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I am pleased to introduce the 2009 Middle East and North Africa Media Sustainability Index (MSI). The MSI provides an analysis of the media environment in 19 countries of the Middle East during 2009. 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 the Middle East, Africa, and Europe and Eurasia.

The MSI allows policymakers and implementers to analyze media systems and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with knowledge, citizens can help improve the quality of governance through participatory and democratic mechanisms, and help government and civil society actors devise solutions to pervasive issues such as poverty, healthcare, conflict, and education.

The MSI also provides important information for the media and media advocates in each country and region. The MSI reflects the expert opinions of media professionals in each country and its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector. IREX continues to encourage professionals in their vital efforts at developing independent and sustainable media in their own countries or, in many cases, preserving alternative voices in the face of repressive governments.

IREX would like to thank all those who contributed to the publication of the Media Sustainability Index 2009. 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 editorial and administrative assistance from Dayna Myers. USAID has been a consistent supporter of the MSI, helping to develop the project and ensure its ongoing implementation. In particular, IREX would like to thank Mark Koenig for his invaluable guidance and support of the MENA MSI.

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

Sincerely,



W. Robert Pearson

President, IREX

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*A question IREX sometimes receives, and is discussed by outside observers, is: “Does the public, or even the media itself, in many of these countries value quality, objective journalism?” Looking at scores for Objective 2, Professional Journalism, in the Middle East, it does seem to be a question worth exploring.*



In analyzing scores for 2009, in total the Middle East and North Africa region lost ground as a whole. Taken as an aggregate average each objective lost ground, except for Objective 2, Professional Journalism, which nudged up slightly. However, the regional breakdown of scores reveals a more complicated picture.

As a region, North Africa suffered a staggering loss in average overall score of nearly a quarter point, from 1.54 in 2008 to 1.30 in 2009. Each country contributed to this decline, as each except Algeria saw their score erode by two-tenths of a point or more (Algeria suffered a loss of .12). Throughout the region, there was a tightening of the reins on journalists and media outlets, and less tolerance for free speech on new media platforms in particular.

Egypt and Tunisia led the way in losses, with .3 pared from the countries' overall scores. However, the two countries have very different media environments and still are separated by a wide margin in score. Tunisia went from a 0.98, defined as "unsustainable," to a dismal 0.68. Egypt, in the other hand, remained within the boundaries of "near sustainability" by finishing with a 2.07, down from 2.37 in 2008. Despite the very low score for Tunisia, Egypt's drop in score might be seen as more troubling.

Tunisia under the Ben Ali regime has historically not enjoyed much leeway for freedom of speech. While at times there has been a somewhat tolerant attitude for opposition ideas seeing the light of day, in such cases these ideas have been marginalized, available only in the rare opposition newspaper. Although a degradation in score is still unfortunate and worrying there, going from 0.98 to 0.68 is a change in degree of how dreadful the free speech situation is. In 2009, a brief period of neglect ended and the Tunisian regime returned to the status quo of brutally repressing most critics.

Egypt, on the other hand, has for many years now tolerated a much more open atmosphere of dissent, even if still guarded. The Mubarak regime has kept some opposition groups, notably the Muslim Brotherhood, sidelined and squelched their ability to participate in the public sphere. But this is not the case with other opposition parties who publish readily available newspapers that are openly critical of the regime, even if certain topics are handled with care.

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Therefore, the current situation that has resulted in a lower score is more troubling because one of the Middle East's more robust local media markets appears to be under threat. The threat, as it relates to MSI scores, is coming not directly through legal restrictions. The free speech objective remained static this year, although still had the lowest score of all five objectives and the only one to score below 2.00, putting it in the "unsustainable, mixed system" category. Certainly critical bloggers and others detained by security agents or prosecuted by the government would not say that Egypt is without its problems when it comes to the legal enabling environment for free speech.

Rather, the drop in score is attributable to lower scores in Objective 3, Plurality of News, Objective 4, Business Management, and Objective 5, Supporting Institutions. It appears that the lack of progress in the free speech arena is beginning to impact other areas of the media sector.

