



The TACSO project
is supported by the European Union



+387 33 847 604



welcome@tacso.eu



@TACSO3



Kemal Begova 1/II, 71000, Sarajevo, Bosnia and Herzegovina

Contract: IPA/2018/402-893

Title: Technical Assistance to CSO (TACSO 3) in the Western Balkans and Turkey

Terms of Reference for the preparation of a Study on Independent Media Business Support

Time input: up to 20 working days during May-June 2019.

Objectives and purpose of the TACSO 3 project:

The overall objective of the Civil Society Facility and Media Programme, of which this TACSO3 is a part, is to strengthen participatory democracies and the EU approximation process in the Western Balkans and Turkey. The main goal of TACSO 3 is to strengthen the capacity of civil society organisations (CSOs) to actively take part in the democratic processes and to stimulate an enabling environment for civil society and **pluralistic media development**.

The specific purpose of TACSO3 is to provide services to the target groups in 5 main areas:

1. CSOs organisational and operational capacity development
2. Enabling environment for civil society development
3. Communication and visibility of civil society
4. Development and Monitoring of the Civil Society and Media Guidelines
5. Effective relations between EU and CSOs
6. Events management (including the People to People programme)

General background of this assignment:

Ensuring freedom of expression and pluralism of the media is one of the main challenges faced by the Western Balkans (WB) region. Political interference in the media, economic concerns such as media ownership concentration and various forms of harassment, including violence against journalists, are fundamental issues in these societies. Improving this situation inevitably goes beyond a simple transposition of EU rules: it calls for behavioural and cultural change in politics, judiciary and media.

The EU supports this process by

- providing legal assistance and guidance in drafting media legislation;
- thoroughly monitoring the policies of candidate countries and potential candidates in this field;
- providing financial support to support media freedom and freedom of expression .

EU financial support for media is granted through the Instrument for Pre-accession Assistance (IPA). The Civil Society Facility and Media Programme (CSF) is the major assistance delivery vehicle both regionally and at local level. In the period 2014-2020, a number of regional support programmes has been rolled out. Following the [Guidelines for EU support to media freedom and media integrity in the enlargement countries](#), they have covered all the major aspects of the so-called enabling environment for freedom of expression, media literacy, support to journalists' education, capacity assistance to journalist professional organisations as a factor for the expected policy improvement, etc. However, one of the issues flagged by stakeholders in the region is the need to address the challenges faced by media as a sector of industry.

As suggested in multiple studies and research, and by the EC own regular reporting on the country situations, the prevalent risk to freedom of expression in WB is emanating from ever-weaker **financial and economic sustainability** of professional independent media organisations. This phenomenon in turn undermines pivotal goals of the EU enlargement policy in the WB region – accountability of the political establishments, the fight against corruption, rule of law, and good governance in these countries in general. A weakening media environment becomes also more vulnerable to foreign interference and non-democratic narratives.

The issues faced by independent media in different IPA beneficiaries are largely comparable. Of particular interest, however, is the situation of *legacy independent media organisations*, known for their established commitment to independent professional reporting, considerable outreach and loyal audience. These outlets are currently plagued by the hardships of an ever more hostile media business environment, potentially endangering the pillars of a free and pluralistic media in the region. Such difficulties also hamper them from making the necessary “modernisation leap” to respond to modern media consumption patterns.

A common feature of the media business environment¹ in the region is the heavy and multifaceted interference into the market to establish political control over media and sideline recalcitrant and critical news organisations. It puts serious limits to a fair competition-based environment for independent media organisations trying to make a living out of professional news and story production. On the other hand, new technologies offer new production and audience engagement tools enabling complementary new business revenue sources independent of the politically corrupt traditional markets

From this perspective, a good understanding of the media landscape in the region from a business perspective becomes of particular importance.

Scope of Work of the Expert:

Assignment:

The objective is to provide a succinct analysis of the current situation in the Western Balkans media landscape, with a main focus on the economic situation of independent media outlets and their needs.

