

# FROM PUPPET TO POWERHOUSE

A Global Study of the Independence of  
State and Public Media



By Marius Dragomir and  
Astrid Söderström



# Authors

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## Marius Dragomir

Marius Dragomir is the Director of the Media and Journalism Research Center. He previously worked for the Open Society Foundations (OSF) for over a decade. Since 2007, he has managed the research and policy portfolio of the Program on Independent Journalism (PIJ), formerly the Network Media Program (NMP), in London. He was also one of the main editors for PIJ's flagship research and advocacy project, Mapping Digital Media, which covered 56 countries worldwide, and was the main writer and editor of OSF's Television Across Europe, a comparative study of broadcast policies in 20 European countries. He is now running the [Media Influence Matrix](#), a global research project looking into power relations and undue influence in news media and State Media Monitor, the world's largest study of state media. Marius has spent the past 15 years in the media research field, specializing in media and communication regulation, digital media, governing structures of public service media and broadcasting, spectrum management, and ownership regulation. He has authored expert studies and articles on journalism and media policies that have been published and translated in more than 60 countries. He started his career as a journalist some 25 years ago in his native Romania where he worked for several local dailies, radio, and TV stations. Since 1999, he has been working for English-language media.

## Astrid Söderström

Astrid Söderström is a freelance journalist and a Master's student at the University of Helsinki where she studies media and democracy in the Global Politics and Communication program. She has been a research intern at the Media and Journalism Center since 2021, most notably working on the State Media Monitor and the three State of State Media studies. In her university work, she has taken an interest in communication ethics, challenges to journalism, disinformation, and propaganda. Astrid is currently a Youth Ambassador in the RADAR – Raising Awareness on Disinformation: Achieving Resilience project.

## About Media and Journalism Research Center

The Media and Journalism Research Center is a media research and policy think tank that seeks to improve the quality of media policymaking and the state of independent media and journalism through research, knowledge sharing and financial support.

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# Introduction

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This study is an updated version of an analysis that focuses on the editorial independence of state and public media worldwide, first published in 2021. It is based on a typology introduced in the same year to research state and public media. The 2023 study covers a total of 157 countries, which is the same number as last year, but six more than in 2021 due to an increase in the sample of countries in 2022. The data used for the analysis was collected over the past seven years as part of the Media Influence Matrix project carried out by the Media and Journalism Research Center. The study also incorporates historical data collected by the paper's author, Marius Dragomir, through older research projects, including Television Across Europe and Mapping Digital Media (see *Methodology*).

The need for more sophisticated and nuanced research methods to capture the complexity of today's state and public media prompted the development of a new typology, which is the basis for this series of studies. We named this new taxonomy the State Media Matrix. It goes beyond the reductive dichotomy that distinguishes between state-controlled outlets (the worst) and independent public service media (the best). Instead, it aims to capture nuances related to the editorial performance of state and public media and how that performance is influenced by different geographical contexts, political situations, and economic factors in various periods of time.

The State Media Matrix proposes a classification of state and public media based on three key sets of factors that influence their independence: funding, ownership/governance, and editorial autonomy. The Matrix, which is illustrated in the figure below, was thoroughly explained in the study's first year[1]. The research behind this study can be accessed online via a regularly updated platform[2].

As in previous years, the goal of the 2023 study is to present the latest trends in state and public media globally, with a focus on how these operations are funded and managed, and on how their editorial autonomy is protected.

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[1] Marius Dragomir & Astrid Söderstrom. (2021). The State of State Media: A Global Analysis of the Editorial Independence of State Media and an Introduction of a New State Media Typology. Center for Media, Data and Society: Budapest. DOI: [10.13140/RG.2.2.33500.72321](https://doi.org/10.13140/RG.2.2.33500.72321).

[2] The database is hosted at [www.statemediamonitor.com](http://www.statemediamonitor.com).

## State Media Matrix: A Typology of State and Public Media

Predominantly state-funded	Control of governing structures and/or ownership	Editorial control	Model	Description	Performance
No	No	No	Independent Public Media (IP)	Public service media whose funding and governing mechanisms are designed to fully insulate them from government interference.	Highest level of independence
No	Yes	No	Independent State Managed/Owned Media (ISM)	Public service media not predominantly funded from state budget resources that are either owned by the state or whose governing bodies are controlled by the government, which, however, does not attempt to control their editorial agenda	Medium to high level of independence, yet potential danger of politicization of editorial agenda
Yes	No	No	Independent State Funded Media (ISF)	Public service media whose main funding source is the state, which, however, does not own them or control their governing bodies, and does not attempt to control their editorial agenda	Medium to high level of independence, yet potential danger of government interference with their editorial agenda as they financially depend on the state
Yes	Yes	No	Independent State Funded and State Managed/Owned Media (ISFM)	Public service media whose main funding source is the state, which owns them or controls their governing bodies without, however, attempting to control their editorial agenda	Medium level of independence, yet potential danger of becoming fully controlled by the state, which plays a central role in running and financing them.
Yes or No	No	Yes	Captured Private Media (CaPr)	Privately owned media outlets dependent to a large degree on the government for funding or other privileges (i.e. state advertising or public procurement contracts for other businesses run by their owners)	Lack of editorial independence as these media serve the interests of the government and businesses that support the government
No	Yes	Yes	Captured Public or State Managed/Owned Media (CaPu)	Public service or state-owned media not predominantly financed through state budget resources, where the state is using its status as owner and/or its control over the management of these outlets to influence their editorial agenda	Lack of editorial independence as these outlets are staffed by individuals loyal to the authorities
Yes	Yes	Yes	State Controlled Media (SC)	State media created as propaganda channels, a model typical for authoritarian regimes, or failed public media in which the government retains a significant influence, funding and owning them, controlling their management and closely supervising their editorial agenda	Lowest level of independence as these outlets are operated as state propaganda organizations, their editorial agenda being in most cases dictated by state authorities

Source: Marius Dragomir, 2021, revised in 2023 · Created with Datawrapper

# Key Findings

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In the past year, the government's control over state media has remained overwhelmingly strong, although there has been a slight decrease. According to the State Media Monitor, around 83% of the 592 state-administered media entities across 157 countries lack editorial independence. While this figure has decreased by one percentage point from the previous year, it still reflects an increase from the 80% recorded in 2021.

The share of media outlets categorized as state-controlled has slightly declined. These outlets, which are primarily funded, managed, and editorially controlled by the government, now make up approximately 76% of the 493 outlets lacking independence. This marks a decrease from the figure of 80% in the previous year.

The slight decrease in the incidence of government-controlled media can be attributed to the ongoing trend of media centralization pursued by several governments. This strategy involves consolidating multiple media outlets into larger entities, albeit in smaller numbers. A notable example of this can be observed in Morocco, where the government is currently in the process of merging numerous outlets under the state-controlled media outlet SNRT.

However, state and public media have a significantly larger and expanding outreach when their portfolios of assets are analyzed. According to the State Media Monitor, the combined ownership of these media entities amounts to nearly 6,200 media assets. This figure includes television and radio channels, print titles, news agencies, and news portals, but does not include the websites associated with their traditional media operations.

Over the past year, six media companies have experienced a downgrade in our matrix due to the loss of their editorial independence. These companies include RTA in Argentina, SINART in Costa Rica, Once in Mexico, CRTVG in Galicia, Spain, RTSH in Albania, and Czech Radio.

However, there have also been positive developments, with five outlets being upgraded from a category lacking editorial independence to one that now possesses it. These include the Central News Agency (CNA) in Taiwan, the public broadcaster RTCG in Montenegro, as well as three outlets in Slovenia - the public broadcast group RTVSLO, the news agency STA, and the news portal SiolNET (for more detailed information, please refer to the Regional Overviews).



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The situation of state and public media worldwide continues to be a cause for concern, as only 99 outlets currently hold editorial independence. This represents a decrease of three outlets compared to the previous year. Out of these, a mere 19 can be classified as independent public service media, which is considered the golden standard for media independence in all aspects.

It is worth noting that the majority of independent public media outlets, a total of 12, are located in Europe. Six Western European countries, namely Austria, Germany, Sweden, Switzerland, the United Kingdom, and the Netherlands, account for the presence of eight of these outlets. The remaining independent public media outlets in Europe are distributed across Southern Europe, with Portugal being the sole representative, and Central and Eastern Europe, with Czechia and Lithuania each hosting one outlet.

But even these outlets are not immune to pressures. Several independent outlets are facing relentless attacks, particularly from right-wing politicians and parties that oppose the autonomy of public service media. The funding model of ORF and BBC, the public service media in Austria and the United Kingdom respectively, is currently subject to ongoing pressures for change. Concerned advocates for public media worry that these shifts could jeopardize the continued existence of these outlets.

