Made for minds.

Report • Regional Edition

The State of *Media Development*

Eastern Europe and Central Asia

DW Freedom • *The Media Development Think Tank*

Supported by the



Imprint

Publisher
Deutsche Welle
53110 Bonn
Germany

Published
August 2025

© DW Akademie

Responsible
Carsten von Nahmen

Author
Giorgi Jangiani

Editor
Dennis Reineck

Proofreading
Loveday Wright

Layout
Alexandra Schottka

Contents

Introduction 5

Regional context:
Eastern Europe and Central Asia 6

Methodology 7

PRINCIPLE 1
Ensure that assistance does no harm to public interest media 8

PRINCIPLE 2
Sufficient financial and other support 10

PRINCIPLE 3
Take a whole-of-system perspective on supporting the media and information environment 12

PRINCIPLE 4
Strengthen local leadership and ownership 14

PRINCIPLE 5
Improve coordination of support to the media and information environment 16

PRINCIPLE 6
Invest in knowledge, research and learning 18

Conclusion and key recommendations 20

Introduction

Since the OECD recognized media development as a key component of international development cooperation, DW Akademie has created a timely opportunity to assess whether this approach is working in practice. Following comprehensive research conducted in early 2025, DW Akademie presented its findings at the Perugia International Journalism Festival, offering a snapshot of the current state of media development and outlining existing monitoring mechanisms and policy tools to guide future support.

The State of Media Development report provides an overall sector assessment, helping both media organizations and donors identify where and how their engagement is most needed. It serves as a useful tool to understand how your efforts align with the OECD's six principles for effective media development—and where improvements in strategy and positioning may be required.

This follow-up report offers a regional perspective on **Eastern Europe and Central Asia**, shaped by engagement with local experts and responses to a survey completed by media professionals across the region. Structured around the OECD's six principles, the report begins by assessing the current landscape, identifying key challenges, and providing recommendations for both media organizations and donor communities.



© Rodrigo Abd/AP Photo/picture alliance

Russia's ongoing war in Ukraine destabilizes the region as a whole

Regional context: Eastern Europe and Central Asia

Media development support is especially critical in Eastern Europe and Central Asia—a region grappling with persistent political instability and economic hardship. Russia's ongoing war in Ukraine, Moldova's democratization efforts undermined by foreign influence and misinformation (FIMI), Georgia's drift toward authoritarianism, Armenia's promising yet isolated reform process, and Azerbaijan's centralized authoritarianism (Freedom House, 2025) all underscore the fragility of the region. Meanwhile, independent Russian and Belarusian media in exile face the added challenge of operating in underdeveloped media markets, further constraining the broader media and civic space.

Yet there are also encouraging signs. In 2025, **Armenia** has emerged as a regional leader in media freedom. **Moldova** has improved its position, despite ongoing polarization and notably **Estonia**, for the first time, has ranked second globally on the Press Freedom Index, setting a positive example for other former Soviet states.

Methodology

The data collection period ran from December 2024 to February 2025, providing a comprehensive baseline. The study employed a mixed-methods approach, combining quantitative and qualitative tools: For the State of Media Development Report, an online survey was distributed to a total of 203 GFMD member organizations and additional partners, and 76 key informant interviews were conducted with media professionals and experts worldwide, including independent consultants with deep knowledge of media development ecosystems. For the region Eastern Europe/ Central Asia, the findings below are based on a subset of ten key informant interviews and 13 organizations that participated in the survey from this region.

The quotes presented are taken from the interviews and have been anonymized. The diagrams and data draw on the State of Media Development data set. Appraisals of the Media Principles by the author follow a five point “traffic light” scale from red (“not fulfilled at all”) to dark green (“comprehensively fulfilled”).

It is important to note that the ongoing USAID funding withdrawal significantly impacted the media landscape during the research period. While this issue was addressed in discussions, it was not part of the project’s original design.

PRINCIPLE 1

Ensure that assistance does no harm to public interest media



Minimally fulfilled

Most results/data show that the principle is not met

The study found that media development organizations are generally equipped to integrate the "do no harm" principle into their operations. However, in most cases, this integration remains reactive and is not supported by deeper institutional policies or monitoring frameworks. This is reportedly caused by rapidly developing risk environments, which makes it harder for donors to conceptualize and implement "do no harm" in their programs, while already limited resources further restrict their ability to respond in ongoing projects.

