

STAGE TWO: OUTCOMES: This questionnaire consists of 33 questions and was sent to 19 experts, representing the Armenian media.

QUESTIONNAIRE

#	QUESTION
1	Please list the three major achievements and the three major problems of the Armenian media.
	Achievements
Answer	<ul style="list-style-type: none"> • Newsrooms are becoming convergent, materials are increasingly in multimedia formats, Internet reporting is becoming more popular. • Making of the media as the fourth power. • RA Laws on Mass Media, Freedom of Information, and the decision passed by the European Court of Human Rights on A1+ TV case. • Freedom of the media. • Media diversity. • Prompt reaction. • Freedom and diversity of print media. • The quick growth of Internet outlets and their unique place in the media sector. • Introduction of multimedia tools. • Internet - as free as possible. • Strong journalistic organizations. • More media freedom. • Abundance of news websites. • Decrease of litigations with political subtexts, brought against media outlets; • Measurements of TV audience. • Monitoring radio and outdoor advertising. • Creation of a sales house. • Increasing freedom, a trend conditioned by the introduction of advanced technologies and wider Internet access. • Social networks, as an additional source of information. • Development of Internet news media; online videos have become tantamount to traditional TV, due to the audience they attract when covering emergencies. • Recently Armenian media have actively started their own production. • Pluralism (not in a separate media outlet, but in general). • The desire to quickly implement new technologies. • The development of new and alternative media. • The probable digitalization of TV. • The development of Internet technologies contributed to the increase in the number of free media outlets that are not controlled by the power. • Today we can note a trend with media attempting at commercial self-sufficiency.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<ul style="list-style-type: none"> • New, apolitical and multi-genre publications are emerging. • Development of media legislation. • Diversity and development of media networks. • Pluralism on the Internet. • Pluralism in Internet media. Spread of electronic media outlets and immediacy.
	Problems
Answer	<ul style="list-style-type: none"> • Trying to ensure immediacy, journalists tend to work on their materials less and less. Investigative reporting is becoming more of an expensive luxury, while making a report by merely copying and pasting statuses from social networks is becoming more and more fashionable. • The volumes of the media market with its financial implications. • Almost lack of “export” of local media production. • Few specialists with quality re-training, low levels of professionalism. • Problems related with the transition to digital telecommunication, including the relevant concept, the RA Law on TV and Radio and so on. • Self-censorship and the underlying reasons, including the impunity of persons who did offenses against journalists and media outlets. • Legal practice of civil cases brought against media outlets, allegedly for defamation and insult. • Party affiliation. • Legislative gaps. • Lack of economic freedom and transparency. • Monopolization of TV. • Secretly commissioned information and coverage. • Lack of journalists’ trade union. • Lack of healthy economy to feed the media. • Politicized media. • The news making business remains the adjunct of political business and has not yet emerged as a stand-alone market with its own economic rules. • Media outlets are not the main sources of income of private media owners. Their main businesses are in real estate, beverages, construction, tobacco and candy, ice-cream and restaurants, and petrol businesses. This is the reason why the ownership of a media outlet is of rather political significance to these owners. That is why the owner of the media outlet is ready and willing to subsidize its media business (not profitable) from his/her main (super-profitable) businesses. • Low quality media production continues to be sold, following the logic of cheap goods wholesale markets: the lower the quality and cost of sale of goods, the higher customer’s attendance. • Creation of an independent Industry Committee. • Amendments to the RA Law on Advertising. • To separate politics from business, lack of independent TV stations, no commitment to the role of a responsible player in social relations. • A free advertisement market is not getting formed. Media (also because of

