

MEDIA SUSTAINABILITY INDEX

2006/2007

**The Development
of Sustainable
Independent Media
in the Middle East
and North Africa**



MEDIA SUSTAINABILITY INDEX 2006/2007

The Development of Sustainable Independent Media in the Middle East and North Africa

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Printer: Kirby Lithographic Company, Inc.

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Acknowledgment: This publication was made possible through support provided by the United States Department of State's Middle East Partnership Initiative (MEPI), and the United States Agency for International Development (USAID) under Cooperative Agreement No. #DFD-A-00-05-00243 (MSI-MENA) via a Task Order by the Academy for Educational Development. Additional support for the Iraq study was provided by UNESCO.

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ISSN 1546-0878

USAID

The United States Agency for International Development (USAID) is an independent agency that provides economic, development, and humanitarian assistance around the world in support of the foreign policy goals of the United States. The agency works to support long-term and sustainable economic growth and advances US foreign policy objectives by supporting economic growth, agriculture, and trade; global health; and democracy, conflict prevention, and humanitarian assistance.

USAID provides assistance in four regions of the world: Sub-Saharan Africa; Asia and the Near East; Latin America and the Caribbean; and Europe and Eurasia.

With headquarters in Washington, DC, USAID's strength is its field offices around the world. They work in close partnership with private voluntary organizations, indigenous organizations, universities, American businesses, international agencies, other governments, and other US government agencies. USAID has working relationships with more than 3,500 American companies and over 300 US-based private voluntary organizations.

MEPI

The United States Department of State's Middle East Partnership Initiative provides tangible support to reformers in the Middle East and North Africa so democracy can spread, education can thrive, economies can grow, and women can be empowered. In four years, this presidential initiative has devoted \$293 million to more than 350 programs in 15 countries and the Palestinian territories to support the aspirations of those working to build a more peaceful and prosperous Middle East. Examples of the initiative's work includes campaign schools, independent media training, civic education, entrepreneurship skill building, youth leadership development, trade transparency promotion, business hubs for women, and judicial and legal reform training.

UNESCO

UNESCO, the United Nations' Educational, Scientific and Cultural Organization, maintains a Communication and Information (CI) sector that is guided by the principles of freedom of expression and freedom of the press as basic human rights. Since 2003, the CI sector has supported the Iraqi people in their transition to democracy. Among other projects, UNESCO facilitated initiatives to develop a national media policy and provided practical guidance for journalists and civil society prior to the elections. Training and networking opportunities were made available to more than 550 media workers and professionals.

IREX

IREX is an international nonprofit organization providing leadership and innovative programs to improve the quality of education, strengthen independent media, and foster pluralistic civil society development.

Founded in 1968, IREX has an annual portfolio of \$50 million and a staff of over 500 professionals worldwide. IREX and its partner IREX Europe deliver cross-cutting programs and consulting expertise in more than 50 countries.



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NORTH AFRICA**

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The MSI should also be seen as an important tool for the media and media advocates in each country, as it reflects the expert opinions of local media professionals. We encourage local media professionals to use the MSI to continue their vital efforts at developing independent and sustainable media.



I am pleased to introduce the 2006/2007 Media Sustainability Index (MSI) for the Middle East and North Africa (MENA), the second such study of 18 countries from Morocco to Iran. This edition of the MSI provides an analysis of the media sector based on events occurring in the latter part of 2006 through 2007.

The MSI was first conceived in 2000 and launched in Europe and Eurasia in 2001, in cooperation with the United States Agency for International Development (USAID). Since that time, it has become a universally recognized reference for benchmarking and assessing changes in media systems across Europe and Eurasia, the MENA region, and, for the first time this year, Africa. In addition to support from USAID, the Middle East and North Africa edition also received the generous support of the US State Department's Middle East Partnership Initiative (MEPI) and UNESCO.

Policymakers, development specialists, and professionals in developing countries increasingly recognize media as a key element of the development agenda. The MSI is designed to assist policymakers and implementers by analyzing the various elements of a media system and pointing to areas where assistance can be most effective in developing a sustainable and professional media system.

The MSI should also be seen as an important tool for the media and media advocates in each country, as it reflects the expert opinions of local media professionals. We encourage local media professionals to use the MSI to continue their vital efforts at developing independent and sustainable media.