> ***"Do no harm is understood differently across the region, and not all donors or implementers are aligned on how to apply it in practice."***

Interviews revealed that while some donors have **risk mitigation strategies** in place—often based on prior experience—formal **risk monitoring tools** remain limited. Despite country-specific differences, donors were often reported to prioritize project objectives over a broader application of "do no harm." This was evident in the lack of locally deployed tools for assessment and in limited attention to policies in areas such as gender, disability, equity, or human rights. Fewer than 50 percent of respondents reported any significant progress on these fronts at the policy level.

Interviewees emphasized the need for **donor consistency and long-term commitment** to address rapidly changing environments and support a more strategic, coordinated approach to media development. Given the region's diversity, a one-size-fits-all solution is not feasible. Instead, tailored strategies are needed—anchored in sector-led efforts to ensure cross-sectoral ecosystem sustainability. Currently, much of the sector remains slow to act, shaped by inherited conditions rather than proactive strategies or vision.



Media development projects and programmes are in urgent need of further support

What to do?

Inspiration for media development organizations

- If your organization lacks risk monitoring tools or strategies, reach out to GFMD or peer organizations for knowledge exchange—there are good practices available in the sector.
- Include safety and security indicators in the project design stage to proactively mitigate risks.
- When significant safety concerns are identified in a project, consider re-negotiating with the donor. Several organizations reported that funders were open to adjustments when well-justified.

Inspiration for donors

- Further invest in risk assessments and ensure their findings are integrated into funding calls and program design.
- Establish dedicated emergency response funds for media organizations under threat.
- Commit to long-term engagement. Move beyond issue-based support and focus on underlying structural problems that hinder sustainable media development.

PRINCIPLE 2

Sufficient financial and other support

Not fulfilled at all

All results/ data show that the principle is not met at all.

The study was significantly impacted by the USAID funding pause; most media professionals noted that financial support was already shrinking and insufficient. Beyond direct funding, other forms of support—such as strengthening institutional capacity, fostering enabling environments, encouraging cross-sector collaboration, and promoting a vibrant information ecosystem—remain underdeveloped and sporadic. Several interviewees expressed concern that emerging challenges, such as media business development, safety and security training, and legal threats (including SLAPP cases), have overstretched the capacity of editors and managers to focus on long-term sustainability or attract additional funding. As a result, resources are increasingly diverted away from core content production to cover these pressing needs.

Engagement from tech companies has also diminished. For some media, major platforms have withdrawn completely, while for others, they continue to play a vital role—covering up to 80 percent of an organization's annual budget and providing essential support for sustainability.

From a donor perspective, more than 50 percent of respondents identified media development as part of broader international development cooperation—particularly within governance, peacebuilding, and humanitarian programs. Notable positive examples mentioned were the Norwegian, Swedish, and Swiss governments, though efforts in some countries remain limited. Despite this recognition, media development is still rarely integrated into the major governmental level development agenda and is often treated as a standalone sector.

However, on an organizational level a few were positively highlighted.

- International Fund for Public Interest Media (IFPIM) was cited as a promising new actor helping to sustain public interest media.
- People in Need was praised for successfully integrating media support into its humanitarian work.

> ***"They may accept business development projects to secure salaries for some months, but this distracts them from content production.***



Media diversity helps citizens to get a variety of perspectives

The survey also asked local and regional organizations whether they were aware of **safety and security assistance programs**, such as relocation support for media professionals at risk. Alarmingly, 83 percent of respondents were unaware of any such donor-supported mechanisms. This lack of awareness is concerning in the time of rising authoritarianism and escalating conflicts that increasingly endanger journalistic safety. However, this result may also partly reflect the survey's limited outreach to media organizations that have already relocated due to safety and security issues.

Another significant gap identified is the lack of **legal and regulatory support**. Donor investment in reforming the legal frameworks that govern media operations—and in providing legal counsel to journalists and media organizations—remains minimal. (This gap is further reflected in principle 3, particularly the underfunding of media associations and media representatives within broader institutional structures).

> ***Legal support and advice to individual journalists—and to governments—is an underfunded yet valuable sector.***

One respondent also warned about the consequences of hostile legal environments:

"The country used to have many good media outlets, but in this kind of legislative environment [note: referring to Russian style "foreign agent" laws], they are all at risk of disappearing overnight."

What to do?