Alternate voices are having a harder time being heard, particularly if these are voices independent of the established regime and opposition. Financial pressures are making it harder for media to operate as independent businesses, and politically connected money plays a more prominent role in financing media operations. Civil society organizations face increased difficulties gaining traction to promote reform and protection of free speech. Other supporting institutions such as the Journalists Association remain politicized and hamstrung. Therefore, losses in these areas, particularly plurality and supporting institutions where Egypt was a leader in the Middle East region, is troubling indeed.

Morocco has also suffered a fate similar to Egypt, but has not enjoyed historically quite the level of tolerance for free speech. Further, the assault on the media has included both direct attacks against press freedom as well as measures that have resulted in losses in other objectives. Therefore, the overall score, as well as most individual objective scores, are solidly within the "unsustainable, mixed system" range. Only Objective 2, Professional Journalism, did not suffer a noteworthy loss in score this year, although it did inch backward. Objective 5, Supporting Institutions, suffered a significant loss in score, moving from 2.29 last year to 1.98.

In Libya, fears that recent gains, although extremely guarded, were fragile proved correct. The tiny crack in absolute control over the media by Muammar Qadhafi that was the result of media controlled by an organization under his son Saif's control was closed when those media were subsumed by the state. The gains in score in 2008 were marginal enough that Libya was still the lowest scoring country in the region, although not too far behind Syria. This year the score slid back to where it was before 2008: well below any other country in the region.

Apart from North Africa, the MENA region was a mixed bag of gains, losses, and stagnation. In the Levant, scores on balance edged upward as the Palestinian territories and Syria regained some of the ground lost previously. However, neither one has returned to the scores they achieved in the 2005 inaugural study, and Syria's scores still place it in the "unsustainable" category. Lebanon and Jordan remained mostly the same.

On balance, the average score in the Gulf remained the same, with losses in some countries canceling out gains in others. United Arab Emirates was one of the countries that gained in 2009. Every objective showed notable improvement except for, perhaps tellingly, Objective 3, Plurality of News. Further, while Objective 1, Freedom of Speech, and Objective 5, Supporting Institutions, improved, they are just inside the "near sustainability" range. Objective 2, Professional Journalism, and Objective 4, Business Management, both do yeoman's work pulling up UAE's average. The strong scores in these two objectives keep UAE from scoring the same as Jordan. It is likely that at some point in the future the performance of the media sector in these two objectives will drive reforms that improve the state of the other three, or else improvements in those areas will be held back until the situation with freedom of speech and freedom of association—an important prerequisite for strong supporting institutions—improves.

Two countries in the Gulf region, Iraq and Iran, continue to move in opposite directions. Iraq still has a long way to go: it remains a dangerous place to be a journalist, much of the media is politicized, and quality journalism is the exception. However, the country has experienced further stabilization that has allowed more breathing space for the media this year. It is likely that the improvements Iraq has witnessed in recent studies will hit a ceiling in the absence of an improved and clear legal structure (including free access to public information), more tolerance for dissenting voices, and access to apolitical revenue by media outlets.

In Iran, the 2009 elections and the protests that accompanied them resulted in further crackdowns on the media and anyone reporting on events in a critical way. After the crackdowns in 2008 the media were already in a fragile state, particularly after the Association of Iranian Journalists (AoIJ) was declared an “illegal entity” by the government. In August 2009, after the AoIJ complained in a letter about its many members jailed in during the protests, the Tehran prosecutor ordered the offices sealed off and occupied by its agents. In addition, in June 2009 the country’s first computer crimes law was enacted, formally criminalizing the use of the Internet to spread information that the regime found threatening or inconvenient. Until 2008, Iran scored in the middle of the “unsustainable, mixed system” category. In 2008 it lost significant ground but remained in that category. This year it has fallen into the “unsustainable” category, in the range where Iraq scored in its first couple of studies. The picture for the future, as the regime consolidated its grip on dissent, is indeed grim.