Additionally, Europe is currently grappling with a concerning surge in the number of captured media outlets, accounting for nearly a third of all such cases globally. A total of 36 media outlets have fallen victim to capture. Out of these, 25 are privately owned and predominantly controlled by oligarchic entities that maintain close ties with state authorities. These outlets unabashedly toe the government's line, leaving little room for impartiality. Worryingly, the number of such outlets continues to rise, with recent examples identified in Hungary and Turkey.

Furthermore, it is worth noting that Eurasia, Sub-Saharan Africa, Latin America, and MENA lack independent public media outlets, which is a clear sign of the growing divide between Western nations and the rest of the globe.

As war and conflict continue to escalate in Ukraine and the Middle East, concerns are mounting over the increasing government control of public and state media. This development is particularly worrisome as the world approaches a crucial election year in 2024.

## Global overview of state media by typology and number of media outlets, 2023

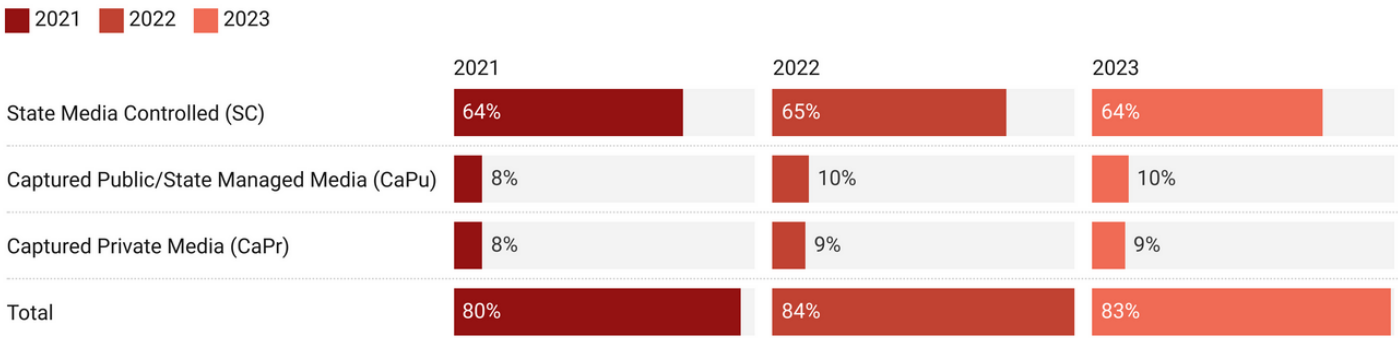
State Media Matrix: SC: State Controlled Media; CaPu: Captured Public/State Managed/Owned Media; CaPr: Captured Private Media; ISFM: Independent State Funded and State Managed/Owned Media; ISF: Independent State Funded Media; ISM: Independent State Managed/Owned Media; IP: Independent Public Media.

	SC	CaPu	CaPr	ISFM	ISF	ISM	IP	Total
Europe	24	11	25	30	5	10	12	117
Eurasia	52	5	6	2	0	0	0	65
Sub-Saharan Africa	107	13	1	3	0	0	0	124
MENA	51	17	14	3	1	0	0	86
Asia	93	13	8	3	0	3	5	125
Latin America*	50	2	1	5	7	0	0	65
NAAN**	0	0	0	3	4	1	2	10
<b>Total</b>	<b>377</b>	<b>61</b>	<b>55</b>	<b>49</b>	<b>17</b>	<b>14</b>	<b>19</b>	<b>592</b>

Note: The 2023 study included also two countries, Monaco and Luxembourg, which do not have any state-administered media outlets. \*Including some Caribbean countries \*\*North America, Australia & New Zealand  
Source: Media and Journalism Research Center • Created with Datawrapper

## Government control in state media

### Government control typologies as share (%) of total number of state media entities surveyed globally, 2021-2023

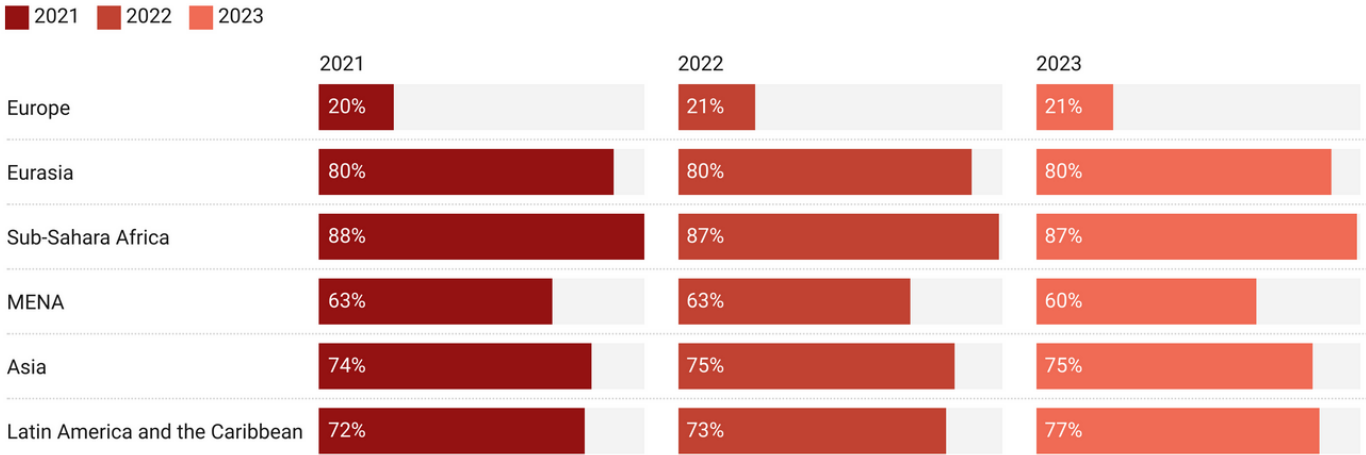


Source: Media and Journalism Research Center • Created with Datawrapper



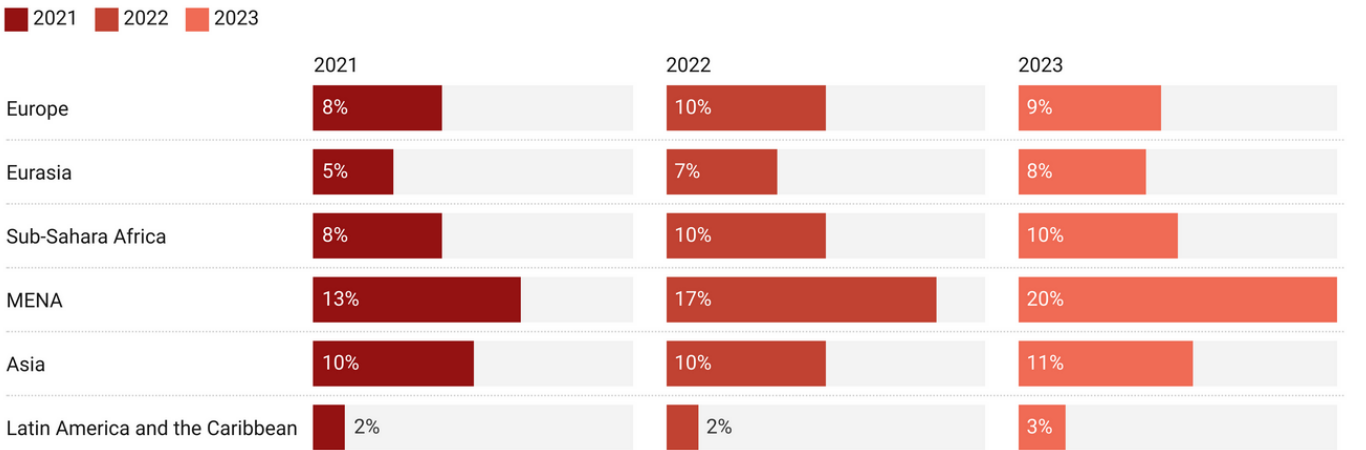


## State Controlled Media (SC) typology as share (%) of total number of state media entities surveyed in their region, 2021-2023



