

Media Viability Indicators - Methodology

Some General Remarks about Starting the Research

This package of interview instruments was developed to assist researchers, media managers and others interested in the topic to measure DW Akademie's [Media Viability Indicators \(MVIs\)](#). It contains several different items:

- a) General information on how to get started with the research
- b) An interview script you can use when introducing yourself and your research to interviewees
- c) General information on each of the indicators as well as the scoring system, and key information on what to assess within the Sub-Indicators
- d) Sources for general information about freedom of expression in a certain country
- e) Tables you can use to enter your results

We hope that this will help you to get reliable results. If you have any queries or suggestions, please feel free to contact Nadine Jurrat nadine.jurrat@dw.com.

Please also share any results that you have using this methodology!

How to get started

The ability to use the MVI effectively to assess news media viability in a country will require some time and preparation!

- 1)** Read through each page of these documents carefully. Particularly spend time becoming familiar with the interview instruments and measures for each dimension. Some indicators are scored using data from sources such as the World Bank or the World Justice Project, and should not be asked during your interviews. After each interview instrument is a “Guidance” section that explains what the interview is trying to measure and how different situations might be scored on every item. The Guidance section also provides resource information to third party sources that should be used to gather some data, or which can be used to verify and validate interviewee’s responses.
- 2)** After you have familiarized yourself with all of the documents, begin by gathering the “Background Information” listed on a following page.
- 3)** When greeting interview subjects, read or repeat a version of the “Introductory Script.” This script is designed to quickly and correctly explain the project, explain how the data will be used and reported and gain their consent to that use, gain their consent, if applicable to have the interview recorded, and provide them with a clear definition of what is meant by “News Media Viability,” so that they can consider their answers accordingly.

What interview subjects are told about a research project, and how that information is presented, affects interviewees’ responses to questions. Therefore, it is *very* important that each person being interviewed be introduced to the project in the same way and provided with the same information and definitions. If they are not, it will be difficult to know whether different interviewees were thinking about the questions the same way as they answered. If they were not, then it will be difficult, if not impossible, to interpret the responses you get. Consistency is important.

- 4)** Begin the interview with the Overview Questions. When you have completed the entire interview process with an interview subject, go back to the interview page and ask the question again. Do not change the person’s initial answers. Just record the answers to the post-interview questions separately. Compare and aggregate the pre- and post- interview issues rankings across interview subjects and use the information to help you assess the primary issues affecting News Media Viability.
- 5)** Be aware that there are cultural norms regarding the numbers that represent “best” and “worst” – they are being perceived differently in different countries. In the News Media Viability Index, the Score of “4” means that the situation is “Best,” while the

Score of “1” means that it is “Worst.” The scoring was done in this direction to reduce the possibility of errors in the mathematical calculations of the final index. But the pilot test of the instrument made it clear that interviewees may accidentally reverse the scores, incorrectly using “4” for “worst.” It is very important for the Interviewer to listen closely to responses and make sure you are assigning the correct score for what your interview subject *means*

6) The Guidance Information for each Indicator and Sub-Indicator is also designed to help you improve the consistency of your interview subject’s understanding of what you are asking and trying to learn. The Guidance Section for each Indicator/Sub-Indicator set comes immediately after each section of the Interview instrument. It is designed to make it easy for you to scroll down for guidance during an interview, if you need to help an interview subject understand what you are asking and how to provide a score. However, in order to ensure that interviews flow smoothly, it is important that you have read and absorbed the guidance sections before beginning the interview process and simply use them occasionally when additional clarity is necessary.

7) It is not necessary to ask every interview subject to respond to every Dimension or to every Indicator or Sub-Indicator in a Dimension. It is desirable to get as many expert responses to each Indicator and Sub-Indicator as possible. Do not, however, ask people to answer questions about which they have no real knowledge. Having respondents guess about answers or scores will make your overall assessment less accurate.

8) There are Sub-Indicators on “Local Media” included as part of a number of Indicators. Many countries do not have local news media –media that report on and serve only specific cities or communities outside of the capital. Even in countries where there are local media, many media experts may not have much knowledge of the issues and conditions affecting local media. In either case, skip all Sub-Indicators about local media in the interview.

9) When you have skipped an Indicator or Sub-Indicator, just calculate the average score for that indicator after reducing the number of items used in the calculation. Sub-Indicators that are “Not Applicable” should also be dropped from the calculation of the average Indicator Score.

10) While conducting the interview, take extensive notes on what the interview subject says as they speak. Those notes will be important to interpreting the final scores and understanding the issues affecting News Media Viability in the country.

Background Information

Instructions: Collect the following information before beginning interviews. Use the interviews to verify and add to the data you collected from third party sources. Third party sources for this information include the [Media Landscapes Project](#); European Federation of Journalists; [Freedom House](#); Wikipedia also sometimes has national media lists.

Daily Newspapers (Add rows as necessary; leave cells blank, if the information is unavailable)

<u>Newspaper Name</u>	<u>Owner</u>	<u>Circulation Area (city/nation)</u>	<u>Circulation</u>	<u>Ideological Slant (if any)</u>	<u>Language</u>

Television Networks/Stations that Produce News Daily for National Distribution (Add rows as necessary; leave cells blank, if the information is unavailable)

<u>Network/Station Name</u>	<u>Owner</u>	<u>Broadcast Area (city/nation)</u>	<u>News Audience Size (Ratings or Audience Share)</u>	<u>Ideological Slant (if any)</u>	<u>Language</u>

Radio Network/Stations that Produce News Daily for National Distribution (Add rows as necessary; leave cells blank, if the information is unavailable)

<u>Network/Station Name</u>	<u>Owner</u>	<u>Broadcast Area (city/nation)</u>	<u>News Audience Size</u> <small>(Ratings or Audience Share)</small>	<u>Ideological Slant</u> <small>(if any)</small>	<u>Language</u>

Major Digital Native News Organizations that Produce News Daily for National Distribution (Add rows as necessary; leave cells blank, if the information is unavailable)

<u>News Organization Name</u>	<u>Owner</u>	<u>Focus Area of Content</u> <small>(city/region/nation)</small>	<u>News Audience Size</u> <small>(Approx. Daily Readers or Market Share)</small>	<u>Ideological Slant</u> <small>(if any)</small>	<u>Language</u>

Introductory Script for Interview Subjects

Thank you so much for taking the time to meet with us today and for your willingness to help us with this project.

As I'm sure **(Contact Name)** told you, we **(Organization)** are working together on a project to assess News Media Viability in **(Country)**. My role is to assist **(Organization)** with this project.

We define ***news media viability*** as a news media industry that has three characteristics: financial sustainability, editorial independence, and journalism quality.

We're talking with **(Country)** media experts like yourself to learn about the **(Country)** media system. We'd like to ask your views about specific aspects of how the news media system works in **(Country)**, and about trends that you see. We are using an index of factors developed by DW Akademie that we think will help people around the world assess news media viability in their own countries. So, we would like to ask you your views on the items that are included in the index.

When we analyze the data and write the report, all responses will be combined and only the collective results and analysis will be reported. If we quote something specific that you or another person who is helping us tells us, we will do it in the form of "A respondent said..." without identifying the person by name. I'll be taking notes on my computer throughout our conversation. [But if it's alright with you, I also would like to audio record our interview to ensure that I have accurately understood what you've told me. The audio recording will only be used to confirm my notes. Would that be OK with you?]

Do you have any questions for us, before we begin?

Overview Question

Let me begin our discussion by asking you a direct opening question. I've given you the definition that we are using for "News Media Viability" - that is, financial sustainability, editorial independence and content quality. Considering everything going on in your country that is affecting News Media Viability – the political and legal system, the economic and ownership situation in the country, the public's attitude and relationship to news media, the technological situation of the country, and the general quality of the content produced by your country's news media: What would you say are the THREE biggest obstacles to News Media Viability as we have defined it? Please rank order them, and be as specific in your answers as possible

Answers Before Formal Interview (if they offer more than three, include them all).

1)

2)

3)

Answers AFTER Formal Interview (if they offer more than three, include them all).

1)

2)

3)

Dimension 1: Politics

1. Rule of Law

A nation must have a stable, reliable system of government in which government action is enabled and constrained by laws that are applied fairly and transparently to all people and businesses, regardless of wealth, personal or political connections. The assumption that citizens have the right to oversee and control the government, rather than the other way around, is the foundational philosophy underlying an independent, watch dog media. Within that rule of law, an independent judiciary has been determined to be the most important single factor in sustaining a rule of law. All countries can be assessed on their Rule of Law, so the category “not applicable” does not apply for this indicator or either of its Sub-Indicators.

Indicator: Government actions are determined by laws that are fairly applied and enforced.

Sub-Indicator (score)	Combined World Justice Project Score + Freedom House Score in 4th Quartile of all countries indicate that this accurately describes the situation, supporting news media viability (4)	Combined World Justice Project Score + Freedom House Score in 3rd Quartile of all countries indicate that the situation is OK, but not fully secure as regards news media viability (3)	Combined World Justice Project Score + Freedom House Score in 2nd Quartile of all countries indicates the situation is a problem for news media viability. (2)	Combined World Justice Project Score + Freedom House Score in 1st Quartile of all countries shows the overall situation is effectively the opposite of what is described and is a serious obstacle to news media viability. (1)	Not Applicable (0)
1.1 Government is based on the principle that citizens have the right of active participation in, and oversight of, the government.					

Notes:					
1.2 The country has an independent judiciary that applies laws and judgments impartially to businesses and individuals.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 1

Sub-Indicator (score)	The country is in the 4th Quartile of all countries indicate that this accurately describes the situation, supporting News Media Viability (4)	The country is in 3rd Quartile of all countries indicating that the situation is OK, but not fully secure as regards News Media Viability (3)	The country is in the 2nd Quartile of all countries indicating the situation is a problem for News Media Viability. (2)	The country is in the 1st Quartile of all countries showing that the overall situation is effectively the opposite of what is described and is a serious obstacle to news media viability. (1)	Not Applicable (0)
1.1 Government is based on the principle that citizens have the right of active participation in, and oversight of, the government.	<p>Sub-Indicator 1.1 asks you to assess the degree to which government is based on the principle that citizens have the right of active participation in, and oversight of, the government.</p> <p>The World Justice Project Rule of Law Index comparatively measuring the different elements that combine to create a regime based upon the Rule of Law.</p> <p>Combine the Justice Project’s Rule of Law Score and the Freedom House Freedom of the World Index to determine where the country stands on Indicator 1.1. Determine into which quartile the country you are assessing</p>				

	<p>falls compared to all other countries in each index and compare the results across WJP and Freedom House.</p> <p>If the two indices rank the country you are assessing the same way on this indicator, then record that score. If there is a difference, use the lower of the two rankings. In the instance where a country is not included in one or the other of these two NGOs' indices, the ranking of the other will be used alone. In the event that a country is not included in either index, the evaluator should make note of that and simply evaluate the situation using the general heading categories as they describe the impact of the situation on news media viability.</p> <p>To determine the Quartile, sort the countries in an index by rank order. Divide the total number by 2. Then divide each half by 2. The resulting number in each case is the highest case in the quartile. (Ex: $100/2 = 50$. $50/2 = 25$. Quartile 1 = 1-25. Quartile 2 = 26-50; Quartile 3 = 51-75; Quartile 4 = 76-100.</p> <p>1.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>1.2 The country has an independent judiciary that applies laws and judgments impartially to businesses and individuals.</p>	<p>Sub-Indicator 1.2 asks you to assess the degree to which the country has an independent judiciary that applies laws and judgments impartially to businesses and individuals. For this Sub-Indicator, determine the quartile into which the country falls on the basis of its rank in WJP Rule of Law Index based on each of the two sub-scores for "Civil Justice" and "Criminal Justice." If the quartile is the same for both the Civil Justice and Criminal Justice rankings, then record that quartile for Indicator 1.2. If the quartile is different for the two different sub-scores, average the two rankings and determine in which quartile the country would then fall and record that as the score for Indicator 1.2</p> <p>In the instance where a country is not included in the WJP Rule of Law Index, use the Freedom House Index score for "Civil Liberties." In the instance where a country does not appear in either index, use the scores assigned by interview subjects to determine the country's score in Indicator 1.2.</p> <p>1.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

2. Freedom of Expression

A nation must have a strong legal framework supporting freedom of expression and of the media in order to support News Media Viability over the long term. Each of the Sub-Indicators refer to specific techniques used by some countries to undermine or circumvent freedom of expression.

Experts have advised that in many countries, there are significant gaps between the Laws as they are written; the Laws as they are enforced by government authorities; and the Laws as they are experienced and used by citizens. A pilot test of this interview instrument validated the challenge respondents have in trying to come up with a single score on these questions. Therefore, in the following questions, give your interview subjects the chance to separately evaluate the state of the country’s political structures differently, if they see differences between the legal code, its enforcement, and how it actually is lived by citizens of the country.

Average the scores to determine the final score on each Sub-Indicator.

All countries can be assessed on their Freedom of Expression regimes, so the category “not applicable” does not apply for this indicator or any of its Sub-Indicators.

Indicator 2: The country has a strong legal framework supporting freedom of expression.

