**CENTER FOR
MEDIA, DATA
AND SOCIETY**

CEU SCHOOL
OF PUBLIC
POLICY

Media Influence Matrix: Georgia

Methodology

This report is part of the Media Influence Matrix project initiated by the Center for Media, Data and Society (CMDS) and run as part of the Media & Power Research Consortium.

The country reports in the Media Influence Matrix series aim to research the changing landscape of:
- government and policy space, with a focus on the changes in the policy and regulatory environment;
- funding, with a focus on the key funding sources of journalism and the impact on editorial coverage;
- technology in the public sphere, with a focus on how technology companies, through activities such as automation and algorithm-based content distribution, impact news media and journalism.

The research focuses on news media, including newly emerged players. The study is neither aimed at exhaustively mapping the entire media industry nor is it intended to target specific media sectors. Instead, it maps the most popular and most influential news media on a country-by-country basis and analyzes their changing relations with politics, government and technology companies.

Researchers are collecting data and information following a common methodology and set of research guidelines (*See Methodology & Research Guidelines in Appendix II below*). The analysis in these reports is carried out by researchers with experience in the country, under the guidance of a team of editorial supervisors and experts. The reports are reviewed by a team of experts selected by our advisory board.

For each country report, a list of sources used in each chapter of the report is available. In the categorization of technology companies in all country reports we use the methodology of the Ranking Digital Rights project, which divides companies in two groups. The first group, internet and mobile, includes the so-called "mobile ecosystems," companies that create mobile devices and products. In the second category, telecommunications companies, we include service operators that offer connection and access services such as voice, data or cable connections.

DATA AND INFORMATION COLLECTION FOR THE GEORGIA REPORT

The report is based on:

- Data and information collected in the period June 2018-April 2020 following a common set of research guidelines (*See Methodology & Research Guidelines in Appendix II below*)
- We conducted for this project interviews with 20 journalists and media experts based in Georgia. The interviews were conducted via Skype between July 2017 and April 2018, referred to in the list of sources below as "Media Influence Matrix Georgia: Journalists Survey" (*see the list of interviews in Appendix I*)

DETAILED SOURCES OF INFORMATION USED FOR THE GEORGIA REPORT:

GOVERNMENT, POLITICS AND REGULATION

LEGAL OVERVIEW

Legal analysis of key laws affecting news media and journalism

REGULATORY AUTHORITIES

Analysis of the regulatory environment in Georgia focused on the following research questions:
a). What have been the key changes in regulation of news content in the past 5-10 years?
b). Who are the key influencers and most powerful institutions in regulation of news content?
c). How transparent is the regulatory process when it comes to news media?
d). What impact do these influencers have on news media and journalism?

Operational Aspects

Broadcast Media and Frequency Spectrum

Remit and Tasks

- Documents and reports from Georgian National Communication Commission (საქართველოს კომუნიკაციების ეროვნული კომისია) and the report on Georgian media landscape from the Medialandscapes.org

Board Composition

- Documents and reports from Georgian National Communication Commission (საქართველოს კომუნიკაციების ეროვნული კომისია) and reports from Transparency International Georgia.

Funding

- Documents and reports from Georgian National Communication Commission (საქართველოს კომუნიკაციების ეროვნული კომისია), GNCC - Analytical Portal, and reports from Transparency International Georgia.

Internet Regulators

- Documents and reports from the Office of the Personal Data Protection Inspector of Georgia (პერსონალურ მონაცემთა დაცვის ინსპექტორის აპარატი)
- Analysis from Georgian think tanks
- Documents and reports from the Institute for Development of Freedom of Information (IDFI) and other documents.

Data Protection Regulators

- Documents and reports from the Office of the Personal Data Protection Inspector of Georgia (პერსონალურ მონაცემთა დაცვის ინსპექტორის აპარატი)
- Documents and reports from the Institute for Development of Freedom of Information (IDFI) and other documents.
- Data from industry associations

Decision-Making Process

Key Decision-Makers in Regulation and Policy-Making

- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Georgia: Journalists Survey

Transparency of Decision-Making in Media Regulation

- Documents and reports from Georgian National Communication Commission (საქართველოს კომუნიკაციების ეროვნული კომისია)
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Georgia: Journalists Survey

FUNDING JOURNALISM

SOURCES OF FUNDING

Analysis of the key trends in funding journalism focused on the following research questions:
a). What were the main changes in funding news media and journalism in the past 5-10 years?
b). Who are the key funders and owners of news media and journalism?
c). How big is the role of government in funding news media?
d). How are sources of funding affecting independent reporting?
e). Are there any policy implications for journalism funding?