## Valuing Good Journalism

A question IREX sometimes receives, and is discussed by outside observers, is: “Does the public, or even the media itself, in many of these countries value quality, objective journalism?” Looking at scores for Objective 2, Professional Journalism, in the Middle East, it does seem to be a question worth exploring. Taken as a region, the average score for this objective is 1.80, putting it in the “unsustainable, mixed system” category. Do most of the public prefer information that appeals to their own beliefs, political and otherwise? Are journalists content with the editorial line that their media outlet enforces in favor of and/or against certain political or social forces? Or is such information valued, but simply hard to find due to the efforts of people in power to control the news?

The MSI is not specifically designed to measure this, or to poll public opinion about it. However, the comments of the participants leads a reader to believe that indeed this information is valued, and that media professionals know the difference between objective information and propaganda.

A good example from the 2009 study is the Yemen chapter. Yemen scores 1.52 in Objective 2, solidly in the “unsustainable, mixed system” category. In general, panelists describe the media as a “propaganda tool.” However, panelists decry this situation, and describe what is missing in Yemen in a way that demonstrates an understanding of what constitutes better journalism. One panelist points a media outlet he describes as

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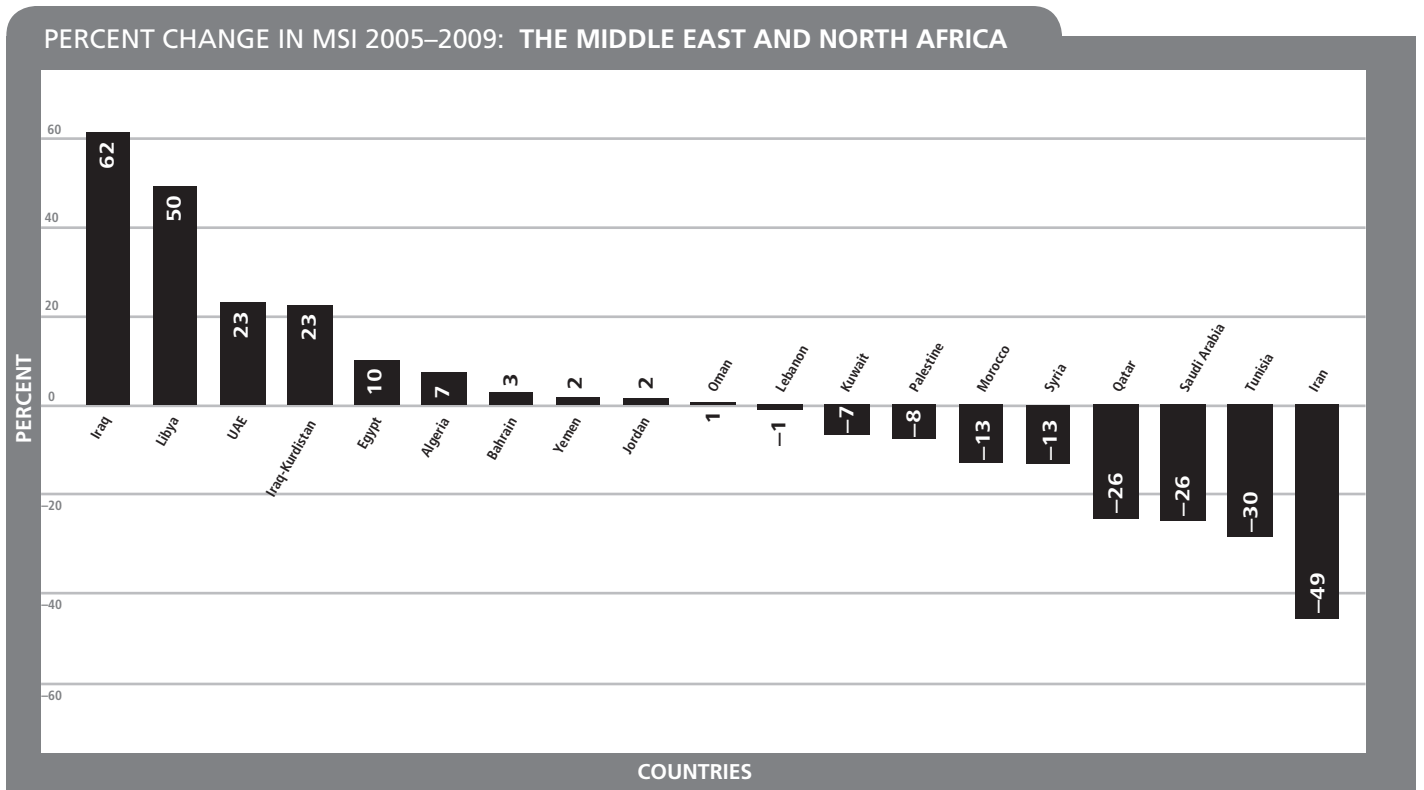
the sole exception to the propaganda outlets as an example of what could be given other circumstances. Another panelist notes that journalists indeed value professionalism and that they are pushing for the adoption of a code of ethics that would apply to the whole profession.