Sub-Indicator (score)		This accurately describes the overall situation, supporting News Media Viability. Freedom of Expression-indices from CSOs used as measure, where appropriate.	The overall situation is OK as regards News Media Viability, but there are signs that it is deteriorating. Freedom of Expression-indices from CSOs used as measure, where appropriate.	The overall situation is bad and is a problem for News Media Viability. Freedom of Expression-indices from CSOs used as measure, where appropriate.	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. Freedom of Expression-indices from CSOs used as measure, where appropriate.	Not Applicable (o)
2.1 Laws establishing rights to	As Written:					
	As Enforced:					

free expression are enforced on all platforms.	As Lived:					
Notes:						
2.2 Criminal and civil statutes and actions are not used to silence or intimidate journalists, news media organizations or citizens providing fair and accurate coverage and commentary.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
2.3 Libel and slander laws are limited as much as possible and provide protection for journalists and citizens who have reported or spoken truthfully.	As Written:					
	As Enforced:					
	As Lived:					

Notes:						
2.4 Licensing and visas are not used to control journalists or limit news media organizations' access to information.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.						
INDICATOR SCORE:						

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 2

Sub-Indicator (score)	This accurately describes the overall situation, supporting News Media Viability. Freedom of Expression-indices from CSOs used as measure, where appropriate.	The overall situation is OK as regards News Media Viability, but there are signs that it is deteriorating. Freedom of Expression-indices from CSOs used as measure, where appropriate.	The overall situation is bad and is a problem for News Media Viability. Freedom of Expression-indices from CSOs used as measure, where appropriate.	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability Freedom of Expression-indices from CSOs used as measure, where appropriate.	Not Applicable (o)
2.1 Laws establishing rights to free expression are en-	Sub-Indicator 2.1 asks you to assess the degree to which a country has and enforces laws that establish the right to free expression. Base your assessment on the information given to you by your interview subjects. However, you can cross check the reliability of the information you get from your interview subjects against				

<p>forced on all platforms.</p>	<p>additional sources including: Freedom House, the WJP Freedom of Expression Regime Measure, International Press Institute, Reporters Without Borders, IFEX</p> <p>2.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>2.2 Criminal and civil statutes and actions are not used to silence or intimidate journalists, news media organizations or citizens providing fair and accurate coverage and commentary.</p>	<p>Sub-Indicator 2.2 asks you to assess the degree to which journalists, news media organizations and citizens are safe from attempts to use criminal and civil statutes to silence or intimidate them as they exercise their right to free expression. NGOs that assess Freedom of Expression generally assess this issue separately, as part of the larger measure. An aggregation of those individual sub-measures should be used to determine how this Sub-Indicator is scored. If 3 or more journalists or journalism assistants are in jail under criminal or civil statutes as a result of their reporting according to the sources for Sub-Indicator 2.1, the country should be scored as a 2 or lower. Reporters Without Borders, UNESCO and the Committee to Protect Journalists issue regular reports on violence against journalists.</p> <p>2.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>2.3 Libel and slander laws are limited as much as possible and provide protection for journalists and citizens who have reported or spoken truthfully.</p>	<p>Sub-Indicator 2.3 asks you to assess the degree to which a country has and enforces defamation laws that protect journalists who have reported or spoken truthfully. Such laws generally allow the truth of the information reported to be sufficient as a defense. The burden of proof rests with the plaintiff, not the journalist or news media organization, and the standards for proving defamation against a government official or public figure are much higher and generally require the proof not only of falsity, but also of deliberate malice on the part of the journalist. The laws must not only exist but be consistently and equitably enforced. All countries can be assessed on this measure.</p> <p>2.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>2.4 Licensing and visas are not used to control journalists or limit news media organizations' access to information.</p>	<p>Sub-Indicator 2.4 asks you to assess the degree to which a country does not use licensing to control domestic journalists and visas to control foreign journalists. Ideally, a country would use neither. The worst case scenario would be if a country used both, if visas are hard for foreign journalists to obtain, and/or if journalists are often assigned official "minders" to monitor and report on their journalistic activities. All countries can be assessed on this measure.</p> <p>2.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

3. Access to Information

This indicator measures the degree to which journalists have fair and equitable access to the information they need to report on government and issues in the public interest. Each of the Sub-Indicators refers to specific techniques used by some countries to undermine or circumvent reporting about government.

In some countries, the existence and enforcement of access to information laws may vary greatly between national and local governments, affecting national and local news media organizations differently. If there is a significant gap in access between the two levels of governments that threatens the long-term viability of local media, then the country should not be scored 4, even if it is not a problem for national media. Please include this in the explanation for your scoring.

All countries can be assessed on their Access to Information regimes, so the category “not applicable” does not apply for this indicator or any of its Sub-Indicators.

Indicator 3: Citizens and journalists can access public information.

Sub-Indicator (score)		Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not Applicable (0)
3.1 Government officials are available to provide information to news media organizations on a fair and equitable basis.	As Written:					
	As Enforced:					
	As Lived:					

Notes:						
3.2 Governmental meetings, hearings, and press conferences are open to news media organizations and citizens on a fair and equitable basis.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
3.3 Government documents and data are available to news media organizations and citizens on a fair and equitable basis.	As Written					
	As Enforced:					
	As Lived:					
Notes:						
3.4 There are laws allowing journalists to protect their sources.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						

Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. *Not Applicable* is dropped from calculation.

INDICATOR SCORE:

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 3

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not Applicable (o)
<p>3.1 Government officials are available to provide information to news media organizations on a fair and equitable basis.</p>	<p>Sub-Indicator 3.1 asks you to assess the degree to which the government officials in a country make themselves available to provide information to news media organizations on a fair and equitable basis across news media organizations. This should be assessed in terms of how both the national and local governments operate overall and the degree to which failure to meet this standard creates problems for news media organizations. In worst case scenarios, government officials might make themselves available only on the basis of favoritism to those news media organizations that provide positive coverage, or they might not make themselves available at all.</p> <p>3.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
<p>3.2 Governmental meetings, hearings, and press conferences are open to news media organizations and citizens on a fair and equitable basis.</p>	<p>Sub-Indicator 3.2 asks you to assess the degree to which a country has and enforces governmental open meetings or “sunshine” laws on a fair and equitable basis across news media organizations. This should be assessed in terms of how both the national and local governments operate overall and the degree to which failure to meet this standard creates problems for news media organizations. In worst case scenarios, government meetings and press conference might be open to news media organizations only on the basis of favoritism to those news media organizations that provide positive coverage, or they might not be open to the news media and public at all.</p> <p>3.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				

<p>3.3 Government documents and data are available to news media organizations and citizens on a fair and equitable basis.</p>	<p>Sub-Indicator 3.3 asks you to assess the degree to which a country has open records and Freedom of Information laws that are enforced. Government documents and data should be available to news media organizations and citizens on a fair and equitable basis and at a reasonable cost. This should be assessed in terms of how both the national and local governments operate overall and the degree to which failure to meet this standard creates problems for news media organizations.</p> <p>In worst-case scenarios, documents and data might available only at an exorbitant cost; available only on the basis of favoritism to those news media organizations that provide positive coverage; or not available at all to news media organizations and citizens.</p> <p>3.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>3.4 There are laws allowing journalists to protect their sources.</p>	<p>Sub-Indicator 3.4 asks you to assess the degree to which a country has and enforces laws that allow journalists to protect their confidential sources, sometimes known as “shield laws.” Journalists should be free from targeted government efforts to force them to reveal sources through intimidation tactics, criminal proceedings, surveillance or attempts to hack into news media organization notes and files. Courts should side with news media organizations over governments when violations occur. This should be assessed in terms of how both the national and local governments operate overall and the degree to which failure to meet this standard creates problems for news media organizations. In worst case scenarios, a country would not have laws that allow journalists at both the national and local levels to protect their sources, or those laws would be ignored in most cases.</p> <p>3.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

4. Legal Equality

This indicator measures the degree to which news media organizations are treated under the law the same way other businesses and industries are treated and can maximize their ability to produce revenue from their products. In some countries, the existence and enforcement of business laws may vary greatly between national and local governments, affecting national and local news media organizations differently. If there is a significant gap in access between the two levels of governments that threatens the long-term viability of local media, then the country should not be scored 4, even if it is not a problem for national media. Please explain that as part of your explanation for your scoring.

Not all of these Sub-Indicators will be appropriate for all countries.

Indicator 4: Laws and regulations affecting news media organizations are comparable to those applied to other industries and are impartially enforced.

Sub-Indicator (score)		Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
4.1 The general business environment (legal, regulatory, taxation) is supportive of private media enterprise.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
4.2 Laws that limit concentration, monopolies	As Written:					
	As Enforced:					

and cross-ownership of news media organizations are impartially enforced.	As Lived:					
Notes:						
4.3 Government taxes and fees for news media organizations – such as broadcast license fees, newspaper registration, fees for establishing an ISP, taxes, etc. – are reasonable, comparable to those of other industries, and impartially applied.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
4.4 Foreign investment or foreign donor support for private news media organizations is permitted under reasonable regulations and restrictions.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
4.5 Copyright and intellectual property laws exist	As Written:					

and are enforced, enabling news media organizations to profit from the original content and associated profits they create.	As Enforced:					
	As Lived:					
Notes:						
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.						
INDICATOR SCORE:						

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 4

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
4.1 The general business environment (legal, regulatory, taxation) is supportive of private media enterprise.	Sub-Indicator 4.1 asks you to assess the degree to which a country's general business environment is supportive of private media enterprises. The laws should treat news media organizations no differently than other private business enterprises and the laws should be fairly and equitably enforced. The situation should be assessed in terms of how both the national and local governments operate overall and the degree to which failure to meet this standard creates problems for news media organizations. Public and private media organizations should compete on an equal footing in countries that have both systems. Conversely, in worst case scenarios, private media enterprises would be subject to significantly burdensome legal, regulatory, or tax requirements				

	<p>that are not applied to public media or are harsher than those applied to other industries.</p> <p>4.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>4.2 Laws that limit concentration, monopolies and cross-ownership of news media organizations are impartially enforced.</p>	<p>Sub-Indicator 4.2 asks you to assess the degree to which a country has and impartially enforces <i>laws</i> that limit media concentration, monopolies and cross ownerships of news media organizations within individual markets. The laws on media ownership and concentration should try to ensure that there remains active competition among independent news media organizations, ensuring that audiences have access to multiple sources of information and diverse points of view. This Sub-Indicator is focused on the existence of laws and regulations about media concentration, not on the level of news media concentration itself. In worst case scenarios, there would be no laws or regulations limiting the concentration of ownership in news media markets, or those laws would be fairly and equitably enforced, or not enforced at all.</p> <p>4.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>4.3 Government taxes and fees for news media organizations – such as broadcast license fees, newspaper registration, fees for establishing an ISP, taxes, etc. – are reasonable, comparable to those of other industries, and impartially applied.</p>	<p>Sub-Indicator 4.3 asks you to assess the degree to which a country has reasonable taxes and fees for news media organizations and that those taxes and fees are impartially assessed and are not used to favor, punish or otherwise control the editorial independence of news media organizations. Conversely, in worst case scenarios, taxes and fees for news media organizations would be higher than for other industries, would be differentially applied to different news media organizations, or would be used by the government as a way of controlling news media organizations.</p> <p>4.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>4.4 Foreign investment or foreign donor support for private news media organizations is permitted under reasonable regulations and restrictions.</p>	<p>Sub-Indicator 4.4 asks you to assess the degree to which a country permits foreign investment in news media organizations or foreign donor support, when such investment or support can strengthen news media in the country and does not threaten editorial independence. The need for reasonable restrictions on foreign ownership and investment should be recognized, so long as such laws are impartially enforced and not used to prevent the development of quality, independent news media organizations. In worst case scenarios, the government would limit foreign investment or foreign donor support for the news media explicitly as a means of weakening or control-</p>

	<p>ling news media organizations.</p> <p>4.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>4.5 Copyright and intellectual property laws exist and are enforced, enabling news media organizations to profit from the original content and associated profits they create.</p>	<p>Sub-Indicator 4.5 asks you to assess the degree to which a country has and impartially enforces intellectual property and copyright laws. Such laws enable news media organizations to profit from the original content they produce and prevent that content from being freely shared or pirated by others for their own profit. In worst case scenarios, the country would not have copyright or intellectual property laws protecting news media content, or those laws would not be enforced.</p> <p>4.5 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

5. Media within Society

This indicator measures the degree to which relationships between government officials and media professionals are mutually respectful and professionalized, even during times of tension. All countries can be assessed on the quality of government/press relations, so the category “not applicable” does not apply for this indicator or any of its Sub-Indicators.

Indicator 5: Relations between government and news media organizations are mutually respectful and professional.

Sub-Indicator (score)		Accurately describes the overall situation, supporting News Media Viability There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not Applicable (0)
5.1 The Government and their agents respect the societal role of news media organizations, and the relations are professional even during times of high tension.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						

5.2 Government officials and politicians do not directly or indirectly threaten journalists as the result of their reporting.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
5.3 Journalists do not frequently face physical threats and dangers as a result of their reporting.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
5.4 Individuals or organizations that threaten or injure journalists face criminal prosecution and severe penalties.	As Written:					
	As Enforced:					
	As Lived:					
Notes:						
5.5 Professional associations that advocate for journalists' rights and safety are allowed to operate.	As Written:					
	As Enforced:					
	As Lived:					

Notes:
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.
INDICATOR SCORE:

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 10

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not Applicable (0)
5.1 The Government and their agents respect the societal role of news media organizations, and the relations are professional even during times of high tension.	<p>Sub-Indicator 5.1 asks you to assess the degree to which a country’s government and its agents respect the societal role of the news media. Government-news media relationships should be professionalized, even during times of high tension. The government and its agents should not regularly try to undermine the public’s trust in the news media. Politicians and government officials recognize that the news media’s role is to serve the public’s interest, not the government’s interest. Conversely, in worst case scenarios, tensions between government agents and the news media are usually tense and antagonistic. Government agents actively try to undermine public trust in the news media. Government officials do not generally respect the role of news media in the society.</p> <p>5.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
5.2 Government officials and politicians do not directly or indirectly threaten journalists as the result of their reporting.	<p>Sub-Indicator 5.2 asks you to assess the degree to which journalists, news media organizations, media assistants or citizen journalists are able to work without facing threats from politicians and government agents – directly or indirectly in response to their reporting. Conversely, in worst case scenarios, journalists, news media organizations, media assistants or citizen journalists frequently would be threatened by government agents. The threats could be either threats of direct action or the action itself. Threats of all kinds, including threats of criminal or civil charges, physical violence against the</p>				

	<p>journalist or the journalists' family and friends, should be considered. The threats might come directly from politicians or government agents or be organized through third parties. If there are differences between national and local governments in a country in regards to this Sub -Indicator, that should be included in the assessment and explained in the explanation.</p> <p>5.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>5.3 Journalists do not frequently face physical threats and dangers as a result of their reporting.</p>	<p>Sub-Indicator 5.3 asks you to assess the degree to which journalists, news media organizations, media assistants, or citizen journalists are able to work without frequently facing physical threats or actual danger of physical violence from any source – government, business, organized crime, or individual actors – as a result of their journalistic work. The NGO the Committee to Protect Journalists tracks violence against journalists worldwide and should be consulted in evaluating this measure. Any country in which 3 or more journalists, news media organizations or media assistants have been victims of violence each year in the past two years should be scored 2 or lower. If there are differences between national and local governments in a country in regards to this Sub -Indicator, that should be included in the assessment and explained in the notes section.</p> <p>5.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>5.4 Individuals or organizations that threaten or injure journalists face criminal prosecution and severe penalties.</p>	<p>Sub-Indicator 5.4 asks you to assess the degree to which those who threaten or attack journalists, news media organizations, media assistants or citizen journalists are held accountable for their actions under the law. The law should impartially prosecute all who threaten or attack those working in journalism, regardless of whether the attack originated from individuals, businesses, criminal organizations or government agents. Penalties for such attacks should be severe. If there are differences between national and local governments in a country in regards to this Sub-Indicator, that should be included in the assessment and explained in the explanation. UNESCO's biennial reports on the safety of journalists should be consulted when assessing this Sub-Indicator. In worst case scenarios, Perpetrators of violence against journalists, news media organizations, media assistants or citizen journalists are rarely brought to justice and, if they are arrested and tried, sentences are generally not severe.</p> <p>5.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

<p>5.5 Professional associations that advocate for journalists' rights and safety are allowed to operate.</p>	<p>Sub-Indicator 5.5 asks you to assess the degree to which professional associations that advocate for journalists' rights and safety are allowed to operate within the country. Journalists should be able to join such associations without fear of retaliation from either the government or the news media organization that employs them. Such associations and their members should not be subject to government surveillance. In worst case scenarios, professional associations of journalists would be banned by the government; would be operated and controlled by the government; or journalists and news organizations that joined such associations would place themselves at risk professionally or personally.</p> <p>5.5 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
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Dimension 2: Economics

6. National Economy

Economics are necessarily the foundation of news media viability, regardless of the type of media system in which a news media organization operates. The strength and stability of the economy in which news media organizations operate is critical to news media viability. Even in systems where news media operate on non-commercial revenue models, the strength of the surrounding economy influences the ability of citizens to purchase and consume news media content, to purchase the technologies -- such as radios, televisions, and smart phones -- that are necessary to access and consume news media content, and to purchase the consumer products and services that may be advertised around news media products.

