Chapter 2
Diagnostic tools and performance indicators
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This chapter considers recent progress in developing diagnostic tools and performance indicators to assess how the media can contribute to democracy and development. A major concern of donor agencies is to understand where to concentrate their investment in media development – and then to assess the impact of that investment. Any attempt to answer these questions has to start from an understanding of the actual media environment in any given country and how that media environment supports democratic institutions and human development. There are many such systems for assessing this baseline. This chapter focuses particularly upon a new diagnostic tool recently developed for UNESCO. This project reviewed existing systems of assessment and generated a new, composite approach to analyzing the media’s role, which functions as an organizing framework rather than a prescriptive checklist. This chapter considers how this diagnostic tool could be used to drill down and identify more focused performance indicators that can assess the impact of specific media programs.

The context for this work is the growing concern amongst donors for the general need to assess the impact of their funding. Developing performance indicators for media development represents a major challenge. Whilst protection of freedom of expression has long been a precondition for much international development assistance from donors, free speech and communications have until now been at the periphery of development programs. The situation changed somewhat at the advent of the twenty-first century, with an increasing recognition of the role that independent and healthy media play in promoting good governance and fighting corruption. In parallel, there was a growing consensus that country-ownership of development programs was essential and that direct budget support was the most appropriate means of achieving this. Many believe that aid delivered in this way will only be effective, however, if public funds are used effectively and transparently by recipient governments. Democratic and inclusive media are keys to this. Post-September 11th, a democratic media has been seen as a weapon in fighting extremism and terrorism. In addition, the potential for new communication and information technologies to connect poor and peripheral areas has received increased recognition.
Much freedom of expression support focuses on traditional press freedoms, centering on journalist training and advocacy against censorship and biased media. Donors also support programs which aim to increase access to, and use of, communications technologies, yet these tend to be framed as economic and social development projects and they are rarely integrated with human rights and media programs. Estimates put the total amount spent on media assistance programs by donors and funders outside of the US at $1 billion a year. An additional $142 million is spent annually by the USA. There is therefore a pressing need for effective indicators to assess the effectiveness of this spending. In any such assessment, a policy discussion considering the basis for the belief that the ever evolving media can support democracy and development should be included, as well as an analysis of the socio-political context in which the programs are being conducted, as the assumptions behind these factors are frequently not considered.

The link between media, democracy and development: a brief recap of dominant debates

Freedom of expression is a core aspiration of the Universal Declaration of Human Rights, and this is widely seen as underpinning democratic freedoms, such as the right to form political parties, the exchange of political ideas, the questioning of public officials, and so on.

Media outlets are crucial to the exercise of freedom of expression because they provide the public platform through which this right is effectively exercised. The idea of media as a platform for democratic debate embraces a wide variety of overlapping media functions. This concept is explored elsewhere in this volume, particularly in the introduction and in the specific regional case studies of the media’s role as a watchdog, agenda-setter, and gatekeeper in coverage of politics and elections. Of course the media is widely recognized as an essential constituent of the democratic process and one of the guarantors of free and fair elections. But beyond this, media outlets are channels through which citizens can communicate with each other, acting as a facilitator of informed debate between diverse social actors, encouraging the non-violent resolution of disputes. The media disseminates stories, ideas and information and acts as a corrective to the “natural asymmetry of information” between governors and governed, and between competing private agents. The media can also function as a watchdog, promoting government transparency and public scrutiny of those with power through exposing corruption, maladministration and corporate wrongdoing, and thereby be a tool to enhance economic efficiency. The media can be a national voice, a means by which a society or a country can learn about itself and build a sense of community and of shared values, a vehicle for cultural expression and cultural
cohesion within nation states. Finally, it should never be forgotten that the media can function as an advocate of certain issues or causes - a social actor in its own right.

The media may potentially fulfill any or all of these functions - or none of them. In some contexts, the media may serve to reinforce the power of vested interests and exacerbate social inequalities by excluding critical or marginalized voices. In more established democracies, the role of the media has come under attack from those who believe it is undermining democracy through the trivial, antagonistic and personalized nature of its coverage. At its most extreme, the media can also promote conflict and social divisiveness, particularly in a pluralistic society. The nurturing of a media framework and practice that promotes good governance and human development, rather than its opposite, is a particularly acute concern in new or restored democracies, whose media systems have been warped or shattered by totalitarianism, oppression, corruption, or the effects of war and under-development.

What standards are necessary to deliver media freedom? In the past many liberal advocates have argued for minimal state interference in the media as the necessary condition for an environment that can support democracy. This argument has particular currency in the United States with its First Amendment statement that “Congress shall make no law... abridging freedom of speech or the press...” Others would argue that the construction of a modern media environment capable of supporting democracy and good governance may require a proactive role by the state – in providing infrastructure, funding a public broadcaster, ensuring the right kind of regulatory environment. Norris and Zinnbauer argue that independent journalism, as a potential check on the abuse of power, is a necessary but not sufficient means of strengthening good governance and promoting human development. They suggest that these goals are achieved most effectively under two further conditions. Firstly, in societies where channels of mass communications are free and independent of established interests; and secondly, where there is widespread access to these media.

The UNESCO approach takes as its starting point that any attempt to measure media development must embrace issues of both independence and access, as well as the absence of restrictions on the media. What matters is the extent to which all sectors of society, especially those who are most disadvantaged or marginalized, can access the media to gain information and make their voices heard. Limited access to - or lack of engagement with - the media is a function of poverty and poor education. It may also be caused or exacerbated by language, gender, age, ethnicity or the urban-rural divide. Whatever the cause, it contributes to an environment that can undermine democratic development.
If this perspective is taken, then the absence of state intervention on its own is no guarantee of an appropriate media environment. On the contrary: to promote a media system characterized by pluralism and diversity may require active state intervention. For example, to guarantee pluralism requires appropriate regulations of public broadcasting, commercial media, and community-based media. In an increasingly converged communications environment, the underpinning regulatory structure will be crucial in shaping private investment. If the regulatory authority does not insist upon inter-operability in telecoms providers, the ability of the data-ready mobile phone to provide widely available content (an increasing trend in Africa) will be inhibited. The state can play a crucial role by investing in human resources, specifically in building the professional capacity of media workers, both journalists and media managers, through academic and vocational training, 'on-the-job' development and the development of professional associations.