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<p>the advertising business) continues to remain a subsidized business which cannot survive without funding from external sources and/or political support. The degree of professionalism is low in the media; plagiarism is all over the place, thus hampering the development of professional and “honest” media outlets.</p> <ul style="list-style-type: none"> • Dependence upon political and business groups. • The limitedness of the advertising market. • The rudimentary state of self-regulation. • Lack of fact-checking rules (I realize that this is a component of non-professionalism, but I would like to mention it separately). Lack of ethical norms. • High levels of politicization. • Dependence on owners. • Lack of professional media specialists (not only journalists, but rather media managers). • The financial dependence of most media outlets on political parties, large business owners, and the state. • State control over private TV stations. • Self-censorship. • Incompliance with professional journalistic code of ethics. • Lack of media literacy. • Imperfection of advertising. • Impossibility for independence. • Uncertainty for the future. • Pluralism is not ensured in TV and radio industry. Media ownership has remained secret from the public. No success with a public broadcaster, we still have a state broadcaster. • Lack of professionalism, only partial independence, lack of retraining opportunities, lack of narrow specializations.
2	<i>According to the results of the previous stage in the survey, 100% of respondents considered Armenian media dependent on political forces and owners, and not on their audiences. What do you think the reason for such dependence is (please select no more than 3 options)?</i>
16	a) Politicization of the business that hinders the formation of market mechanisms in advertising,
10	b) Monopolies in various sectors of economy that reduce the significance and role of products and services provided,
4	c) Limited representation of foreign capital, independent of domestic situation in the market,
5	d) Lack of professional media managers, capable of protecting their own independence from owners,
1	e) Low motivation among young specialists to work in this field,
7	f) Misconception on the role of media in public life by media owners and the power,
5	g) Other reasons, in your own words, please.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<ul style="list-style-type: none"> In Armenia media is not yet a stand-alone and independent business. It is funded from other businesses. Corruption in the media, that leads to the compulsion to obey the authorities. Owners view media as a shadow backup for their own interests. There is no legitimate power in Armenia, those who are in power are intruders and control most media outlets, because this is one of the tools for the reproduction of power and the means to ensure political competition. The authorities badly need the broadcasting media to fail to ensure and intensify political competition.
3	<i>Will you agree to the opinion that to overcome the politicization of the RA media market and to transform it into a profitable and accountable business, we should (please select no more than 2 options):</i>
16	a) Change the economic situation in the country,
3	b) Send signals of authority to owners,
2	c) Such a change is no longer possible,
3	d) To transfer media (and other) assets to editorial houses,
0	e) It is pointless to be concerned about this, since pluralism is ensured due to diversity among owners,
5	f) Other opinions, in your own words, please. <ul style="list-style-type: none"> Ensure media businesses realize the profitability of the media market. Ensure an increase in the number of specialized and vigilant professionals. Make owners reevaluate and realize the real role of media in public life, especially those authorities that are inclined to put pressure on the media in every possible way. We need a change in the political situation in the country. A change in the internal political situation is required, and these should be radical political changes, for without such a change no tool or toolkit listed above can be effective.
4	<i>Do you agree that in the income raising race the media compromises the quality of offered content?</i>
14	a) This is not a mandatory requirement, it is possible to have content that is both profit-making and quality,
4	b) This is a global tendency, it is impossible to struggle against it,
1	c) the desires of our audience are important to us, and we comply with them,
3	d) Other opinions, in your own words, please. <ul style="list-style-type: none"> Media outlets producing low quality content newscasts are not concerned about this fact for their target audience that does not pay cash for this, is always ready to consume the low quality production. This is a global trend, but I would not say that it is impossible to struggle against it, rather it is necessary to realize that with time the audience will tell good from bad, and the good content will find its audience.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	<ul style="list-style-type: none"> An unhealthy market creates unhealthy competition and vice versa... hence, combining hundreds of populist articles next to quality reports creates an opportunity for that single quality report to get published.
5	<i>What is the knowledge that you personally or media managers (if you are not a media manager) in Armenia lack to manage media companies (please select no more than two of the options below)?</i>
2	a) On finances,
2	b) On technical issues,
6	c) On the creation of program concepts,
10	d) On media planning,
14	e) On identification of the audience's needs,
2	f) Other options, in your own words, please.
	<ul style="list-style-type: none"> Ability to design an organization strategy and tactics. Lack of knowledge on management, rules to run a business and business culture. To put it shortly, knowledge I could get in an MBA course.
6	<i>What are the problems of interrelation between media companies and advertisers? (please select no more than two of the below):</i>
7	a) Lack of data on media audiences, hindering constructive cooperation,
8	b) Lack of special professional knowledge on the media market among advertisers,
5	c) Advertisers' doubts on the great role of advertising, as a guarantee for success in the market,
12	d) Lack of competent specialists at media outlets, capable of effectively working with advertisers,
1	e) Ranking advertising as secondary for generating income by media,
4	f) Other problems, in your own words, please.
	<ul style="list-style-type: none"> Monopoly in the advertising market and its merger with the media sector. The combination of options b), c), and d), that is: even large-scale businesses in essence follow small-scale business logic (with very few exceptions), failing to realize what advertising is, with management in most media outlets not even having dedicated advertising units or sales agents. Political dependence of advertisers. Advertisements are often primitive, advertising is mostly arranged not to assist the advertiser in his/her business, but rather to ensure financial gains for the broadcaster.
7	<i>What do you think generally the advertising market scales in Armenia are? What is the proportionality of their distribution among various media - TV companies, radio, print media and online media?</i>
Answer	<ul style="list-style-type: none"> The advertising market is small and is mainly divided among TV stations. Print media and radio come second. Advertisers have not yet fully perceived online media as an effective advertising platform. Generally, the volumes of the advertising market are quite modest. The lion's share of the market is in the domain of a few TV companies. The rest

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



	<p>of the volume is distributed in the following order: radio, Internet websites, and print media.</p> <ul style="list-style-type: none"> • My estimate of the volume of commercial advertising would be about 6 million USD. TV absorbs about 75% of this volume; about 15% is taken up by radio, about 7% by print media and approximately 3% by online media. • The advertising market in Armenia is very small and is primarily concentrated around monopolies. • TV - 70%, radio - 15%, print media - 5%, online media - 10%. • TV prevails. • A maximum of 25 million US Dollars annually, of which 20-22 million falls onto the TV share, about 1 million for the Internet, and about a million for radio and print media taken together. • 60% - outdoor advertising, 30% - TV, 4% - print media, 3% - radio, 3% - online media. • TV- 70-75%. Outdoor advertising - 8-10%. Radio- 3-4%. Press - 1-3%. Internet -10-12%. Others-1-2%. • I do not have any data on advertising volumes. As for proportionality, it is obvious that 90% of advertising is at TV stations and the remaining 10% belongs to online media, print media and radio (distributed in the same order). • The lion's share of advertising falls on broadcast media, and recently the Internet advertising market has started to take shape. • It is necessary to conduct special dedicated research to be able to answer this question. Since I have not done any such research, my answer will be absolutely approximate. • I cannot say anything about the volumes of the advertising market. However, the breakdown among various media I think would look like this (I will enumerate them without any percents or absolute numbers, for this would require special calculations). TV companies, radio, print media, online media. However, I think that this situation is going to change in the near future, and online media will start moving up onto higher positions. • About \$60 million dollars a year: 60% - TV, 15% - Internet, 10% - Print press, 10% - outdoor advertising, 5% - radio. • The answer to this question requires a special study that I have not done personally. Besides, I do not know of any results from any studies on the Armenian media market. However, I am well aware that all over the world advertising budgets are being shifted from traditional media, especially from print media to the Internet. Simply, as also a media consumer, I can say that in Armenia the larger share of the advertising markets still belongs to TV. • The feeble and small advertising market does not ensure the qualitative development and independence of the media. 60-70 percent of the advertising market is taken up by TV, and the rest is distributed among print media (mainly colored and illustrated magazines), radio and the Internet, by descending order. • TV stations are leading, and servicing large volumes of advertisements is their monopoly. The volumes of advertising in online media are increasing,
--	--