IREX would like to thank all those who contributed to the publication of the MENA MSI for 2006/2007. Participants, moderators, authors, and observers for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse managed the MSI with administrative assistance from Blake Saville. Drusilla Menaker, Mark Whitehouse, and Christine Prince provided editorial and other assistance. IREX staff in the region provided important logistical support and guidance. USAID and the US State Department's MEPI program have been consistent supporters of the MSI, helping to develop the project and ensure its ongoing implementation. In particular, IREX would like to thank Mark Koenig at USAID and Saira Saeed at the US State Department for their invaluable guidance and support of the MENA MSI.

We hope you will find this report useful, and we welcome any feedback.

Sincerely,



Mark Whitehouse

Director, Media Development, IREX

In 2005, the MSI identified contradictions between constitutional guarantees of free speech and the laws and regulations governing the media. Little progress was made in addressing those discrepancies in any country under study. An Algerian panelist described a “perfect” constitution compared to its “catastrophic” application.



The 2006-2007 Media Sustainability Index (MSI) for the Middle East and North Africa (MENA), the second study of the media in 18 countries of the region, updates the findings of IREX's 2005 edition. The challenges facing media in much of the region remain largely unchanged, and most stem directly or indirectly from restrictive legal environments. While there were some cases of improvement or specific examples of alleviation of an issue, in most countries the obstructions to the work and development of independent, objective media have increased. The overall scores of 10 countries fell by more than .10 point, while three showed little to no change. In five countries the overall score showed modest improvement, greater than .10 point.

The methodology used in the MENA region was the same as that used in 2005, and the same as that used in Africa and Europe and Eurasia, allowing for comparison over time and across regions. More about our methodology may be found in the next section. The methodology, although the same in each region, is designed to compare universal elements of a media sector but allow the unique characteristics of each country to be highlighted. The result is that this study reveals challenges and strengths that are common in much of the world, but also those that are unique to the MENA region and sub-regions or individual countries therein.

Legal Frameworks: Impacting Media Sustainability

Many of the common challenges in the MENA region include legal frameworks that are unfriendly to press freedom in practice. Again this year, Objective 1, free speech, received the lowest scores from panelists when comparing region-wide MENA averages. This total average dropped from 1.60 last year to 1.52 this year. Exactly the same as 2005, in six countries (one-third of those studied) this represented the lowest objective score, while only two reported it as their highest.

In 2005, the MSI identified contradictions between constitutional guarantees of free speech and the laws and regulations governing the media. Little progress was made in addressing those discrepancies in any country under study. An Algerian panelist described a "perfect" constitution compared to its "catastrophic" application. In Jordan, for example, panelists reported that the March 2007 Press and Publications Law eliminated jail sentences for violations of the law. However, the former jail sentences were replaced with fines of up to \$40,000; journalists may still find themselves imprisoned, as the Penal Code still includes certain provisions relevant to media professionals.

An Algerian panelist noted that the largest obstacle to realizing constitutional guarantees is the subservience of the courts to political authorities. Panelists in Yemen, where judges are appointed by the justice minister, pointed to preferential legal treatment for media operated by the government.

In many countries, discrepancies between constitutional guarantees and practice widened. In Morocco, panelists reported the use of national security provisions to arrest a journalist along with his wife and baby in order to compel him to disclose the source of a leaked military report. Jail sentences for opposition media professionals and blocking of certain Internet sites were described by Egyptian panelists. Palestinian panelists reported that political upheaval had damaged the legal protections—limited as they were—afforded to the press, particularly in Gaza.

Exacerbating this situation is the lack of independence of courts in most countries studied, although this is not unique to the MENA region. An Algerian panelist noted that the largest obstacle to realizing constitutional guarantees is the subservience of the courts to political authorities. Panelists in Yemen, where judges are appointed by the justice minister, pointed to preferential legal treatment for media operated by the government. Iraqi panelists noted that Coalition Provisional Authority rules still in place requiring approval from the prime minister before bringing charges against journalists are ignored by judges, and such charges proceed without such approval.

Another key way that legislation and regulations restrict free speech is through control of terrestrial broadcasting. Five of the countries under study (Algeria, Iran, Saudi Arabia, Qatar, and Yemen) control all terrestrial broadcasting, both radio and television. An additional seven countries (Bahrain, Egypt, Jordan, Libya, Morocco, Oman, and Syria) control terrestrial television broadcasting. Recent regulatory changes in Kuwait that have allowed for licensing of private television and radio are one bright spot.