Yemen’s panelists also describe the obstacles to creating a better news industry. They note that self-censorship is high. They also tie in financial performance to quality journalism: the newspaper held up as an example of good journalism is described as suffering from anemic revenue streams because it does not “blackmail institutions or people for advertisements, as some newspapers do.”

Another example comes from an unlikely source: Libya. In 2008 Libya flirted with the beginnings of non-state media with the creation of media controlled by Saif Qadhafi, the son of the Libyan ruler. Although these media had little leeway to engage in critical reporting, 2009 panelists note that journalists working for these media “reported stories objectively and attempted to follow ethical standards.” Since no outlet had previously existed that could demonstrate these values, it seems likely that the journalists understood the value of this kind of information through other means, such as from observing foreign media or by their own intuition and education. Given an opportunity to practice better journalism, Libyans did so within the parameters allowed.

Perhaps the best example can be found in the Qatar chapter. Home to the Al Jazeera satellite network, some of the world’s best journalism is produced there. However, this journalism is almost exclusively reserved for its reporting on events in the Middle East and the rest of the world, and not Qatar itself. Panelists note that within Qatar, Al Jazeera is the exception for quality, objective news. For reporting on domestic affairs, panelists were much more negative. They note that local newspapers are unwilling to be critical. They point to the large number of expatriate workers in the local media who fear deportation if they were to be critical, and note that given they are expatriates, have little incentive to change the state of affairs for the better.

It is clear that Qatari media professionals value objective news and information while being critical of substandard news. Further, reviewing the other chapters within this study, it is also clear that throughout the Middle East there is high value placed upon good reporting and objective news. However, the obstacles to producing better quality news are, without exception, too difficult to overcome for the time being.



## MEDIA SUSTAINABILITY INDEX 2009: OVERALL AVERAGE SCORES

		▼ Algeria (1.51) ▲ Bahrain (1.87) ▲ Iraq (1.87) □ Iraq-Kurdistan (1.81) ▼ Morocco (1.78) □ Oman (1.90) □ Saudi Arabia (1.50) ▼ Tunisia (0.68)	▼ Egypt (2.07) □ Jordan (2.19) □ Kuwait (2.14) □ Lebanon (2.14) ▲ UAE (2.30)				
▼ Iran (0.81) ▲ Syria (0.94) ▼ Libya (0.47)		▲ Palestine (1.93) ▼ Qatar (1.84)					
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 2009: FREEDOM OF SPEECH

		▲ Algeria (1.56) ▲ Bahrain (1.96) □ Egypt (1.83) ▲ Iraq (1.73) ▲ Iraq-Kurdistan (1.97) ▼ Lebanon (1.99) ▼ Morocco (1.52) □ Oman (1.84)	▲ Jordan (2.12) □ Kuwait (2.24) ▲ UAE (2.14)				
▼ Iran (0.47) ▼ Libya (0.48)	▲ Syria (0.88) ▼ Tunisia (0.56)	▼ Saudi Arabia (1.19) ▼ Yemen (1.13)	▲ Palestine (1.72) ▼ Qatar (1.87)				
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	