Estimating the strength of individual national economies in a way that permits cross national comparisons is very complicated. The World Bank and other international organizations calculate such measures. It is widely recognized that while all such measures are flawed, they are developed by experts and are the best such measures available. Another issue is that because of the complexities of international data collection, some of these indices are not updated regularly. For Indicator 1, the data sources listed under “Guidance for Indicator 1” should be used, using the data for the most recent year that is available for the country being analyzed. Please make a note in the Notes section of the measure on which source and what year the measure is based.

Indicator 6: The national economy is strong enough to make news media organizations financially viable.

Sub-Indicator	Top Quartile (4)	Third Quartile (3)	Second Quartile (2)	First Quartile (1)	Not applicable (0)
6.1 The economy produces enough consumer goods to create a strong advertising market. (GDP per capita)					
Notes:					
6.2 Household income levels are high enough to support a strong advertising market: Purchasing Power Parity (PPP)					

Notes:					
6.3 The majority of citizens can afford to buy news media products and services. Average Monthly Disposable Salary (after taxes) (AMDS)					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 6

Sub-Indicator	Top Quartile (4)	Third Quartile (3)	Second Quartile (2)	First Quartile (1)	Not applicable (0)
6.1 The economy produces enough consumer goods to create a strong advertising market. (GDP per capita)	<p>Sources World Bank Data. If country is not listed, then data from the International Monetary Fund</p> <p>If the country is not listed in either index, then data from the country's national statistics office, compared against the data from the World Bank.</p> <p>To determine quartile, sort the countries in the index in rank order from largest GDP to smallest. Divide the number of countries in the index in half. The country ranked at the median or halfway point, becomes the country at the top of the Second Quartile. Take the number of the countries in the top half of the index and divide them by half again. The country at the median point of the top half becomes the country at the Top of the Third Quartile. Do the same for the bottom half of the index to determine the country at the Top</p>				

	of the First Quartile.
6.2 Household income levels are high enough to support a strong advertising market: Purchasing Power Parity (PPP)	Source: Nationmaster Index If country is not listed on the Nationmaster Index, then use the CIA World Factbook If the country is not listed on either index, then use <i>Not applicable</i> .
6.3 The majority of citizens can afford to buy news media products and services. Average Monthly Disposable Salary (after taxes) (AMDS)	Source: Nationmaster Index If the country is not listed on the Nationmaster index for AMDS, then use <i>Not applicable</i> .

7. Financial Stability of News Media Organizations

The central issue in news media viability is financial stability. The factors that influence financial stability vary according to the type of media system a country has, so not all of the Sub-Indicators included in Indicator 2 will apply to all countries. There will be variation according to the types of revenue models news media organizations use in a particular media system.

In some of the Sub-Indicators in Indicator 2, you are asked to separately evaluate the national news media sector and the local news media industry sector. For those questions that do *not* ask you to assess national and local media separately, you should still consider the performance on that Sub-Indicator of both types of media in your response. If there is a significant gap between the conditions around that Sub-Indicator in the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 7: News media organizations are financially stable.

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
7.1 National news media organizations consistently break even or achieve profits/surpluses.					
Notes:					
7.2 <u>Local news media</u> organizations consistently break even or achieve profits/surpluses.					
Notes:					
7.3 News media organizations are able to develop diverse sources of revenue.					
Notes:					
7.4 National news media organizations' share of the advertising mar-					

ket provides a dependable revenue stream.					
Notes:					
7.5 <u>Local news media</u> organizations' share of the advertising market provides a dependable revenue stream.					
Notes:					
7.6 Digital and online advertising are not controlled by third party digital platforms. News media organizations can generate revenue from their own digital and online content.					
Notes:					
7.7 Ad fraud does not siphon off large portions of news media organizations' digital ad revenues.					
Notes:					

7.8 The majority of non-PSB news media organizations operate without direct subsidies (from the government or donors).					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 7

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
7.1 National news media organizations consistently break even or achieve profits/surpluses.	<p>Sub-Indicator 7.1 asks you to assess the degree to which the great majority of national news media organizations consistently break even or achieve profits/surpluses and financial markets and experts expect that to remain the case in the next few years. Conversely, in worst case scenarios, the great majority of national news media organizations across most or all news industry sectors are under severe financial strain (severe budget cuts; not breaking even; or getting close to not being able to break even) for any reason, including debt load.</p> <p>7.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				

<p>7.2 Local news media organizations consistently break even or achieve profits/surpluses.</p>	<p>Sub-Indicator 7.2 asks you to assess the degree to which the great majority of local news media organizations consistently break even or achieve profits/surpluses and financial markets and experts expect that to remain the case in the next few years. Conversely, in worst case scenarios, the great majority of local news media organizations across most or all news industry sectors are under severe financial strain (severe budget cuts; not breaking even; or getting close to not being able to break even) for any reason, including debt load.</p> <p>Some countries may not have a significant local media sector. Countries that do not have a significant local media sector should be scored <i>Not Applicable</i>.</p>
<p>7.3 News media organizations are able to develop diverse sources of revenue.</p>	<p>Sub-Indicator 7.3 asks you to assess the degree to which news media organizations are able to develop diverse sources of revenue. Ideally, almost all of those news media organizations that need diverse revenue sources are developing them. Conversely, in worst case scenarios, news media organizations need to develop diverse revenue sources, but are prevented from doing so for a variety of reasons, including lack of resources, lack of expertise, or legal or other restrictions.</p> <p>7.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>7.4 National news media organizations' share of the advertising market provides a dependable revenue stream.</p>	<p>Sub-Indicator 7.4 asks you to assess the degree to which national news media organizations receive a significant share of the national advertising market, and that share is stable, providing a dependable revenue stream. Conversely, in worst case scenarios, national news media organizations' sell advertising when they can. However, the volume of advertising that they can sell is too small for advertising to provide a dependable revenue stream. Or, alternatively, national news organizations need to sell advertising but are not allowed to do so, or the government does not give them a share of government-distributed advertising as a means of controlling the news organization.</p> <p>In some countries, news media organizations do not accept commercial or government advertising. In such cases, <i>Not Applicable</i> should be used, and a brief explanation should be added to the Notes section for the measure.</p>
<p>7.5 Local news media organizations' share of the advertising market provides a dependable revenue stream.</p>	<p>Sub-Indicator 7.5 asks you to assess the degree to which local news media organizations receive a significant share of the local advertising market, and that share is stable, providing a dependable revenue stream. Conversely, in worst case scenarios, local news media organizations' sell advertising when they can. However, the volume of advertising that they can sell is too small for advertising to provide a dependable revenue stream. Or, alternatively, local news organizations need to sell advertising but are not allowed to do so, or the</p>

	<p>government does not give them a share of government-distributed advertising as a means of controlling the news organization.</p> <p>Some countries may not have a significant local media sector. In other countries, news media organizations do not accept commercial or government advertising. Countries in either category should be scored <i>Not Applicable</i>.</p>
<p>7.6 Digital and online advertising are not controlled by third party digital platforms. News media organizations can generate revenue from their own digital and online content.</p>	<p>Sub-Indicator 7.6 asks you to assess the degree to which news media organizations that have digital platforms collect the large majority, on average, of the revenue from advertising sold around the content on their digital platforms. Conversely, in worst case scenarios, news media organizations that have digital platforms collect only a small fraction – 25% or less, on average – of the revenue from advertising sold around the content on their digital platforms.</p> <p>In some countries, news media organizations may not be distributing content on digital platforms. In others, they may not accept advertising. Countries in either category should be scored <i>Not Applicable</i>.</p>
<p>7.7 Ad fraud does not siphon off large portions of news media organizations’ digital ad revenue</p>	<p>Sub-Indicator 7.7 asks you to assess the degree to which the majority of news media organizations operate without suffering significant financial losses to ad fraud – either digital or conventional. Conversely, in worst case scenarios, all or nearly all news media organizations in the country suffer significant financial losses to ad fraud.</p> <p>In some countries, news media organizations do not accept commercial or government advertising. In such cases, <i>Not Applicable</i> should be used.</p>
<p>7.8 The majority of non-PSB news media organizations operate without direct subsidies (from the government or donors).</p>	<p>Sub-Indicator 7.8 asks you to assess the degree to which the majority of news media organizations operate without direct subsidies from the government or donors. Conversely, in worst case scenarios, very few or even no news media organizations at the local or national levels are able to operate without financial or in-kind subsidies from government or donors.</p> <p>In some countries, news media organizations are entirely government owned. In such cases, <i>Not Applicable</i> should be used and a note should be made to that effect under the <i>Notes</i> section of the measure. In countries that have a split system, with some government/PSB news media and some privately owned, only the privately owned media should be considered and a note should be made under the <i>Notes</i> section of the measure.</p>

8. Financial Independence of News Media Organizations

This index of News Media Viability is built on the foundational idea that the *quality* of the news content produced by a news media system is the key issue in evaluating the system. Indeed, it is the question of whether the news media in a nation are able to produce quality news content that distinguishes evaluating News Media *Viability*, from evaluating News Media Sustainability.

Financial independence is a necessary condition for news media organizations to produce quality news content that reflects the news judgement of the organization’s professional journalists and not the priorities of those who control the organization’s access to revenue. There are many ways the financial independence of news media organizations can be threatened, ranging from dependence on direct financing from government, political parties or other powerful interests, to being totally reliant for revenue on a handful of advertisers, who then wield enormous “buyer” power over what is and is not published – a situation many news media organizations in rural areas face. The following Sub-Indicators address known factors that undercut the financial independence of news media organizations.

For indicator 8, you are not asked to separately assess the general degree of financial independence in the national and the local news media. However, you should still consider both types of media in your response. If there is a significant gap between the general degree of financial independence in the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 8: News media organizations sources of capital do not constrain their editorial independence.

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
8.1 News media organizations have access to the capital					

they need from credible institutional sources.					
Notes:					
8.2 Subsidies for news media organizations are distributed in a fair and transparent manner that is determined by law.					
Notes:					
8.3 Foreign organizations do not play a major role in supporting news media organizations, either financially or through content subsidies.					
Notes:					
8.4 Government advertising is distributed among news media companies in a fair and					

transparent manner that is not used to constrain editorial independence.					
Notes:					
8.5 There is competition among advertising agencies in the market so that commercial advertising is not available to news media organizations only through a monopoly or near-monopoly distributor.					
Notes:					
8.6 News media organizations that receive subsidies remain editorially independent from donors.					
Notes:					
8.7 State-owned or funded news media					

organizations are protected from interference in editorial content by laws and independent governing bodies.					
Notes:					
8.8 National news media organizations have enough diversity in advertising clients that editorial independence is not at risk.					
Notes:					
8.9 Local news media organizations have enough diversity in advertising clients that editorial independence is not at risk.					
Notes:					
8.10 News media organizations' use of revenue sources,					

including native advertising and other forms of paid content, is transparent and does not affect the independence of editorial content.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 8

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
8.1 News media organizations have access to the capital they need from credible institutional sources.	<p>Sub-Indicator 8.1 asks you to assess the degree to which established news media organizations are able to get needed capital from regulated banks, financial markets, venture capital sources or public crowdfunding based upon transparent measures of credit worthiness and future financial potential. Conversely, in worst case scenarios, the majority of established news media organizations would be reliant upon irregular or dark money sources or are unable to get needed capital from any source.</p> <p>8.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				

<p>8.2 Subsidies for news media organizations are distributed in a fair and transparent manner that is determined by law.</p>	<p>Sub-Indicator 8.2 asks you to assess the degree to which subsidies for news media organizations are distributed in a fair and transparent manner that is determined by law. Conversely, in worst case scenarios, subsidies for news media organizations are not distributed in a fair and transparent manner or are distributed on the basis of favoritism, possibly being used as a means to influence or control editorial independence.</p> <p>In some countries, subsidies may not be part of the revenue model for news media organizations. In such countries, <i>Not Applicable</i> should be used, and a brief explanation should be added to the Notes section for the measure.</p>
<p>8.3 Foreign organizations do not play a major role in supporting news media organizations, either financially or through content subsidies.</p>	<p>Sub-Indicator 8.3 asks you to assess the degree to which foreign organizations do not play a major role in supporting news media organizations through ownership or investments, or with financial or in-kind subsidies. Conversely, in worst case scenarios, there is substantial foreign ownership of mainstream national or local news media, or substantial foreign support for news media organizations through subsidies or donations. The foreign involvement in media is a mechanism of foreign interference in politics or society, or an extension of criminal or corrupt activities.</p> <p>8.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>8.4 Government advertising is distributed among news media companies in a fair and transparent manner that is not used to constrain editorial independence.</p>	<p>Sub-Indicator 8.4 asks you to assess the degree to which government advertising is distributed among news media organizations in a fair and transparent manner that is determined by laws that is not used to constrain editorial independence. Conversely, in worst case scenarios, the distribution of government advertising to news media organizations is unfair and is transparently used as a mechanism for controlling news content and punishing or destroying news media organizations that produce unfavorable content.</p> <p>In some countries, government-distributed advertising may not be a significant part of the revenue model for news media organizations. In such countries, <i>Not Applicable</i> should be used.</p>
<p>8.5 There is competition among advertising agencies in the market so that commercial advertising is not available to news media organizations only through a</p>	<p>Sub-Indicator 8.5 asks you to assess the degree to which there is effective competition in the traditional commercial advertising market. Ideally, there would be many advertising agencies in a market producing and placing advertising for different clients. In such conditions, news media organizations would have sales departments with skilled account executives who work to attract advertising placements to their employer.</p> <p>In worst case scenarios, however, the advertising market is controlled by a single advertising agency or perhaps two such agencies. The agencies have total or near total control over the distribution of advertising to</p>