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<p>along with the development of online media and the growth in the number of Internet users.</p> <ul style="list-style-type: none"> • The lion's share is with TV, especially the larger trio. Advertising interests and prices in Internet resources grow, too. The radio has its stable audience and advertiser. The print media is declining and survives only due to a number of its sponsors. • I think that the annual weight is approximately 160-200 million USD, 35-40% of which goes to TV, about 6% goes to the radio, about 5% belongs to the print media, and approximately 8-10% is for online media, the rest falls onto outdoor advertising, illuminated advertising, transport and other print advertising, apart from mannequin advertising. • TV has the lion's share, with radio following it. A very small share is taken by print and online media.
8	<p><i>What do you think the share of the three major (according to the available media measurements) TV channels - H1, Armenia and Shant from the total advertising block is?</i></p>
Answer	<ul style="list-style-type: none"> • I think <i>Armenia</i> leads with <i>Shant</i> following it. And only after that comes <i>H1</i>. I could find more exact data, but I am trying to answer, judging by what I see on those channels' air. • There is no large difference volume-wise; however, here we should pay special attention to the pricing policies led by different companies. • 30-35%. • <i>H1</i> - 40%, <i>Armenia</i> - 30%, and <i>Shant</i>- 30%. • I will find it difficult to estimate, for this is largely in shadow. • No data. • By saying total advertising market, here I mean exclusively the TV advertising market - 100%. I think that in the TV advertising market <i>H1</i> has 25%, <i>Armenia</i> has 20% and <i>Shant</i> has 15%. • 58-62 %. • The three of these TV companies together probably cover 90% of TV advertising. • At least 70% of the advertising market. • I cannot answer this question. It should be calculated by experts. • About 2/3 or 66%. • It will take a special study to answer this question. I have not done any such research and I am not aware of the results of any other study. • The three TV stations together embrace over half of the advertising market. • 80-90%. • 40-60%. • What matters here - the share or the quality? These channels are watched only because they show soap operas and other low quality content, while we cannot help doubting the extent to which they are concerned with accuracy of news reports. And still, these take up the lion's share of the advertising budget in the sector, for here a minute of advertising costs five times more than in the other channels. It is a different story what the sales

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<p>of CRPs will demonstrate. We should not forget that the organization involved in telemetries and these three channels have a common sponsor and in any case there may be abuses here.</p> <ul style="list-style-type: none"> • <i>H1</i> has it up to 13-15 million dollars, <i>Armenia's</i> share is approximately 10 - 12 million dollars and <i>Shant's</i> share is 12 - 13 million dollars. • Perhaps 50% more.
9	<i>How integrated are Armenian media and advertising companies with the international systems of advertisement dissemination (please select no more than three options)?</i>
7	a) Practically they are not integrated,
9	b) They are integrated only at the level of transnational corporations immediately present in the local goods and services market (and at the level of their sales agents),
2	c) They are integrated only at the level of consumption needs of Armenian communities abroad,
7	d) The volumes of the Armenian economy and market do not allow for real integration,
5	e) The replacement of the traditional model of advertising money distribution through global search and social networks by "virtual" ones creates some prospects for the Armenian media,
2	<p>f) Other options, in your own words, please.</p> <ul style="list-style-type: none"> • Rephrased option d): The volumes of the Armenian economy and market do not allow for wider integration. • The answer to this question requires a special study that I personally have not done. I am not aware of the results of other studies either.
10	<i>What kind of competent mid-tier professionals do you think media management and advertising sectors lack (do not hesitate to come up with your own answers, without any limitations)?</i>
Answer	<ul style="list-style-type: none"> • There is a lack of competent professionals in media management. • I think we lack the golden middle quality of professionals in media management and sales, that is to say we have two extreme approaches. Application of traditional and obsolete methods. The classical approach currently widely practiced in the international market. I think we should be able to combine both approaches in a reasonable way and to customize them to our local needs. • IT and economics specialists (including accountancy). • Professionals to assess the needs in the media market. • Sales professionals. • Monitoring specialists. • Specialists involved in distance programming. • The media almost lack producers, even though almost all media outlets have a few positions, named - "producer," and they even have positions for "creative producers" at high salaries. However, 95% of top managers and 90% of people in the producer's position at media outlets have no idea what