Infrastructure capacity is also crucial: promoting a diverse media environment requires money to flow into supporting the means of communication, including broadcast reception quality, the provision of electricity supplies and access to telephones and the Internet. In many parts of the world there is little or no access to the means of communication – in such environments, formal freedoms mean little.

Defining the necessary media landscape in such a broad fashion is politically controversial, particularly within UNESCO. There have been, and continue to be, fierce debates about whether there is an appropriate positive role for the state in securing a supportive media environment. Within UNESCO itself, the attempt to develop new international standards that would redefine freedom of expression in the form of a right to communicate, caused a substantial split in the organization during the early-1980s, with the USA and the UK leaving UNESCO for a period. The repercussions from that debate continue to this day, although few doubt that the state must play a role in developing infrastructure and appropriate regulation.13

Finally, any analysis of the media's contribution to human development must also be situated in the context of rapid and far reaching changes in the platforms for communication.14 In particular the traditional media model of 'one-to-many' is increasingly being challenged by a more interactive form of media where conventional news commentary is supplemented and often challenged by blogs and comment of all kinds. It is noteworthy that in countries such as Iran, where the traditional media is tightly controlled, interactive blogging has become an important tool of communication, with Farsi now one of the world’s top ten languages most commonly used in blogs.15 The rapid growth of new
technologies (Internet, SMS, mobile telephony) presents positive opportunities for democratization, but also challenges in the form of fragmentation and (potentially) decreased opportunities to disseminate development messages to a large population through a limited number of media channels. The potential of the cellular mobile phone to emerge as the dominant platform for delivering content, particularly in the developing world, is being increasingly noticed. Assessment tools, if they are to be meaningful, must incorporate these new communications platforms, and embrace the dynamism and adaptability of the media sector itself.

**Existing initiatives to define indicators of media development**

In 2006 UNESCO commissioned an analysis of existing initiatives that seek to define indicators of media development. The subsequent analysis of 26 sets of indicators by different agencies (tabulated in Appendix 1) revealed a patchwork of overlapping, and at times contradictory, sets of indicators. Some were informed by different ideological values. Some prioritized different issues or sectors. Some emanated from different institutional cultures and were geared to a wide variety of purposes, including lobbying, policy guidance and accreditation. They employed a wide variety of methodologies.

Within this variegated landscape, there were several types of indicators. Some related to any given country’s national media system or to national media systems within a specific region. Others concern specific issues (e.g. violence against journalists), particular sectors (e.g. ICT), or whose sole aim is to disaggregate macro data according to particular criteria (e.g. gender). There were indicators relating to media development at the level of specific media assistance projects or media organizations, and those showing the correlation between media development and another key variable e.g. governance.

In summary, different indicators had been designed for, and were used for, different purposes. Therefore, to compare assessment tools is rarely, if ever, to compare like with like, making general conclusions difficult to draw. The danger is that policy makers select those indicator systems that fit their own pre-existing hypotheses. **BY aggregating all of the existing indicator systems UNESCO attempted to produce a global set that could be drawn upon by the donor community as a whole.**

*Which existing initiatives were included in this mapping exercise?*

A wide variety of charters, declarations of principles, and general commentaries and surveys relate to media development and freedom of the media. The UNESCO exercise focused on those initiatives which were concerned with *measurable indicators*, whether qualitative or quantitative. The
survey examined 26 different initiatives, listed in Table 2.1 with identifying acronyms. Within this crowded landscape, the two most frequently-cited sets of indicators were the IREX Media Sustainability Index and the annual Freedom of the Press Survey published by Freedom House.

[Table 2.1 about here]

The Media Sustainability Index developed by IRES has been incorporated into USAID evaluation schema for several countries, and the World Bank has accepted this as one of its governance indicators. The MSI is also suggested as a means to measure the success of media systems by the UK Department for International Development. Freedom House publishes the Freedom of the Press Survey, and its findings are widely used by governments, international organizations, academics, and the news media in many countries. This source is adopted by Norris and Zinnbauer for their UNDP Human Development Report Giving Voice to the Voiceless and by the UNESCO-CPS research project on press freedom and poverty.

Summary of existing indicators and methodologies

The UNESCO paper ‘Developing Indicators for Media Development’ summarizes all the initiatives concerning media development listed above, including the indicators and the methodologies they employ. The analysis selected fifteen of these initiatives (including the most prominent) and clustered the existing indicators into twenty-five main categories (for example, editorial independence, censorship, access to printing and distribution, public broadcasting). These are summarized in Table 2.2 which shows, at a glance, which of the categories is covered by the selected initiatives. It demonstrated that the existing assessment tools adopt a wide range of categories, which coincide only sporadically. Most of these indicators are assessed by means of subjective processes – the aggregated opinions of groups of experts. So exact correlations are difficult to make – nevertheless it seems clear that common indicators can produce divergent results depending on the methodology used.

[Table 2.2 about here]

It seems sensible therefore to assess these initiatives relative to their diverse objectives. That is to say that a tool designed to generate data for lobbying purposes cannot properly be judged by the criteria of a tool aimed at providing a robust scientific measurement of media development. This should make us cautious about using these initiatives to make comparative judgments since like is not being compared with like.


**Developing indicators**

Moving away from straightforward comparisons, it is possible to draw out three overall approaches to the pool of indicators. The first is a longitudinal analysis that compares media development over time. The second is a comparative analysis which compares different countries, one to the other. The drawback of these first two is that genuine comparisons can often be difficult to make – how can one compare a country with limited infrastructure and weak economic development with a rich OECD country with a long history of democratic freedoms and transparency. How much weighting should be given to political and cultural factors, such as the different approach to public broadcasters adopted by different methodologies, or the different cultural and religious views of explicit sexuality? Low technical capacity may co-exist with a positive legal and policy framework, as in Mali. Elsewhere, media may evolve into a driver for greater openness even in an adverse political environment, as in Ghana (ibid). The resulting comparisons are often fiercely contested, or are inconsistent with each other and lead inevitably to the governments of evaluated states being reluctant to engage in a debate about areas of weakness that are being highlighted. This is an important consideration for international bodies such as UNESCO whose policies are set by member states.