<p>monopoly or near-monopoly distributor.</p>	<p>legacy media organizations. In such cases, advertising placements may be done by pre-arranged contract and some media organizations may not even have a sales department because actively selling advertising is not possible. The monopoly/oligopoly structure of the commercial advertising market is similar to situations where government controls the distribution of most available advertising or where digital companies such as Google and Facebook control most digital advertising placements.</p>
<p>8.6 News media organizations that receive subsidies remain editorially independent from donors.</p>	<p>Sub-Indicator 8.6 asks you to assess the degree to which news media organizations that receive subsidies remain editorially independent from donors. Conversely, in worst case scenarios, the majority of news media organizations that receive financial or in-kind subsidies from whatever sources typically allow their donors to influence or control the news content the organization produces.</p> <p>In some countries, news media organizations receive few, if any, subsidies from third party sources and subsidies, including in-kind subsidies, may not be a significant source of revenue. In such countries, <i>Not Applicable</i> should be used, and a brief explanation should be added to the Notes section for the measure.</p>
<p>8.7 State-owned or funded news media organizations are protected from interference in editorial content by laws and independent governing bodies.</p>	<p>Sub-Indicator 8.7 asks you to assess the degree to which state-owned or funded news media organizations are protected from interference in editorial content by laws and independent governing bodies. Conversely, in worst case scenarios, state-owned or funded news media organizations are not protected from interference in editorial content by laws and governing bodies that protect their funding and journalistic independence. If such laws exist, they are not enforced, and interference occurs.</p> <p>In countries where state-owned or funded news media do not exist or are not a major part of the news media system, <i>Not Applicable</i> should be used, and a brief explanation should be added to the Notes section for the measure.</p>
<p>8.8 National news media organizations have enough diversity in advertising clients that editorial independence is not at risk.</p>	<p>Sub-Indicator 8.8 asks you to assess the degree to which established national news media organizations have a large number of different advertising clients such that each provides a relatively small share of the organizations' or industry sectors' total advertising revenue. Conversely, in worst case scenarios, established national news media organizations would tend to be heavily dependent for advertising revenue on a small group of advertisers or industrial sectors, giving those advertisers significant influence over news coverage.</p> <p>In countries where the national news media do not depend upon advertising as a significant revenue source, <i>Not Applicable</i> should be used, and a brief explanation should be added to the Notes section for the measure.</p>

<p>8.9 Local news media organizations have enough diversity in advertising clients that editorial independence is not at risk.</p>	<p>Sub-Indicator 8.9 asks you to assess the degree to which established local news media organizations have a large number of different advertising clients such that each provides a relatively small share of the organizations’ or industry sectors’ total advertising revenue. Conversely, in worst case scenarios, established local news media organizations would tend to be heavily dependent for advertising revenue on a small group of advertisers or industrial sectors, giving those advertisers significant influence over news coverage.</p> <p>In countries where the national news media do not depend upon advertising as a significant revenue source, <i>Not Applicable</i> should be used, and a brief explanation should be added to the Notes section for the measure.</p>
<p>8.10 News media organizations’ use of revenue sources, including native advertising and other forms of paid content, is transparent and does not affect the independence of editorial content.</p>	<p>Sub-Indicator 8.10 asks you to assess the degree to which mainstream news organizations at the national and local levels are transparent with their audiences about their general revenue sources and strive to be sure that those sources do not affect the independence of editorial content. Conversely, in worst case scenarios, mainstream news media, in general, are not transparent about their revenue sources and allow those sources to have an influence on editorial decisions.</p> <p>8.10 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

9. Competition

Research has shown that competition in the market among news media organizations enhances the quality of journalism performance – so long as the competition does not become so intense that revenues at individual news organizations begin to fall. When that happens, the reduction in resources available to produce quality news has a negative impact on news content quality. The level of market entry and exit among organizations in an industry sector may indicate market saturation or excessive competition. Moderate competition is defined as being sufficient to encourage journalism organizations to try to produce higher quality content than others in the market, but not so high as to make it necessary for news organizations to cut costs, layoff staff members in order to maintain profitability, or seek outside subsidies.

For indicator 9, you are not asked to separately assess the general level of competition in the national and the local news media markets. However, you should still consider both types of news media markets in your response. If there is a significant gap between the general level of competition in the two levels of news media markets, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 9: Moderate competition among news media organizations exists, allowing for quality journalism.

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
9.1 Moderate economic competition exists among news media organizations.					
Notes:					
9.2 Small and medium-sized news media companies can survive.					
Notes:					
9.3 Levels of market entry and exit of national news media organizations are relatively stable from year to year.					
Notes:					

9.4 Levels of market entry and exit of local news media organizations are relatively stable from year to year.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 9

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
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<p>9.1. Moderate economic competition exists among news media organizations.</p>	<p>Sub-Indicator 9.1 asks you to assess the degree to which effective economic competition exists among news media organizations. Ideally, the national mainstream media would have an HHI Index ¹¹ score of less than 1,500 based on audience share. Audiences should have free and open access to news sources on the Internet. Conversely, in worst case scenarios, national mainstream media operate as a monopoly or near-monopoly in each industry sector, or government or government-affiliated corporations effectively control all news and information sources, and few people have access to global news sources. Audiences have few differentiated choices among news and information providers.</p> <p>Local news media markets, where they exist, would be expected to be much more highly concentrated than national news media markets. Therefore, for this Sub-Indicator, consider the level of competition in national</p>
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¹ The Herfindahl-Hirschman Index (HHI) is the standard measure of economic market competition used by government regulators and industry world wide. It is based on the market share of each company in an industry, and is even applied to measure of industry concentration across the entire GDP of a country. In most countries, it will not be possible to get the data you need to calculate the HHI. However, if you can get market share or audience data in a country, using the HHI would be a more reliable measure of market concentration than simple observation by respondents. It should be applied using audience size as the measure of news media organization market share across the entire national news media market, not within specific industry sectors such as newspapers vs television. The estimated circulation, ratings and daily unique visitors should be translated to actual numbers of audience. Those numbers should be added together to generate a total news audience figure. Each news organization's circulation/ratings/visitors number would then be divided by the total news audience to generate that organization's share of the total news market. From Investopedia. <https://www.investopedia.com/terms/h/hhi.asp>. The HHI is calculated by taking the market share of each firm in the industry, squaring them, and summing the result. $HHI = s_1^2 + s_2^2 + s_3^2 + \dots + s_n^2$ (where s is the market share of each firm expressed as a whole number, not a decimal). Consider the following hypothetical industry with four total firms: Firm one market share = 40%; Firm two market share = 30%; Firm three market share = 15%; Firm four market share = 15%; The HHI is calculated as: $HHI = 40^2 + 30^2 + 15^2 + 15^2 = 1,600 + 900 + 225 + 225 = 2,950$. The U.S. Justice Department considers an industry with an HHI below 1,500 to be competitive; an industry with an HHI between 1,500 and 2,500 to be moderately concentrated, and an industry with an HHI higher than 2,500 to be highly concentrated.

	<p>news media markets only.</p> <p>9.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>9.2 Small and medium-sized news media companies can survive.</p>	<p>Sub-Indicator 9.2 asks you to assess the degree to which there are news organizations of different sizes and ownership structures (corporate, family, independent, community) operating at different market levels across the country. Many small communities are served by weekly or community media. Entrepreneurs can freely start news content sites and blogs and many find it possible to survive for 3-5 years. Conversely, in worst case scenarios, news organizations operate only at the national level. Few local communities outside of the capital or largest city have community-specific news media. There are few if any news entrepreneurs or bloggers. Alternatively, government or government affiliated corporations effectively control all news and information. Small independent news organizations are legally forbidden or economically unfeasible.</p> <p>9.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>9.3 Levels of market entry and exit of national news media organizations are relatively stable from year to year.</p>	<p>Sub-Indicator 9.3 asks you to assess the degree to which the total number of national news media organizations has been relatively stable over the previous three years or is growing, and the stability of the total number does <i>not</i> hide a high-level of turnover among the individual organizations in the market. Conversely, in worst case scenarios, the total number of national news media organizations in the country may be stable, but there is a high-level of start-up and failure among individual news organizations so the number of <i>established national</i> news organizations has declined or, alternatively the total number of news media organizations has been declining rapidly (double digit declines) over the past three years.</p> <p>For this Sub-Indicator, consider carefully whether sharp declines in some news media sectors – such as print – are being offset by growth in other news media sectors – such as digitally native news organizations – before determining your answer. The goal is to assess the stability of the number of news and information providers in the market.</p> <p>9.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>9.4 Levels of market entry and exit of local news media organizations are relatively</p>	<p>Sub-Indicator 9.4 asks you to assess the degree to which the total number of local news media organizations has been relatively stable over the previous three years or is growing, and the stability of the total number does <i>not</i> hide a high-level of turnover among the individual organizations in the market. Conversely, in worst case scenarios, the total number of local news media organizations in the country may be stable, but there is a high -</p>

<p>stable from year to year.</p>	<p>level of start-up and failure among individual local news organizations so the number of <i>established local</i> news organizations has declined or, alternatively the total number of news media organizations has been declining rapidly (double digit declines) over the past three years.</p> <p>For this Sub-Indicator, consider carefully whether sharp declines in some news media sectors – such as print – are being offset by growth in other news media sectors – such as digitally native news organizations – before determining your answer. The goal is to assess the stability of the number of local news and information providers in the market.</p> <p>Many countries do not have a local news media sector. In those countries, <i>Not Applicable</i> should be used.</p>
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10. Audience Demand

Consumer demand for a product – in this case, news content – is a necessary condition for the viability of any business. In the case of news media, the level of consumer demand for specific news content products can affect news media viability in several ways. The level of demand, the value that audiences assign to news content and – therefore – their willingness to pay for that content affects both the revenue news media organizations gain from direct sales and the willingness of politicians to use public funding to support news media that operate on a public service model. In media systems that depend upon advertising revenue as an important financial resource sustaining news media, it is not only the level of consumer demand as measured by audience size that matters – but also the *quality* of those news audiences as they are perceived by the advertisers who are being asked to pay to reach them.

For indicator 10, you are not asked to separately assess the general level of competition in the national and the local news media markets. However, you should still consider both types of news media markets in your response. If there is a significant gap between the general level of competition in the two levels of news media markets, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 10: Audience demand for quality journalism content supports a strong news media industry.

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
10.1 News media organizations' audiences are big enough to attract advertising.					
Notes:					

10.2 Publicly funded news media organizations' audiences are big enough to justify continued public financing.					
Notes:					
10.3 News media organizations' audiences are attractive to potential advertisers.					
Notes:					
10.4 Audiences value quality journalism content enough to be willing to pay for it.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR INDICATOR 10

Sub-Indicator	Describes the overall situation in the market, and the situation is stable (4)	Describes the overall situation in the market, but the <i>trend</i> is negative in terms of future News Media Viability (3)	The current situation is broadly unfavorable for News Media Viability (2)	The current situation is generally opposite of what is described, undermining News Media Viability (1)	Not applicable (0)
<p>10.1 News media organizations' audiences are big enough to attract advertising.</p>	<p>Sub-Indicator 10.1 asks you to assess the degree to which news media organizations that depend on advertising for revenue have audiences large enough to attract advertising. News media organizations generally sell out 70% or more of advertising inventory. Conversely, in worst case scenarios, news organizations' audience sizes have fallen to the level where the organization must develop alternative revenue sources to replace lost advertising revenue.</p> <p>In countries where news media do not accept advertising or do not depend upon advertising as an important revenue stream, <i>Not Applicable</i> should be used, and a brief explanation should be added to the <i>Notes</i> section for the measure.</p>				
<p>10.2 Publicly funded news media organizations' audiences are big enough to justify continued public financing.</p>	<p>Sub-Indicator 10.2 asks you to assess the degree to which publicly funded news media organizations' audiences are large enough to justify continued public funding. Conversely, in worst case scenarios, news organizations' audience sizes have fallen to the level where policy makers are discussing, or have taken steps to reduce public funding for those news organizations on the grounds that audience size and interest no longer justifies the expenditure of substantial public money to support publicly funded news media.</p> <p>In countries where news media do not receive public funding, <i>Not Applicable</i> should be used, and a brief explanation should be added to the <i>Notes</i> section for the measure.</p>				
<p>10.3 News media organizations' audiences are attractive to potential advertisers.</p>	<p>Sub-Indicator 10.3 asks you to assess the degree to which news media organizations' audiences are attractive to a diverse range of potential advertisers. Conversely, in worst case scenarios, the demographics of the news media's audiences have narrowed so that the amount of revenue that news media organizations can generate from advertising is declining sharply and may soon, or already, no longer provides a significant portion of revenue.</p>				

	<p>In countries where news media do not accept advertising or do not depend upon advertising as an important revenue stream, <i>Not Applicable</i> should be used, and a brief explanation should be added to the <i>Notes</i> section for the measure.</p>
<p>10.4 Audiences value quality journalism content enough to be willing to pay for it.</p>	<p>Sub-Indicator 10.4 asks you to assess the degree to which news media organizations get a substantial portion of their revenue from subscription revenue or direct sales across most, or all distribution platforms. Subscription revenue is growing at a rate that provides increased financial resources for the organization. Publicly funded news media have broad political and public support for their funding structure and fee avoidance is minimal. Conversely, in worst case scenarios, subscription revenue or direct sales are not part of the revenue models for most news media organizations. Audiences do not pay for digital content. Public support for using government money to support publicly funded media is declining or solidly against such expenditures.</p> <p>10.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

Dimension 3: Community

11. Media and Information Literacy

Text remains a critical format for the distribution of news content, so the level of education and literacy among the population of a country is a key factor in estimating the size of the potential market for news media products. Additionally, the accuracy and, therefore, value of news content as a product is difficult for consumers to judge unless they personally have witnessed the events being reported. Therefore, the credibility of news media organizations depends upon the level of “information literacy” in the population – that is, the average citizen’s understanding of the news media system and the forces that shape its performance. Equally important is the average person’s ability to think critically and evaluate evidence for the accuracy of the reporting presented, and the truth or falseness of the information reported. The value of news content to consumers as a product that they may or may not choose to consume depends upon the consumer’s perception of the credibility of the content being offered and, therefore, its value to them as a product.