Inspiration for media development organizations

- Diversify funding sources and explore innovative partnerships, particularly with the private sector.
- Clearly communicate to donors and peers that media is a democratic institution, not a communication tool.
- Avoid fragmentation by reinforcing and supporting existing media institutions rather than duplicating efforts.
- Support freelancers with a long-term perspective—invest in their potential to build future media outlets.
- Prioritize audience needs in all stages of project design and implementation.

> ***There are likely some very good ideas that have not been funded simply because they've come from small organizations.***

Inspiration for donors

- Provide core funding to ensure stability and the long-term impact of media organizations.
- Pair financial assistance with diplomatic pressure, particularly in support of reform-oriented governments (e.g., through the Media Freedom Coalition).
- Conduct thorough media landscape analyses before launching new initiatives—account for market scale and sustainability when allocating funds.

PRINCIPLE 3

Take a whole-of-system perspective on supporting the media and information environment

Partially fulfilled

The data do not clearly indicate if the principle is met or not

In terms of the media and information environment, many interviews highlighted significant differences between media development organizations and media funders. While several interviewees from national and local organizations acknowledged that tools like needs assessments are widely used, some questioned the degree to which they genuinely inform funding priorities.

> ***"I would say that not all donor support is always driven by demand or actual on-the-ground analysis, but it would be better to see this reflected in their long-term strategic goals.***

Organizations such as Civitates, Fondation Hirondelle, GFMD, and the Media Development Investment Fund were mentioned as examples of actors promoting localized approaches, demonstrating strong expertise in local environments and engagement strategies tailored to specific needs.

On the media support side, donors were widely recognized as funding a broad spectrum of initiatives—ranging from digital production and startups to investigative journalism. However, media associations continue to struggle to secure funding. This highlights a donor focus on media production, often at the expense of legal and ethical standards and institutional support frameworks.

Interviewees also acknowledged improvements in **donor flexibility and adaptability** in response to rapidly changing environments. Many expressed a desire for more scalable funding mechanisms that extend beyond one-year cycles. Additionally, enabling environment priorities such as media literacy and education were widely supported—92 percent of projects reported including such components as cross-regional priorities.

The study also found that many media actors are aware of multi-stakeholder formats in which media are involved. However, they often feel underrepresented or inadequately engaged when it comes to articulating their role and contributions to these processes.



Figure 1: *Media contributions to the broader enabling environment*

> ***I understand why the EU, US, and many large funders tend to work with major international organizations—it provides stability and quality assurance. But if local intermediaries never get the support they need, you'll never develop sustainable local capacity.***

What to do?

Inspiration for media development organizations

- Check your blind spots and ensure that the broader enabling environment—including advocacy coalitions, journalistic associations, and media representative bodies—is not neglected.
- Acknowledge the sector's diversity by understanding the working realities of newer actors like influencers, podcasters, and content creators, and set clear criteria for meaningful partnerships.
- Engage in joint analyses by collaborating across the sector to conduct shared assessments and co-shape research agendas.
- Strengthen regional capacity to improve needs identification, track trends more effectively, and respond swiftly to changing dynamics.

Inspiration for donors

- Support hybrid and cross-sectoral models. Increase support for innovative organizations operating at sectoral intersections, such as bilingual platforms or regional partners of OCCRP.
- Fund sustainable digital solutions. Avoid fragmented, project-based funding. Instead, support stable, long-term innovation that addresses systemic problems—not just reinforcing solutions.
- Include prominent media actors in support strategies, recognizing that large, high-profile outlets also face resource gaps and are essential to sector-wide transformation.
- Engage proactively with policymakers and provide support to regulators, political parties, and legislative processes to foster enabling media policies.
- Support and strengthen media self-regulation to promote ethical journalism, build public trust, and reduce reliance on external oversight.
- Address emerging disinformation gaps as platforms like Meta withdraw from fact-checking initiatives, especially in regions like Eastern Europe.

> ***Donors need to be more aware of looking for opportunities for innovation in the field. They're probably not stressing it as an important aspect of their work. We need to change and develop things.***

PRINCIPLE 4

Strengthen local leadership and ownership

Overall fulfilled

Most of the results/data show that the principle is met

For local public interest media, prioritizing local ownership and leadership means donors offering them an active role across all phases of the project cycle—from design and implementation to monitoring and evaluation. In this regard, the study found positive engagement in most areas. One of the most encouraging findings across the region was that donors did not interfere in content production. As one respondent noted: "We've never experienced pressure on our content—that's a red line we don't cross."