The third approach is that of a toolkit, setting out a series of indicators but allowing the assessor to select those most appropriate to the environment. The toolkit has the advantage that it can be treated as a diagnostic tool without implying any comparison with other countries. It may therefore be easier to engage countries in a debate about identified weaknesses or gaps. But equally, if the selection of indicators from the toolkit is partial it risks giving a distorted view of media development. The process by which the toolkit is used therefore becomes vital.

For UNESCO’s purposes, the most useful initiatives examined coalesced around this toolkit approach. This is because such an approach offers an inclusive list of indicators and methods from which selections can be made according to the requirements of a particular program or intervention. It also offers guidance as to how the selection can be made while recognizing that indicators and methodologies must be customized, using local expertise, to fit the particularities of the national context. Finally, it allows for some tailoring of the indicators to the correct level of engagement within each national context (e.g. the national media system, the individual media organization, the professional group).

Examples of the toolkit approach include UNDP’s *Guide to Measuring the Impact of Right to Information Programs* provides an inclusive list of potential indicators and sets out guiding principles
for selecting country specific and appropriate indicators in order to assess focused interventions on the Right to Information. In addition UNDP’s *Communication for Development: developing media strategies in support of vulnerable groups* offers a comprehensive range of indicators relating to how the media serves and affects poorer groups in society. 23 The Danish International Development Agency (DANIDA)24 and the UK Department for International Development (Dfid)25 offer guidance to identifying and developing indicators of media development and appropriate methodologies. In its *African Media Development Initiative*, 26 the BBC World Service Trust customized indicators within each of the 17 countries surveyed. Indicators were customized both at the regional level across the three “hubs” of East, West and Southern Africa, and at the country level by local media professionals and those with a sound grasp of the methodological challenges.

**Challenges presented by existing initiatives**

Taken as a whole, the existing indices which measure media development offered an excellent starting point to enable us to further define indicators in line with UNESCO priorities and produced a degree of consensus on which to build. It is inescapable that the very diversity of existing initiatives must give rise to questions about the methodological approach and subsequent research findings27 and the UNESCO project identified six areas which needed further consideration.

**Different value systems**

Competing approaches to measuring media development rest on different ideological assumptions, even though most claim to offer universal criteria. Even established democracies do not interpret press freedom in the same way. For example, the *Media Sustainability Index* describes non-state owned media as “independent” rather than “commercial” or “privately-owned”. The choice of terminology reflects the fact that in the US, the market is seen as the prime guarantor of media independence, while Western European countries attach greater importance to state-regulated public service broadcasting models. These differences should not be over-stated: there is substantial consensus around, for example, the freedom of expression guarantees enshrined in the main international legal instruments. However, the need remains for the embedded values which inform the various media assessment tools to be interrogated and made explicit.

**Perceived bias**

The dominant indices of media development have been developed by U.S.-based organizations. Concerns that the underlying approach is over influenced by a US experience of media, that is not typical
in the world, has led to accusations of bias and in turn has spurred the development of alternative indices within the developing world, such as the African Media Barometer, based on the principle of self-assessment by African nationals.

In addition, global indicators of media development drawn up in the West have been accused of lacking the degree of customization required to reflect the local media environment in which they are being applied. For example, indicators relating to the development of “community” media would need to specify whether they relate only to licensed or also unlicensed media, whether they include “community” media part-funded by the state, advertising or private interests, and so on. It was clear in the subsequent UNESCO debate about their indicators that while many people assumed community media were not-for-profit, the US government and NGOs took a different view which complicates the understanding of community media. Indicators would also need to embrace the different ways in which a community can give its mandate to a media outlet, for example the holding of public hearings to award community radio licenses. Another obvious example is that of hate speech, where its legal treatment in the international human rights system is quite different to that of the USA. Interpretation of acceptable restrictions of hate speech will inevitably vary depending upon those drawing up the indicators.

*Imprecise indicators and inconsistent results*

Any attempt to measure media development requires clear and unambiguous indicators. Clarity is lost if the indicators blur the distinction between different units of analysis, fail to separate out different levels of engagement within a country or bundle together several elements in one category. For example, the Media Sustainability Index requires that “citizens’ access to domestic or international media is not restricted”. Mid-score on this indicator could be interpreted as meaning that citizens have partly restricted access to both types of media, or good access to one and severely restricted access to the other. Indices which rank countries annually make it possible to track macro-level changes over time. However, the comparative results they produce are sometimes inconsistent. For example, almost one fifth of the countries in the top third most free according to the RSF index (11 out of 57) are categorized as only “partly free” by Freedom House. To take another example, five Middle Eastern and North African countries categorized as “near sustainability” by the MSI are classified as “not free” by Freedom House: the Palestinian Territories are, according to MSI, “near sustainability” yet come second to bottom of the Freedom House scale, just above Libya.
Lack of data and subjectivity

All attempts to measure media development are faced with the problem of lack of data sources. For many indicators in many countries, data either does not exist, is inaccessible, is out of date, is inconsistent, or a combination of all of these. By far the best data is expensive to access and is produced for commercial purposes or as a means of income generation. For newspaper readership the World Association of Newspapers produces up to date data but it is expensive to purchase. UNESCO produce free data and have released new data this year covering various broadcast and newspaper indicators. However, the data is still old, collected between 2004 and 2005 (the previous data went back to 1997). The ITU provide some free data but access to their database requires payment. The World Bank Indicators are a good compilation of data, including radios and televisions per 100 people although that is only a rough estimation of broadcast ‘penetration’. Again the downside is that payment is required. Currently the Swedish Development Agency SIDA is commissioning work to identify and fund the creation of useful data sources and how these problems might be tackled.

The usual response has been to devise methodologies which assemble panels of media or other professionals to score countries on the basis of qualitative assessment. An example of this approach is the African Media Barometer. However, this methodology carries the evident risk that even the most experienced of panels will produce results colored by their personal experience. For example, in the African Media Barometer the assessment of Swaziland for the indicator “private media outlets operate as efficient and professional businesses” produces individual scores ranging from five (“meets all aspects of the indicator and has been doing so over time”) to one (“does not meet the indicator”). This wide spectrum of views makes the resulting average hard to interpret definitively, however valuable the qualitative debate that underpinned the scoring.