Indicator 11: Citizens are able to consume and evaluate the quality of news and information content across multiple platforms.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
11.1 Citizen education across the nation fosters critical thinking of news media content and the forces that shape it.					
Notes:					

<p>11.2 Citizens across all population groups are able to evaluate information about sources and decide about the truth and validity of content.</p>					
<p>Notes:</p>					
<p>Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.</p>					
<p>INDICATOR SCORE:</p>					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 11

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
<p>11.1 Citizen education across the nation fosters critical thinking of news media content and the forces that shape it.</p>	<p>Sub-Indicator 11.1 asks you to assess the degree to which citizen education across the nation fosters critical thinking about news media content and the forces that shape it. Ideally, the education system has taught the majority of citizens to be “media literate.” That means that they have a general understanding of the way in which the media system in their country works and the forces – economic, political and technological – that influence the types of news stories that are covered and how they are covered. Conversely, in worst case scenarios, the majority of citizens would not understand how the media systems in their country are organized and the forces, economic, political and technological that shape news reporting.</p> <p>11.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				

<p>11.2 Citizens across all population are able to evaluate information about sources and decide about the truth and validity of content.</p>	<p>Sub-Indicator 11.2 asks you to assess the degree to which citizens across all population groups are able to evaluate information about sources and decide about the truth and validity of content. Conversely, in worst case scenarios, the majority of the population lacks the education and background to critically evaluate the truth/validity of information, or they appear willing to believe information that reinforces their beliefs and values, regardless of the source from which it comes and even when it is directly contradicted by hard evidence.</p> <p>11.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
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12. Social Cohesion

The news media industry is an institution that functions within the larger institutions of society. Although media play a critical role in shaping society and supporting the smooth functioning of government and the economy, media viability is, in turn, shaped by the function or dysfunction of the society in which news organizations operate. If a society or government is significantly dysfunctional, that dysfunction threatens all institutions within that society.

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

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
<p>12.1 Most citizens have enough shared values to permit the peaceful political negotiation of policy and social issues.</p>					

Notes:					
12.2 The majority of citizens consume either news that impartially covers issues and reflects multiple perspectives, or multiple news media sources across different perspectives.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 12

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
12.1 Most citizens have enough shared values to permit the peaceful political negotiation of policy and social issues.	Sub-Indicator 12.1 asks you to assess the degree to which citizens have enough shared values to permit the peaceful political negotiation of policy and social issues. Ideally, most citizens would share values and government would operate through negotiation and peaceful democratic processes. Conversely, in worst case scenarios, tensions between groups of fellow citizens would be high. There might be sporadic acts of violence against opposition groups and open talk of armed conflict, or actual armed conflict by military or paramilitary				

	groups in areas of the country. 12.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.
12.2 The majority of citizens consume either news that impartially covers issues and reflects multiple perspectives, or multiple news media sources across different perspectives.	Sub-Indicator 12.2 asks you to assess the degree to which citizens consume news that impartially covers issues and reflects multiple perspectives, or to which citizens consume multiple news media sources across different perspectives. Ideally, audience data would show that the majority of citizens use news media in one of those two ways. Conversely, in worst case scenarios, audience data would show that people tend to use only a few news media sources, usually ones that are partisan and reinforce their pre-existing beliefs and values. Social media would be used in ways that reinforce the partisan information bubble citizens construct for themselves. Or, alternatively, the majority of people in the country do not regularly consume news content. 12.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.

13. News Media Trust and Credibility

News content is what economists call a “credence” good. That means that consumers must take on faith that the product that they are consuming is a quality product, that it has real value for them and is worth their time and money to consume. They must take the quality of news content on faith because they cannot be personally present to observe all events that are reported so that they can personally assess the quality of the reporting they consume. But the “credence good” characteristic of news content means that if news media organizations are going to be viable, they must have the public’s trust. Recent research suggests that media viability in the digital age increasingly depends upon audience loyalty and willingness to financially support media organizations, rather than audience size. In countries where the government is openly hostile to independent journalism, media viability also can depend on the willingness of the public to defend – verbally and sometimes physically – news organizations and journalists, when they come under attack.

For indicator 13, you are not asked to separately assess news media trust and credibility at the national and local levels. However, you should still consider both types of media in your response. If there is a significant gap between the public’s trust and credibility in news media as it relates to each specific Sub-Indicator at the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 13: Citizens have a generally high level of confidence in the credibility of news media organizations and their content.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
13.1 News media organizations are viewed as an ally of citizens in the effort to secure fair, equitable and non-corrupt governments and corporations, as well as human rights.					
Notes:					
13.2 Public trust in the accuracy and fairness of news media content is high.					
Notes:					
13.3 The public's opinion of news media organizations and journalists is in line with, or slightly higher than, public opinion regarding government and					

other social institutions.					
Notes:					
13.4 The public demonstrates loyalty to the news media organizations that serve them.					
Notes:					
13.5 In confrontations with authorities, journalists and news media organizations can count on the public to support them over the authorities.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 13

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
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<p>13.1 News media Organizations are viewed as an ally of citizens in the effort to secure fair, equitable and non-corrupt governments and corporations as well as human rights.</p>	<p>Sub-Indicator 13.1 asks you to assess the degree to which news media are viewed as an ally of citizens in the effort to secure fair, equitable and non-corrupt governments and corporations, and human rights. Conversely, in worst case scenarios, a substantial proportion of the population believes that the news media are the enemy of the people, or at least generally detrimental to society. Public dissatisfaction with the news media is high, with public officials openly attacking news media organizations (verbally or otherwise). There may be organized effort to institute regulatory or legislative reforms that will reduce or eliminate news media's editorial independence, if any level of independence exists.</p> <p>13.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>13.2 Public trust in the accuracy and fairness of news media content is high.</p>	<p>Sub-Indicator 13.2 asks you to assess the degree to which public trust in the accuracy and fairness of news media content is high. Ideally, public opinion research would show that levels of public trust in the media are reasonably high and relatively stable. Conversely, in worst case scenarios, public opinion research or general assessment shows that public trust in the accuracy and fairness of news media content is moderate to low.</p> <p>13.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>13.3 The public's opinion of news media organizations and journalists is in line with, or slightly higher than, public opinion regarding government and other social institutions.</p>	<p>Sub-Indicator 13.3 asks you to assess the degree to which the public's opinion of news media and journalists is in line with, or slightly higher than, public opinion regarding government and other social institutions. Ideally, the public's opinion of the media has been relatively stable over the past two years. Conversely, in worst case scenarios, the public's opinion of news media and journalists would be significantly lower than public opinion regarding government and other social institutions.</p> <p>13.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>13.4 The Public demonstrates loyalty to the news media organizations that serve them.</p>	<p>Sub-Indicator 13.4 asks you to assess the degree to which the public demonstrates loyalty to the news media organizations that serve them. Ideally, audience data would show high subscription renewals and donation rates for crowdfunded news organizations, and high return online visitors and broadcast audi-</p>

	<p>ence. Audience members are willing to openly and publicly support the news media of their choice when those organizations are criticized, attacked, or otherwise encounter problems that threaten their viability. Conversely, in worst case scenarios, the public has a generally hostile view of news media organizations. Audiences seek free and easily accessible news first and show resistance to paying for news and information. Most members of the public would not defend any news organization or journalist against criticism or attack.</p> <p>13.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>13.5 In confrontations with authorities, journalists and news media organizations can count on the public to support them over the authorities.</p>	<p>Sub-Indicator 13.5 asks you to assess the degree to which in confrontations with authorities, journalists and news media organizations can count on the public to support them over the authorities. Conversely, in worst case scenarios, journalists and news media organizations would expect the public to support the authorities, including in assisting the authorities in physical actions against the media.</p> <p>13.5 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

14. Participation

One of the primary impacts of digital technology has been to shift control of content production and consumption from news media organizations to the audience. News audiences in many countries now have the technologies available to capture news events as they happen, which can provide news media organizations with additional resources and diverse perspectives, if news media organizations are willing and able to use user-generated content. Additionally, audiences have gained a voice in discussing and commenting on the news through social media, and research suggests that organizations that effectively connect with audiences are better able to build brand trust and loyalty – both increasingly important to news media viability.

For indicator 14, you are not asked to separately assess citizens’ news media participation at the national and the local media levels. However, you should still consider both types of media in your response. If there is a significant gap between the level of participation in the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 14: Citizens contribute to the content produced and distributed by news media organizations.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
14.1 News media organizations provide platforms where citizens can comment, discuss, correct, and elaborate on news content.					
Notes:					
14.2 News media content is shared and viewed by a majority of the population active on social media and sparks public debate, (including social media trends picked up by news media outlets).					
Notes:					

<p>14.3 News media Organizations are willing and able to collaborate with citizen journalists to expand news gathering resources and diversity of perspectives.</p>					
<p>Notes:</p>					
<p>14.4 Citizens contribute news and information to their communities or local news organizations.</p>					
<p>Notes:</p>					
<p>Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.</p>					
<p>INDICATOR SCORE:</p>					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 14

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
14.1 News media organizations provide platforms where citizens can comment, discuss, correct, and elaborate on news content.	<p>Sub-Indicator 14.1 asks you to assess the degree to which news media organizations provide platforms where citizens can comment, discuss, correct, and elaborate on news content or actively monitor and use such comments as they are shared through social media. Conversely, in worst case scenarios, news media organizations and journalists actively reject audience comments and feedback as being irrelevant to news decisions, or users take risks when they communicate with news media organizations because comments or messages may be shared with authorities. Conversely, in worst case scenarios, users cannot comment publicly on news organization websites.</p> <p>14.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
14.2 News media content is shared and viewed by a majority of the population active on social media and sparks public debate, (including social media trends picked up by news media outlets).	<p>Sub-Indicator 14.2 asks you to assess the degree to which citizens can contribute qualitative news and information to their communities or local news media organizations or other digital platforms. Ideally, participation in citizen journalism through social media, blogs and other platforms would be increasing. Conversely, in worst case scenarios, citizens do not have the opportunity to contribute news and information to their communities or local news media organizations. The authorities control the professional news media and individual reporting by citizen journalists is highly dangerous.</p> <p>14.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
14.3 News media organizations are willing and able to collaborate with citizen journalists to	<p>Sub-Indicator 14.3 asks you to assess the degree to which news media organizations are willing and able to collaborate with citizen journalists to expand news gathering resources and diversity of perspectives. Ideally, they encourage citizen contributions of all kinds of content and set up systems to make it easy for people to contribute and for the organization to review such contributions for accuracy and veracity. News</p>				

<p>expand news gathering resources and diversity of perspectives.</p>	<p>media organizations showcase citizen-generated content. They use social media as a source of stories and sometimes showcase audience comments or activities on social media. Conversely, in worst case scenarios, news media organizations and journalists view citizen journalists with professional contempt. They are unwilling to collaborate with citizen journalists to expand news gathering resources and diversity of perspectives. Alternatively, news media organizations may be controlled by the government or other powerful actors and forbidden by their owners to accept citizen-generated content. Social media is not used as a source or focus of stories.</p> <p>14.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>14.4 Citizens contribute news and information to their communities or local news organizations.</p>	<p>Sub-Indicator 14.4 asks you to assess the degree to which news media content is shared and viewed by a majority of the population active on social media and sparks public debate, including social media trends picked up by news media outlets. Conversely, in worst case scenarios, access to social media is tightly controlled and monitored by the government. Participation and free discussion on social media is dangerous. The government or other authorities use social media as a source of public monitoring and censorship of news media organizations and individuals for purposes of suppressing free speech and controlling behavior. Alternatively, most of the population doesn't have access to social media.</p> <p>14.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

15. Audience Data

Understanding audiences has become critical to news media viability. New audience research methods and digital technologies make it possible for journalists and advertisers to understand what news content audiences actually consume; what makes them consume it; and how, where and when they consume it. Research has found that some publishers are now able to monetize audience loyalty as effectively as they once monetized audience size. To harness the power of media analytics, however, reliable and valid audience data must be available and affordable, and news organizations must have personnel with the skills to analyze and interpret the data and convert them into effective strategies that support viability. News media executives also must recognize, adopt and embrace media analytics as a news management tool.

For indicator 15, you are not asked to separately assess the availability of audience data and the use of those data by the national and the local media. However, you should still consider both types of media in your response. If there is a significant gap between

the availability of audience data and the use of those data in the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 15: News media organizations have regular access to reliable data about audiences and their media uses.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
15.1 News media organizations are able to access reliable audience data.					
Notes:					
15.2 News media organizations have staff members skilled at analyzing and interpreting audience data and deriving actionable insights from it.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 15:

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
<p>15.1 News media organizations are able to access reliable audience data.</p>	<p>Sub-Indicator 15.1 asks you to assess the degree to which news media organizations are able to access reliable audience data that are gathered by reputable audience research firms. In addition to the existence of reputable audience research firms or technologies, you should consider whether there are independent organizations that review and validate the methodologies the media research and data companies use to gather the data they sell to news organizations and advertisers, as well as organizations that audit news media organizations’ claims about the size of their audiences. In worst case scenarios, news media organizations and advertisers would not have regular access to reliable, valid and timely audience data because of lack of the technical or professional infrastructure necessary to generate and validate such data; the lack of money needed to buy such data; or because of regular tampering with or falsification of data by news media organizations.</p> <p>15.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
<p>15.2 News media organizations have staff members skilled at analyzing and interpreting audience data and deriving actionable insights from it.</p>	<p>Sub-Indicator 15.2 asks you to assess the degree to which news media organizations have staff members skilled at analyzing and interpreting audience data and deriving actionable insights from them that can be used to improve revenue generation and content management. Staff members working in media analytics should have the skills to monitor and evaluate the methodologies and technologies used to collect audience data, recognizing problems that affect their news media organization’s audience figures. In the worst case scenario, news organizations would be unable to find or would be unable to afford to hire skilled media analysts; or news media executives reject the ideas that understanding audiences and using audience data are important in news management.</p> <p>15.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				

Dimension 4: Technology

16. Production and Distribution Resources

News media organizations must have dependable, affordable access to the production supplies and technologies needed to produce news media content in order to be able to consistently deliver for their markets. Necessary inputs include such basic things as electricity, paper for publications, broadcast equipment, etc. This is not a comprehensive list and evaluators should consider whether shortages of any necessary production inputs regularly cause problems for news media in their country. In some countries, the access to and affordability of production supplies may vary greatly between national news media organizations and local news media organizations. If there is a significant gap in access between the two levels of news media that threatens the long-term viability of local media, then the country should not be scored 4, even if it is not a problem for national media. Please explain that as part of your explanation for your scoring.