Source: Media and Journalism Research Center • Created with Datawrapper

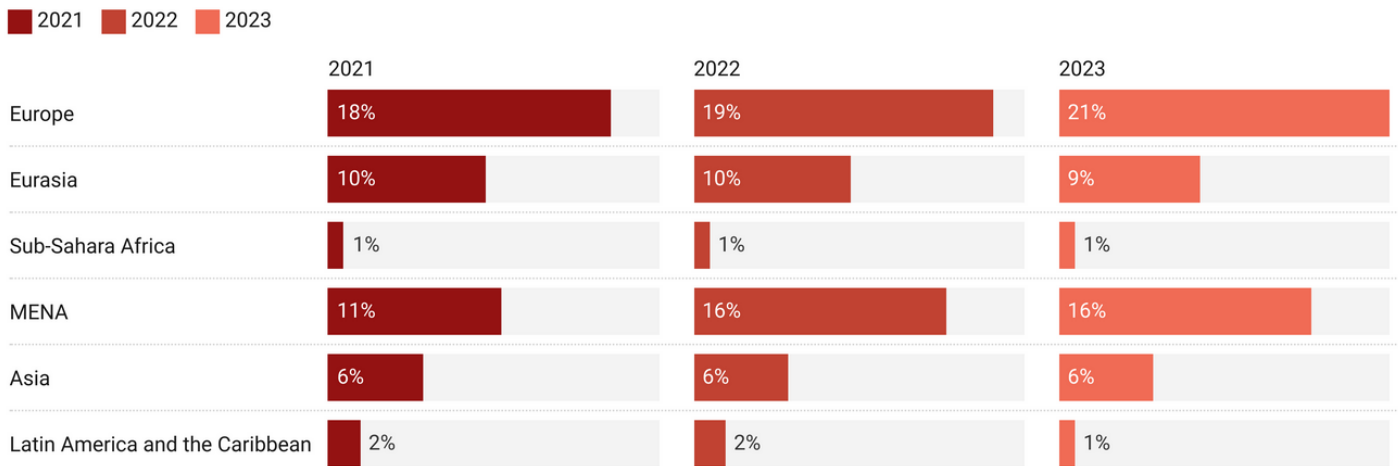
## Captured Public/State Managed/Owned Media (CaPu) typology as share (%) of total number of state media entities surveyed in their region, 2021-2023



Source: Media and Journalism Research Center • Created with Datawrapper



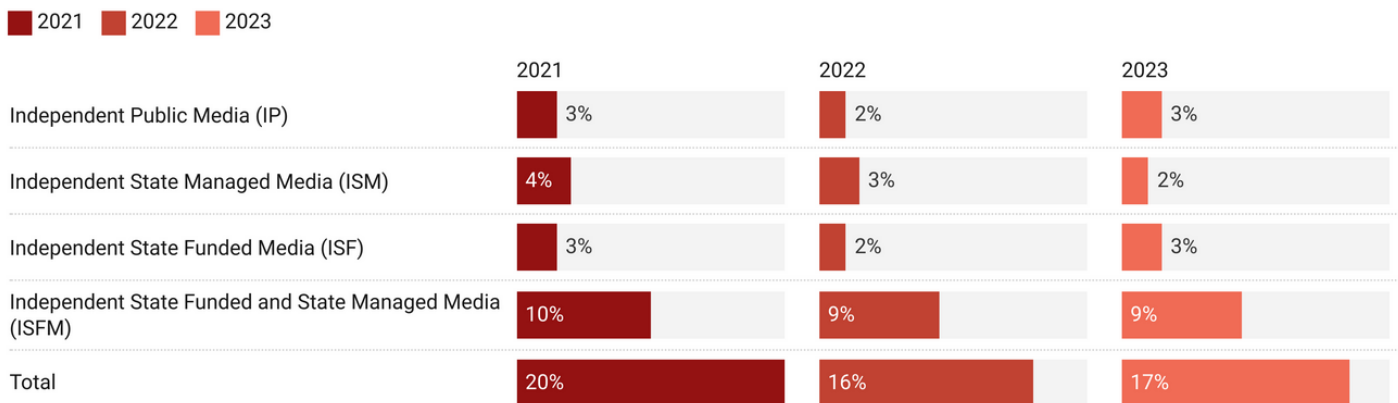
## Captured Private Media (CaPr) typology as share (%) of total number of state media entities surveyed in their region, 2021-2023



Source: Media and Journalism Research Center • Created with Datawrapper

## Editorial independence in state media

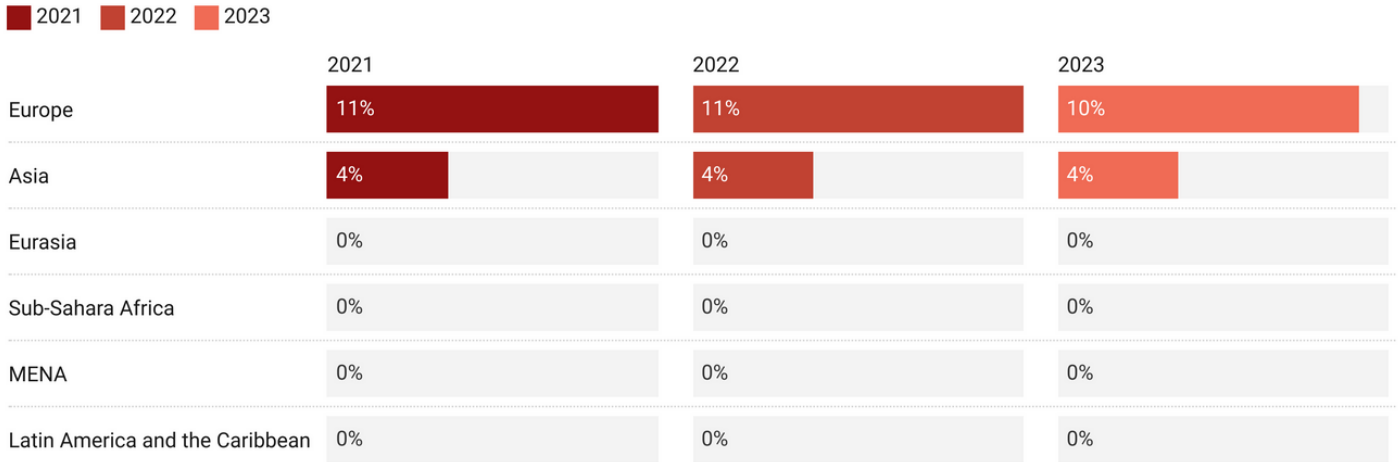
### Editorial independence typologies as share (%) of total number of state media entities surveyed globally, 2021-2023



Source: Media and Journalism Research Center • Created with Datawrapper

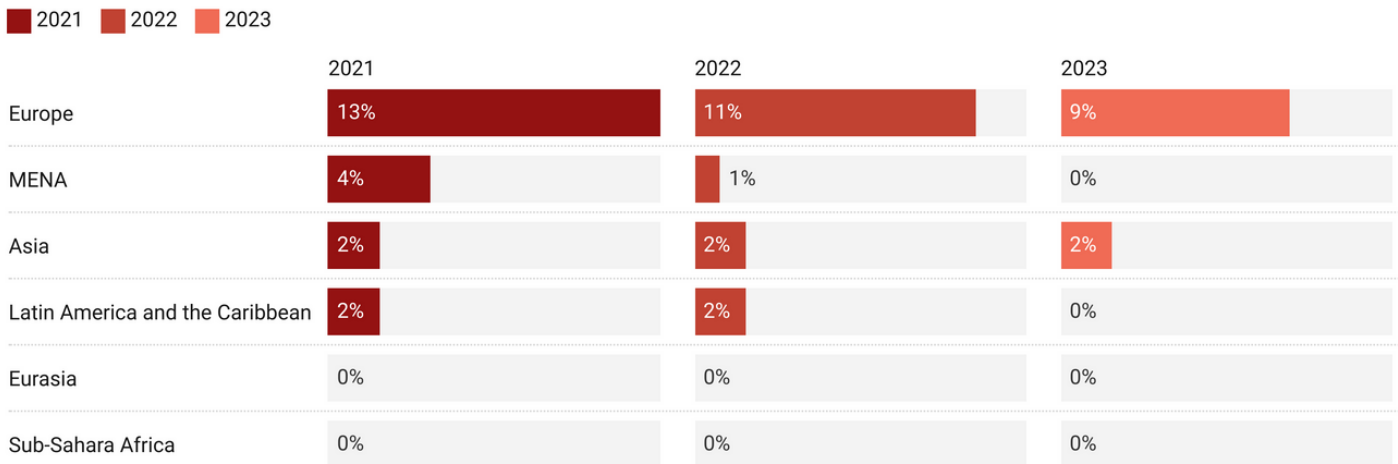


## Independent Public Media (IP) typology as share (%) of total number of state media entities surveyed in their region, 2021-2023