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<p>a TV producer is and what they should deal with. In most media there is no documented job description and that is why everyone is doing what they think they should do without any professional education and experience. Another problem is staff turnover. Someone who has been in the position of a producer for some six months starts to figure out what he should be doing, but this person gets dismissed by the director and replaced by a new inexperienced and unaware employee, at a lower salary.</p> <ul style="list-style-type: none"> • Specialists, who will implement creative ideas, be flexible and quick in their decisions, design media development programs not only based on the results of surveys, but also taking into consideration the gaps in the field: very often media duplicate one another, while the needs of many groups in the audience remain unsatisfied. • Marketing experts, media lawyers, managing editors. • Marketing experts, advertising agents and market analysts. • Managers in the middle tier, media planners. • We do not have enough sales agents capable of developing and implementing a sound sales (media production, commercial time) strategy, organizing the work of a sales department, developing information systems for sales and a robust pricing strategy, and clearly studying the media audience. All this will enable an increase in the cash flow, which will in its turn result in increased media independence, that is - it will lead to qualitative changes. • Advertising agents. • I think there is a lack of tools, lack of studies, and lack of people who are willing to work, because there are no independent media. The materials and reports that are written are what some need to get published or are popular. Unfortunately... • Script writers, authors of purposeful texts, specialists that enhance creative approaches, advertising agents. • Specialized and general managers.
11	<i>Is there a detailed strategic business plan at your company? What is the timeframe for planning your activities?</i>
Answer	<ul style="list-style-type: none"> • No, there is none. • According to the RA Constitution, the National Commission on Television and Radio is an independent state regulatory body, established by the law and guided by the RA laws. • There is a clear strategy and short-term plans. • There is none. We plan according to orders. • Unfortunately, only an incomplete one. Normally we plan for a year or six months. • There is a 4-year Strategic plan. • We do not have a detailed strategic business plan. At our organization media planning takes place three times a day: planning for the next day, planning for the week, and in some cases - monthly planning. We plan the season 2-3 times a year (September - February, or fall, winter and spring

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

	<p>seasons).</p> <ul style="list-style-type: none"> • The strategy for a business plan is developed for 1 year. • We do not have a detailed strategic plan, as such, and the actions to be taken are normally planned for the upcoming month, and are elaborated on for a weekly period. • Yes, our company has both a short and a long-term business plan. • Yes, there is. The short-term one is for 6 months, and the major one is for a year. • I am not a media representative. The institution I work for develops its Strategic plan for 5 years within the frames of which long- and short-term plans are developed. The department I am the head of develops an action plan within the general strategy for at least one year, and for four years, maximum. • No, since the main part of the activity of the NGO is fulfilled due to grants as a result of fundraising, hence the main strategy and the activities for raising funds are not related to business or having a business-plan, but rather ensuring the sustainable development of the NGO. We have developed a sustainability plan. • We do not have a detailed one. • Yes, quarterly, annual, and for three years. • There is none, we have a tactical plan for a period between 12-18 months. • There is one, for a period of 5 years.
12	<i>Why do you think there are no influential professional media associations in Armenia (please select no more than two reasons)?</i>
14	a) Media outlets come together due to their political commonalities, rather than business interests,
6	b) There is a lot of mistrust in a potential for a responsible business partnership,
4	c) Based on the experience, there is some concern that such associations start at some point to serve their own interests, rather than those of the media involved,
4	d) It will take costs to form efficient associations, and the media do not find it expedient to overload themselves with extra costs,
3	<p>e) Other reasons, in your own words, please.</p> <ul style="list-style-type: none"> • I disagree that there are no influential and professional media associations in Armenia. I know at least two. It is only a matter of time. • There are very few qualified media specialists and they are not enough to cover the whole sector, they are scattered all over the place and are in various media. These individuals do not have a significant impact in their own places, they do not dictate or ensure quality. • The political oversight of media does not allow for long-term hopes cherished for the sector. There is a lot of dishonesty in advertising and in rating determination.
13	<i>What association or what kind of corporate union MUST be created in our times (please select no more than two options)?</i>

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

6	a) To consolidate the whole of the media industry,
6	b) To unite various media (TV companies, radio, print media, online publications) (please specify which),
7	c) To unite individual and stand-alone media outlets (please mention by mixing them or rather classifying according to their types),
	d) Other options, in your own words, please. <ul style="list-style-type: none"> • Journalistic trade unions. • Uniting various media. Newspaper, TV, radio, Internet media. • Associations of media-content generators and media content disseminators may have sound and competitive business interests. • A journalistic trade union. • Only such corporations that would exclude the possibility for monopoly in the media sphere and in the advertising market. And in a market as small as ours the threat of a monopoly is too high. • The global trend in media's struggle for survival is the creation of large-scale media holdings that will involve TV, radio, print media, and Internet websites. The only such example in Armenia is the Panarmenian Media Group. • No corporative union can lead to the development of the field without any radical political changes.
14	<i>Which of the enumerated associations is REALISTIC to create (please select only one option)?</i>
4	a) To consolidate whole of the media industry,
4	b) To unite various media (TV companies, radio, print media, online publications) (please specify which),
5	c) To unite individual and stand-alone media outlets (please mention by mixing them or rather classifying according to their types), <ul style="list-style-type: none"> • Mixed type unions are realistic and already being applied by online media. The component of video stories, video materials and online video broadcasts are successfully implemented by websites, ensuring a noticeable enlargement of their audiences.
5	d) Other options, in your own words, please. <ul style="list-style-type: none"> • In the first stage it is necessary to form associations that will combine a mix of individual media cooperation that may lead to their general unification. • Mixed unions. • I think it is not realistic to have any association created in the upcoming five years since the political interests of TV channel leaderships are absolutely opposite to one another. • An authority to observe media ethics. • Unfortunately this does not depend on the media industry representatives. There is such an association, but it was created as a result of a political decision and for political purposes. It is not currently realistic to form another