Satellite channels have provided a way around this monopoly for citizens of the region. Many of the countries that control terrestrial television allow private or relatively independent state owned satellite broadcasters to operate from their territory. While this does add an expense that prices some

consumers out of the market for these services, many others are able to access domestic, regional, and international channels in this manner. In some countries, liberal laws exist in special zones that allow nearly unfettered operations of these stations, and could serve as the foundation for future liberal laws that could apply to an entire country.

However, governments have taken notice of this source of unrestricted news. The future of independent regional satellite channels was called into question in early 2008 after an Arab League proposal to jointly regulate satellite broadcasts within member countries. Only Qatar and Lebanon did not support this proposal initially, and although it is still pending, it fortunately appears to be on hold for now. Many satellite channels, however, cover only regional or international news in a relatively open manner; local news is subject to the many restrictions and self-censorship found in traditional local media.

The issue of self-censorship by media professionals came up often in panel discussions again this year, and that indicator within Objective 2, professional journalism, was problematic for most countries. Panelists in Algeria noted that self-censorship emerged in the wake of official censorship, and extended beyond stories involving the government or powerful politicians, but also to large advertisers. A panelist in Yemen referred to three taboo topics: “The person of the president, the army, and Yemen’s unity.” Panelists typically invoked government or financial pressure as the source of this self censorship. With criminal libel penalties in place in most countries—or worse, violence against media professionals who write critical articles—journalists are constantly taking pains to walk a thin line or simply not report on certain issues at all. Furthermore, in several Gulf countries media workers are often citizens of other countries and fear deportation should they ruffle official feathers. Official censorship does still exist as well: for example, Syrian media mostly did not report on the September 2007 Israeli airstrikes in their country.

Also in Objective 2, the indicator regarding pay levels scored low in nearly every country, as it does in other regions of the world. In Iraq, panelists were concerned with “piecework” journalism, which undercut quality of articles in favor of quantity. Panelists in Yemen reported salaries of \$100 per month, which essentially forces journalists into suspect practices at best, and corruption at worst. Even in Kuwait, panelists reported limited corruption; however another damaging effect of low salaries is loss of trained personnel. Panelists there noted that many graduates of journalism programs choose to take more lucrative jobs with the government.

Overall, Objective 2 scores remained about the same in nine of the countries studied, while three improved noticeably and six decreased. The overall score for the region declined from 1.73

to 1.68, but was still one of the leaders along with Objective 4, business management.

Restrictive legal frameworks also hamper the work of civil society in many countries in the region, although notably less in others. Scores for Objective 5, supporting institutions, represented a number of highs and lows for individual countries. Six country panels reported Objective 5 as their lowest score, although five reported it as their highest. On balance, however, the total MENA average score for Objective 5 was the second lowest, after Objective 1, and dropped slightly from 1.60 in 2005 to 1.59 this year. Between Objective 1 and Objective 5, 12 of the 18 countries studied reported either Objective 1 or Objective 5 as their lowest score.

Laws limiting the rights to assemble, such as government approval for public meetings in Oman or, as faced by the MSI panel discussion in Saudi Arabia, need for government approval for men and women to gather in the same meeting, hamper the ability for associations and civil society to support the work of the media and lobby for reform. In another example, Kuwaiti panelists reported that their government refuses to allow the formation of a recognized trade union of media professionals.

The associations that do exist are, in many countries, not independent. For example, Syrian panelists dismissed the Journalists' Union there. One said "The union represents the government line; it is just a structure but it does nothing meaningful." The Tunisian Association of Newspaper Editors was expelled from the World Newspaper Association for being controlled by the government there, while an independently formed Syndicate of Tunisian Journalists has not been allowed by the government to hold a general assembly.

On the other hand, there are successful examples of associations working to support the media. Egyptian panelists noted with satisfaction that, despite what they considered a restrictive law on NGOs, a number of organizations exist that focus on human rights and act to protect journalists who find themselves facing court proceedings or under arrest. In Iran, panelists characterized the Association of Iranian Journalists as an independent and trusted institution, although they noted that it is increasingly coming under government pressure. One noted that "In recent months—unfortunately—it's been us journalists defending and supporting the association, rather than the other way around." A panelist in Morocco expressed his appreciation of the efforts of several civil society groups to improve access to information.