Source: Media and Journalism Research Center • Created with Datawrapper

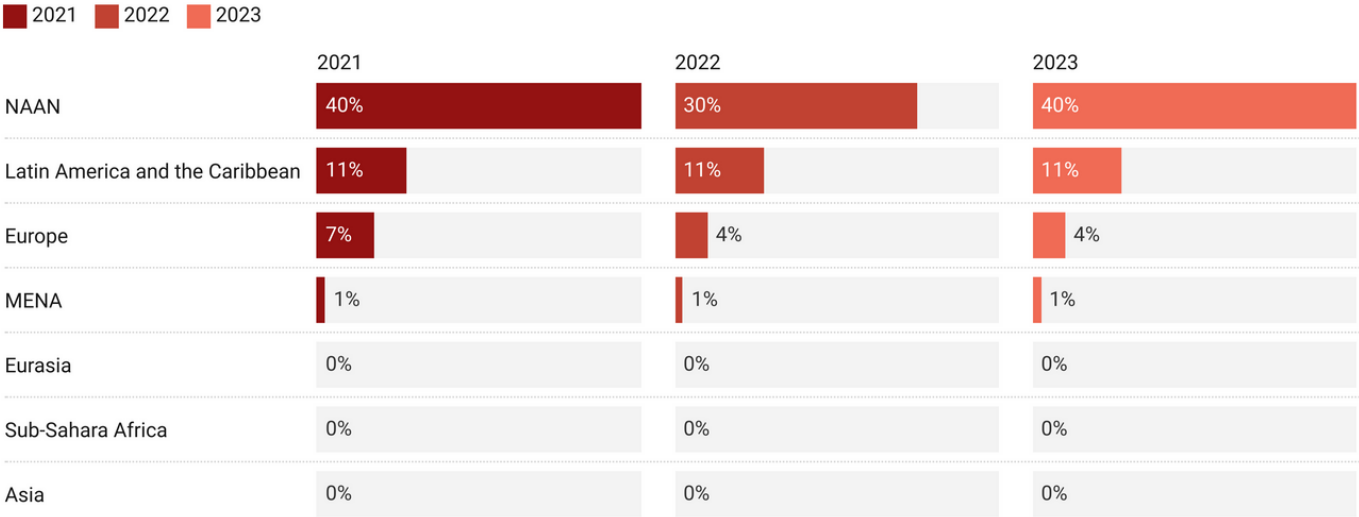
## Independent State Managed/Owned Media (ISM) typology as share (%) of total number of state media entities surveyed in their region, 2021-2023



Source: Media and Journalism Research Center • Created with Datawrapper

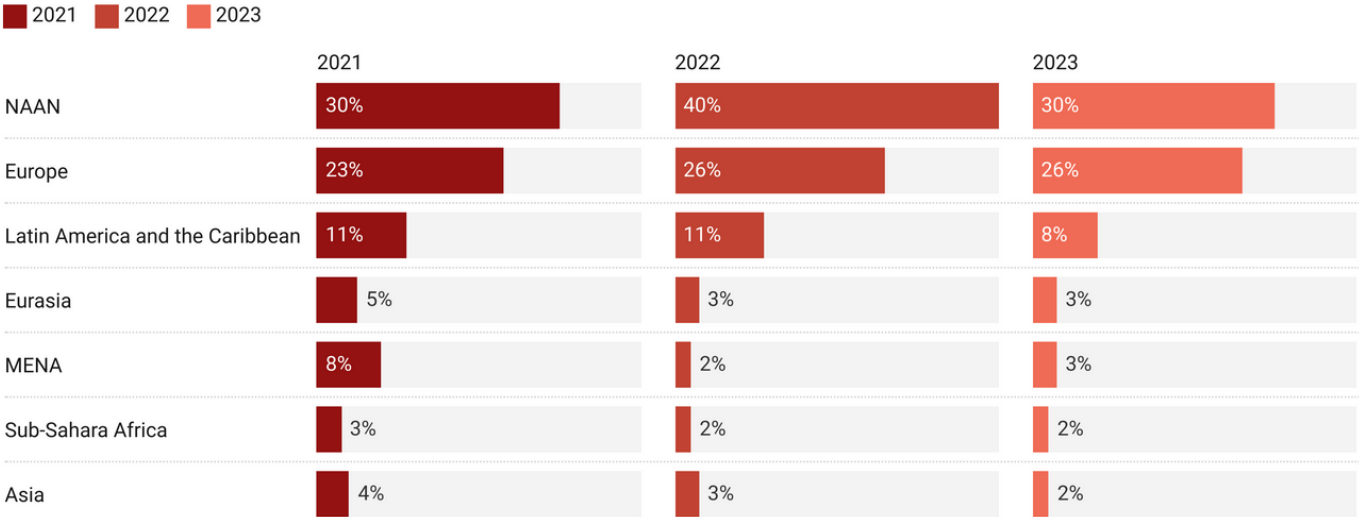


### Independent State Funded Media (ISF) typology as share (%) of total number of state media entities surveyed in their region, 2021-2023



Source: Media and Journalism Research Center - Created with Datawrapper

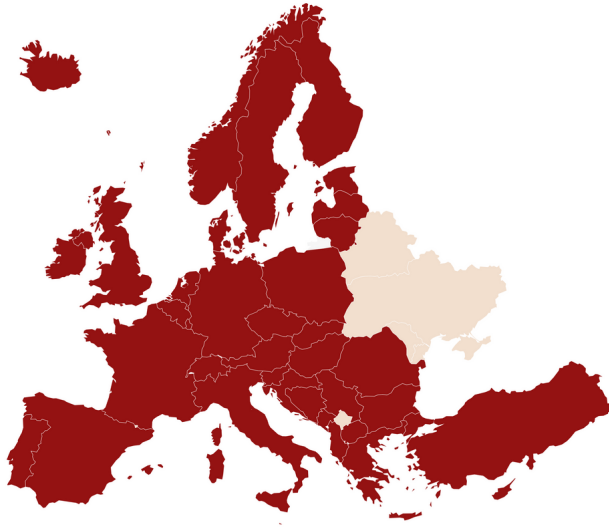
### Independent State Funded and State Managed Media (ISFM) typology as share (%) of total number of state media entities in their region, 2021-2023



Source: Media and Journalism Research Center - Created with Datawrapper

# Regional Trends

## Europe



When it comes to editorial independence, Europe continues to lead with the highest number of independent state and public media in the world. However, the share of independent public and state media has continued to decline in the past year. The combined share of the four models of independent state and public media in our matrix, in the total number of state and public media in Europe, has further slid to 49%, down from 50% in 2022 and from about 54% in the previous year, indicating a slight yet continuous deterioration. Hence, out of all 117 outlets mapped in Europe, a total of 57 are editorially independent[3].

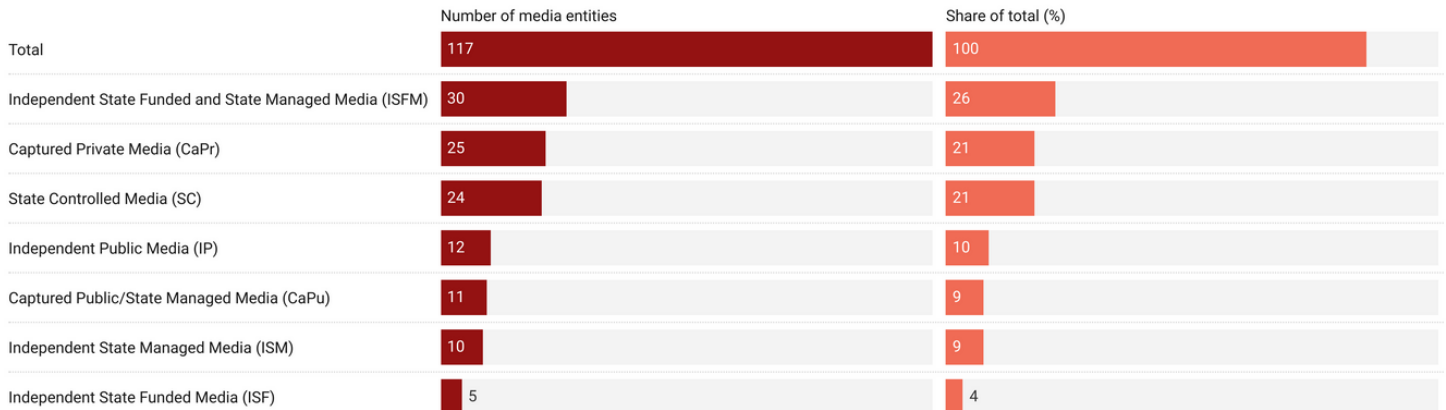
The independent state-funded and state-managed/owned media model (ISFM) remains the most popular in Europe, with a total of 30 outlets in this category. The European continent continues to be home to the highest number of independent public media systems in the world, with a total of 12 independent public media corporations operating in European countries.