Popular News Media

- Industry reports and statistics: TVMR Georgia, TRI Media Intelligence, TNS Market Intelligence Caucasus
- Corporate reports
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Georgia: Journalists Survey

Influential News Media

- Industry reports and statistics: TVMR Georgia, TRI Media Intelligence
- Corporate reports
- Georgian Advertising Market from Transparency International Georgia.
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Slovakia: Journalists Survey

KEY FUNDERS

Non-Governmental Funders

- Industry reports and statistics: US embassy, Open Society Georgia
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Slovakia: Journalists Survey

Government Funding

- Government budget records
- Public Broadcasters' Annual Reports and other documents
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Georgian Think Tank Reports and statements
- Media Influence Matrix Georgia: Journalists Survey

TECHNOLOGY, PUBLIC SPHERE AND JOURNALISM

Analysis of the key trends in technology and journalism focused on the following research questions:
a). What are the main changes in news content consumption driven by new technologies?
b). Who are the largest, most influential technology companies?
c). How are the power relations between technology companies and government?
d). How do technology companies influence news media and journalistic content?

TECHNOLOGY OVERVIEW

- Data and statistics from the National Communication Commission (საქართველოს კომუნიკაციების ეროვნული კომისია)
- Web data and statistics from StatCounter
- Data and information from sources at Facebook, Twitter and Google
- Web data and statistics from Socialbakers

ROLE OF TECHNOLOGY IN MEDIA AND JOURNALISM

Overview and Profiles of Key Players

- Methodology of the Ranking Digital Rights project
- Reports from Georgian think tanks
- Corporate reports
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Georgia: Journalists Survey

Technology Companies & Government

- Documents from the Revenue Service of the Ministry of Finance,
- Media Sustainability Index (MSI) Georgia from the International Research and Exchanges Board's (IREX)
- Media Influence Matrix Georgia: Journalists Survey

Technology Companies & Media

- Data and statistics: Socialbakers,
- Data and information from sources at Facebook
- Media Influence Matrix Georgia: Journalists Survey

APPENDIX I

Georgia: Journalists Survey

Media professionals and journalists interviewed for the report

- Nata Dzvelishvili – Executive Director, Georgian Charter of Journalistic Ethics
- Zviad Koridze – Media expert
- Lasha Tugushi – Chairman, Liberal Academy-Tbilisi
- Natia Kuprashvili – Head of the Georgian National Platform, EU Eastern Partnership Civil Society Forum
- Tamar Kintsurashvili – Director, Media Development Foundation (MDF)
- Mamuka Andguladze – Media Program Manager, Transparency International Georgia
- Maya Mateshvili – Program Director, Georgian Media Partnership Program (GMPP)
- Mariam Gogosashvili – Head of Media Program, Georgian Young Lawyers Association
- Salome Tsetskhladze – Project Assistant, Transparency International Georgia
- Giorgi Isakadze – Editor-in-Chief, Forbes Georgia
- Paata Gaphrinashvili – Director, Factcheck.ge
- Mzia Amaglobeli – Editor-in-Chief, Netgazeti.ge
- Leliko Mirijanashvili – Head of Sales, Forbes Georgia
- Otar Merabishvili – Head of Sales, Palitra Media
- Konstantin Batmanidi – Head of Sales Department, TV Imedi
- Zuka Gumbaridze – Head of Sales Department, TV Formula
- Dimitry Tikaradze – Director, ClipArt
- Hatia Jinjikadze – Head of Media Support Program, Open Society Georgia
- Nino Gogoladze – Executive Director, TVMR GE, Nielsen Television Audience Measurement's official licensee
- Nino Makhviladze – Media Professor, Georgian Institute of Public Affairs

APPENDIX II: MEDIA INFLUENCE MATRIX

Methodology and Research Guidelines

GOVERNMENT, POLITICS AND REGULATION

LEGAL OVERVIEW

Based on desk research focused on legal reports, analysis of statutes and legal acts, collect information to describe the main laws that affect news media and journalism, identifying the positive and negative impact of these laws on independent media.

REGULATORY AUTHORITIES

Operational Aspects

Broadcast Media and Frequency Spectrum

Remit and tasks

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most media-relevant tasks of the regulators involved in broadcasting.

Board composition

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, as well as articles in news media, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members; and to profile the members of the current board.

Funding

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

Print Media Regulators

Remit and tasks

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most relevant tasks of the regulators covering print media operations.