Absence of new communications platforms

Many of the media development assessment tools currently employed do not include indicators relating specifically to new communications platforms such as the Internet, SMS and mobile telephony. This may in some contexts be a deliberate choice. However, the mobile phone is emerging as a key platform in a world of digital convergence, either through the phones themselves or related wireless technologies. There have been phenomenal growth rates in mobile telephony in least developed countries: according to the ITU, 58% of mobile subscribers are now based in the developing world. Internet access in the developing world remain low – just 13.2% of the world's total, according to the ITU. However, Internet penetration is growing due to the expansion of broadband, and mobile phones
could emerge as a key platform for accessing the Internet as progress is made in the development of wireless technologies.

Initiatives to measure media development should therefore consider including indicators specifically relating to the accessibility and usage of new communications platforms, especially in parts of the developing world where these technologies are gaining recognition as a driving force in social and economic development. It is not just audiences who can potentially use new communications platforms: indicators also need to be developed which measure the extent to which media organizations and professionals have the freedom and the capacity to use multi-platform technologies to deliver information or to engage with their audiences.

**Measuring the correlation between media and development**

The UNDP study by Norris and Zinnbauer found a close correlation between widespread media access and an independent free press and systematic indicators of good governance and human development. However, Davis observes that “we are presently unable to measure and determine objectively media's influence within societies and specifically its relationship to governance and overall development, country to country”. Davis proposes the development of a Media-Governance Index which directly relates to the six dimensions of governance as defined by the World Bank. Such an index would be capable of measuring negative as well as positive impacts of media activity, where media behavior is working against governance or even promoting conflict. Unfortunately no further work has proceeded along these lines, even though as Davis notes, it could be designed as a sectoral initiative to complement and even build on existing indices such as the *Media Sustainability Index*.

**UNESCO’s approach**

*Overarching media indicators*

The indicators developed for UNESCO benefited from the analysis in the existing systems of indicators whilst aiming to avoid some of the pitfalls we have identified above. Looking at these, and at the relevant literature discussing the media’s impact upon democracy and governance, five principal categories of media indicators were identified to be developed. These provide an organizing framework that can be adapted to the needs of media development initiatives in any given national context, rather than a prescriptive straightjacket that cannot adapt to circumstance. The assumption is that to have a media environment that is supportive of democracy and good governance, all five categories will be positive.
Category 1: A system of regulation and control conducive to freedom of expression, pluralism and diversity of the media: existence of a legal, policy and regulatory framework which protects and promotes freedom of expression and information, based on international best practice standards and developed in participation with civil society.

Category 2: plurality and diversity of media, a level economic playing field and transparency of ownership: the state actively promotes the development of the media sector in a manner which prevents undue concentration of ownership and ensures plurality and transparency of ownership and content across public, private and community media.

Category 3: media as a platform for democratic discourse: the media, within a prevailing climate of self-regulation and respect for the journalistic profession, reflects and represents the diversity of views and interests in society, including those of marginalised groups. There is a high level of information and media literacy.

Category 4: professional capacity building and supporting institutions that underpins freedom of expression, pluralism and diversity: media workers have access to professional training and development, both vocational and academic, at all stages of their career, and the media sector as a whole is both monitored and supported by professional associations and civil society organizations.

Category 5: infrastructural capacity is sufficient to support independent and pluralistic media: the media sector is characterized by high or rising levels of public access, including among marginalized groups, and efficient use of technology to gather and distribute news and information, appropriate to the local context.

Critically, this approach assumes that the categories are taken together to create a holistic picture of the media environment. No one category is therefore more important than the other and it is a working assumption that each is fundamental. Inevitably the indicators taken as a whole are an aspirational picture but an analysis based upon these categories will enable a comprehensive map of the media environment to be constructed.

The selection of categories aims to capture and build upon the consensus across the existing initiatives about how the media can best contribute to, and benefit from, good governance and democratic development. The proposed framework was geared to assessing media development at the national level, not at the level of the individual media organization. Nor does it apply to the work of individual media development NGOs or organizations. Following the toolkit approach, this UNESCO
methodology therefore offers an inclusive list of indicators from which selections can be made according to specific requirements. The structure can be conceptualized as a process of “drilling down” from the desired media development outcome to the specific means of verifying how far this outcome is achieved in practice.

This approach is structured around five principal media development categories and each category is sub-divided into a number of issues. For each category, the context and main issues are briefly outlined and a range of key indicators are given. Each of these in turn has a set of sub-indicators to flesh out what the ‘headline’ indicator looks like in concrete terms. For each indicator, various means of verification are suggested. For each category, a guide to data sources, available at an international level, is offered. Though not exhaustive, this guides the user towards available online and offline sources which can be supplemented by national level data, as well as data available in local languages. As a working example, the indicators for each category are set out in Appendix 2.

Response to the indicators

UNESCO adopted these indicators at a meeting of the International Program for the Development of Communication (IPDC) Committee on March 31st 2008. Subsequently it has been agreed by UNESCO and UNDP to test the usefulness of the approach by applying them to a range of up to five countries. UNESCO and UNDP are aware that the ability of the evaluators to select the most relevant categories and indicators is a critical factor in the use of this organizing framework. They have delegated the assessment to a team of local researchers and it will also be subjecting it to a central process of quality control.

A number of other observations were made in the UNESCO sponsored discussion on adoption of standards. Some UNESCO staff argued that the toolkit approach might undermine the “normative” role of UNESCO in terms of standard setting. It was suggested that UNESCO consider benchmarking countries against minimum set of core indicators derived from this approach that were considered the minimum or optimum. At the official level UNESCO members were lukewarm about this option, considering that it would create political difficulties in an international governmental organization, preferring a diagnostic tool specific to an environment rather than a comparative tool dependent upon subjective judgments and inadequate data. Independent experts observed that subjective and qualitative indicators are still present in the UNESCO approach. The nature of media is such that judgments of quality are very subjective, whether it is quality of a journalists syndicate or the quality of journalism. In such circumstances there can be no agreed objective approach. Additionally, many aspects of a media system
do not lend themselves to quantitative measurement. Finally, even where data that can be measured quantitatively exists, it is very uneven across countries. These latter concerns remain whatever system of assessment is used.