[3] We also mapped Monaco and Luxembourg, two countries that do not have any public or state media. In Luxembourg, the private owned broadcast group RTL is receiving government funds to produce and air public service programming, which prompts various people to refer to it as a “quasi-public” broadcaster. Yet, RTL remains a privately owned, commercially funded media operation, not fitting the State Media Matrix. The country has no form of state-administered media.

## Overview of state and public media in Europe, 2023

■ Number of media entities ■ Share of total (%)



Source: Media and Journalism Research Center • Created with Datawrapper

During the past year, Europe has experienced both positive and negative developments.

By far, the most positive development was recorded in Slovenia. Following the loss by the conservative party of former Prime Minister Janez Jansa in the April 2022 elections, the country's public media began to experience better days. The newly installed government, led by Robert Golob, has adopted a series of legal amendments that helped the public broadcast group RTVSLO regain its independence from political parties and authorities. Another positive development was registered in Montenegro, where the public broadcaster RTCG has shown significant improvements in editorial independence. This prompted the European Commission to praise the station for its balanced editorial policy in its 2022 report on the country's progress towards EU membership.

On the negative side, three notable developments were monitored. First, Czech Radio, once hailed as an independent public broadcaster, has been tarnished by mounting evidence of censorship and editorial pressures faced by its journalists. A particular incident that grabbed headlines involved the station's refusal to air a podcast based on an investigation that the broadcaster itself had commissioned.

Meanwhile, RTSH, the public broadcasting company in Albania, has experienced a series of arbitrary dismissals of journalists following the appointment of new management in 2021. These dismissals have drawn sharp criticism from both local and international media experts, as well as NGOs.

Lastly, CRTVG, the public broadcaster in the Galicia region of Spain, has seen its independence gradually erode due to relentless attacks and pressures from the Popular Party (PP), which holds a majority in the regional parliament. Despite journalists' previous efforts to resist such pressures, the influence of the PP at CRTVG has grown, putting the broadcaster's independence at risk.

Europe continues to face a significant divide between its western and eastern regions. Out of the 12 independent public media outlets, eight are concentrated in Western and Northern Europe (for more information about the regional breakdown, please refer to the State Media Monitor Global List, available online)[4].

Independent public and state media in the West are also facing a multitude of risks, primarily stemming from relentless attacks by right-wing politicians. In Austria, for instance, the government is actively advocating for an amendment to the ORF act that would significantly alter the station's funding model. This proposed change would eliminate the license fee and potentially replace it with a household levy. Furthermore, the center-right Austrian People's Party (ÖVP), one of the ruling coalition parties, has also called for reductions in the Austrian broadcaster's budget. Similar pressures are evident in the United Kingdom, where the government is making plans to abolish the license fee by 2027. However, as of yet, no viable alternative solution has been put forth.

Despite facing such attacks, the public media in Western and Northern Europe continue to enjoy high levels of trust and produce high-quality programming. This is largely due to the presence of a robust civil society that staunchly opposes attempts by politicians and state authorities to manipulate their operations.

On the other hand, the state and public media in Central and Eastern Europe and Turkey are often seen as mere mouthpieces for the government. In fact, approximately 80% of all state and public media in this region lack independence, either being privately owned or fully controlled by the state.

However, there are a few exceptions to this trend, such as Czech Television, the public broadcasters in the Baltic states (LRT in Lithuania, ERR in Estonia, and Latvian Radio and Latvian Television), the Slovenian public broadcaster RTVSLO, the public broadcaster RTCG in Montenegro, and several independent news agencies.

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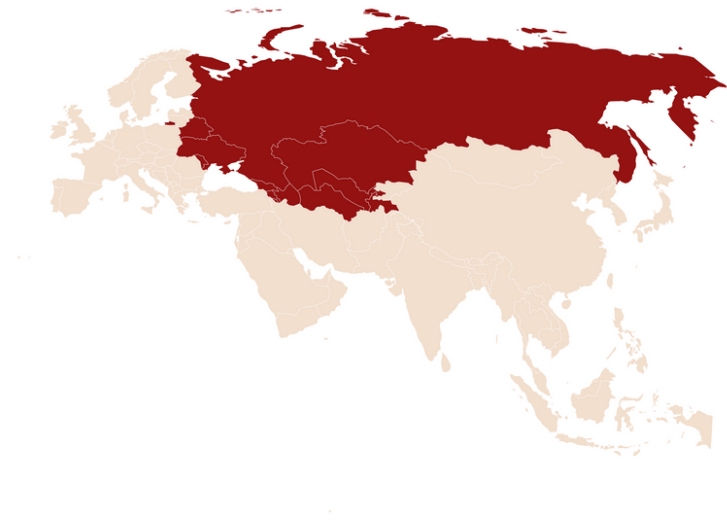
[4] See <https://statemediamonitor.com/category/global-list/>.

Central and Eastern Europe continues to be affected by a troubling trend: media capture. State authorities and political parties in power are gaining control over the editorial agendas of numerous privately owned media outlets. This model of private capture is particularly prevalent in four countries: Hungary, Poland, Serbia, and Turkey. In these countries, 25 media groups adhere to this model, with some conglomerates boasting extensive portfolios of media outlets across various platforms. For example, KESMA in Hungary operates approximately 470 media outlets across all segments. Additionally, government control extends to national public media in those four countries. MTVA in Hungary, TVP and Polskie Radio in Poland, RTS and RTV in Serbia, and TRT in Turkey are all subject to government influence. However, with the conservative party PiS in Poland failing to win the majority in the October 2023 elections, the situation of public media in the country is expected to improve.

In the Southern Europe region, the situation is not much improved compared to the Eastern Bloc. Despite the presence of a handful of independent news agencies in Cyprus, Greece, and Portugal, and the existence of one independent public media outlet (RTP in Portugal), the state still holds a firm grip on the media in these countries. This control extends to state media organizations such as CyBC and BRTK in Cyprus, ERT in Greece, RAI in Italy, PBS in Malta, and RTVE in Spain. One of the exceptions is represented by the network of regional television channels in Spain, most of which manage to protect their editorial independence despite facing numerous other challenges.



# Eurasia



The situation of state media in the Eurasian region remains grim, as the state exerts significant control over national media landscapes. Traditional media outlets, such as television and radio, dominate in these countries, boasting extensive reach and a sizable audience. Their widespread popularity makes them a desirable tool for governments, who exploit them to further their own agendas.

An alarming 97% of the 65 state media outlets in the Eurasia region are under strict government control, which is more or less the same as in the previous year.

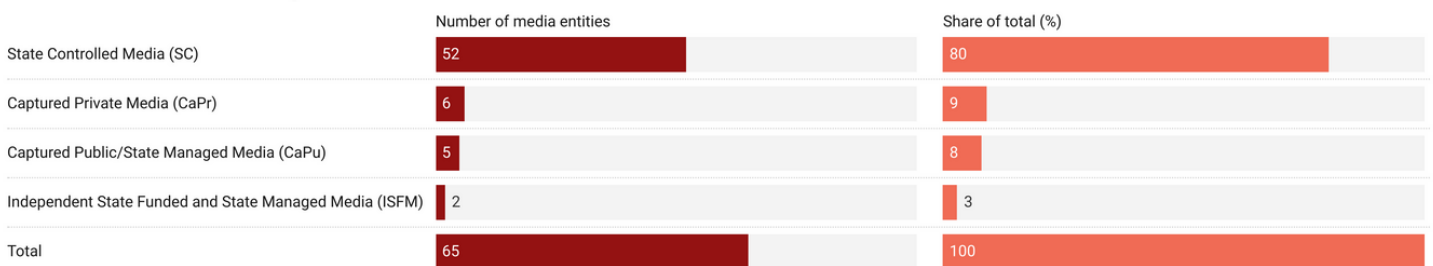
Furthermore, approximately 80% of these state media organizations adhere to the state-controlled model, while the others fit the captured media model. Notable examples of the latter include Russia's Channel One, Gazprom Media, and National Media Group. Additionally, several media outlets from Azerbaijan, such as Azad Azerbaijan and ARB Media Group, are classified as captured private media entities.

Each of the 65 state media companies mapped as part of our study operates a wide range of news outlets, including newspapers, television and radio stations, as well as internet portals, exerting significant influence over public discourse.