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	union of the type.
15	<i>Do you think it is necessary to create journalistic trade unions or not?</i>
15	a) It is necessary because we should regulate the relations between employers and employees,
	b) It is not necessary as the Union of Journalists of Armenia can take up that role,
2	c) It is unnecessary since it is not realistic,
1	d) It is unnecessary because in Armenia trade unions are not functional in any field,
4	e) It is necessary but such a trade union may become an organization serving the power and will not defend journalists.
16	<i>What specialists (apart from journalists) should higher educational institutions in Armenia train in order to fully meet the needs of the market and provide qualified specialists (come up with your own answers, without limitations)?</i>
Answer	<ul style="list-style-type: none"> • Specialists in media marketing. • Today we do not lack names for various specializations and departments in higher educational institutions, it is a different story that today we need professionals with narrow specializations, that is media managers, reporter-editors and technical support staff. • I do not think that in a market as small as Armenia higher educational institutions should prepare other specialists than now to work in the media. If the media operate in a business environment, ensure income, both the demand and the supply of few and needed professionals will shape up on the market. • Media managers, financial specialists, sales specialists, professionals to assess needs, specialists to conduct monitoring. • No hopes any more. • Officials, responsible for multimedia content. • Officials, responsible for the development of technologies. • TV producer. • TV manager. • TV editor • Media planner. • PR specialist. • An advertising expert. • Marketing expert. • Marketing experts, media planners, PR and advertising experts. • Media management specialists, media marketing experts, IT specialists. • Media managers. • Marketing experts and advertising agents. • SEO, SMM specialists. • Higher educational institutions that train media specialists should, in addition to journalists, train media managers, media sales agents, as well as content managers, capable of correctly assessing the needs of the media audience

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



	<p>and preparing proper media production.</p> <ul style="list-style-type: none"> • Makeup-designer. • Media managers, advertising market specialists. • Media lawyers. • Higher educational institutions in Armenia are supposed to train broad and free minded specialists as competent professionals, not scared of expressing their opinions, whereas in Armenia they cannot even train a literate journalist. • Narrow specialization journalists, for example, an economist-reporter, a reporter to cover local self-government issues, a photo-reporter, a reporter with environmental expertise and so on. • Media lawyers, media managers and media economists.
17	<p><i>What can and what cannot a graduate of a Journalism Department recruited by your editorial office do, or could you please share your ideas about this if you do not really work at a media outlet (please suggest your own answers, without any limitations)?</i></p>
Answer	<ul style="list-style-type: none"> • They cannot tell the important from the secondary when covering an event. They can prepare multimedia materials. • There is no common standard today. Sometimes you come across with such talented graduates who are able to replace experienced specialists. • I do not work at a media outlet. Mostly, graduates are not able to fully fulfill the functions that are conditioned by experience (this primarily has to do with ensuring accuracy of information and fact-checking). Besides, as a rule, we can see lack of general erudition. • Can bring press releases from press conferences. • Cannot fulfill any professional function. • In fact, the majority of these graduates unfortunately cannot do anything. • They cannot write or shoot a feature story. • In most cases they cannot write a lead. • They find it hard to use new technologies. • They have theoretical knowledge of journalistic ethics, but real life often makes them forget about it. • Can get an inferiority complex and disturb everyone, or fail to interact with anyone for a long time. • Cannot tell the major from the minor, make a concrete appointment, read their own texts in a human voice, edit, and keep in mind their previously made basic mistakes. • They are partially prepared, theory-wise. But they do not have any practical knowledge. • For Journalism Department graduates and some reporters journalism is confined to the mere registration of the fact or the event, sometimes they find it hard to do this minor thing properly, and they lack skills to go deeper into the matter. The largest gap, however, is the lack of literacy and comprehensive education, typical of not only Journalism Department graduates.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