General remarks

The UNESCO document represents the outcome of a long period of discussion, both among experts and between representatives of governments. Perhaps inevitably it can resemble something designed by a committee, rather than the outcome of a single coherent vision. For policy makers, this is an inevitable consequence of seeking a methodology which can find support among a range of organizations, be they bi-lateral, multilateral donors or implementing organizations. Evaluation systems that are used in the real world will always reflect the compromises of political imperatives (and frequently professional jealousies). Whether such a system achieves any kind of coherent analysis depends principally upon its implementation.

The indicators themselves range across the structure of the media – such as the system of regulation and ownership, through the content – whether the media is a platform for public discourse to questions of capacity – the degree of professional training or ICT access available. Each of these, taken in isolation will give no clue as to the impact of the media upon society as a whole. They were designed to be a toolkit rather than a specific method of analysis, to be drawn upon and synthesized in a way appropriate to a particular country. Some observers might prefer a more defined method, one less open to interpretation. The problem with such approaches is that they fall into the problems of data and consistency set out above – how can we develop a system of assessment appropriate to ll types of societies in all possible circumstances? To attempt to do so simply invites a different set of errors.

The interest within UNESCO and UNDP is to find a set of indicators that will enabling a comprehensive analysis of a current media situation, identify the main gaps to be addressed by donors and indicate the direction reforms should take in order to foster an enabling environment for free, pluralistic and independent media. They will be tested in a series of pilot studies to measure their effectiveness.

From media indicators to performance indicators

The media indicators project for UNESCO has produced a diagnostic tool for examining the particular media landscape and how it supports, or fails to support democracy. As it is not designed to be comparative between countries, it is more useful for international agencies, who can encounter
criticism if seen to be engaged in making what are seen as politicized comparisons. It identifies those issues where change is most needed and where active donor intervention is likely to make the most significant impact and so is likely to be of most value in shaping donor or implementer intervention. But in itself, it does not provide a methodology that can help assess the impact of specific interventions – it does not represent a set of performance indicators. To move towards these, a further stage is required; one which seeks to develop this analysis from a diagnostic tool for analyzing the media’s contribution to democracy, to performance indicators that assess how specific programs or activities impact upon them.

There are two levels at which the process of developing performance indicators might take shape. The first is at the level of donor programs themselves. Donors have invested a considerable amount of public and private money in media development over the last fifteen years, although many donors are uneasy about what has been achieved with this support. There is growing interest, particularly among government donors in looking for a means to assess the impact of their spending over time. This is complicated by the ways in which donor aid is shaped by domestic policy considerations. The second is to work with the implementing organizations themselves – usually NGOs, but increasingly private companies, to see how the assessment of their own work can be made consistent with the macro approach adopted by UNESCO.

Existing donor activities

Despite increasing recognition of their importance, media initiatives still do not receive enough attention and resources within development programs. Approaches are too often fragmented and lack strategy and long-term perspective. Deane suggests a number of reasons for this. In a bid to increase effectiveness and country-ownership of development programs, many decisions about funding are being decentralized to the regional and country levels. This leaves support for freedom of expression fragmented, inconsistent and non-strategic. The trend of providing increasing amounts of aid via budget support leaves donors unable to support the development of an independent, critical media, and governments have few direct incentives to do these themselves. When donors do fund media development, they are often accused of advancing their own policy agendas. Related to the previous point, donors too often conflate different forms of media support. In particular, many argue it is important to foster the media as an independent sphere for citizen communications and this should be clearly separated from public relations activity to build donor branding, and from 'communication for development' work that uses the media to encourage particular social practices (for example to advance public health and combat HIV).
Furthermore, media development programs often encourage competition between local organizations for funds, undermining the collaboration and cooperation that is needed to develop an effective and coherent agenda for a unified but diverse public sphere. There is currently limited cooperation between donors at the country level, undermining strategic and coherent intervention. There is insufficient ownership of free expression programs by local NGOs and media practitioners, including a lack of their participation in the formation of media support strategies. Finally, an increasing emphasis on results and evaluation has often led to the prioritization of programs that yield quantitative indicators of success over short periods of time. The cacophony of voices that characterize a healthy public sphere is difficult to capture and measure using current monitoring and evaluation tools.

Rights-based approaches to development are increasingly common, following Amartya Sen's conception of “development as freedom”. Nevertheless donors rarely explicitly recognize the direct links between international obligations to protect freedom of expression and efforts to promote media development and democracy in their strategies and programming. Media development work is generally seen as a tool to achieve objectives such as good governance, but rarely as a good in itself. The fundamental role that a healthy public sphere hosted by an independent media plays in protecting freedom of expression and other human rights is either assumed or overlooked. Either way, coherent and coordinated programs to foster lively and inclusive public debate, according to an issue agenda that is locally owned and driven, are often lacking. All of this complicates any attempt to develop a robust system for assessing the impact of donor programs, as they will have to reflect vastly different sets of political imperatives.

**Assessing the impact of implementing organizations**

Most donors rely upon independent organizations to implement their programs. Historically this has been as the province of formally constituted not-for-profit organizations. More recently, many donors have taken the view that contracts can be open to any type of organization, profit seeking or not-for-profit, who should compete against each other on price and quality. Assuming the project is implemented through a contract, then it is logical for the organization issuing the contract to set the performance indicators. These terms should be written into the contract and should specify what impact the media program should have and how it should be assessed. Frequently of course, contracts are not this specific. The donor organization has a general idea what it wishes to achieve and the contractor is able to suggest different project activities that aim to achieve the goal. In this case, where the contractor defines the activities (or is an NGO seeking a grant) it is logically their responsibility to
identify how it intends to assess the impact of its work. There is often a great deal of confusion about roles and responsibilities at this interface, which does not help develop a robust system of assessment.

