

Media Influence Matrix: Israel

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 ISRAEL REPORT

The report is based on:

- Data and information collected in the period May 2019-March 2021 following a common set of research guidelines (*See Methodology & Research Guidelines in Appendix II below*)
- Interviews with 16 journalists and media experts, mostly based in Israel. The interviews were conducted via WhatsApp calls or correspondence between July 2019 and April 2020, referred to in the list of sources below as “Media Influence Matrix Israel: Journalists Survey” (*see the list of interviews in Appendix I*)

DETAILED SOURCES OF INFORMATION USED FOR THE ISRAEL REPORT:

GOVERNMENT, POLITICS AND REGULATION

LEGAL OVERVIEW

Legal analysis of key laws affecting news media and journalism
Media Influence Matrix Israel: Journalists Interview Series

REGULATORY AUTHORITIES

Analysis of the regulatory environment in Israel focused on the following research questions:

- What have been the key changes in regulation of news content in the past 5-10 years?
- Who are the key influencers and most powerful institutions in regulation of news content?
- How transparent is the regulatory process when it comes to news media?
- What impact do these influencers have on news media and journalism?
- What is the role of civil society organizations in the regulatory process?

Operational Aspects

Broadcast Media and Frequency Spectrum

Remit and Tasks

- Official website of Cable and Satellite Broadcasting Council (CSBC)
- Official website of The Frequencies Committee and Ministry of Communication (MOC)
- Official website of The Second Authority for Television and Radio
- Official website of Israeli Public Broadcasting Corporation (IPBC)

Board Composition

- Official website of Cable and Satellite Broadcasting Council (CSBC)
- Official website of The Frequencies Committee and Ministry of Communication (MOC)
- Official website of The Second Authority for Television and Radio
- Official website of Israeli Public Broadcasting Corporation (IPBC)
- Official webpage of Privacy Protection Authority members on the Ministry of Justice portal
- Published journalistic reports and news
- Ministry of Communication reports
- Israel Democracy Institute publications
- Official Government decision publication

Funding

- Documents and reports from the Ministry of Communication (MOC)
- Official website of Cable and Satellite Broadcasting Council (CSBC)
- Official website of The Frequencies Committee and Ministry of Communication (MOC)
- Official website of The Second Authority for Television and Radio
- Official website of Israeli Public Broadcasting Corporation (IPBC)
- Hasadna, Workshop for Public Data (online)

Data Protection Regulators

- Published journalistic reports and news
- Media Influence Matrix Israel: Journalists Interview Series

Other Institutions with Regulatory Powers

- Knesset Official Website: Parliamentary Committees
- Israel Competition Authority (ICA) official website
- Israel National Cyber Directorate official Website
- Citizens' Empowerment Center in Israel (CECI) website: "A Decay of Ministerial Committees – Comparative Study" (in Hebrew), January 2016
- Published journalistic reports and news.
- Additional Literature: Gabi Siboni, Ido Sivan Sevilla, "Regulation in Cyberspace", INSS, Memorandum No. 190, April 2019

Decision-Making Process

Key Decision-Makers in Regulation and Policy-Making

- Media Influence Matrix Israel: Journalists and Media Experts interview series
- Published journalistic reports and news.
- Additional Literature: Dr. Assaf Shapira, "אזרחים בוועדות הכנסת"(Citizens in Knesset Committees), Parliament Vol. 66, 15 September 2010

Transparency of Decision-Making in Media Regulation

- Published journalistic reports and news

FUNDING JOURNALISM

SOURCES OF FUNDING

Analysis of the key trends in funding journalism focused on the following research questions:

- What were the main changes in funding news media and journalism in the past 5-10 years?
- Who are the key funders and owners of news media and journalism?
- How big is the role of government in funding news media?
- How are sources of funding affecting independent reporting?
- Are there any policy implications for journalism funding?