Interviewees noted that philanthropic and regional donors often work directly with local organizations or embassies, either individually or in consortiums with regional partners. In contrast, for Official Development Assistance (ODA), local actors typically serve as co-applicants under international lead organizations. In some cases, calls for proposals even require that the lead applicant be based in a donor country, further exacerbating existing power imbalances.

"Every donor has preferences—if you apply with a large implementer, your chances of success are simply higher." This sentiment was repeated in multiple interviews, reflecting both frustration and acknowledgment of the current operational formula. However, in some cases, this was positively assessed since many smaller local organizations lack the infrastructure or experience to lead complex applications and therefore remain dependent on international partners.

> ***"We recognize the unique value of South-to-South exchanges and try to enable them whenever possible. In some cases, European or American understanding of media markets doesn't apply well to our context.***

Several examples of good practices were highlighted

- The Norwegian EEA Grants model was praised for appointing local intermediaries in each country who manage part of funding and program design, building local trust and capacity.

- IREX was recognized for effectively coordinating media donor groups across countries, helping align donor priorities with local needs.

- OCCRP was cited as a successful hybrid model—by providing a research desk, a data desk, and security support, the umbrella organization enables its partners to access these resources and focus on content creation.

The study also found that **54 percent** of surveyed organizations prioritize work with **underrepresented or marginalized groups**. Amplifying these voices and improving their access to reliable information remains a cornerstone of meaningful media development.

What to do?

Inspiration for media development organizations

- Involve local and regional partners in setting project priorities—not just in implementation after decisions have already been made.

- Establish stronger monitoring tools to track regional changes and respond to evolving local needs.

- Invest in capacity development; build skills through digital tools or resources that can be easily transferred or owned by local stakeholders.

- Prioritize channeling funding to partners over expanding central organizational structures.

Inspiration for donors

- Increase flexibility in funding to allow adaptation in response to local priorities.

- From ODA funding—whether direct or via international partners—guarantee a minimum percentage for local and regional organizations.

- Empower local organizations as lead applicants, not just sub-grantees.

- Avoid one-size-fits-all approaches by resisting the direct transfer of Global North practices; instead, rely on local expertise and context-driven assessments

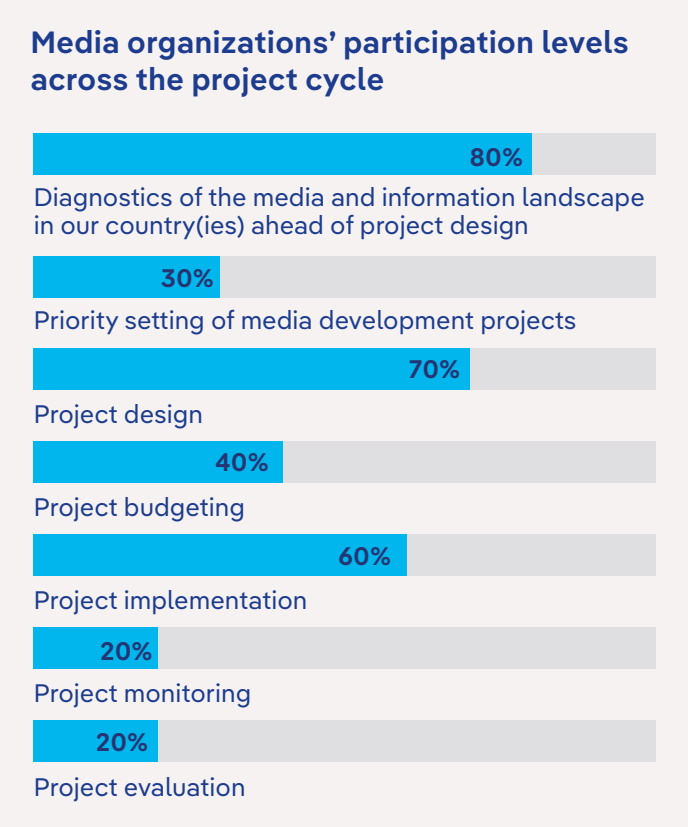


Figure 2: *Media organizations' participation levels across the project cycle*

PRINCIPLE 5

Improve coordination of support to the media and information environment

Overall fulfilled

Most of the results/data show that the principle is met

Over 40 percent of surveyed respondents cited donor and sector-wide coordination as active at the international level. Many expressed interests in this type of coordination going beyond multilateral platforms and being embedded at regional and local levels to ensure that efforts on the ground are aligned and non-duplicative. Also positively, more than **63 percent** of respondents reported meaningful participation in coordination activities, and **73 percent** stated that donors take these responsibilities seriously. Despite this, several challenges were identified—most notable among them was the administrative burden placed on local organizations. Interviewees described situations where donors pass down overly complex requirements set at the global level, expecting small grantees to comply despite a lack of capacity.