**Assessing implementers**

Assessing the impact of an organization’s work is not possible without addressing the different levels at which the question of performance is addressed. Most not-for-profit organizations have an overall goal (sometimes known as the mission or purpose), which represents the philosophical view of the organization, and which is the expression of its core beliefs. In the field of media development this will reflect the highest level assumptions about the role of the media; for example it is a channel through which citizens can communicate with each other or a facilitator of informed debate between diverse social actors; that it encourages the non-violent resolution of disputes, is a watchdog, promotes government transparency and public scrutiny of those with power through exposing corruption, maladministration and corporate wrongdoing and so on. These beliefs are a given in that they constitute the reason for the organization to exist in the first place and cannot be tested at the level of specific project activities. Utilizing the UNESCO methodology, we would expect the core beliefs to address one or more of the five major categories (or sub categories) listed above.

The impact of the organization at this level can only be measured in broad terms, over time, by perceptible shifts in the media landscape and then only if the organization’s work can be sifted out from the contributions of others and from local contingent events. For donors however, this level of analysis is highly relevant. If donors spend millions of US dollars in a particular country on the media environment and there is no perceptible shift in that environment, they are likely to conclude that there is little value in continuing, even if the projects they support are well run and achieve the immediate deliverable goals.

The second level consists of the organization’s specific objectives which, though supporting the goals of the organization, are a reflection of its organizational capacity and skills. An organization whose objective is to help the media further peace and help resolve conflict is likely to have a set of objectives that promote peace journalism or even strengthen the investigative journalist skills that enable journalists explore the background to a conflict. By contrast, an organization that believes that the legal and regulatory structure is crucial is likely to have objectives that promote advocate legal reform and will have developed the requisite in house skills. The most common objectives in the media development field are the training of journalists – justified in a number of ways and often reflecting a rather nebulous belief that creating professional capacity among journalists and business managers will,
in and of itself, strengthen the media’s ability to contribute to democracy or good governance. There are a further range of media organizations that provide content directly themselves or in partnership with local actors. The significant emphasis on training over the last years may derive from the fact that governments prefer to fund activities that can be easily audited, even if their effectiveness is hard to measure. Although originally the objectives will determine the organizational capacity and skills of the organization, in time those skills and capacities frequently “fix” the objectives even if their relevance has diminished.

At the level of objectives, the UNESCO media development indicators help by identifying whether the particular organizational capacities are relevant to the country in which they are being applied. For example, if the overall diagnosis identifies the legal and regulatory regime as the key problem in a society (a heavily censored state controlled media for example) then training journalists in investigatory techniques they will never have the professional opportunity to apply is less useful than measures which promote legal and regulatory reform. This may seem an obvious point but it is surprising how many media development programs operate without regard to this wider context. A case in point is the European government donor that invests heavily in training Arab journalists in investigative techniques, as part of its counter terrorism program, when they will have little opportunity to practice these skills in a tightly censored state controlled or Saudi owned media. By contrast, there is no training offered in on line, interactive, networked journalism which is where the genuinely independent, and usually Islamist dominated, discourse takes place.

Other organizations may have a specific regional objective – strengthening the media in West African or building communications skills in Brazil and are likely to possess particular regional expertise. In these cases, the capacity level is likely to be regional knowledge and expertise. But again, its relevance to the diagnosis that derives from the application of the UNESCO methodology should still be applied.

The third level that can be distinguished are the program activities of the organization – the level at which projects are formulated and implemented. An example might be to build the capacity of Iraqi journalists to cover the forthcoming elections, a program to establish a media centre in central Asia, or a program to promote investigative journalism in China by producing an online guide in English and Mandarin. These programs may be developed as grant applications or proposals made directly to donors, or may result from tenders issued by the donor agency. These activities are the organizing blocks of work, the subjects of proposals or contracts, the key layer where attention on assessment
tends to focus.

Finally, there are the specific deliverables of each organization: the training courses, seminars, and advocacy activities that make up the program activities of the organization concerned. These are the activities that can be monitored, observed, measured and assessed and which provide the raw material for a more developed set of performance indicators.

It is important to separate out these levels conceptually in order to assess the performance of an organization. This should be a task for the management of the organization, which in all cases should lead on the process of assessing performance. The rationale of performance assessment after all is to improve the operation of an organization, not to catch people out. It is essential therefore that, just as the diagnostic tool is used by local stakeholders even if quality controlled externally, so the performance indicators should be owned and developed by the implementing organization subject to some form of external validation. The assessment itself will have three components – the congruence of the different levels, internal quality checks and external verification.

Congruence is an ongoing process of assessing the degree to which each level correlates and fits with the other, how the goals shape the objectives and in turn determine activities and finally deliverables. The most common weakness in an organization is that there is either no match between the deliverables on the ground and the higher level goals or no clear internal understanding of how they connect. More specifically, the organization must understand how the deliverables relate to the program activities – are they a practical translation of what the program seeks to achieve; if successful will they do what is hoped for? In turn do the activities genuinely support the organization’s objectives; are they the right fit? Is there a match between the activities and objectivities and the needs of the situation, as determined by the overall diagnosis of the media environment? Finally, there needs to be a logistical match between the deliverables and the objectives – if the organization claims to be strengthening democracy by training journalists, is this a reasonable claim to make or does it need to be more nuanced?

The internal quality checks should focus on the deliverables and are likely to vary from project to project. When a project is designed, the implementers should assess, for themselves, how effective are the proposed deliverables – what is the standard they are aiming for and how will they achieve this. A high quality training organization will have a set of service standards that set out a process for determining standard of service to be achieved, the policy required to support this and the accompanying evidence which demonstrates that the standard has been achieved. While service
standards are common where activities are externally regulated (such as with public service provision at the national level) in this field there are relatively few agreed standards to draw upon. Another source for quality control is relevant international standards. One example is the International Standards and Accreditation Services (ISCS) standards for radion and television broadcasters, the internet, and the print press, which provide individual media organizations with a robust methodology to improve their contribution to social development and to make their progress measurable and transparent.33

Finally the external verification should assess how effective deliverables are in reality: on the ground, do they achieve objectives? This will require a socio-political analysis with reference back to the UNESCO level diagnostic analysis of the particular environment and may involve qualitative measures – feedback from participants, interviews on the ground with stakeholders, and quantitative measures involving data analysis and assessment. One of the significant problems in this case is the lack of reliable up to date publicly available data on media environments globally.