Russia continues to play a leading role in developing its media sector, predominantly shaping its media as propaganda weapons. As the international information war intensifies and the media faces substantial criticism, especially from Western sources, Russian-based media outlets have come under increasing pressure to align themselves with the directives of the state authorities in Moscow.

Uncovering the extent of Russian influence in the international media scene continues to be an arduous task. The Russian government has diligently constructed a burgeoning network of media operations targeting international audiences, all while maintaining a shroud of secrecy. Numerous online portals are evasive and elusive, posing challenges for journalists and experts in their efforts to identify state control. Consequently, it is believed that the actual number of media outlets affiliated with the Russian government and operating beyond its borders far surpasses what has been officially recorded thus far.

### Overview of state and public media in Eurasia



Source: Media and Journalism Research Center • Created with Datawrapper

As noted in our analysis last year, it is evident that all countries in our Eurasia sample lack substantial safeguards to uphold editorial independence. The media environments in these nations, including Azerbaijan, Belarus, Russia, and the Central Asian countries included in this study, are among the most restrictive and perilous worldwide. Media professionals constantly face severe government control, which exposes them to the constant risk of fines and threats if they fail to comply with the official narrative.

State media outlets are predominantly controlled by those in positions of power, either directly by the state or through state-run institutions. The remaining media entities are often owned by influential businessmen and oligarchs who maintain close connections with ruling politicians. A case in point can be seen in Azerbaijan, where privately-owned media organizations have been taken over by the president’s family or their trusted associates.

Only two state/public media outlets in the region enjoy editorial independence: the National Public Broadcasting Company (UA:PBC) in Ukraine, which has seen improved editorial independence following the implementation of the Law on Public Television and Radio in 2014; and Teleradio-Moldova, which benefits from protection under the Audiovisual Services Code and is overseen by an Ombudsman who ensures its editorial performance.

# Sub-Saharan Africa



In Sub-Saharan Africa, the media landscape is largely shaped by state control, with 98% of the 124 media outlets in the region being either state-controlled or captured by public/state entities. This represents the highest level of state control observed globally.

In 2022, a noteworthy shift occurred in the typology of three prominent media outlets: the South African Broadcasting Corporation (SABC), Radiodiffusion Télévision Ivoirienne (RTI), and Tanzania Standard Newspapers (TSN). All three organizations transitioned from the State Controlled (SC) model to the Captured Public/State Managed (CaPu) model, which is technically an improvement. However, despite this change, these outlets still lack the crucial aspect of editorial freedom. Over the past year, no significant developments, whether positive or negative, have been observed that would necessitate a modification in their typology.

As mentioned in our 2022 analysis, Sub-Saharan Africa only has three state media entities that maintain editorial independence. One of these entities is Sidwaya, a government-run media company in Burkina Faso. Sidwaya operates various print publications and the Burkina Agency of Information (AIB), which is the country's primary news agency. While there is some influence from state authorities, we have not found concrete evidence of government control over Sidwaya's editorial content. The other two outlets with editorial autonomy are Société nouvelle de presse et d'édition de Côte d'Ivoire (SNPECI), a state-owned publishing house in Côte d'Ivoire, and Agence Ivoirienne de Presse (AIP), the official news agency in the same country. Despite facing frequent pressures from high-ranking officials, SNPECI's main publication, *Fraternité Matin*, remains widely read and maintains its editorial independence. On the other hand, AIP, headquartered in Abidjan, appears to have freedom over its editorial agenda.

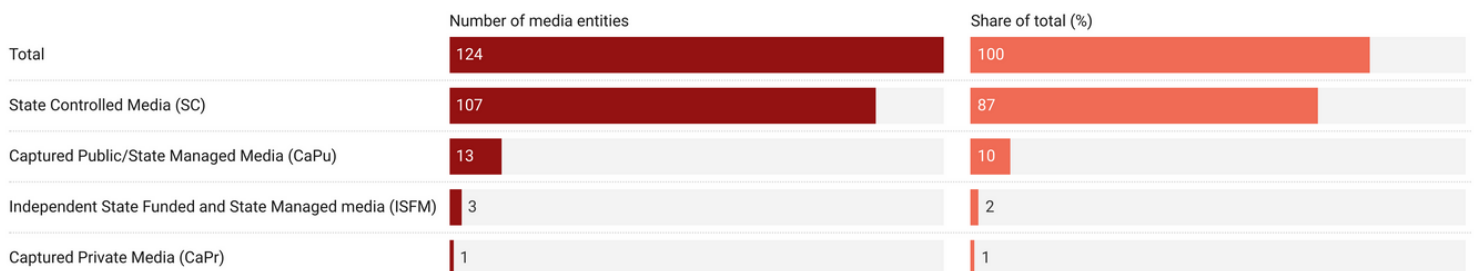
In the past year, a pressing concern has arisen among numerous public media outlets in Sub-Saharan Africa regarding their funding. These organizations are grappling with significant financial challenges as they strive to maintain their editorial independence and ensure long-term financial stability. Consequently, they are now reevaluating their funding models in a bid to overcome those obstacles.

In South Africa, the state subsidy for the public broadcaster SABC has significantly decreased in recent years due to the government's efforts to revamp SABC's funding model. However, the Cabinet approved a new SABC Bill in early October 2023 and sent it to the South African Parliament for approval, but it is not expected to resolve SABC's ongoing funding crisis. The license fee is still considered the main source of funding, despite its proven ineffectiveness in the South African context. Additionally, the implementation of a new funding model has been postponed for three years.

In neighboring Zimbabwe, the governing board at the public broadcaster ZBC has been advocating for the abolition of the license fee for years due to low collection rates. This funding mechanism has also proven to be ineffective in Zimbabwe. In response, however, the government has instructed ZBC to raise the fee, a decision that was implemented in early 2021 but has yet to produce the expected results.

The public broadcaster in Kenya, KBC, finds itself in a comparable predicament as it grapples with years of debt and struggles to generate enough advertising revenue to meet its expenses. Burdened by a loan acquired some years ago to enhance its equipment and a liability from a lawsuit, KBC is faced with the daunting task of restoring profitability, a process that could take a minimum of three years. However, this can only be achieved if the government approves a series of financial bailouts from the state.

### Overview of state media in Sub-Saharan Africa



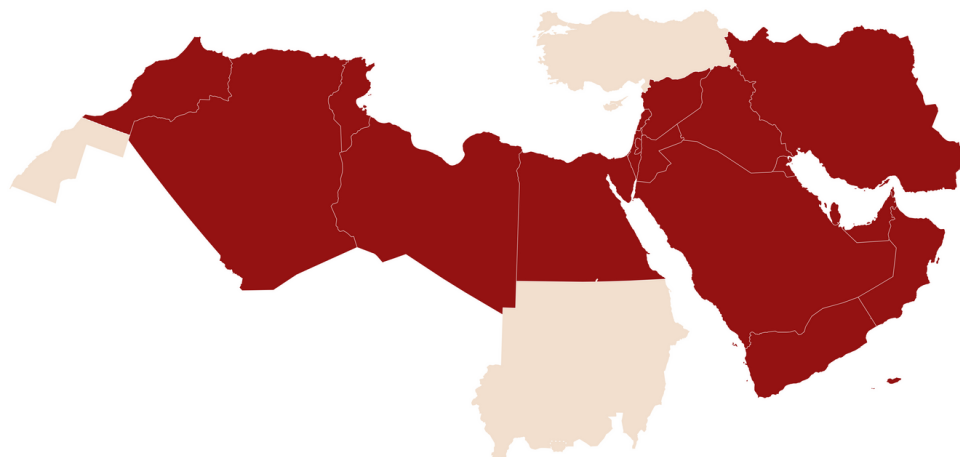
Source: Media and Journalism Research Center • Created with Datawrapper

The extensive state control over the African media can be attributed to a series of unsuccessful attempts to establish thriving public service media throughout the continent. In addition, the financial instability of the African media markets has compelled numerous publishers to rely on state intervention in order to remain operational.

Africa is also known for having one of the highest rates of state ownership in the print media. According to our mapping in Sub-Saharan Africa, nearly a fifth of all state-administered media players are print media publishers.

Countries such as Burundi, Mozambique, Tanzania, Zanzibar, Angola, and Namibia are home to major print media publishers like Publications de Presse Burundaise (PPB), Sociedade de Notícias, Tanzania Standard Newspapers, Zanzibar Newspaper Corporation (ZNC), Edições Novembro E.P., and New Era, among others. Additionally, it is worth noting that news agencies across most of Africa also remain state-controlled.