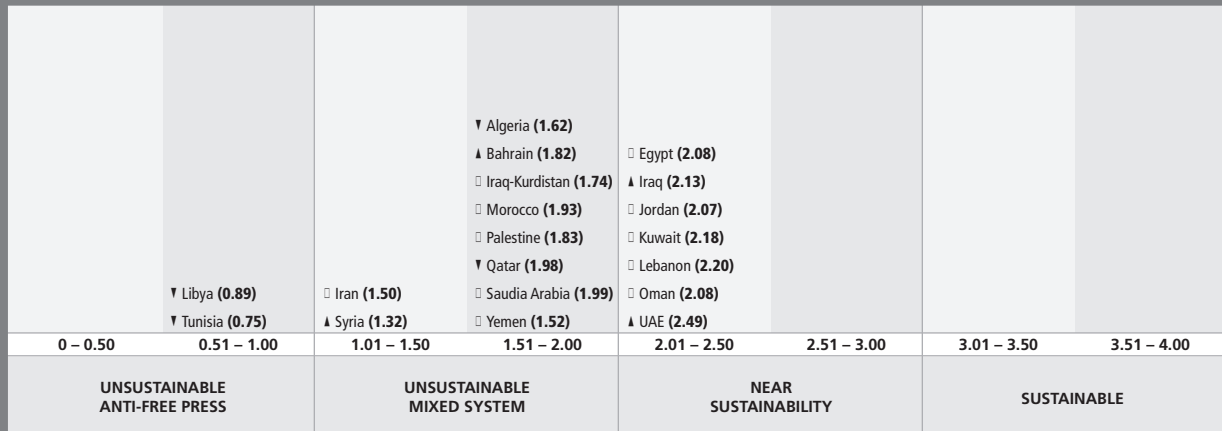
### CHANGE SINCE 2008

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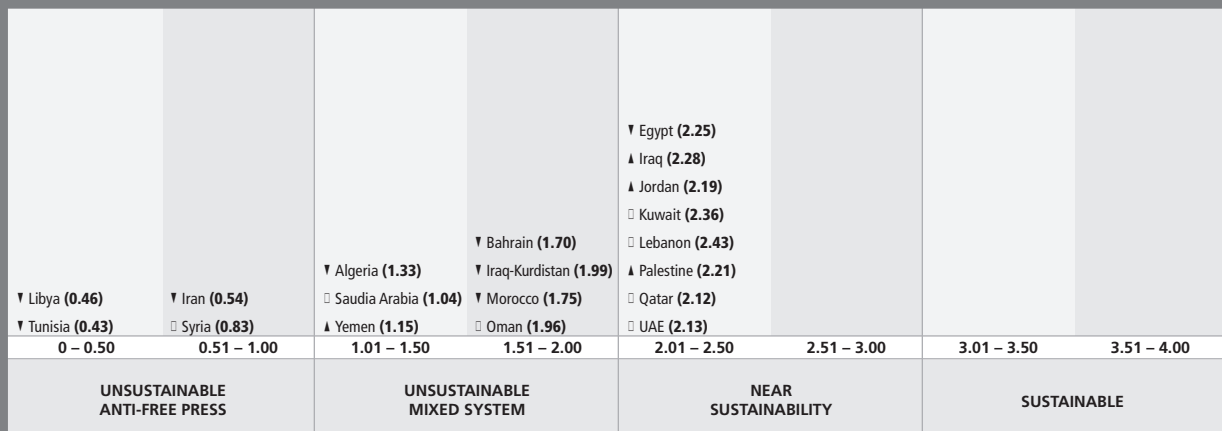
Annual scores for 2005 through 2008 are available online at [http://www.irex.org/programs/MSI\\_MENA/index.asp](http://www.irex.org/programs/MSI_MENA/index.asp)