The indicators included in Objective 5 also include those geared toward evaluating journalism education, and those often did not help to improve scores. In Jordan, one panelist said, "Neither university [program] offers practical training

Market research and reliable audience measurements are vital to the independence and overall financial sustainability of media outlets themselves. They promote a media sector based upon market principles, where independent media that become trusted by their audience can make a case with advertisers to place advertisements because they will bring results. Unfortunately, in many countries, advertisements are placed based upon business ties or political connections.

for graduates. At best, training programs lack the minimum required standards." This comment was echoed in several other countries.

Business Management and Plurality: Promising Strengths and Lingering Weaknesses

Objective 4 scores for the overall region led all others, with a combined average of 1.69 (compared to 2005's 1.76). The many robust economies of the MENA region help drive better performance in this objective; even outside the oil-rich Gulf countries one can find relatively strong advertising markets and traditions of media marketing.

However, there are still poor performers in the region. Media outlets in Tunisia lack the freedoms necessary to develop as financially independent businesses. In Libya, panelists said that there exist no media that they would term "commercial;" all media are dependent on the state directly or indirectly. In Iraq, panelists described a situation of inexperience with media management and advertising sales. In Yemen, panelists decried the weak economy and the impact it has on media operations.

Furthermore, a trait shared among all countries, even the best performers in Objective 4, is the absence of market research and audience measurement. Panelists in countries where such work does take place indicated that it is either rarely done or not trusted or both. Based upon the country reports, research and audience measurement is most advanced in UAE. Panelists there described research that is accused of being sold, with favorable results, to the highest bidder and newspaper circulation statistics published by a few newspapers that back claims by each that they enjoy the largest readership.

Market research and reliable audience measurements are vital to the independence and overall financial sustainability of media outlets themselves. They promote a media sector based upon market principles, where independent media that become trusted by their audience can make a case with advertisers to place advertisements because they will bring results. Unfortunately, in many countries, advertisements are placed based upon business ties or political connections. Finally, market research promotes a media sector that better responds to the information needs of the consumer, including increased reporting on issues such as local issues, health, and education.

One consistently positive aspect of the media sector in the MENA region is plurality of news sources, covered by Objective 3. Across the region, as a whole this objective ranked first in 2005, although it dropped to 1.64 this year, placing it third. In general, the region's proximity to Europe and access to multiple satellite channels is a plus. In many countries, the relative wealth of consumers allows them to access many sources of information, including the Internet. Free media zones also encourage plurality in the Gulf. Lebanon, which scored a 2.88 for this objective, the highest in the MENA region this year, has the further benefit of a liberal licensing framework that allows the many competing voices into the media landscape.

Lebanon's additional strength, however, is a key weakness in most other countries. While citizens may access international or regional news freely, it is difficult for them to receive objective news—or even competing, yet biased voices—about their own country. As mentioned above, panelists in UAE and Qatar reported that regional satellite news channels based there rarely cover local news and local media must abide by a

different, and more stringent, set of regulations. Therefore the ability of citizens to make political or other decisions based on unbiased information or an individual analysis of competing points of view is limited, with countries such as Libya, Yemen, and Tunisia the extreme examples on the low scoring side.

Media Development in Common: the Middle East, Africa, Europe & Eurasia

Compared to the Africa and Europe and Eurasia (E&E) MSI studies for 2006-2007, which showed the quality of journalism and business management of media as the weakest of the five MSI objectives, the MENA MSI study showed these to be the two strongest overall. This allows for a certain advantage in considering future development of media, particularly in those countries with stronger economies in the region. Better resources may allow for better news and information for citizens produced by trained professionals. Much of Africa and Central Asia, in particular, have a long way to go to catch up to many countries in the MENA region in these two objectives.

However, one strength in particular shared by Africa and E&E, supporting institutions, turned in another low performance this year in the MENA region. Furthermore, the combined free speech scores in the MENA region ended up much lower than those in Africa and E&E. These deficiencies in the MENA region may well negate the advantages enjoyed by certain countries and essentially cap their development until addressed. Robust supporting institutions that can protect media professionals and advocate for legal reforms are an integral part of sustainable legal reform. In turn, such legal reform is necessary to allow better quality, and ultimately more financially sound, media to develop.