In the digital age, access to production supplies also means having reliable and affordable access to digital hardware and software. However, in countries where the population does not have enough affordable access to digital technologies to create a viable market for digital news production and distribution, it would not make sense for news media organizations to invest in digital production. Therefore, some digital Sub-Indicators may not be applicable to all countries.

Indicator 16: News media organizations have access to the necessary production and distribution resources.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
16.1 The physical resources needed to produce and distribute content are available and affordable.					

(Example: electricity, newsprint, production equipment, distribution systems etc.)					
Notes:					
16.2 News media organizations can access and afford the digital technologies required for digital news content production and distribution.					
Notes:					
16.3 The infrastructure makes news content technologically accessible to citizens across the country on all major platforms, regardless of where the citizen lives.					
Notes:					
16.4 Trustworthy digital payment systems are available.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 16

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (o)
<p>16.1 The physical resources needed to produce and distribute content are available and affordable. (Example: electricity, newsprint, production equipment, distribution systems etc.)</p>	<p>Sub-Indicator 16.1 asks you to assess the availability and affordability of the traditional physical resources needed to produce news: electricity, paper, production and distribution equipment. Conversely, in worst case scenarios, in many countries or in areas of a country, such resources may not be reliably available (e.g. lack of infrastructure, under strict control of third parties etc.).</p> <p>16.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
<p>16.2 News media organizations can access and afford the digital technologies required for digital news content production and distribution.</p>	<p>Sub-Indicator 16.2 asks you to assess the availability and affordability of the digital technologies needed to produce and distribute news digitally: hardware, software, and related technologies. Conversely, in worst case scenarios, Internet Service Providers (ISPs) with a monopoly and/or exerting throttling pricing practices would be considered as negative for media viability.</p> <p><i>Not Applicable</i> would be used in instances where the broader public has not yet adopted, or for infrastructure reasons, been able to access digital technologies and, therefore, media companies have not started to digitize because there is no market for digital content.</p>				
<p>16.3 The infrastructure makes news content technologically accessible to citizens across the country</p>	<p>Sub-Indicator 16.3 asks you to assess whether the country has installed the quality of infrastructure to make it technologically possible for people to access news from digital platforms, therefore, creating a market for digital news production and distribution. Conversely, in worst case scenarios, the country lacks the necessary infrastructure either nationwide or in major areas of the country that is necessary for citizens to be</p>				

<p>on all major platforms, regardless of where the citizen lives.</p>	<p>able to easily access news media content on digital platforms.</p> <p>16.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>16.4 Trustworthy digital payment systems are available.</p>	<p>Sub-Indicator 16.4 asks you to assess whether trustworthy digital payments systems are available in the country, making it possible for news media organizations to digitally collect revenue from subscribers and advertisers. Payment systems must be available, affordable for news media, and secure enough that users trust them enough to use them. Conversely, in worst case scenarios, trustworthy digital payments systems are not available in the country, or in large sections, of the country, make it difficult or impossible for news media organizations to monetize digital content and advertising.</p> <p><i>Not Applicable</i> would be used in instances where the broader public has not yet adopted or, for infrastructure reasons, been able to access digital technologies and, therefore, media companies have not started to digitize because there is no market for digital content.</p>

17. News Media Organizations’ Access to Technology

News media organizations must have equitable access to the production supplies and technologies needed to produce news in order to be able to consistently produce for their markets. In some countries, access to the basic supplies needed for production is used as a mechanism to control news media. Access to basic production supplies may be given only to news media organizations that give favorable coverage to the government, or only to those who have strong personal connections with those in power. In countries where the population does not have enough affordable access to digital technologies to create a viable market for digital news production and distribution, it would not make sense for news media organizations to invest in digital production. Therefore, some digital Sub-Indicators may not be applicable to all countries.

Indicator 17: News media organizations' access to production and distribution technologies is fair and apolitical.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
17.1 News media organizations' access to the physical equipment needed to produce news and information content is fair and apolitical.					
Notes:					
17.2 Access to news media distribution channels is fair and apolitical (e.g. kiosks, transmitters, cable, Internet, mobile, etc.)					
Notes:					
17.3. News media organizations have equitable and affordable					

access to digital distribution networks.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 17

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
17.1 News media organizations' access to the physical equipment needed to produce news and information content is fair and apolitical.	<p>Sub-Indicator 17.1 asks you to assess the degree to which news media organizations have fair and transparent <i>access</i> to the basic production supplies -- electricity, paper, production and distribution equipment, etc.-- needed to produce news content. Ideally, the government does not use access to basic production supplies to control media or allow access on the basis of any type of favoritism. Conversely, in worst case scenarios, the use of price discrimination – that is, charging higher prices for supplies to some news media organizations as a way to control or punish them – would be considered a negative indicator of news media viability.</p> <p>17.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
17.2 Access to news media distribution channels is fair and	<p>Sub-Indicator 17.2 asks you to assess the degree to which news media organizations have fair and transparent <i>access</i> to the technologies and infrastructure traditionally needed to distribute news products – kiosks, newsstands, broadcast transmitters, mobile networks, etc. Conversely, in worst case scenarios, the use</p>				

<p>apolitical (e.g. kiosks, transmitters, cable, Internet, mobile, etc.)</p>	<p>of price discrimination – that is, charging higher prices for access to distribution technologies or infrastructure - to some news media organizations as a way to control or punish them – would be considered a negative indicator of news media viability.</p> <p>17.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>17.3. News media organizations have equitable and affordable access to digital distribution networks.</p>	<p>Sub-Indicator 17.3 asks you to assess the degree to which news media organizations have equitable and affordable <i>access</i> to digital distribution technologies and infrastructure. A key consideration in evaluating this Sub-Indicator is the existence and enforcement of <i>net neutrality</i>. Net neutrality is a law or policy that prevents ISPs from throttling access to some users over other users. All Internet users, regardless of size, political power, or volume of material they produce or consume, should have equal access to digital networks at identical prices. Big producers and distributors of content are not given better access to digital networks in terms of speed of uploads and downloads, network quality, or better pricing, than smaller producers of content. Conversely, in worst case scenarios, the use of price discrimination – that is, charging higher prices for network access to small content producers and users than to large content producers and users – would be considered a negative indicator of news media viability.</p> <p><i>Not Applicable</i> would be used in instances where the broader public has not yet adopted or, for infrastructure reasons, been able to access digital technologies and, therefore, news media companies have not started to digitize because there is no market for digital content.</p>

18. Audience Access to Technologies

That means that the infrastructure and technologies of news media distribution must be available and affordable to audiences across the country. Media viability depends upon there being audience demand for news content. Some digital Sub-Indicators may not be applicable to all countries.

Indicator 18: Citizens can access and afford the technologies over which news and information content is distributed.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
18.1 The price of receiver technologies is affordable for audiences so that a majority of people can access news media content and participate in communication. (e.g. televisions, radios, computers, cell phones, print and delivery costs, etc.)					
Notes:					

<p>18.2 Network access and data rates for (mobile) Internet are affordable so that the majority of people can access digital news media content and participate in communication.</p>					
<p>Notes:</p>					
<p>Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.</p>					
<p>INDICATOR SCORE:</p>					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 18

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media viability. There are no signs that things are changing in a negative way. (4)	This is only moderately the situation. Things are OK for News Media Viability, but there may be signs that the situation deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
<p>18.1 The price of receiver technologies is affordable for audiences so that a majority of people can access news media content and participate in communication.</p>	<p>Sub-Indicator 18.1 asks you to assess the degree to which news media distribution technologies are affordable to people in the country. Specifically, receiver technologies should be affordable to the majority of the population across all income and ethnic groups, and across most, if not all regions of the country, so that the entire population is realistically part of the news media’s potential market. Conversely, in worst case scenarios, the majority of people in the country would not be able to afford to buy receiver technologies, or certain ethnic groups or people living in certain regions of the country would lack the ability to buy</p>				

<p>tion. (e.g. televisions, radios, computers, cell phones, print and delivery costs, etc.)</p>	<p>media technologies.</p> <p>18.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>18.2 Network access and data rates for (mobile) Internet are affordable so that the majority of people can access digital news media content and participate in communication.</p>	<p>Sub-Indicator 18.2 asks you to assess the degree to which network access and data rates for mobile and Internet-distributed news content are affordable to people in the country. Specifically, network access and data rates should be affordable to the majority of the population across all income and ethnic groups, and across most, if not all regions of the country, so that almost the entire population is realistically part of the news media’s potential market. Conversely, in worst case scenarios, the majority of people in the country would not be able to afford to network access or mobile data rates, or certain ethnic groups or people living in certain regions of the country would lack the ability to buy network and mobile access.</p> <p>18.2 is a Sub-Indicator that should be evaluated for all countries, including those where news media are not yet heavily involved in digital news distribution because lack of affordability of data is likely to be a major factor in slowing the news media’s transition to digital production and distribution. <i>Not Applicable</i> should not be used.</p>

19. Digital Expertise

News media organizations must have access to, and the financial ability to hire, individuals with the expertise to install and maintain the technologies of production, whether production is analog or digital. Without such expertise, it is impossible for news media organizations to reliably produce and distribute their products. In the digital era, access to personnel with required expertise in digital technologies is critical, if news media organizations are to make the transition to digital production and distribution. Thus, long-term news media viability in the 21st century depends upon the availability and affordability of people with the necessary technical expertise.

In the digital era, the expertise news media organizations need goes beyond basic maintenance of production and distribution technologies and include a range of digital skills, including circumventing the technologies of digital censorship, cyber security, and search optimization of content.

In some countries, the access to and affordability of technological expertise may vary greatly between national news media organizations and local news media organizations. If there is a significant gap in access between the two levels of news media that threatens the long-term viability of local media, then the country should not be scored 4, even if it is not a problem for national media. Please explain that as part of your explanation for your scoring.

Because lack of access to digital expertise could be a major obstacle to the ability of news media organizations to continue to reach their audiences as those audiences become increasingly dependent on digital technologies, the first Sub-Indicator should be assessed for all countries, whether or not the news media is currently heavily engaged in digital news production and distribution. The last three Sub-indicators should be scored “Not applicable,” if news media organizations are not widely digital.

Indicator 19: News media organizations have the technological expertise to optimize their use of digital production, distribution and management technologies.

Sub-Indicator (score)	Accurately describes the overall situation, supporting news media viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for news media viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to news media viability. (1)	Not applicable or (0)
19.1 News media organizations have the expertise available to install, optimize, maintain and update the technological systems required for digital content production and distribution.					
Notes:					
19.2 News media organizations and journalists have the capacity (skills, financial means, strategic networks) to circumvent censorship measures					

where online censorship, blocking or filtering of journalistic content occurs.					
Notes:					
19.3 News media organizations have the cybersecurity expertise to protect their organizations, audiences, and clients against cyberattacks. (e.g. denial of service attacks, website spoofing, planting of false content into Content Management Systems, ad fraud, deep faking of content, data breaches, etc.).					
Notes:					
19.4 Journalists have the expertise and technologies required to optimize content discovery and marketing.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 19

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
19.1 News media organizations have the expertise available to install, optimize, maintain and update the technological systems required for digital content production and distribution.	<p>Sub-Indicator 19.1 asks you to assess the degree to which news media organizations, national and local, have on staff or are able to contract with personnel with the expertise to install, optimize, maintain and update the technological systems required for content production and distribution, whether those technologies are analog or digital. Conversely, in worst case scenarios, the expertise is generally not available in the country, or it is available but not affordable for news media organizations, giving them limited or no access to that expertise.</p> <p>19.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
19.2 News media organizations and journalists have the capacity (skills, financial means, strategic networks) to circumvent censorship measures where online censorship, blocking or filtering of journalistic content occurs.	<p>Sub-Indicator 19.2 asks you to assess the degree to which news media organizations, national and local, have the expertise and systems necessary to circumvent digital censorship, blocking, or filtering of journalistic content, if attempts at such forms of control were to occur. Conversely, in worst case scenarios, if the expertise is available in the country but is not affordable for news media organizations, then they should be deemed to have limited or no access to that expertise.</p> <p>Countries where such forms of digital control are rare or nonexistent, but the news media organizations would have the technical expertise available, or would be able to acquire it, if needed, should be scored 4. Countries where digital infrastructure is not widely installed and most news media are not digital, should be scored “Not Applicable.”</p>				
19.3 News media organizations have the cybersecurity expertise to protect	<p>Sub-Indicator 19.3 asks you to assess the degree to which news media organizations, national and local, have or have access to the expertise and systems necessary to circumvent direct digital attacks on the news media organization and to provide a digitally safe and secure environment for the audiences and advertisers</p>				

<p>their organizations, audiences, and clients against cyberattacks (e.g. denial of service attacks, website spoofing, planting of false content into Content Management Systems, ad fraud, deep faking of content, data breaches, etc.).</p>	<p>with which they interact. Conversely, in worst case scenarios, if the expertise is available in the country but is not affordable for news media organizations, then they should be deemed to have limited or no access to that expertise.</p> <p>Examples of the types of digital attacks referenced here include, but are not limited to, denial of service attacks, website spoofing, planting of false content into Content Management Systems, ad fraud, deep faking of content, data breaches, etc.</p> <p>Countries where digital infrastructure is not widely installed and most news media are not digital, should be scored “Not Applicable.”</p>
<p>19.4 Journalists have the expertise and technologies required to optimize content discovery and marketing.</p>	<p>Sub-Indicator 19.4 asks you to assess the degree to which journalists and news media organization managers have the skills to optimize content so that audiences in the digital realm can find that content. Optimizing content so that it can be found by audiences in the highly competitive digital content world is an essential marketing skill. Conversely, in worst case scenarios, most journalists and news media organization managers would lack content and search engine optimization skills, or would be unaware or unconvinced of the importance of content optimization and discovery to the success of online news media organizations.</p> <p>Countries where digital infrastructure is not widely installed and most news media are not digital, should be scored “Not Applicable.”</p>

20. Citizens’ Digital Rights

Digital Rights refers to the right of individuals to control their own data and information about their use of digital technologies. Digital technologies are a powerful surveillance tool for both government and industry. Individual’s choice and use of news content provides important insights into their interests and political views. In order for audiences to be willing to consume news on digital platforms, they must believe that the data that their news consumption generates will not be used against them. Thus, long-term news media viability in the digital age depends on governments and corporations respecting citizens’ digital rights by not seeking to acquire the data generated by news consumption. It is equally important that news media organizations also recognize and respect the digital rights of their audience members, actively protecting their data from both government and industry surveillance and abuse.