# Middle East and North Africa (MENA)



State and public media in the MENA (Middle East and North Africa) region face significant capture. The authorities have editorial control over a majority, with 82 out of 86 state and public media outlets, accounting for 96%. This figure has remained unchanged since 2022 but has seen a notable 10% increase compared to 2021.

The MENA region has also witnessed a significant rise in the number of captured media outlets, as revealed by our State Media Matrix. Approximately 36% of all outlets in the region can now be classified as captured. This marks a notable increase from 24% in 2021 and 33% in 2022. The spike can be attributed to changes in our methodology, which affected media entities in Algeria, Iran, and Morocco, as well as the emergence of new instances of captured media.

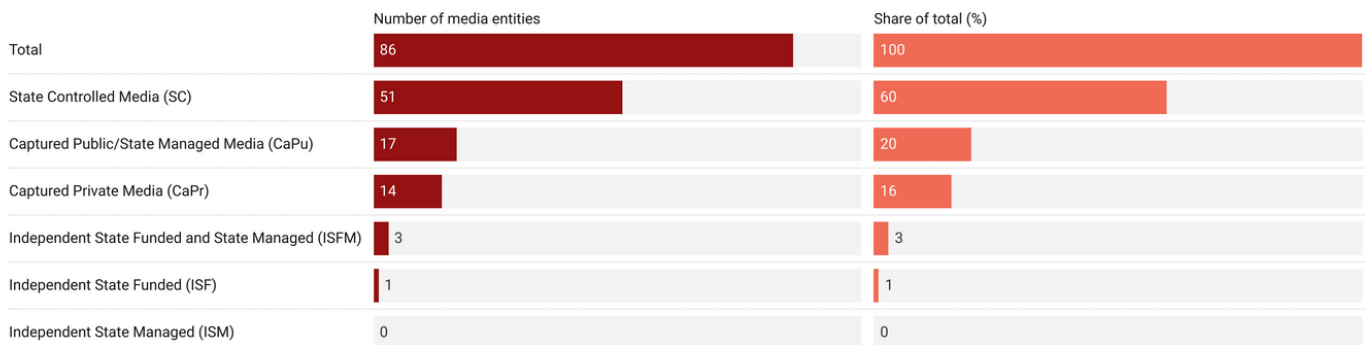
The proportion of state and public media companies with editorial independence is thus very low. These companies now represent a mere 4% of the total, which is a significant drop from the 13% recorded in 2021.

Amidst the ongoing conflict between Israel and Hamas, which has sparked turbulence in the Middle East, it is anticipated that state and public media in the region will face even more scrutiny. Governments will seek to exert greater control over these media outlets in order to disseminate their own ideologies and advance their respective agendas.

The political instability has already had a profound impact on the editorial autonomy of numerous media organizations, causing significant harm. State media in failed states within the region, such as Yemen, Syria, and Libya, face immense challenges in operating independently. Even researching these media outlets has become challenging in those countries, as a bevy of entities, including political factions and warlords, assert their authority. In our database, we have included media establishments controlled by several parties involved in conflicts in Yemen and Libya, for example. On the other hand, there is a growing concern that even media outlets that have previously safeguarded their editorial independence will face mounting challenges.

Despite the government’s inability to influence the editorial decision-making at the public broadcaster IPBC in Israel, led by Prime Minister Benjamin Netanyahu, there have been discussions in recent years about the possibility of completely shutting down the broadcaster.

### Overview of state and public media in MENA region



Source: Media and Journalism Research Center • Created with Datawrapper

In a similar vein to other regions across the globe, state and public media outlets in some countries in the MENA region are grappling with growing financial challenges. This was the reason why the Lebanese authorities made the decision to shut down Télé-Leban in August 2023. The decision came after its employees staged a series of protests due to unpaid wages.

In parallel, the MENA region has witnessed a significant surge in the establishment of numerous pan-Arabic and global media entities. Many of these organizations are financially supported or overseen by governmental bodies. These media outlets primarily originate from the affluent emirates of Qatar, Saudi Arabia, and the UAE, and they are known for producing high-quality programs. However, the majority of them remain under the influence of the authorities that finance them. As a result, they rarely, if ever, venture into criticizing their respective country's political leadership.

Finally, a trend that is expected to adversely affect the editorial independence of state and public media in the region is the tendency of various governments to consolidate and centralize an increasing number of outlets. In Iran, the government is actively working towards merging the country's media into a centralized entity. The primary motivation behind this move, according to media experts in Iran, is the government's economic struggle. As the government is the main source of funding for pro-government media in the country, the consolidation would allow authorities to more effectively control these outlets.

Meanwhile, in Morocco, the government is also taking steps towards creating a powerful media conglomerate by merging a spate of media companies. As part of this effort, television channels 2M and Medi1TV, along with Medi1 Radio, have been placed under the country's public broadcast group SNRT. These developments raise concerns about the potential impact on media independence and freedom of expression in the region.



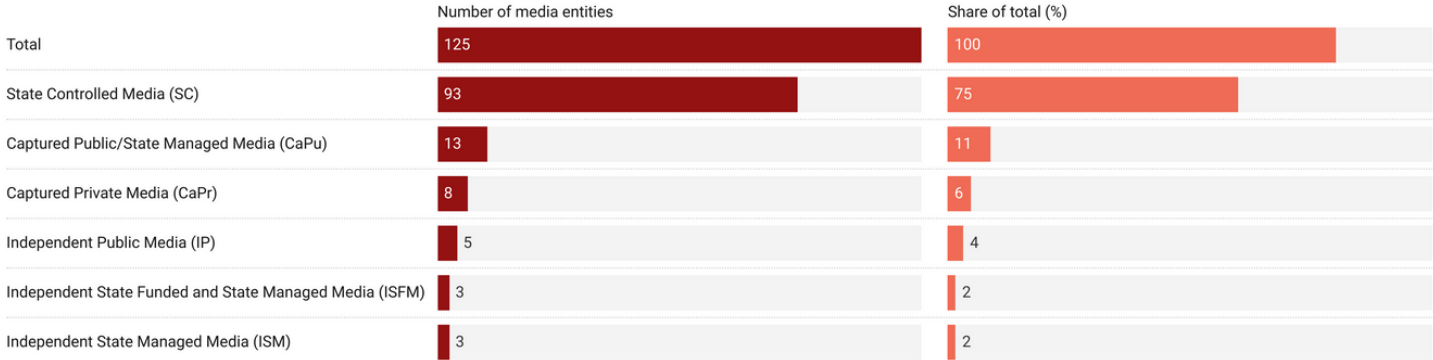
# Asia



The state and public media landscape in Asia have remained largely unchanged over the past year. Despite the region’s diversity and vastness, there are several factors that contribute to the unchanging nature of the media landscape on the continent. On one hand, authoritarian states continue to exert their control over the media, while on the other hand, a few public service media outlets in democratic countries have managed to preserve their identity and independence.

According to our research, the government’s influence over state and public media in Asia remains significantly high. Out of the 125 state and public media institutions surveyed, only 8% maintain editorial independence, which indicates a slight decline from the previous year. The majority of media outlets, however, are subject to significant government control, with three-quarters falling under the category of state-controlled in our analysis.

## Overview of state and public media in Asia



Source: Media and Journalism Research Center • Created with Datawrapper

Asia is home to some of the most tightly controlled media systems on the planet, with governments in countries such as China, North Korea, Laos, and Vietnam exerting significant control over all media outlets. These systems represent an unprecedented level of centralization. A recent development in this trend can be seen in Cambodia, where the Bayon High Media System, along with the Royal Group (owner of CBS) and the Hang Meas TV Group (a Cambodian media conglomerate), have come together to form the Cambodian Television Alliance. The group aims to operate the largest digital television platform in the country. Notably, the government is also involved in this partnership through the Ministry of Economy and Finance, while Hun Mana, the prime minister's daughter, serves as the board chair of the alliance.

The significant influence of the Chinese government on media narratives continues to raise concerns among various Western governments. State-owned Chinese media outlets consistently produce content aimed at foreign audiences, sparking criticism for spreading Chinese propaganda within these countries. China has also increased its efforts to expand its influence over foreign media outlets, with the aim of connecting with Chinese communities abroad and shaping local narratives. This aggressive expansion of propaganda has further decreased media freedom in Hong Kong, where the government has consolidated its control over the public broadcaster and effectively pushed independent media outlets out of the market.

According to experts, it is believed that the influence of the Chinese government in foreign media extends beyond what has been identified by the State Media Monitor, similar to the situation with Russia.