There is growing recognition that streamlining administrative processes is essential. As one interviewee put it: "Donors can choose to have either a very rigorous selection process with relaxed reporting afterward—or approve more projects with tighter monitoring. But trying to do both—difficult selection and difficult implementation—creates a heavy burden on the media and information environment."

> ***We hear complaints that the cost of running a project is higher than the grant itself.***

Positive examples of coordination

- **Global Forum for Media Development (GFMD):** Repeatedly praised for playing a critical role during key moments, such as the war in Ukraine, and in supporting coordination for media in exile.
- **SIDA:** Described as flexible and responsive: "After three months, we reviewed the project, found savings, and were allowed to reallocate funds. That flexibility was extremely helpful."
- **IREX:** Recognized for coordinating media development donor groups across countries, helping to align donor priorities with local needs.

- **OCCRP:** Cited for providing centralized services — research, data, and security — to its partners, allowing them to focus on content creation.

- **The Media and Journalism Research Center** and the **Media Founders' Forum:** both were acknowledged for strengthening coordination mechanisms within the sector.

> ***Coordination happens on multiple levels, but donor organizations often lack staff. In large OECD countries, media portfolios are managed by one person — or even half a person — which makes it hard to react to changing realities.***

What to do?

Inspiration for media development organizations

- Advocate for the inclusion of local and regional actors in coordination meetings.

- Learn from past crises and proactively share best practices so that responses to future crises are faster and more effective.

- Invest in strategic coordination networks, such as the Media Viability Manifesto (MVM), which unites many organizations around a common framework for joint action.

- Push for less paperwork and more flexibility, particularly for long-term projects, to allow better planning and responsiveness.

Inspiration for donors

- Invite local and regional partners to coordination platforms if not already included.

- Harmonize reporting requirements so that one set of documents (e.g. due diligence reports, financial audits) is acceptable across multiple donors.

- Consider basket funding for large-scale programs, requiring only one consolidated report for multiple funding sources.

- Increase local engagement by outsourcing and hiring local resources, particularly for monitoring, evaluation, and risk mitigation.

- Ensure due diligence is balanced. While transparency and accountability are essential, reporting obligations should be proportional and not overly burdensome.



The more actors in the media landscape, the more important coordination becomes

© Bernd Von Jutrczenka/dpa/picture alliance

PRINCIPLE 6

Invest in knowledge, research and learning

Partially fulfilled

The data do not clearly indicate if the principle is met or not

The study finds that while research and best practices are widely available—53 percent of respondents confirmed access—many local and regional organizations struggle to secure funding for conducting their own research. Most donor support is directed toward project-specific studies, leaving little space for broader or long-term research efforts that could inform sectoral strategy and innovation.

> ***"Valuable research—like media gap analyses, needs assessments, or technical capacity reviews—that used to be common five years ago are now slowly being phased out.***

This challenge applies across all levels of the media development sector and reflects deep disparities in access to research funding between international organizations and local actors. Local organizations often lack resources to conduct research and remain connected to ongoing developments and knowledge networks. As one interviewee noted: "We don't do lobbying or advocacy, but we know that bigger players spend time cultivating relationships and staying close to the sources of information. We just don't have the time or budget for that—and we know it hurts our ability to function."

However, several interviewees highlighted successful examples of research initiatives that have strengthened the sector:

- **The Media and Journalism Research Center**'s work on EU media funding and accountability was cited as influential and impactful.
- **The Center for International Media Assistance (CIMA)** was noted as one of the few actors that consistently funds knowledge-building efforts.
- One organization mentioned that they finance their research from internal revenue streams because donor funding is unreliable.

Unfortunately, interviewees also expressed concern that while research is often conducted, it is mostly part of outreach or learning agendas under individual project

deliverables. Deeper sectoral or structural analyses are increasingly rare. Also concerning was reports of some international partners limiting local researchers' roles or cutting research components altogether due to cost-saving measures.