Indicator 20: The government, news media organizations and private companies respect citizens' digital rights, allowing them to communicate freely and safely online.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
20.1 Government authorities or private companies do not interfere with digital communications in potentially threatening ways, (e.g. Internet shutdowns social media taxes or license fees for bloggers).					
Notes:					
20.2 Users enjoy privacy and data security, allowing them to communicate freely and without surveillance.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 20

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability. (1)	Not applicable (0)
<p>20.1 Government authorities or private companies do not interfere with digital communications in potentially threatening ways, (e.g. Internet shutdowns social media taxes or license fees for bloggers).</p>	<p>Sub-Indicator 20.1 asks you to assess the degree to which news media organizations and citizens can use digital communications without interference from government authorities or corporations through such techniques as Internet shutdowns, social media taxes, licensing bloggers, etc. Ideally, governments would not engage in such activities. If they do, but news media organizations have the expertise to protect themselves and their audiences and circumvent such activities, that would be scored as a 3. In worst case scenarios, governments would use such techniques to disrupt digital communications or control news media organizations, and news media organizations would not have any effective means to protect themselves or their audiences.</p> <p>All countries have some level of digital infrastructure installed, so this Sub-Indicator should be evaluated for all countries. “Not Applicable” should not be used.</p>				
<p>20.2 Users enjoy privacy and data security, allowing them to communicate freely and without surveillance.</p>	<p>Sub-Indicator 20.2 asks you to assess the degree to which news media organizations have both the policy and the technological ability to offer audiences on their digital sites privacy and data security, and allow those audiences to communicate freely and without surveillance by the news media organization, government or advertisers. An intermedia situation would be cases where news media organizations don’t have the technology or expertise to protect audiences’ digital communications, or the news media organizations routinely sell audience data to advertisers and other corporations. In worst case scenarios, news media organizations may participate in government surveillance of audience behavior.</p> <p>Countries where digital infrastructure is not widely installed and most news media are not digital, should be scored “Not Applicable.”</p>				

Dimension 5: Content and Expertise

21. Quality Content

This index of News Media Viability is built on the foundational idea that the *quality* of the news content produced by a news media system and the relevant existing expertise to produce this content are the key issue in evaluating the system. Indeed, it is the question of whether the news media in a nation are able to produce quality news content that distinguishes evaluating News Media *Viability*, from evaluating News Media Sustainability. This index for measuring News Media Viability was explicitly developed on the idea that if a country's news media do not produce quality news content, then news media sustainability matters very little.

The question then becomes: How does one judge and measure the quality of news and the expertise within a news media organization? National and local cultures unquestionably influence the assessment of news media quality. However, this index defines news media “quality” as content that has those characteristics that allow the news media to play a role in supporting democratic self-governance, non-corrupt government and social institutions, the rule of law, strong economic performance that benefits all sectors of society, and in ensuring that individuals and communities are well informed about issues that may affect them. The index also recognizes that news content is a language-based product and the potential market of all news content is defined by the number of people who understand the language in which the content is published.

On that basis, the index used research on international standards for news content and journalism ethics to define the following content characteristics as representing “quality” news content: The selection and reporting of international, national, and local news should demonstrate balance, fairness, accuracy, relevance, timeliness; comprehensive coverage; lack of sensationalism; a primary focus on topics of importance to government, economics, and community; investigative journalism on topics of international, national and local public interest; provision of context and interpretation for news events; believability; favorable coverage of different groups in society; conflict-sensitive reporting; coverage of stories of interest to different groups in society; presentation of multiple points of view; reliance on expert, authoritative and diverse sources; less emphasis on crime; more emphasis on coverage of institutions; coverage that helps readers develop common values and global awareness; and inclusion of voices from the community and from women, minorities and underrepresented groups.

Some questions ask you to separately assess the quality of content in the national and the local media because, in most countries, there are important differences between media at the two levels. For those questions that do not ask you to assess national and

local media separately, you should still consider the performance of both types of media in your response. If there is a significant gap between the quality of content in the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 21: Citizens have access to quality news media content.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle News Media Viability. (1)	Not applicable (0)
21.1 Major news media organizations adhere to the standard of non-partisan reporting.					
Notes:					
21.2 Citizens have access to national and international news content that meets international standards for quality news media content.					
Notes:					
21.3 Citizens have access to local news media content that meets international standards for quality news content.					

Notes:					
21.4 Citizens have timely access to information about important events.					
Notes:					
21.5 Citizens have access to accurate information about minority and marginalized groups in society that reflects the perspectives of those groups.					
Notes:					
21.6 Citizens have access to news media in different languages, including minority languages.					
Notes:					
21.7 Citizens have access to news and information from multiple local, regional, national and international sources.					
Notes:					

<p>21.8 Native advertising and other forms of paid content are clearly indicated as such.</p>					
<p>Notes:</p>					
<p>IndicatorScore = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.</p>					
<p>INDICATOR SCORE:</p>					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 21

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle News Media Viability. (1)	Not applicable (0)
<p>21.1 Major news media organizations adhere to the standard of non-partisan reporting.</p>	<p>Sub-Indicator 21.1 asks you to assess the degree to which the major national and local news media organizations try to report the news in a non-partisan manner. Partisan media exists on the fringes in most countries, but this asks you to focus on the primary media sources reaching most people at the national and local levels. The worst-case scenario would be if the news media were controlled by the ruling political, religious or social factions and produce only content that is favorable to those in power.</p> <p>21.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
<p>21.2 Citizens have access to national and international news content that meets international stand-</p>	<p>Sub-Indicator 21.2 asks you to assess the degree to which citizens have access to national and international news content that meets international standards for quality as defined in the Indicator Explanation. If there is a significant gap in the degree to which people in urban and rural areas can access quality national and international news content, then the country should not be scored 4. National and international cover-</p>				

<p>ards for quality news media content.</p>	<p>age that focuses mostly on disasters, crime, sports, sensationalism or just positive stories would be considered poor quality. The worst-case scenario would be if the news media were controlled by the ruling political, religious or social factions and produce only content that is favorable to those in power.</p> <p>21.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>21.3 Citizens have access to local news content that meets international standards for quality news content.</p>	<p>Sub-Indicator 21.3 asks you to assess the degree to which citizens have access to news about local government and events that affect them as defined in the Indicator Explanation, even in smaller cities and communities. Local news coverage that focuses primarily on disasters, crime, sports, sensationalism or just positive stories would be considered poor quality. The worst-case scenario would be if the news media were controlled by the ruling political, religious or social factions and produce only content that is favorable to those in power.</p> <p>21.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>21.4 Citizens have timely access to information about important events.</p>	<p>Sub-Indicator 21.4 asks you to assess the degree to which citizens have timely and real-time access to information about important events. Ideally, national and local news media organizations regularly provide live coverage of breaking news, election returns, and other timely events. The worst case scenario would be that because of lack of resources or government control of the news media, timely information important to the public interest is not available from traditional news media sources, forcing citizen to turn to social media or VPNs for timely information.</p> <p>21.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>21.5 Citizens have access to accurate information about minority and marginalized groups in society that reflects the perspectives of those groups.</p>	<p>Sub-Indicator 21.5 asks you to assess the degree to which citizens have access to accurate information about minority and marginalized groups in society, including women, that reflects the perspectives of those groups. Ideally, media organizations would employ individuals from those groups, who can ensure the accuracy and reflectivity of coverage. The worst-case scenario would be that news media organizations cover minority and marginalized groups in an overtly hostile way that frames them as “others” or misrepresents their situation or perspectives; or ignores their existence altogether. If there is a significant gap in the degree to which national and local media successfully cover minority and marginalized groups, then the country should not be scored 4.</p> <p>21.5 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

<p>21.6 Citizens have access to news media in different languages, including minority languages.</p>	<p>Sub-Indicator 21.6 asks you to assess the degree to which quality news media in different languages, including minority languages, are available to serve people in those language groups where a sufficiently large language population exists to support independent news media. The worst-case scenario would be that the government representing the dominant language group prohibits or severely restricts independent news media organizations that produce news in other languages.</p> <p>Not all countries have populations speaking minority languages that large enough to support independent news media organizations in the minority language. Where no substantial minority language populations exist, this Sub-Indicator should be scored “not applicable.”</p>
<p>21.7 Citizens have access to news and information from multiple local, regional, national and international sources.</p>	<p>Sub-Indicator 21.7 asks you to assess the degree to which citizens have access to multiple quality local, regional, national and international news sources, providing them with multiple perspectives and choice among news sources. The worst-case scenario would be that government control, economic conditions, or consolidated media ownership means that most citizens have few real choices among sources of news and information.</p> <p>21.7 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>21.8 Native advertising and other forms of paid content are clearly indicated as such.</p>	<p>Sub-Indicator 21.8 asks you to assess the degree to which the majority of mainstream news media organizations clearly identify for their audiences’ content that they have been paid to produce or distribute on contract. Such content would include native advertising, video or audio press releases, or content created by outside authors specifically to influence audience opinion or behavior and that the news media organization is paid to run. Conversely, in worst case scenarios, mainstream news media organizations do not clearly identify content, such as native advertising, video or audio press releases, or content created to specifically influence audience opinion that the organization is paid by sponsors to produce or distribute.</p> <p>21.8 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

22. Journalism Expertise

The concept of News Media Viability is based on the assumption that the quality of news content produced by news media organizations is of paramount importance when evaluating a media system. News content quality depends on the level of journalism expertise in the news media organizations producing news content.

For indicator 22, you are not asked to separately assess the quality of journalism expertise in the national and the local media. However, you should still consider the degree to which journalism expertise exists in both types of media in your response. It is natural that there will be a lower level of journalism expertise and experience at smaller and more local news media organizations than there is at major national and international news media organizations. However, if the gap between the quality of journalism expertise in the two levels of news media is such that one sector is described by the top end of the scale and the other towards the lower end, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 22: News media organizations have professionally educated and trained journalists to produce high quality content that meets international standards.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. ¹ There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. ¹ (2)	The overall situation is effectively the opposite of what is described and is a serious obstacle to News Media Viability.	Not applicable (0)
22.1 News media organizations pay journalists high enough wages to attract and retain qualified journalists.					
Notes:					

<p>22.2 News media organizations pay journalists high enough wages to discourage journalistically unethical behavior.</p>					
<p>Notes:</p>					
<p>22.3 There are professional journalism education and training programs available to supply the needs of news media organizations and communities.</p>					
<p>Notes:</p>					
<p>22.4 The number of journalists in each national news media industry sector is relatively stable over time.</p>					
<p>Notes:</p>					
<p>22.5 The number of journalists in each local news media industry sector is relatively stable over time.</p>					
<p>Notes:</p>					
<p>Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.</p>					
<p>INDICATOR SCORE:</p>					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 22

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (0)
22.1 News media organizations pay journalists high enough wages to attract and retain qualified journalists.	Sub-Indicator 22.1 asks you to assess the degree to which news media organizations pay journalists high enough wages to attract and retain qualified journalists. Conversely, in worst case scenarios, news media organizations pay only a few qualified experience journalists wages high enough to retain them, filling remaining positions with students, interns, and others with limited training and experience, or wages are so low that individuals with vocational or academic training in journalism cannot be attracted or retained in available journalism jobs. 22.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.				
22.2 News media organizations pay journalists high enough wages to discourage journalistically unethical behavior.	Sub-Indicator 22.2 asks you to assess the degree to which news media organizations pay journalists high enough wages to discourage journalistically unethical behavior (such as receiving payments for partisan reporting, dissemination of fake news et al.). Corruption among journalists designed to bring the journalists additional income is virtually unknown. A mid-level case might be that, in some countries, such wage related problems may consistently exist in a particular news industry sector, or at among local news media organizations, as compared to national news media organizations. In worst case scenarios, news media organizations at all levels and across all industry sectors, pay journalists such low wages that unethical behavior designed to bring journalists additional income is common. 22.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.				
22.3 There are professional journalism education and training programs available to supply the needs of news media	Sub-Indicator 22.3 asks you to assess the degree to which there are professional journalism education and training programs available to supply the needs of news media organizations and communities. A mid-level case might be that in some countries, available journalism education and training programs cannot produce enough professional journalists to keep up with the industry's needs. In worst case scenarios, professional journalism vocational and academic programs are not available outside of the occasional free training provided by NGOs, or existing programs are not keeping up with changes in the industry's technologies, content and processes so that				

<p>organizations and communities.</p>	<p>graduates are not fully prepared for professional working conditions.</p> <p>22.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>22.4 The number of journalists in each national news media industry sector is relatively stable over time.</p>	<p>Sub-Indicator 22.4 asks you to assess the degree to which the number of journalists in each national news media industry sector is relatively stable or growing over time. If there has been significant loss in the number of journalists working for national news media organizations in recent years, but it is the result of reduction in politically mandated overstaffing, that should not be considered a problem. A midlevel case might be that the number of journalists in one or two industry sectors has fallen, but has been largely, although not completely offset by growth in the number of journalists in other news media sectors. In worst case scenarios, the number of journalists working for national news media organizations in the country has fallen 10% -20% or more over the past 5 years, not including any reduction in mandated overstaffing.</p> <p>22.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>22.5 The number of journalists in each local news media industry sector is relatively stable over time.</p>	<p>Sub-Indicator 22.5 the number of journalists in each local news media industry sector is relatively stable or growing over time. If there has been significant loss in the number of journalists working for local news media organizations, but it has been the result of reduction in politically mandated overstaffing, that should not be considered a problem. A midlevel case might be that the number of journalists in one or two industry sectors that operate in local news markets has fallen, but has been largely, although not completely, offset by growth in the number of journalists in other news media sectors. In worst case scenarios, the number of journalists working for local news media organizations in the country has fallen 10%-20% or more over the past 5 years, not including any reduction in mandated overstaffing.</p> <p>In countries where there is effectively not a local news media sector, <i>Not Applicable</i>, should be used, with an explanation added to the notes section.</p>

23. Ownership of News Media Organizations

Research shows media ownership plays a major role in media viability – both with regards to news media quality and organizational sustainability. Ownership structures and the values of news media owners influence media viability.

For indicator 23, you are not asked to separately assess the media ownership at the national and local levels. However, you should still consider both types of media in your response. If there is a significant gap between media ownership as it relates to each specific Sub-Indicator at the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 23: Ownership of news media organizations is transparent and does not prevent diversity of perspectives or quality content.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (0)
23.1 News media ownership is not concentrated in the hands of the state or a few companies or families.					
Notes:					
23.2 The nature and structure of news media ownership is transparent.					