Board composition

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members and to profile the members of the current board.

Funding

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

Internet Regulators

Remit and tasks

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most media-relevant tasks of internet regulators, focusing on rules on distribution of online content.

Board composition

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members; and to profile the members of the current board.

Funding

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

If such regulators do not exist, describe what other institutions carry out similar tasks. If there are not such examples, do desk research focused on articles in the media and reports from meetings with experts and interviews with experts, to summarize the key arguments in favor or against regulation of internet content and any describe any plans to do so in the near future.

Data Protection Regulators

Remit and tasks

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most media-relevant tasks of the data protection regulators.

Board composition

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members; and to profile the members of the current board.

Funding

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

Other Regulators with Powers in News Media

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, but also articles in the media and industry reports, collect information to describe other regulators that have competences in the news media segment. They could be antitrust regulators, retail industry watchdogs, advertising self-regulating bodies, etc.

Key sources of information recommended:

For **Remit/tasks** and **Board composition**
Statutes and legal acts
Legal studies
Annual reports

For **Funding**
Government budget documents
Articles in the media

Decision-Making

Key Decision-Makers

Based on desk research that will include articles in the media, and reports by think tanks and policy institutes, as well as interviews with independent media experts and journalists, write short profiles of the key decision-makers in the media policy field, focusing on decision-makers working with the regulatory authorities described under the section Regulatory authorities. Focus on fact-based evidence of the power they exert in the policymaking area.

Transparency in Decision-Making

Based on desk research that will include articles in the media, reports by think tanks and policy institutes, and academic articles and studies, as well as interviews with independent media experts and journalists, describe the main mechanisms in place to ensure transparency of the decision-making process and how they function in practice.

Impact

Based on desk research that will include articles in the media, academic articles and studies, and existing surveys, as well as interviews with representatives of media companies, present case studies of regulatory decisions that directly or indirectly had an impact, both negative and positive, on media and journalism.

Key sources of information recommended:

For **Decision-making** and **Transparency**
Articles in the media, academic studies, reports by think tanks and policy institutes
Interviews with local experts and journalists

For **Impact**
Articles in the media, academic studies, surveys
interviews with representatives of media companies

INFLUENCERS

Internal

Based on desk research that will include articles in the media and investigative reports as well as interviews with independent media experts and journalists, describe the main influencers in the media policy field, focusing on the following categories (others can be included if relevant in the country), explaining also the key motivations for their interest in the regulatory process:

Industry Players

Companies (news media operators and media-related companies such as advertising and PR agencies and companies totally unrelated to media that exert influence on media regulators)

Civil Society

Civil society groups, including NGOs, professional associations, academic institutions and think tanks, religious groups, community media that influence the regulatory process

Personalities

Journalists, bloggers, artists or other celebrities that have an influence in the media policy and regulation

External

Based on desk research that will include articles in the media, academic articles and studies, reports by think tanks and policy institutes and research conducted by International bodies, describe international bodies, including intergovernmental organizations that can influence the media policy in the country and present cases where they concretely used this influence.

Key sources of information recommended:

For **Internal**
Articles in the media, investigative reports
Interviews with independent media and political experts, and journalists

For **External**
Articles in the media, academic studies and articles, reports by think tanks and policy institutes,
reports by international bodies

FUNDING JOURNALISM

SHIFTS IN JOURNALISM FUNDING

Consumption Trends

Based on data from reports and statistics issued by trade and professional bodies, describe the forms of media most used to consume news content (focusing on the shifts between television, radio, print and online consumption). Use data for the past five years or as far back in time as possible. The information collected here is used to find causal links between the shifts in consumption patterns and shifts in funding.

Popular News Media

In the first part of the chapter, based on data from reports and statistics issued by trade and professional bodies, articles in the media, and content analysis studies, a). **present** the media outlets in a table with audience data for the past five years (or as far back in time as possible) starting with the most popular form of media identified under Consumption trends; b). **analyze** the main shifts in audience share; and c). **describe** the main media channels in the country, focusing on their ownership and type of content, and highlighting any relevant biases, particularly ideological.

In the second part of the chapter, present the turnover and profit of the main media groups under each category (television, radio, print and online) for the past five years (or as far back in time as possible). You can collect these data from:
- Local trade registry or other economic databases in the country
- Annual reports of each company
- Direct requests made to the media companies
- Interviews with company representatives.

If data can't be found through any of these methods, researchers should look for other financial data (such as tax returns) that could help calculate the turnover and profit information.