There was mixed feedback on research outreach. Some found in-person exchanges valuable for deeper dives into methodology and learning what works. Others felt there were too many conferences, suggesting that face-to-face events should be reserved for strategic exchanges, with most information delivered via more efficient online channels.

Newsletters and mailing lists—especially those from GFMD and similar networks—were cited as the most important ongoing source of knowledge, followed by webinars and conferences. More detailed reports and articles are appreciated but require significant time that many staff simply don't have. As one media developer noted, "This is a time when we're focused on survival rather than growth or innovation. I hate to say it—but that's the reality."

> ***"It's not possible for us to conduct deep research annually like in other countries. We have to include it as a small part of a larger project just to make it feasible.***

What to do?

Inspiration for media development organizations

- Ensure policy-focused research to feed directly into stakeholder discussions, such as multi-stakeholder roundtables or public consultations.
- Avoid hoarding knowledge—build a common research and learning agenda, and share lessons learned across the sector.
- Invest in building and maintaining research capacities, especially in regions that have seen little or no research over recent years.

Inspiration for donors

- Make research and learning integral components of funded projects and prioritize them in program design.
- Require and support formats to disseminate research findings and help develop in-house expertise in research methods and data use.
- Advocate for increased media research funding in major frameworks such as the EU Multiannual Financial Framework (MFF) and other international aid instruments.



The media in the region demonstrate great resilience and adaptability

© Bernd Von Jutrczenka/dpa/picture alliance

Conclusion and key recommendations

This study is aimed at advancing the discussion on media viability through regional knowledge-sharing and the development of practical tools for monitoring media development. Grounded in the OECD's six principles, the research presents a well-structured, scalable progress monitoring framework that can inform global efforts to strengthen media ecosystems—especially in regions where democratic institutions and press freedom are under increasing pressure.

The report highlights both urgent challenges and emerging opportunities in Eastern Europe and Central Asia—a region grappling with financial instability driven by the Russian war in Ukraine, political manipulation, declining support from tech platforms, and the potential loss of decades of accumulated human and intellectual capital in the media sector. These challenges are further compounded by growing polarization, opaque platform-dominated markets, and increasingly repressive legislation. As a result, many media organizations are being forced into untenable choices between defending press freedom and investing in innovation and content production.

Despite these pressures, the study emphasizes the resilience and adaptability of local media actors. Donor support remains meaningful in key areas such as institutional strengthening, coordination, research/learning and promoting local ownership. However, the report stresses that financial support alone is not enough—it calls for sustained, principled, and coordinated engagement. As one interviewee noted, "We don't want to end up in a situation where we're forced to sacrifice one principle over another—but in this region, that's already happening."

While panic is not a strategy, inaction risks deepening the crisis. This report provides clear guidance for donors and implementers to reinforce media ecosystems and protect public interest journalism.

If we were to summarize the key recommendations of this report, they would be:

- **Ensure sustainable core funding:** Core support is essential to respond to crises and reduce reliance on politically influenced or commercially driven content.
- **Invest in long-term tech innovation:** Fragmented, short-term digital investments fall short. Donors must coordinate support for scalable, sustainable digital strategies and help reclaim advertising revenue.
- **Address local media gaps:** In many areas, television remains dominant while digital capacity lags. Fund initiatives that reinforce local democratic discourse and reduce polarization.
- **Strengthen legal and safety protections:** Small and exiled media face legal threats and security risks. Long-term investment is needed in legal reform, journalist safety, and operational resilience.
- **Prioritize local leadership and inclusion:** Donor reliance on international actors often sidelines capable local organizations. Local voices must be centered in strategy, funding, and implementation.

Finally, it's worth noting that the regional findings are based on a focused but insightful sample: 13 organizations from Eastern Europe and Central Asia participated in the survey (as part of the global survey), alongside 10 key informant interviews. Despite its limited scope, the report offers a solid foundation for future assessments and strategic agenda-setting in media development.

DW Akademie

DW Akademie is Deutsche Welle's center for international media development, journalism training and knowledge transfer. Our projects strengthen the human right to freedom of expression and unhindered access to information. DW Akademie empowers people worldwide to make independent decisions based on reliable facts and constructive dialogue.

DW Akademie is a strategic partner of the German Federal Ministry for Economic Cooperation and Development. We also receive funding from the Federal Foreign Office and the European Union and are active in 60 developing countries and emerging economies.

DW Freedom-Newsletter
dw.com/freedom

Follow DW Akademie on

akademie.dw.com