## MEDIA SUSTAINABILITY INDEX 2009: PROFESSIONAL JOURNALISM



## MEDIA SUSTAINABILITY INDEX 2009: PLURALITY OF NEWS SOURCES

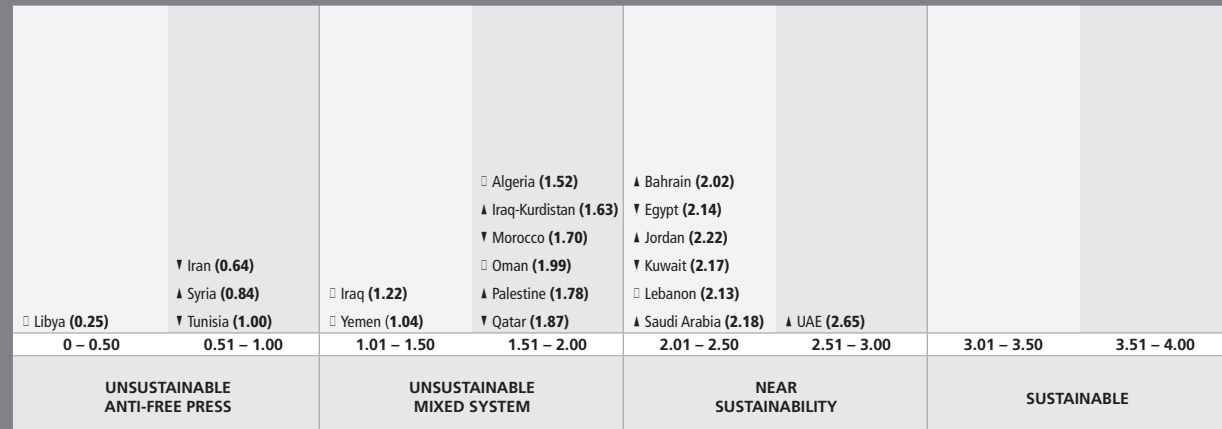


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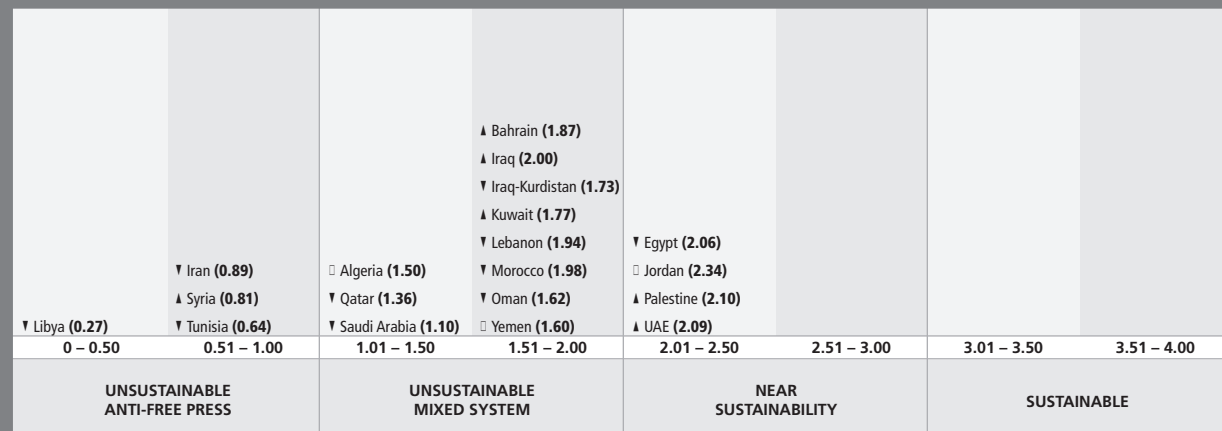
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Annual scores for 2005 through 2008 are available online at [http://www.irex.org/programs/MSI\\_MENA/index.asp](http://www.irex.org/programs/MSI_MENA/index.asp)

## MEDIA SUSTAINABILITY INDEX 2009: BUSINESS MANAGEMENT



## MEDIA SUSTAINABILITY INDEX 2009: SUPPORTING INSTITUTIONS



### CHANGE SINCE 2008

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

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