MEDIA SUSTAINABILITY INDEX 2006/2007: OVERALL AVERAGE SCORES

▲ Libya (0.45)	□ Tunisia (0.89)	▼ Yemen (1.12)	▼ Saudi Arabia (1.42)	□ Algeria (1.50)	▼ Jordan (1.86)	▼ Morocco (1.89)	▼ Oman (1.65)	▼ Palestine (1.84)	▼ Bahrain (1.63)	▲ Egypt (2.23)	▲ Lebanon (2.45)	▲ UAE (2.09)	▼ Kuwait (2.04)	▼ Qatar (2.36)	▼ Iran (1.56)
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00								
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM				NEAR SUSTAINABILITY		SUSTAINABLE							

MEDIA SUSTAINABILITY INDEX 2006/2007: FREEDOM OF SPEECH

▲ Libya (0.40)	▼ Tunisia (0.50)	▼ Iraq (0.89)	▼ Yemen (0.97)	▼ Iran (1.05)	▼ Saudi Arabia (1.38)	▲ Syria (1.36)	▼ Algeria (1.25)	▼ Kuwait (1.78)	▼ Morocco (1.90)	▼ Oman (1.84)	▼ Palestine (1.77)	▲ Lebanon (2.24)	▲ Qatar (2.97)	▲ UAE (1.92)	□ Bahrain (1.52)	▼ Jordan (1.70)	▲ Egypt (1.97)
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00										
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM				NEAR SUSTAINABILITY		SUSTAINABLE									

CHANGE SINCE 2005

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

2005 scores are available online at http://www.irex.org/programs/MSI_MENA/2005/index.asp

MEDIA SUSTAINABILITY INDEX 2006/2007: PROFESSIONAL JOURNALISM

			<ul style="list-style-type: none"> □ Jordan (2.00) □ Morocco (1.85) □ Syria (1.58) ▲ Bahrain (1.61) ▼ Oman (1.70) ▼ Palestine (1.58) ▼ Saudi Arabia (1.62) 	<ul style="list-style-type: none"> ▲ Egypt (2.25) ▲ Lebanon (2.44) ▲ UAE (2.26) □ Kuwait (2.31) □ Qatar (2.43) 		
<ul style="list-style-type: none"> □ Libya (0.59) □ Tunisia (0.94) ▼ Iraq (1.00) 	<ul style="list-style-type: none"> □ Iran (1.35) □ Yemen (1.35) ▼ Algeria (1.43) 	<ul style="list-style-type: none"> 1.01 – 1.50 	<ul style="list-style-type: none"> 1.51 – 2.00 	<ul style="list-style-type: none"> 2.01 – 2.50 	<ul style="list-style-type: none"> 2.51 – 3.00 	<ul style="list-style-type: none"> 3.01 – 3.50 3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE

MEDIA SUSTAINABILITY INDEX 2006/2007: PLURALITY OF NEWS SOURCES

			<ul style="list-style-type: none"> □ Algeria (1.61) □ Iran (1.54) ▼ Bahrain (1.35) ▼ Saudi Arabia (1.38) □ Syria (1.24) 	<ul style="list-style-type: none"> ▲ Egypt (2.38) ▲ UAE (2.04) ▼ Kuwait (2.16) ▼ Palestine (2.10) ▼ Qatar (2.28) ▲ Lebanon (2.88) 		
<ul style="list-style-type: none"> ▼ Iraq (0.94) ▲ Libya (0.62) □ Tunisia (0.75) ▼ Yemen (0.75) 	<ul style="list-style-type: none"> ▼ Jordan (2.00) ▼ Morocco (1.74) ▼ Oman (1.71) 	<ul style="list-style-type: none"> 1.01 – 1.50 	<ul style="list-style-type: none"> 1.51 – 2.00 	<ul style="list-style-type: none"> 2.01 – 2.50 	<ul style="list-style-type: none"> 2.51 – 3.00 	<ul style="list-style-type: none"> 3.01 – 3.50 3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE

CHANGE SINCE 2005

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

2005 scores are available online at http://www.irex.org/programs/MSI_MENA/2005/index.asp