- Cannot do research on the topic before writing the story, cannot understand the impermissibility of plagiarizing.
- The question is absolutely general and not concrete, for graduates of different higher educational institutions have different skills... All depends on both the quality of instruction, and the student and his/her motivation to study and internalize knowledge.
- My evaluation of the Journalism Department activities would be unsatisfactory: the graduates do not know the simplest principles of the profession. They do not know the concepts of fact checking, working with sources, and journalistic ethics. They cannot practically do anything, and we have to teach them everything anew.
- The graduate of the Journalism department (first tier degree - BA) can prepare materials in various journalistic genres (mostly news) and for various media. They have basic knowledge for shooting and editing and are ready for team work. They have an idea of the structure of the editorial office and the functions of the various links it involves and can fulfill some functions also outside the newsroom, too. The graduates of the second higher education tier - MA, not only have skills to prepare a report, but have deeper knowledge of and proficiency with various media tools (infographics, data visualization), can make a proper use of search systems, have basic skills in media text editing, have deep knowledge of technical and technological aspects, and have necessary knowledge on media management and organization of sales.
- Unfortunately, the curriculum is often unrelated to real life. Hence we have to teach them real reporting.
- It depends on the policy of the media outlet. The fresh graduate or student journalist may become a press conference reporter and be engaged only in running from one press conference to another, preparing short news item, or may become a skilled and experienced reporter covering events in a preferred specialized field, an investigative reporter, a radio or TV journalist.
- The graduates of the State University have theoretical knowledge, but they learn journalism in the course of actual work.
- From my own experience, the graduate of a technical university becomes a better journalist.
- Can write an intelligible text, translate, is well-rounded.
- Can hardly do anything, cannot even use a recorder, and often cannot type a text. They leave the higher educational institutions by writing stupid lectures, dictated by stupid lecturers, passing their exams and taking the diploma.
- Must know the principles of independent journalism, that is to say, what reporting is, what an analytical story is, what an interview is, what a press conference is, how the material should be processed and so on. Must be able to tell what contributes to his/her professional growth and which cases would be an infringement upon his /her journalistic independence. Must be able to be guided by the demand of the audience, at the same time not lowering the professionalism bar and in the meantime raising the level of the

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	audience through higher quality professional supply. Must know the norms of journalistic ethics and the fundamental provisions of media law.
18	<i>What can improve journalistic training in higher educational institutions (please select no more than two options)?</i>
5	a) Lecturers who have rich practical experience, but do not have much knowledge about teaching methodology,
2	b) Theoreticians who propose classical humanities education that ensures comprehensive knowledge,
4	c) Borrowing teaching practices from abroad (if possible, please specify what practices),
6	d) Increasing the attractiveness of lecturers' work at the expense of increasing the salary,
5	e) Excellent technical capacity and equipment available at Departments ,
11	f) Motivation on the part of the media to cooperate with probationers and interns from higher educational institutions,
5	g) Other options, in your own words, please. <ul style="list-style-type: none"> • Introduction of foreign curricula and involvement of foreign specialists in the education process. • At higher educational institutions journalism classes should be recruited by authoritative reporters, anchors, editors, directors, camera-people who will create their own studios or course labs (just as film and theater directors used to do at one time). But the famous reporter should not be compelled to deal with a group of students granted by the Dean's office. Rather, s/he should personally partake in the admission exams, and must recruit his/her course (of 5 or 659), and guide this group through the BA and MA programs, deciding on who should teach the other subjects, too. And this mentor should guarantee jobs for his/her graduates in his/her own media outlet (if not why was s/he recruiting this group)? 3 - 4 semesters are enough to get full journalistic education. • Lecturers who have rich experiences on the field and know of the modern teaching methods who prioritize the development of practical skills. This should be complemented by what was mentioned in point f). • Apart from theoreticians, the involvement of specialists from the field in the instruction process, preferably taking refresher courses on teaching methodology. • Determination and will and reduction of red tape in the higher education administration.
19	<i>What is the best way to raise the qualification of media company employees (please select no more than two options)?</i>
7	a) Workshops, held from time to time,
3	b) Systematically and by agreeing with media development organizations on a one-year program,
0	c) The workshops do not give anything, they simply distract from work,
3	d) There are, as a rule, few employees at editorial offices, and the administration does not welcome the idea of tearing employees from work for a

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	long period of time,
6	e) In-house qualification improvement through mentoring,
5	f) Even in the Armenian media market it is already possible to organize paid training for human resources, and of course, these training courses equip with practical skills;
4	g) It is much more effective to invite consultants from other places, if appropriate,
9	h) A professional should always be concerned about constant professional growth without relying on the editorial office,
1	i) Other options, in your own words, please.
	<ul style="list-style-type: none"> The independence of media companies and real reporting will by itself increase the requirement for better professional quality among employees.
20	<i>How many young professionals (and of what profession) did your media outlet hire in 2012? How many of them have continued working with you into 2013 (the question should be answered only by media representatives)?</i>
Answer	<ul style="list-style-type: none"> We cooperated with about a dozen young journalists last year. Two of them have continued working with us this year. Besides, we are cooperating with 4 more young reporters, to be more precise, four young people with journalistic education. 16, 10 of which continue working with us. 40 young people were hired by our outlet in 2012, and 30 have stayed with us in 2013. Almost none, we had a couple coming in to cover up vacancies. We hired a young specialist from the International Journalism Department from Brusov University, but she is not working with us anymore. I am not a media representative. About 40 journalists. And the vast majority of them continues to work with us. I am not a media representative. Two people - a creative director and a reporter. Both are still working with us. Four reporters, two have stayed with us. 6 reporters, 6 have stayed.
21	<i>How many young specialists (and of what profession) did your company (enterprise, organization) hire in 2012? How many of them continue working with you (the question is not meant for media representatives)?</i>
Answer	<ul style="list-style-type: none"> The vacancies are filled in compliance with the RA Law on Civil Service. A young specialist was hired in 2012 who continues to work with us also in 2013. 6 advertising specialists in 2012 and 1 in 2013. 2 reporters and a producer. We did not hire young specialists in 2012. I am not an organization representative.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	<ul style="list-style-type: none"> • 13 specialists were hired, only 4 of which quit in 2013. • 2 specialists, one is a journalist and the other is a lawyer by profession. • If we focus on the media department, we have 1 marketing specialist, and the organization has a total of about 100. • One and this person continue working with us.
22	<i>Is there an employee (Are there employees) at your organization who is (are) responsible for the selection and training of the staff members?</i>
7	a) Yes, there is (are),
7	b) We would like to have one but we cannot afford it,
2	c) There is no such need: <ul style="list-style-type: none"> • The vacancies are filled in compliance with the RA Law on Civil Service. • No, even though this is quite desirable.
23	<i>What specialist's training (retraining) in higher educational institutions or dedicated workshops (training courses) will your company be willing to invest in?</i>
Answer	<ul style="list-style-type: none"> • A media marketing specialist. • The National Commission on Television and Radio implements its activities within the legally mandated authority. Personally I am ready to have a special lecture on a narrowly specialized topic of <i>Media Legislation</i> in both higher educational institutions and in the course of workshops (training courses). • The specificities of the organization do not allow for such a thing. However, our organization itself coordinates the specialists' training and retraining processes. • Of social advertising experts. • Journalists. • TV producers. • TV editors. • Media planners, marketing experts. • To refine IT skills. • Video editors, social network editors, journalists. • I am not an organization representative. • Script writers. • Advertising agents. • Fundraising specialists. • Journalists, camera men, advertising agents. • We periodically send our employees to be retrained. • A lawyer - an investigative reporter. • Sales and advertising agents.
24	<i>Does the RA legislation on media need amendments (improvement)? In what sections (please select no more than 4 options)?</i>
11	a) On broadcast media regulatory bodies,
12	b) On the transition to digital broadcast,