The expert should, based on existing available public and internal reports from the region, developed both by the EC and other actors in the region, including other donors (tentative list will be provided), carry out a study, that should, as a minimum:

- 1) Provide an assessment of the media landscape in each of the 6 WB IPA beneficiaries, in particular from an economic perspective, i.e. looking at independent media outlets as economic entities. The assessment should include:
 - An analysis of the media markets (at regional and at IPA beneficiary level), structural issues affecting these;
 - a list of major independent media outlets in each IPA beneficiary (including their approximate outreach, relevant basic economic data and financial profiles, such as estimated turnover and profit margins, deficits, economic issues faced), as well as new media initiatives with high growth potential.
 - an analysis of ownership structures (e.g. privately owned, public/state owned, publicly listed companies, etc.) and related issues (e.g. opaque ownership, “oligarch”/political control, etc)
 - Funding and revenue aspects, including use of public/private/donor funding, etc., and an analysis of the advertising market and its potential to provide sustainable revenues for media outlets; potential of other sources of revenue
 - Aspects related to the current level of competition between media outlets, both at country

¹ Also stressed multiple times in the Reports within the Annual Enlargement Package

- level, as well as cross-border, and how sensitive competitive positions and their economic viability are to the influx of funding from various sources (including external donors);
- Other aspects that could affect the sustainability of media outlets, such as consumer basis, accessibility, evolution of offer/demand, as well as the ability of independent legacy media to adapt to global changes in media and its consumption;
- 2) Identify typical investment needs of independent media outlets (especially *legacy*, i.e. established, “traditional” media), in particular from an economic perspective, by looking at the outlets’ nature, capacity and financial needs that have to be met for a given media outlet to become sustainable;
 - 3) Assess the extent to which these needs are being responded to through the current EC programming (regional and local programmes, as well as existing access to finance facilities to which media outlets are in principle eligible), as well as through programmes of other donors;

Following the finalization of the report, the expert will be asked to deliver a briefing in DG NEAR, presenting its main findings, and adapting the feedback received into the final document.

Time input requested: up to 20 working days during May-June 2019.

Input and location: The Study is expected to be mostly based on desk research, conducted at the expert’s home base, as well as Skype/telephone interviews. The study would be initiated with a series of meetings in Brussels with relevant stakeholders, and end up with a presentation at DG NEAR in Brussels.

The expert is expected to synthesize the ample research material on WB media available for the time period since the 2008 economic/financial crisis, that has left last effects both in global and regional media dynamics, and that kick-started an ever-faster deterioration of media freedom in the region. These include institutional reports of the EC (regular country reports, Freedom of expression peer-review mission reports on Serbia (3), Kosovo, BiH, Montenegro, a media sector inquiry for Montenegro), that will be made available upon request. Also, other relevant materials produced by relevant stakeholders should be used at the maximum extent possible, such as the USAID/IREX media sustainability index, studies carried out within the USAID BMAP programme, etc..

Activities and outputs	No. w/days	Location	Provisional Timing
Initiation meetings and delivery of the inception report, detailing the tentative outline of the study	3	Brussels	May 2019
Preparation of the Study, based on extensive desk research, Skype and telephone interviews	14	Home base	May-June 2019
Presentation of the results of the research and a first draft of the Study	1	Brussels	June 2019
Adjustment of the Study based on the received feedback and delivery of the final version	2	Home based	By 20 June 2019
Total	20		

Key Outputs of Assignment:

- A Study on Independent Media Business Support, presented and approved by the DG NEAR Task Manager and Principal Media Adviser;
- A presentation on the results of the Study delivered in Brussels to relevant stakeholders.

Project Management: The expert will report to the TACSO Team Leader, GDSI Project Director, and be guided by the DG NEAR Task Manager, in close coordination with the Principal Adviser, Civil Society and Media.

Required profile for the Expert:

The Expert should have the following educational background and professional experience:

Qualification and skills:

- Relevant University degree in management, economics, media studies, law EU studies or equivalent;
- Excellent analytical, research, presentation, communication skills;
- Fluency in English

General professional experience:

- At least 5 years of practical experience in the field of media development support; in particular related to the economics of media
- At least 3 years of practical experience in carrying out similar studies;

Specific professional experience:

- Strong knowledge of the objectives of the EU IPA policy;
- At least 5 years of experience working on relevant issues;
- Proven advanced knowledge of the Western Balkans media landscape.

Language requirements:

The primary language of the assignment is English. All written inputs shall be provided in English.