platform convergence.

In addition, big tech is unmistakably seen as an aggressive competitor in these reports. They are seen to dominate local markets with little by way of regulation to ensure a fair, transparent, and more stable business and content environment for the media. In these three cases, digital and platform regulation was seen as essential. The findings and experiences of specific contexts, such as those from the media markets included in these consultations, must be prioritised and acted upon in global conversations on the regulation of Big Tech.

A discussion about the lack of public awareness of the current challenges facing the media also took place in all three countries. The Afrobarometer has indicated that journalists are viewed with as much suspicion as politicians, something that needs to be addressed by regaining the trust of the public.

It was argued that this can only be done through sustainable delivery of quality and ethical journalism.

In these country studies, there is a shift away from focusing on donors as the main sources of funding for independent media. Developing national public policies that can support and enable the media to fulfil its role in democracy and be sustainable in rapidly evolving and in some cases restrictive ecosystems was at the core of each set of recommendations and actions which emerged from the consultations. Consultations as a platform for national action

Consultations as a platform for national action

It is clear that developing a knowledge-driven methodology for dealing with media viability based on local context is vital to advancing national and global conversations on one of the key issues for the media. The national-level consultations facilitated by this project have provided relevant bottom-up 'lived experiences' based on conversations which have included all relevant stakeholders. These types of collaborative meetings are essential and there is a strong argument that should take place on a more regular basis. Cross-cutting recommendations in all of the groups highlighted the importance of follow-up which should include stakeholders from the media but also policy, civil society, and the private sector.

The process of working with local partners to decide which recommendations from recent research and policy papers should be prioritised for in-depth national consultations demonstrates that this format provides a clear framework from which consultations on local media viability can begin. The concept is still relatively unfamiliar to recipients of development funding in South-based countries. It is integral therefore that a baseline set of indicators can drive initial conversations, moving them beyond the basic understanding of media viability as purely driven by economic conditions and/or funding. In the case of these three national consultations, conversations around areas such as the regulation of Big Tech and better allocation of public advertising money would not have taken place without the baseline recommendations which guided the consultations.

It might also be interesting to develop more specific local indicators on media viability based on the reports that have been produced. For example, while all three reports flagged low levels of media literacy as a challenge to improving conditions for the media's viability, the specifics were very different. In Namibia, it was felt that audiences should be made more aware of the importance of the preservation of free independent media. In Lebanon and Tunisia, however, the focus was much more on rebuilding trust in the media.

It is also important to consider the implications of the political context in developing locally driven approaches to media viability. In many cases, genuine and enabling legislative reform is not possible in the short to medium term. In others, there are very limited opportunities for diversified commercial revenue, online payment systems or paid subscriptions. Media stakeholders need to be realistic about including what might be defined as normative actions before designing and implementing strategies to support media viability locally. That is not to say that long-term goals are not needed and there is clearly a role for policymakers, local and international, to support media viability with lasting results. However, if locally driven consultations are to define practical actions, they should also then be clear on how and when those actions might result in change. More detail is also necessary on the wider societal and political change that will necessitate genuine conditions for viability.

Although the debate about media viability has become a more recent fixture in the media development agenda, the issues that were raised in the consultations were not new to the media and key stakeholders involved in the development of media. Questions around sustainability, legislative and regulatory reform, safety and security of journalists and their rights, audience engagement and technology have informed the industry for decades. Bringing these issues together, under the auspices of media viability, in order to understand how different sectors can contribute to building media and organisational resilience is important to developing relevant strategies and action plans.

The question now is how to move from dialogue to action. Developing action plans which include timelines, the assignment of tasks, and outputs should be considered as the next steps. Deciding on priorities is key and ideally a systematic methodology to prioritising recommendations can be developed. The multidisciplinary approach to developing recommendations which began with the consultations needs to be sustained in order that holistic solutions can be actioned, collaboration continues to be fostered and trust and respect between stakeholders is embedded.

There were significant findings across the reports from Lebanon, Namibia, and Tunisia that should act as considerations in future iterations of the consultations as well as in policy development moving forward. Responses could also be integrated into UNESCOs global framework for media viability.