Conclusions

This chapter suggests that evaluation be considered in two stages. Firstly, there is a need for an media audit or needs analysis to identify deficiencies and weaknesses in the media system. This audit will help identify the priorities for intervention and support for all agents. The UNESCO methodology provides a comprehensive toolbox approach to this task, setting five categories of indicators that, taken together, can provide the means to construct the media ecology of any country. It is a diagnostic tool, requiring an analytical balancing of the indicators against each other. It does not provide a means of ranking countries, but rather identifies areas that require intervention. It may be that one country has a light touch regulatory framework but also has a heavily concentrated or politicized media. Another may lack basic communications infrastructure but may be liberal in its approach to media policy. A third may practice prior censorship of the traditional media but leave internet communications relatively unregulated. Each of these will require a distinct policy approach and it may be of limited use to produce subjective comparisons among them.

Applying these indicators requires an approach tailed to each country, using local implementers working to an internationally agreed template. The relevance and weighting of each indicators will be the task of each project team and it will require some system of external “quality control”, managed by UNESCO or an appropriate independent agency, to ensure that each exercise does not simply select and weight those indicators that provide the most favorable outcome for the country in question.
Having analyzed the landscape and identified suitable priorities and action strategies, the second stage is then to implement and assess the impact of particular media programs. The approach set out in this paper assumes that evaluation of a project is an on-going process of assessing deliverables against objectives and goals. It is not a process that should solely be conducted externally but rather one that is built into the internal management of projects. To be systematic it should be simple enough to be operational in a busy working environment. While there is a need for some external evaluation this should have a light touch and be concerned to “quality control” the process.

This approach to evaluation does not involve the production of generic performance indicators – rather it requires the development of a system of project management which ensures congruence between the different layers of the organization and develops internal and external indicators appropriate to the deliverables. But it is important to understand that this is a holistic approach in which all three aspects – congruence, internal controls and external evaluation have to be considered side by side. It would be possible to have a range of deliverables that achieve exactly what they are meant to achieve, but which are not congruent with the project activities or organization’s objectives. As such they could not be judged a success. Equally, while it might be assumed that the training of professional journalists in itself contributes to improving the quality of governance or democracy, this is just one aspect of the media environment and may not be the important priority in circumstances where legal and regulatory censorship is practised, there is not plurality and diversity of ownership, the media is heavily polarised and factional or communication infrastructure is weak or even nonexistent.

Whereas the first stage – evaluating the media landscape now has the endorsement of the member states at UNESCO, and therefore has some degree of international acceptance, the second stage remains one where there are many different approaches to evaluation and understanding the impact of projects. We have not reached the point where there is an agreed methodology for the task and it maybe that the particularities of different donor objectives make long term agreement on systems difficult to achieve. It also remains the case that many of the important indicator systems still rely upon the opinions of groups of experts rather than verifiable data. The UNESCO model is an attempt to blend different data sources in a system of assessment. The implementation of the model will test how effective it can be.
Table 2.1: Key indicators of media performance

1. **Freedom of expression is guaranteed in law and respected in practice**
   - National law or constitutional guarantee on freedom of expression.
   - Country has signed and ratified relevant treaty obligations, with no significant exemptions.
   - Public is aware of and exercises its right to free expression, and there are tools and bodies which guarantee the concrete application of this right.

   **Means of verification**
   - Any law or policy on right to free expression that accords with international standards and accepted international practice.
   - Reports from credible agencies about freedom of expression.
   - Reports in national media about freedom of expression issues.
   - Legal cases concerning freedom of expression.
   - Evidence of an independent and functioning judicial system with clear rights of appeal.

2. **The right to information is guaranteed in law and respected in practice**
   - National law or constitutional guarantee on the right to information.
   - Country has signed and ratified relevant treaty obligations, with no significant exemptions.
   - Public is aware of and exercises right to access official information.
   - Public bodies release information both pro-actively and on demand.
   - Effective and efficient appeals mechanism via independent administrative body e.g. Information commissioner or ombudsman.
   - Any restriction on grounds of protection of personal privacy is narrowly defined so as to exclude information in which there is no legitimate public interest.

   **Means of verification**
   - Any law or policy on right to information that accords with international standards
   - Reports from credible agencies about right to information guarantees
   - Policies of public bodies concerning release of information
   - Evidence of state commitment to open government e.g. publication and dissemination of court decisions, parliamentary proceedings, spending programs
   - Statistical information about public requests for official information and their fulfilment or rejection
   - Statistical information about appeals or complaints over information requests that have been refused

3. **Editorial independence is guaranteed in law and respected in practice**
   - Broadcasters are not required to allocate broadcasting time to, or carry specific broadcasts on behalf of the government (aside from obligatory direct access political broadcasts during
• Government, regulatory bodies or commercial interests do not influence, or seek to influence, editorial content of broadcasters or press.
• Law does not allow state actors to seize control of broadcasters in an emergency.

Means of verification
• Any law or policy on editorial independence that accords with international standards
• Evidence of interference in editorial decision making by state or private actors
• Reports by credible agencies about editorial independence issues

4. **Journalists’ right to protect their sources is guaranteed in law and respected in practice**
• Journalists can protect confidentiality of their sources without fear of prosecution or harassment

Means of verification
• Documented cases of journalists being forced to disclose sources
• Any legal guarantee concerning confidentiality of sources that accords with international standards
• Evidence of media organizations or professional associations actively defending right to protect sources

5. **The public and civil society organizations (CSOs) participate in shaping public policy towards the media**
• State creates genuine opportunities for consultation with non-state actors about legislation and public policy towards the media