MEDIA SUSTAINABILITY INDEX 2006/2007: BUSINESS MANAGEMENT

		<ul style="list-style-type: none"> □ Algeria (1.57) □ Iran (1.80) ▼ Bahrain (1.99) ▼ Jordan (1.80) ▼ Morocco (1.76) ▼ Oman (1.75) ▼ Palestine (1.75) ▼ Saudi Arabia (1.67) 					
□ Libya (0.15)	<ul style="list-style-type: none"> ▼ Iraq (0.70) □ Yemen (0.98) 	<ul style="list-style-type: none"> ▲ Syria (1.27) □ Tunisia (1.25) 		<ul style="list-style-type: none"> ▲ Egypt (2.23) ▲ Lebanon (2.27) ▲ UAE (2.50) ▼ Qatar (2.27) ▲ Kuwait (2.71) 			
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

MEDIA SUSTAINABILITY INDEX 2006/2007: SUPPORTING INSTITUTIONS

			<ul style="list-style-type: none"> ▲ Algeria (1.66) 				
		<ul style="list-style-type: none"> ▲ Syria (1.08) □ Iraq (1.04) □ Oman (1.28) ▲ Libya (0.51) □ Tunisia (1.00) 	<ul style="list-style-type: none"> ▲ UAE (1.74) ▼ Bahrain (1.71) ▼ Jordan (1.80) ▼ Kuwait (1.24) ▼ Saudi Arabia (1.07) 	<ul style="list-style-type: none"> ▲ Egypt (2.34) ▲ Palestine (2.01) □ Iran (2.05) □ Lebanon (2.42) □ Morocco (2.22) 			
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2005

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

2005 scores are available online at http://www.irex.org/programs/MSI_MENA/2005/index.asp

The challenges facing media in much of the region remain largely unchanged, and most stem directly or indirectly from restrictive legal environments. While there were some cases of improvement or specific examples of alleviation of an issue, in most countries the obstructions to the work and development of independent, objective media have increased.



IREX prepared the Media Sustainability Index (MSI) in cooperation with the United States Agency for International Development (USAID) as a tool to assess the development of independent media systems over time and across countries. IREX staff, USAID, and other media development professionals contributed to the development of this assessment tool.

The MSI assesses five “objectives” in shaping a successful media system:

1. Legal and social norms protect and promote free speech and access to public information.
2. Journalism meets professional standards of quality.
3. Multiple news sources provide citizens with reliable and objective news.
4. Independent media are well-managed businesses, allowing editorial independence.
5. Supporting institutions function in the professional interests of independent media.

These objectives were judged to be the most important aspects of a sustainable and professional independent media system and served as the criteria against which countries were rated. A score was attained for each objective by rating seven to nine indicators, which determine how well a country meets that objective. The objectives, indicators, and scoring system are presented below.

The scoring is done in two parts. First, a panel of experts is assembled in each country, drawn from representatives of local media, nongovernmental organizations (NGOs), professional associations, and media-development implementers. Panel participants are provided with the objectives and indicators and an explanation of the scoring system. Each panelist individually reviewed the information and scored each objective. The panelists then assembled to discuss the objectives and indicators, and to devise combined scores and analyses. The panel moderator, in most cases a host-country media or NGO representative, prepares a written analysis of the discussion, which is subsequently edited by IREX representatives.

The panelists’ scores are reviewed by IREX, in-country staff and/or Washington, DC, media staff, which then score the countries independently of the MSI panel. Using the combination of scores, the final scores are determined. This method allows the MSI scores to reflect both local media insiders’ views and the views of international media-development professionals.

I. Objectives and Indicators

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens' access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists' rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

II. Scoring System

A. Indicator Scoring

Each indicator is scored using the following system:

0 = Country does not meet the indicator; government or social forces may actively oppose its implementation.

1 = Country minimally meets aspects of the indicator; forces may not actively oppose its implementation, but business environment may not support it and government or profession do not fully and actively support change.

2 = Country has begun to meet many aspects of the indicator, but progress may be too recent to judge or still dependent on current government or political forces.

3 = Country meets most aspects of the indicator; implementation of the indicator has occurred over several years and/or through changes in government, indicating likely sustainability.

4 = Country meets the aspects of the indicator; implementation has remained intact over multiple changes in government, economic fluctuations, changes in public opinion, and/or changing social conventions.

B. Objective and Overall Scoring

The averages of all the indicators are then averaged to obtain a single, overall score for each objective. Objective scores are averaged to provide an overall score for the country. IREX interprets the overall scores as follows:

Unsustainable, Anti-Free Press (0-1): Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2): Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3): Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4): Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