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

1	c) On the restriction for dissemination (filtering) of Internet content,
6	d) On the harmonization of regulation for the activities of traditional and new media,
10	e) On the protection of intellectual property (copyright),
8	f) On the defense of civil rights (defamation, insult, privacy, presumption of innocence),
7	g) On comprehensive liberalization, when the media is fully equalized with those fields of activity that do not need special regulation, and information disputes are settled by self-regulatory bodies,
2	h) Other options, in your own words, please. <ul style="list-style-type: none"> • Amendments to the RA Law on Advertising (the previous amendments are deficient). • There is a regular requirement to make amendments and eliminate gaps in the Law on Mass Media and other legal acts on the sector, however, to ensure the development and full representation of the sector, the media should be independent, hence fewer legislative constraints and more self-regulation is needed.
25	<i>What is the best way of ensuring the independence of the sector regulatory bodies and minimizing their role of a political censor (please select only one option, please)?</i>
10	a) The maximum reduction of their authority and transferring the licensing process of broadcasters onto the purely commercial plain,
2	b) Ensuring independence at the expense of political pluralism (creating broadcasting bodies after the principle of equal representation of the leading political forces),
3	c) The creation of regulatory bodies on the basis of civil (public) institutions - NGOs, funds, churches, trade unions (Please specify which institutions, adding to the list, if appropriate),
2	d) The creation of regulatory bodies with an immediate participation of international organizations,
3	e) Other options, in your own words, please. <ul style="list-style-type: none"> • I think it appropriate to mention that censorship is prohibited by law. We already have a model for creating an independent body, where both political forces and the public in the person of NGOs play a role. In any case, we could have a more profound study of the models used in European countries, for example, I am more inclined for the French model where the Commission is able to create equal conditions not only for TV and radio companies, but also for the whole media content. • To create an independent industry committee. • The role of the regulator (and it does not matter which kind - frequency regulator or any other) is becoming less and less important. At the moment, it is important for broadcasting media to be involved in the cable operators' packages and access of Internet channels. That is why I do not think that the regulator issue is important at all. It will be important for the upcoming 2

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	- 3 years, but no longer.
26	<i>What should the policy of copyright protection be targeted at in the media (please select no more than two options)?</i>
12	a) Toughening responsibility established by law, emphasizing the requirement of reproduction and hyperlinks on the Internet,
5	b) Toughening responsibility established by law, emphasizing the high level of financial compensation for all kinds of media,
3	c) Liberalization of requirements established by the law, considering the impossibility of effective control over reproduction,
11	d) Rely on the self-regulatory system of media,
0	e) Other options, in your own words, please.
27	<i>What can ensure the efficient enforcement of the RA Law on media (please select no more than two options)?</i>
8	a) The unification of media outlets through the formation of industry associations and consistently pursuing the advocacy of free and quality media interests,
14	b) Implementation of democratic reforms in the country within the European integration context,
7	c) Reinforcement of transparency and accountability in the public sector as a result of the development of social networks,
1	d) Other options, in your own words, please.
	<ul style="list-style-type: none"> • Self-regulation.
28	<i>What can the development of self-regulation mechanisms be based on in Armenia (please select no more than three options)?</i>
1	a) Searching for alternatives to litigations over information disputes,
6	b) The media's aspirations to win the confidence of the audience,
10	c) Differentiation between quality and "yellow," professional and "citizen" journalism markets,
1	d) Assistance to the relevant initiatives, offered by foreign donors,
9	e) Releasing media from political influences and their orientation towards the market,
1	f) Other options, in your own words, please.
	<ul style="list-style-type: none"> • Getting mutual assistance through consolidation. That is to say, the realization that if they play by the same rules, they can always rely on the assistance of their colleagues if they face any problems.
29	<i>What is necessary (and realistic) in order to regulate work relations in the media (please select no more than 3 options)?</i>
1	a) Tougher supervision on the part of Labor inspection and Taxing structures,
14	b) Creation of independent journalistic trade unions,
6	c) Creation of media employers unions and enrooting the practice of collective agreements,
11	d) Inclusion of provisions on journalistic ethics in work agreements,
2	e) Other options, in your own words, please.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



**EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON
MEDIA INDUSTRY IN ARMENIA**

	<ul style="list-style-type: none"> • Social security of employees. • They should primarily have work agreements and only after that think of including option d) in there. The problem is that quite a considerable majority of employees in editorial offices work without agreements.
30	<i>How do you think Armenian media is developing in terms of new technologies (please select no more than three options)?</i>
2	a) They are hopelessly lagging behind developed countries,
8	b) Within a year of emergence all technologies arrive in Armenia,
5	c) Within 3 - 5 years of emergence all technologies arrive in Armenia,
9	d) We would not lag behind if we had no financial issues,
7	e) Some technologies are inefficient for Armenia due to the volumes of the audience, it is impossible to ensure the cost recovery of content production,
3	f) Other options, in your own words, please. <ul style="list-style-type: none"> • Through compulsion by international structures. • The introduction and implementation of new technologies indirectly leads to the expansion of the freedom of media and deprives it of ideology, that is why the pace of Armenian media in terms of the introduction of new technologies is artificially kept at a low level. • The whole sector is based on Facebook.
31	<i>How do you think plagiarism affects the development of the Armenian media? Which perspective do you share (please select no more than two options)?</i>
1	a) It is impossible to fight against plagiarism, hence there is no need to waste efforts,
15	b) It is possible to fight against domestic plagiarism by means of corporate arrangements,
7	c) The state should fight against plagiarism and strictly punish those who disseminate unlicensed technological services and communication software,
1	d) Stealing content from foreign technological services and communication software does not affect the development of the Armenian technology market,
2	e) Other options, in your own words, please. <ul style="list-style-type: none"> • Plagiarism halts the development of media creativity. • Only part 2 of Option c), that is - "The state should fight against plagiarism and punish those who disseminate unlicensed technological services and communication software".
32	<i>What new technologies for the preparation, dissemination and consumption of media content have started to be applied in Armenia in the last two years? Please mention the novelties that you, as an editorial office, use when preparing materials and/or the ones that you apply as a consumer.</i>
Answer	<ul style="list-style-type: none"> • Two years ago we functioned as a purely traditional print media outlet which simply posted its materials on its website. While now we operate as an

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.



	<p>online media, which along with the print text also offers audio and video production. For example, when preparing our audio materials we use a novelty - Soundcloud.</p> <ul style="list-style-type: none"> • The provision of new services by mobile operators (TV and so on). • Particularly, multimedia materials, live-stream, Internet TV, social networks, this is what we use. • When preparing our materials we have started to involve ourselves in the story and have ceased to act as an observer. • We fully use the Internet in all its forms to disseminate. • We do not use any technologies to consume. • Multimedia, new possibilities due to upgraded equipment, interactive reporting. • Convergent newsrooms. • TV stations have started to provide quality live broadcasts. • Live-blogging from ongoing events. • Data visualizations, infographics. • Live broadcasts from sites through Skype. • GRP sales. • Dissemination of materials through social networks, triggering discussions through the networks, using videos on websites, organization of live broadcasts. This is what we use. • We have made a transition to the concept of a convergent newsroom, when media content is initially created as a multi-platform and a multi-formula media - video, audio, text and content to be disseminated through social networks, and so on. We have paid especially great attention to Internet video-streaming. • As a consumer - multimedia, infographics. • Online broadcasting, and as a result, shifting focus onto Internet users. • Transition to HD, and preparation of materials in HD quality. • Broadcasting onto mobile devices. • I am not a media outlet representative. As a consumer, I use various blog platforms, as well as various social networks. • Mobile apps. • In the last two years nothing new. • Preparation of video and image sequences and QR codes, publications in the newspaper and on the Internet. Connection between social network and the newspaper website.
33	<i>What technical skills do you think Journalism Department graduates should have?</i>
13	a) To shoot and edit, record and edit,
12	b) To prepare multimedia materials,
10	c) To have an understanding of data visualization and preparation of simple infographics,
11	d) To be able to post materials on websites on their own,
3	e) To be proficient in new and novel photography software,

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

EXPERT SURVEY BY DELPHI METHODOLOGY AS PART OF REPORT COMPILATION ON MEDIA INDUSTRY IN ARMENIA

14	f) To reasonably use Internet search engines,
3	g) Other options, in your own words, please. <ul style="list-style-type: none"> • Certainly, it would be nice for a graduate to have all these skills, but I think we should differentiate between journalistic-editorial and technical skills. • To create Internet media for posting their own work. • In fact, in the conditions of media transformations and the formation of convergent newsrooms the graduate of a Journalism Department should have all the above mentioned technical skills.

The project is implemented by Yerevan Press Club within the framework of *Alternative Resources in Media* project. The project is supported by the American people through USAID. The content generated within the project belongs exclusively to its authors and does not necessarily reflect the perspectives of USAID or the US Government.