Means of verification
• Evidence of government commitment to work with civil society to develop law and policy on the media (e.g. conferences, seminars, public fora, official engagement in debates on the airwaves or in print)
<table>
<thead>
<tr>
<th>Agencies</th>
<th>Source</th>
</tr>
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<tbody>
<tr>
<td>AMB</td>
<td>Media Institute of Southern Africa: African Media Barometer</td>
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<tr>
<td>AMDI</td>
<td>BBC World Service Trust: African Media Development Initiative</td>
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<tr>
<td>Bridges</td>
<td>bridges.org: Comparison of E-readiness Assessment Models</td>
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<tr>
<td>CPJ</td>
<td>Committee to Protect Journalists: Journalists Killed Statistics</td>
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<tr>
<td>DANIDA</td>
<td>Monitoring and Indicators for Communication for Development</td>
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<tr>
<td>DFID</td>
<td>Monitoring and Evaluating Information and Communication for Development Programs</td>
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<tr>
<td>DOI</td>
<td>International Telecommunications Union: Digital Opportunity Index</td>
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<tr>
<td>EFJ</td>
<td>Questionnaire on Quality in Journalism</td>
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<td>FH</td>
<td>Freedom House: Freedom of the Press survey</td>
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<tr>
<td>GFMD</td>
<td>Global Forum for Media Development: Media Matters: Perspectives on Advancing Governance and Development</td>
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<tr>
<td>ISAS Press</td>
<td>Quality Management Systems: requirements for the press</td>
</tr>
<tr>
<td>ISAS RTV</td>
<td>Giving Voice to the Voiceless Quality Management Systems: requirements for broadcasters/Internet</td>
</tr>
<tr>
<td>MMI WB Gov</td>
<td>Money Matters Institute: Wealth of Nations Triangle Index World Bank: Governance Matters IV</td>
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<tr>
<td>MSI</td>
<td>International Research and Exchanges Board: Media Sustainability Index</td>
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<tr>
<td>RSF</td>
<td>Reporters without borders: Worldwide Press Freedom Index</td>
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<td>TI</td>
<td>Transparency International: National Integrity System</td>
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<tr>
<td>UNESCO News</td>
<td>Questionnaire on Newspaper Statistics</td>
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<td>UNESCO Pov</td>
<td>Press Freedom and Poverty: an analysis of the correlations</td>
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<td>Questionnaire on Radio and Television Broadcasting Statistics</td>
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<td>UNDP</td>
<td>Giving Voice to the Voiceless</td>
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<td>UNDP BiH</td>
<td>Supporting Public Service Broadcasting: learning from Bosnia and Herzegovina’s experience</td>
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<tr>
<td>UNDP Emp</td>
<td>Communication for Empowerment: developing media strategies in support of vulnerable groups</td>
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<td>UNDP Info</td>
<td>Guide to Measuring the Impact of Right to information Programs</td>
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<td>WB Dev</td>
<td>World Bank Development Indicators</td>
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<td>WB Gender</td>
<td>World Bank: Engendering ICT Toolkit</td>
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<td>World Bank Institute Governance Matters IV</td>
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### Table 2.3: Dimensions of media performance

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<th>Category of indicator</th>
<th>MSI</th>
<th>ISAS RTV</th>
<th>ISAS Press</th>
<th>FH</th>
<th>AMDI</th>
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<th>UNDP Emp</th>
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<th>UNESCO RTV</th>
<th>CPJ</th>
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<td>Right to information guarantees</td>
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<td>Censorship / jamming</td>
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<td>Market entry, licensing &amp; tax structure</td>
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<td>Access to printing &amp; distribution facilities</td>
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<td>Regulatory regime</td>
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<td>Citizens' access to media unrestricted</td>
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<td>Media reflects diversity of society &amp; promotes minority and social content</td>
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<td>Quality of technical production facilities</td>
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<tr>
<td>Violence/ harassment against journalists</td>
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<td>Access to journalism and status of profession</td>
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<td>Availability of quality journalism training (academic/vocational)</td>
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<td>Trust/ satisfaction in the media: audience and wider public</td>
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<td>Media penetration: per capita coverage of various media</td>
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<td>Overall integrity of media system, extent of corruption</td>
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Appendix A: Data sources

African Commission on Human and Peoples' Rights, Special Rapporteur on Freedom of Expression:  
www.achpr.org/english/_info/index_free_exp_en.html


Council of Europe recommendation (2000) 7 on the right of journalists not to disclose their sources of information: www.humanrights.coe.int/media/index.htm

Freedominfo.org – online network of freedom of information advocates: Freedom of Information Around the World 2006: a global survey of access to government records laws:  


International Journalists' Network - survey of media laws worldwide:  

International Journalists' Network – international directory of constitutional provisions on the media:  

Media Sustainability Index: www.irex.org/msi

Organization of American States Special Rapporteur for Freedom of Expression:  
www.cidh.org/Relatoria/index.asp?IID=1

Organization for Security and Cooperation in Europe (OSCE) Representative on Freedom of the Media:  
www.osce.org/fom

www.undp.org/oslocentre/docs04/Right%20to%20Information.pdf

UNESCO, Freedom of Information: a comparative legal survey by Toby Mendel, 2003:  
www.article19.org/docimages/1707.pdf

United Nations Special Rapporteur on the promotion and protection of the right to freedom of opinion and expression: www.ohchr.org/EN/Issues/opinion/index.htm

World Press Freedom Committee: www.wpfc.org
The best sources on treaty obligations are the websites of international organizations – the UN or relevant regional bodies. These carry details of each treaty, including countries that have signed, ratified or registered any exemptions to their obligations, together with the treaty bodies' general comments on implementation. In addition, the various international and regional rapporteurs on freedom of expression issue country-specific reports.

The main international instruments dealing with freedom of expression and information are:


For data on national laws and constitutional guarantees, sources include: national libraries, law commissions, official records of parliament and government records.


7 What follows is a synthesis of various reports on the media and democratic development, including: Article 19 (undated); Islam (2002); Global Forum for Media Development (2006); Norris and Zinnbauer (2002); UNESCO-CPHS (2006).


9 John Lloyd. 2004. *What the media is doing to our politics.* Constable


11 http://www.law.cornell.edu/constitution/constitution.billofrights.html

http://www.article19.org/pdfs/analysis/hamelinke-declaration-the-right-to-communicate.pdf


Norris, Pippa and Dieter Zinnbauer above


27 It should be noted that this analysis was conducted in 2006 – some of these questions may have been addressed in subsequent versions of the indicators.


29 Alan Davis. 2006. 'A Road map for Monitoring and Evaluation in the Media Development Sector.' in *Media Matters: Perspectives on Advancing Media and Development from the Global Form for Media Development*, Internews Europe and the Global Forum for Media Development, pp.89-93


33 Details are available from Certimedia. [http://www.certimedia.org](http://www.certimedia.org)