Notes:					
23.3 News media owners are not tied to government or other powerful interests.					
Notes:					
23.4 News media owners generally respect the editorial independence of their staff, refraining from interfering in content due to personal or corporate interests or views.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. Not Applicable is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 23

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (0)
23.1 News media ownership is not concentrated in the hands of the state or a few companies or families.	<p>Sub-Indicator 23.1 asks you to assess the degree to which news media ownership is not concentrated in the hands of a few companies or families or the state. Ideally, the application of the Herfindahl-Hirschman Index (HHI) or general assessment would find that there is a low level of concentration among news media owners at both the national and local levels. Conversely, in worst case scenarios, news media ownership would be heavily concentrated in the hands of a few companies or families, relative to the size of country’s population, with competing companies, if there are any, having only a small percentage of the news media market share.</p> <p>23.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
23.2 The nature and structure of news media ownership is transparent.	<p>Sub-Indicator 23.2 asks you to assess the degree to which news media ownership is transparent so that the companies and individuals who control major news media organizations are known. Conversely, in worst case scenarios, complex interlocking webs of joint ownership and subsidiary relationships would make it difficult or impossible to know who actually controls major national news media companies; laws make it possible for news media organizations to hide their ownership; or the government owns most or all of the news media, even if it is transparent about it.</p> <p>23.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
23.3 News media owners are not tied to government or other powerful interests.	<p>Sub-Indicator 23.3 asks you to assess the degree to which news media owners are not tied to government or other powerful interests. In mid-level cases, news media owners may be closely and publicly tied to government and other powerful interests, which can influence organizational behavior, but are known to generally try to allow the news department to operate independently. In worst case scenarios, news media owners are closely and publicly tied to government and other powerful interests and openly pressure or use</p>				

	<p>their news staffs to support those interests. Alternatively, the nation’s news media organizations would be financially dependent upon, or owned by, the government or other powerful interests such as the military, religious, or criminal organizations.</p> <p>23.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>23.4 News media owners generally respect the editorial independence of their staff, refraining from interfering in content due to personal or corporate interests or views.</p>	<p>Sub-Indicator 23.4 asks you to assess the degree to which news media owners respect the editorial independence of their news staff, refraining from interfering in content to protect or promote personal or corporate interests or views. Conversely, in worst case scenarios, the majority of news media owners routinely make their political and financial interests and priorities clear to senior editors and news staffs, who are expected to adhere to the owners’ preferences. Or news media owners or senior corporate managers directly control editorial coverage across the full range of topics, ensuring that it adheres to their personal priorities.</p> <p>23.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

24. Business Structure

To fully measure news media content quality, it is necessary to evaluate both formal and informal news media organizational structures. Formal structures include ownership structures, managerial structures, and departmental structures. Informal structures include owner and manager priorities and values, personnel competencies, and internal organizational relationships. Research has established that formal and informal organizational structures have major impact on the independence and quality of journalism content and on the viability of organizations, in general.

For indicator 24, you are not asked to separately assess business structures in the national and the local media. However, you should still consider the performance of both types of media in your response. If there is a significant gap between the quality of organizational structures and management in the two levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 24: News media organizations have the structures to be viable.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (0)
<p>24.1 News media organizations are governed with the business, financial, and managerial ability to effectively oversee their strategies and operations.</p>					
<p>Notes:</p>					
<p>24.2 News media organizations are committed to the production of quality content.</p>					
<p>Notes:</p>					
<p>24.3 News media organizations have sound business and finance plans that employees are familiar with and able to implement.</p>					

Notes:					
24.4 News media organizations have an organizational entity (department or person) that dedicates most of its working time to the generation of revenue.					
Notes:					
24.5 News media organizations have written documents that specify and standardize the general terms and conditions under which advertising and other services used to gain revenue are provided (including price lists, contracts, etc.).					
Notes:					
24.6 News media organizations have rules or procedures to separate editorial					

and advertising functions to maintain editorial independence from business pressures.					
Notes:					
24.7 News media organizations have established strategic networks to share content, expertise, and other resources.					
Notes:					
24.8 News media organizations have established mutual aid arrangements to support viability in the event of natural disaster or authoritarian suppression.					
Notes:					
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.					
INDICATOR SCORE:					

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 24

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (0)
24.1 News media organizations are governed with the business, financial, and managerial ability to effectively oversee their strategies and operations.	<p>Sub-Indicator 24.1 asks you to assess the degree to which the senior management at news media organizations in your country have the business, financial, and managerial abilities to effectively oversee news media organizations’ strategies and operations. Ideally, a large majority of senior management at national and local media organizations would have strong business, financial, management skills and knowledge of journalism and news markets. Conversely, in worst case scenarios, only a minority of news media organizations would be run by managers with appropriate skills, or news media executives at most news media organizations would be appointed on the basis of political patronage or connections, with little experience in either management or journalism.</p> <p>24.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
24.2 News media organizations are committed to the production of quality content.	<p>Sub-Indicator 24.2 asks you to assess the degree to which news media organizations are committed to the production of quality content and the journalism mission, as well as to long-term viability and, where appropriate, profitability. Ideally, a large majority of senior management at national and local media organizations hold such values, with content quality defined as noted in the Explanation for Indicator 21. Conversely, in worst case scenarios, the majority of news media organizations would be run by managers who are interested only in maximizing profits without regards to content quality or effects on society, or in using the news media organization to pursue political, economic, or personal goals.</p> <p>24.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>				
24.3 News media organizations have sound business and finance plans that employees are familiar with	<p>Sub-Indicator 24.3 asks you to assess the degree to which news media organizations have sound business and finance plans that employees are familiar with and able to implement. Conversely, in worst case scenarios, most news media organizations have inadequate or no formal business and finance plans, or the</p>				

and able to implement.	plans they have are not used. 24.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.
24.4 News media organizations have an organizational entity (department or person) that dedicates most of its working time to the generation of revenue.	Sub-Indicator 24.4 asks you to assess the degree to which news media organizations have an organizational entity (department or person) that dedicates most of its working time to the generation of revenue. In worst case scenarios, the majority of news media organizations do not have a department or full-time staff dedicated to the generation of revenue, or most such work is done by volunteers. 24.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.
24.5 News media organizations have written documents that specify and standardize the general terms and conditions under which advertising and other services used to gain revenue are provided (including price lists, contracts, etc.).	Sub-Indicator 24.5 asks you to assess the degree to which news media organizations have written documents that specify and standardize the general terms and conditions under which advertising, underwriting, and other services used to gain revenue are provided, including price lists, contracts, etc. Management keeps close oversight over the conditions of sales, pricing and collections and enforces the organization's rules. Conversely, in worst case scenarios, sales agents cut individual deals that undermine the journalistic and business credibility of the organization. Or, collusion and corruption between agents and clients is common, costing news media organizations a large percentage of the revenue they might otherwise generate. 24.5 is a Sub-Indicator that should be evaluated for all countries. News media in some countries may not sell advertising or services. In those cases, <i>Not Applicable</i> should be used as the score.
24.6 News media organizations have rules or procedures to separate editorial and advertising functions to maintain editorial independence from business pressures.	Sub-Indicator 24.6 asks you to assess the degree to which news media organizations have rules or procedures to separate editorial decisions from advertising or other revenue-generating functions to maintain editorial independence from business pressures. Ideally, there is little, if any communication between journalists and sales agents below the level of senior management. Some features or special topics sections or inserts may be produced for the specific purpose of selling advertising to advertisers or sponsors, but such sponsor-targeted content makes up only a small part of most organizations' content. Conversely, in worst case scenarios, there is little or no separation between editorial and advertising/sponsorship functions. The Editorial department works under the direction of the Revenue department, producing favorable coverage, publishing client-produced or client-requested content such as "fake news" or political or economic attacks, or otherwise producing "news" content for which clients have paid.

	24.6 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.
24.7 News media organizations have established strategic networks to share content, expertise and other resources.	<p>Sub-Indicator 24.7 asks you to assess the degree to which news media organizations have established strategic networks with other news media organizations to share content, expertise, advertising bundling, alternative revenue projects, and other resources, including technical resources. Ideally, news media organizations collaborate on major investigative reporting projects, lend each other journalists as expert commentators, and otherwise cooperate to create excellent journalism in the public interest. They work together to share information about the industry, lobby the government, and strategize ways of dealing with environmental changes and remaining viable as an industry. Journalists routinely help each other in small ways out of professional courtesy. Conversely, in worst case scenarios, news media organizations see themselves as in competition with all other news media organizations, sometimes going as far as attacking them. Their capacity to produce quality content is limited by their specific internal resources.</p> <p>24.7 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
24.8 News media organizations have established mutual aid arrangements to support viability in the event of natural disaster or authoritarian suppression.	<p>Sub-Indicator 24.8 asks you to assess the degree to which news media organizations have established mutual aid arrangements to support each other's viability in the event of natural disaster or authoritarian suppression. Ideally, at least some major national news media organizations have off-site or out-of-country networks or facilities to use if the government tries to shut them down, OR the Rule of Law makes such off-site arrangements unnecessary. When necessary, competing organizations join together to legally and operationally oppose actions taken against other news media organizations or journalists. Direct attacks against a news media organization generally creates a vehement, united and highly public response by the news industry as a whole against the source of the attack. Conversely, in worst case scenarios, news media organizations do not cooperate, coordinate or assist each other in times of disruption or in the face of direct attacks by government authorities or other actors.</p> <p>24.8 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>

25. Business Expertise

News Media Viability, by definition, requires that news media organizations be managed by individuals with significant business expertise appropriate to the types of markets and revenue models in which the news media organization operates. News media organizations must have access to and be able to afford to hire the top talent available, without regard to race, gender, religion or other irrelevant factors that might cause those organizations to bypass available talent.

For Indicator 25, you are not asked to separately assess the quality of content in the national and the local media. However, you should still consider the performance of both types of media in your response. If there is a significant gap between the quality of business expertise that is available as compared to what is needed in the two different levels of news media, then the country should not be scored 4. Please explain that as part of your explanation for your scoring, including specifics as to the media level where you believe there is a problem.

Indicator 25: News media organizations have the personnel and expertise to be viable.

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (o)
25.1 News media organizations are able to hire staff, including women and marginalized groups, with management knowledge and skills (finance, marketing, sales, etc.).					
Notes:					

<p>25.2 The employees in advertising and sales, including women and marginalized groups, have received vocational or academic training.</p>					
<p>Notes:</p>					
<p>25.3 News media organizations are able to hire staff, including women and marginalized groups, with the technical knowledge and skills to keep the organization current with digital and technological change.</p>					
<p>Notes:</p>					
<p>25.4 News media organizations have the expertise to monetize content across multiple platforms.</p>					
<p>Notes:</p>					
<p>25.5 News media organizations have the expertise to enable the organization and its journalists to innovate content and processes.</p>					

Notes:
Indicator Score = Sum of all Sub-Indicator scores/No. of Sub-Indicators scored. <i>Not Applicable</i> is dropped from calculation.
INDICATOR SCORE:

GUIDANCE FOR EVALUATING THE SUB-INDICATORS FOR INDICATOR 25

Sub-Indicator (score)	Accurately describes the overall situation, supporting News Media Viability. There are no signs that things are changing in a negative way. (4)	The overall situation is OK for News Media Viability, but there are signs that it is deteriorating. (3)	The overall situation is bad and is a problem for News Media Viability. (2)	The overall situation is effectively the opposite of what is described and News Media Viability. (1)	Not applicable (0)
25.1 News media organizations are able to hire staff, including women and marginalized groups, with management knowledge and skills (finance, marketing, sales, etc.).	Sub-Indicator 25.1 asks you to assess the degree to which news media organizations are able to hire experienced staff, including women and marginalized groups, with management knowledge and skills in finance, marketing, sales, etc. Conversely, in worst case scenarios, a large percentage of news media organizations are not be able to afford to hire professionals who have the needed business expertise; individuals with the needed level of business expertise are not be available in the market in the numbers required; or a large percentage of news media organizations are unwilling to hire people who have the business expertise they need because of issues of race, gender, age, religion, caste, etc. 25.1 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.				
25.2 The employees in advertising and sales, including women and marginalized groups, have received vocational or academic training.	Sub-Indicator 25.2 asks you to assess the degree to which employees in the majority of news media organizations' advertising and sales departments, including women and marginalized groups, have received vocational or academic training in their profession. Conversely, in worst case scenarios, the majority of news media organizations hire sales or other people responsible for revenue generation who do not have vocational or academic training in their professions; the news media organizations do not budget for vocational or academic training for their sales staffs; they limit the availability of such training on the basis of race, gender, religion, caste, or other such factors; or they do not provide vocational and academic				

	<p>training and they do not allow employees to seek it on their own.</p> <p>25.2 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should be for countries where news media organizations do not depend upon commercial advertising as an important source of revenue.</p>
<p>25.3 News media organizations are able to hire staff, including women and marginalized groups, with the technical knowledge and skills to keep the organization current with digital and technological change.</p>	<p>Sub-Indicator 25.3 asks you to assess the degree to which news media organizations are able to hire experienced staff, including women and marginalized groups, with the technical knowledge and skills to keep the organization current with digital and technological change. Conversely, in worst case scenarios, a large percentage of news media organizations are not able to afford to hire professionals who have the needed technical knowledge and skills; individuals with the needed technical expertise are not be available in the market in the numbers required; or a large percentage of news media organizations are unwilling to hire people who have the technical expertise they need because of issues of race, gender, age, religion, caste, etc.</p> <p>25.3 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>25.4 News media organizations have the expertise to monetize content across multiple platforms.</p>	<p>Sub-Indicator 25.4 asks you to assess the degree to which the majority of established news media organizations have and use the expertise to monetize content across multiple platforms. Conversely, in worst case scenarios, the majority of news media organizations in the country do not have or do not use people with the expertise to monetize content across multiple platforms, or such expertise is not available in the country.</p> <p>25.4 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>
<p>25.5 News media organizations have the expertise to enable the organization and its journalists to innovate content and processes.</p>	<p>Sub-Indicator 25.5 asks you to assess the degree to which the majority of established news media organizations have the organizational structures and expertise to innovate content and processes. Conversely, in worst case scenarios, the majority of news media organizations in the country do not have the expertise to innovate content and processes, or the organizations are change resistant and slow to adopt innovations in content and processes.</p> <p>25.5 is a Sub-Indicator that should be evaluated for all countries. <i>Not Applicable</i> should not be used.</p>