Popular News Media

- Israel Audience Research Board (IARB) reports and publications
- TGI Kantar Media reports
- Media Influence Matrix Israel: Journalists and media experts interview series
- Published journalistic reports, analysis, assessments and news
- Additional literature:
 - Roi Katz, DIGIT conference at IDC "סקר דעת קהל בנושא תקשורת דיגיטלית" (Public opinion Survey on Digital Media), Maagar Mochot, March 2018.
 - Sheps Marina, "נתונים נבחרים על אוכלוסיית עולי ברית המועצות-לשעבר" (Selected data on formerly SSSR immigrants) in "Hed, the New Ulpan", issue 106, Fall 2016
 - Manosevitch I. and Lev-On A., Local Media in Israel (in Hebrew), Media Frames, Vol. 12 (p. 1-28).

Influential News Media

KEY FUNDERS

Non-Governmental Funders

- Media Influence Matrix Israel: Journalists and media experts interview series
- Israeli Marketing Association reports
- Central Bureau of Statistics Israel reports
- Knesset Research & Information Center data

Government Funding

- IDF nationwide radio stations reports
- Published journalistic reports and news
- Knesset Research and Information Center report
- IPBC Financial Reports and official website
- Media Influence Matrix Israel: Journalists and media experts interview series

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

- Industry reports and statistics: Pew Research Center, Eurostat, World Bank, OECD, Speedtest, DataReportal, Statcounter
- Published journalistic reports, analysis, assessments and news
- Ministry of Communication official website and publications
- The Knesset Research and Information Center data and publications
- Israel Central Bureau of Statistics data (CBS)
- Additional Literature:
 - The Heth Academic Center for Research of Competition and Regulation, COLMAN: "Reform in the Israeli cellular Market," May 2019
 - Roy Goldsmith, "הפער הדיגיטלי ויישום המדיניות הממשלתית לצמצומו" (The digital divide and the implementation of government policy to reduce it), Knesset research and Information Center, 15 September 2020

ROLE OF TECHNOLOGY IN MEDIA AND JOURNALISM

Overview and Profiles of Key Players

- Bezeq media report
- Knesset research and information center
- Published journalistic reports and news

Technology Companies & Government

- Bezeq Digital Life Reports
- Socialbakers data
- Published journalistic reports and news

The Business of Misinformation

- A transcribed audio interview (in Hebrew) with Prof. Karine Nahon at the Dot.IL podcast of the Israeli Internet Association, "כיצד רשתות חברתיות משפיעות על העמדה הפוליטית שלנו?" (How social networks influence our political position?), 10 November 2020.
- Published journalistic reports and news.
- Additional literature:
 - Israeli Internet Association (ISOC) publication: "נייטרליות הרשת – הזווית הישראלית" (Net Neutrality – the Israeli Angle), 19 December 2017
 - Inbal Orpaz, "טכנולוגיות נגד פייק ניוז: כשל שוק או הזדמנות מפוספסת" (Fake news technologies: market Failure or missed opportunity?), INSS, 22 August 2019
 - Tehilla Shwartz Altshuler, "האמת על פייק ניוז" (The truth about fake news), IDI, 9 February 2020

APPENDIX I

Israel: Journalists, Media and Legal Experts Survey

Media professionals and journalists interviewed for the report

- Dr. Roy Peled - Haim Striks School of Law, College of Management
- Adv. Elad Man - Legal Counsel for Hatzlacha org and Chairman of the Seventh Eye Committee
- Dvora Zak - Research Manager for Israeli Audience research Board
- Nati Toker - The Marker
- Shuki Taussig - The Seventh Eye
- Eitan Kassif - Kantar Media
- Guy Yitzhak - Ifat Media Analysis
- Orna Adelberg Kasher - Head of Hebrew Dept. at the Government Press Office
- Guy Rolnik - Haaretz, The Marker
- Talma Biro - CEO, Israeli Marketing Association
- Liat Ziv - Former partner and Director of Strategy Geller Nesis Publicis
- Dr. Tehilla Shwartz Altshuler (Israel Democracy Institute)
- Dean Starkman - CMDS, Central European University, ICIJ
- Adv. Yoram Hacoen - CEO, Israel Internet Association,
- Dr. Haim Wismonsky - Director of cyber unit in the Israeli State Attorney's
- Adv. Shachar Ben Meir

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	Cloud Services
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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



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