Based on the financial data, and using more information from corporate annual reports and articles in the media, **analyze** the financial performance of the media companies focusing on their profitability, focusing on changes in the share of various funding sources (i.e. advertising, subscriptions, grants, donations, etc.) in the total budget.

Influential News Media

Based on data from reports and statistics issued by trade and professional bodies, articles in the media, and content analysis studies, a). **identify** news media that exert influence among specific groups of people, professions and communities (policymakers, business elites, community leaders, religious communities and any other relevant community in the country); and b). **present** and **analyze** them following the same guidance as in Popular news media.

KEY FUNDERS

Non-Governmental

Using data from advertising agency reports, surveys by industry bodies and professional associations, annual reports of philanthropic organizations and political parties, and articles in the media, present the total amount of funding spent in the media in the past five years (or as far back in time as possible) by non-governmental sources, including advertising (overall spend and largest advertisers), philanthropy (overall spend and largest contributions), donations (by political parties or other organizations), and other sources relevant in the country.

Government

Using data from state budget documents and analyses, reports by the national audit authorities, annual reports of public or state media, present the total amount of state expenditure in the media in the past five years (or as far back in time as possible), describing a). **the forms** in which the funding was allocated (i.e. license fees, allocations for public service media, state advertising or state subsidies); b). the institutions and people in charge of **deciding** whom to fund and the criteria used in selecting the recipients of public funding; c). **the main recipients** of the funding, with a focus on their editorial strategy.

Key sources of information recommended:

For **Consumption patterns**, **Popular news media** and **Influential news media**
Reports by trade and professional bodies, company annual reports, articles in the media
Interviews with media experts and representatives of media companies

For **Key funders**
State budget documents and analyses, reports by the national audit authorities, annual reports of public or state media, advertising agency reports, surveys by industry bodies and professional associations, annual reports of philanthropic organizations and political parties, articles in the media

TECHNOLOGY, PUBLIC SPHERE AND JOURNALISM

TECHNOLOGY OVERVIEW

Using local statistical offices and international organizations collecting such information, a). **present** data for the past five years (or as far back in time as possible) on telephone and internet penetration, and use of computer platforms, mobile phones, operating systems, browsers and social media, and b). **analyze** the main shifts in the use of technologies for media and communication.

ROLE OF TECHNOLOGY IN MEDIA AND JOURNALISM

Profiles of Key Players

Based on data from technology companies, technology market reports, trade registry data and articles in the media,
a). present the main communication tech companies in two categories as following:

Internet and mobile (marking the services they offer according as in the following table)

Company	Email service	Messaging and VoIP	Mobile ecosystems	Search	Social network & blog	Video & photo

Telecommunications (companies offering telecommunications services such as mobile telephony and internet connection services)

b). **profile** these companies under each category focusing on their: **audience** (number of users, products offered, etc.); **ownership** and **funding** (including data on turnover and profit for the past five years); and **local operations** (key staff, history of operations, etc.).

Tech and Government

Based on policy reports and analysis from think tanks and policy institutes, legal studies, articles in the media as well as interviews with social media and government representatives, describe the relation of the key tech companies (identified under *Profiles of key players*) with the government, referring to issues such as (but not limited to): a). **compliance** with local legislation and regulations; b). cooperation with government over **data handling**; c). **ownership** links between officials and government bodies and tech companies, and assess the impact of these interactions on news media and journalism.

Tech and Journalism

Based on academic studies, market reports, heuristic analysis of social media data as well as interviews with social media representatives and journalists, **describe** the relation of the key tech companies (identified under *Profiles of key players*) with media and journalists, referring to

issues such as (but not limited to): a). **mutual support** or other forms of cooperation with media outlets; b). **automation methods** including algorithms used in distribution of media content (with a main focus on disinformation); c). **financing** of media outlets by tech companies; d). **ownership** links between media outlets and tech companies; e). tech companies **policies** and **practices** related to access to content such as zero-rating, f). **content distribution**, with a focus on the most followed media outlets on key social platforms used in the country, and **assess** the impact of these issues on news media and journalism.

Key sources of information recommended:

For **Technology Overview**
Data from local statistical offices or international organizations (ITU, World Bank).

For **Profiles of key players**
Data from global social media, local technology market reports, trade registry data, articles in the media

For **Tech and government**
Policy reports and analysis from think tanks and policy institutes, legal studies, articles in the media
Interviews with representatives of social media and government

For **Tech and journalism**
Academic studies, market reports, heuristic analysis of social media data
Interviews with social media representatives and journalists