In Asia, just like in other regions of the world, state and public media outlets are also confronted with economic challenges in some countries. One example is IBC in the Philippines, a television chain under the control of the Presidential Administration. Recently, government representatives have revealed that discussions about the possibility of privatizing IBC are taking place in response to the financial crisis faced by the network.

Meanwhile, in South Korea, the presidential office has recommended separating the license fee, which serves as the primary source of funding for the country's public broadcaster KBS, from the electricity bill of households. Advocates for public service media argue that such a move could potentially destabilize KBS to the extent of jeopardizing its very existence.

On a more uplifting note, South Korea and Taiwan continue to stand out as havens for numerous broadcasters and news agencies, where editorial independence thrives and government meddling is virtually non-existent. Public media in Japan and Macao, which were once part of this commendable group, have succumbed to mounting governmental pressures in recent times, thereby compromising their editorial prowess.

# Latin America and the Caribbean



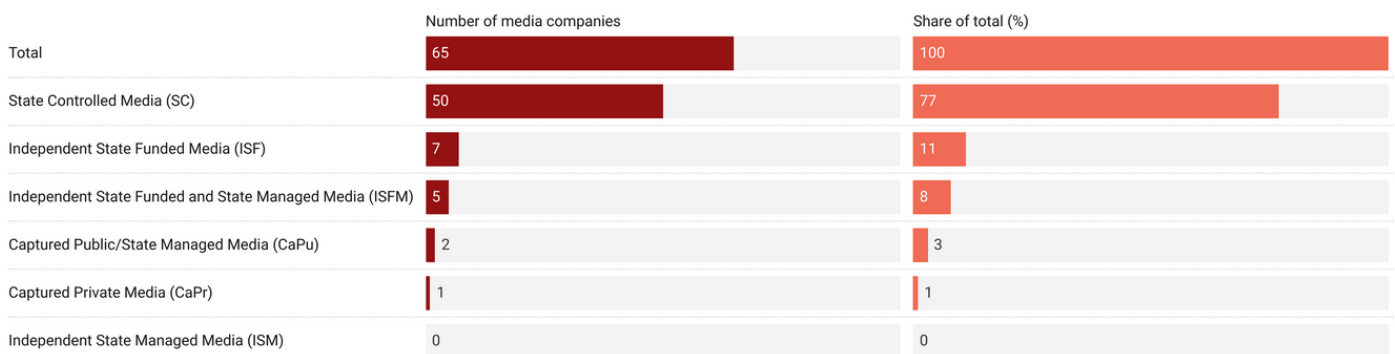
The state control model reigns supreme throughout Latin America and the Caribbean, as more than three-quarters of the 65 state and public media companies surveyed in the region fall under this category. Cuba, Venezuela, and Nicaragua stand out as the nations with the highest levels of state control, with the government exerting significant influence over the majority of their media outlets.

In the past year, there has been a notable shift in the state and public media sector within the region. Some downgrading developments have outweighed progress. Notably, the government’s influence over the editorial agenda of RTA, a prominent public broadcaster in Argentina, has grown stronger. As a result, an increasing number of independent journalists and observers in the country now perceive RTA as more of a state media outlet rather than a public broadcaster. RTA’s news bulletins have transformed into a mere platform for relaying government announcements and regurgitating the words of government officials during their public speeches.

In a separate development, accusations of censorship at the public media operator SINART in Costa Rica have reached a boiling point, with journalists consulted for this report confirming that they are unable to address certain topics due to strict directives from SINART’s management.

Finally, in Mexico, after the election of Andres Manuel Lopez Obrador (AMLO) as president in 2018, there has been a noticeable shift in the direction of Canal Once, a public broadcaster. Under the leadership of the current director, who was appointed by Obrador himself, the station’s news reporting has become supportive of the government. Concerns about censorship regarding media coverage of topics that portray a negative image of the Mexican presidency have intensified over the past year.

### Overview of state media in Latin America & the Caribbean



Source: Media and Journalism Research Center • Created with Datawrapper

In comparison to other regions across the globe, Latin America and the Caribbean stand out with a higher presence of independent state media entities. Notable examples include PBC Jamaica, IMER, and Canal 22 in Mexico, as well as Televisión y Radio de la Universidad Nacional de Colombia. However, the number of these entities continues to steadily decline.

In Latin America, a characteristic of the media systems is the presence of a strong university media sector. This sector consists of broadcasters that are funded by the state budget but operated independently by universities such as UCR in Costa Rica, Universidad de San Carlos de Guatemala, UTV in Honduras, and UNAM in Mexico.

Additionally, there is a media sector focused on the indigenous population, with some outlets receiving state financing. Examples of these outlets include Canal 5 TV Maya in Guatemala, Sistema de Radiodifusoras Culturales Indígenas (SRCI) in Mexico, and Sistema Nacional de Radios de los Pueblos Originarios in Bolivia. All of these outlets seem to have editorial autonomy.

# State and Public Media: Where To Next?

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The state of the state and public media has shown little sign of improvement over the past year. While there has been a slight reduction in the proportion of media companies lacking editorial independence, the majority of these organizations remain tightly controlled by the government and are used as propaganda tools by the authorities. With the ongoing war in Ukraine and intensifying tensions in the Middle East, the battle for public opinion is poised to escalate, which will grant governments greater control over the media.

Authoritarian superpowers, China and Russia, continue to make significant strides in expanding their media influence beyond their own borders. It is widely believed that the reach of media controlled by these regimes extends far beyond what the State Media Monitor has been able to track. With their media systems under close control domestically, both countries are investing heavily in a network of state-controlled outlets aimed at international audiences, as well as media companies targeting national audiences in strategically important countries. This concerted effort is aimed at bolstering their own narratives and increasing their global influence.

Furthermore, the year 2024 is set to witness elections in almost 50 nations worldwide, encompassing a combined population of over 3.3 billion individuals. This impending wave of elections will undoubtedly exert even greater pressure on the media, particularly on state and public media outlets.

Alongside the highly anticipated US elections, citizens will exercise their democratic rights in various other major democracies, including India, Indonesia, and Mexico.

Additionally, a string of African countries such as South Africa, Ghana, and Rwanda, as well as numerous European nations spanning the western and eastern regions like Austria, Finland, Belgium, Romania, and Croatia, will also partake in the electoral process. Furthermore, a slew of Asian nations, including Sri Lanka, Pakistan, and Bangladesh, as well as Latin American countries like El Salvador and Uruguay, are preparing for their own elections. Finally, elections in key strategic countries in East Asia like South Korea and Taiwan, along with the EU-wide elections, will further contribute to the tumultuous year ahead.

According to the State Media Monitor, less than a quarter of all countries expecting elections in 2024 have state and public media outlets with editorial autonomy.

In the midst of a global landscape characterized by intense geopolitical instability, governments are ramping up their efforts in an increasingly aggressive information battle. This comes on the heels of a series of severe economic and health crises, coupled with a marked erosion of democratic values. Against this backdrop, the outlook for state and public media appears more dismal than ever. Instead of serving as reliable sources of news, these outlets persist in fueling political divisions and fostering animosity, prioritizing the dissemination of propaganda and outright disinformation over quality reporting.

In a somber setting like this, we emphasize the plea made in our state media monitor analysis last year, urging civil society and progressive political forces to redouble their efforts in promoting public service journalism, with a strong emphasis on safeguarding the editorial independence of public media as a vital component.

# Methodology

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## Research process

The methodology for this study is the State Media Database that was created by Marius Dragomir in 2004 and updated as follows:

- a). Global update (2006, 2010, 2013, 2020-2023);
- b). Latin America (2006, 2012, 2023);
- c). European countries, North America, Australia and New Zealand (2005, 2009, 2012, 2013, 2015, 2017, 2020, 2023);
- d). Sub-Saharan Africa (2014, 2023);
- e). Asia (various regions including parts of Eurasia) in 2005, 2008, 2012, 2015, 2019, 2023;
- f). MENA (2015, 2019, 2023).

## Country coverage in 2023

During the update in 2022, six countries were added as follows: Iceland, Liechtenstein, Luxembourg, Monaco, North Macedonia in Europe and Malawi in Africa. In Luxembourg and Monaco, no state-administered media were identified. The sample of countries in the latest update in 2023 has remained unchanged.

## Changes in methodology in 2022

Our methodology presents media outlets as individual entities that provide media services on various channels (television and radio stations, print titles, news portals). To be able to consistently compare trends across countries and regions, in our analysis we count the media operators as entities not the number of channels/assets these operators have in their portfolio.

In the 2022 update, we identified all media outlets that are run as individual operators and counted them as entities. This change has affected a few countries (such as Nigeria where as of the year 2022 we have counted all the outlets in operation at the State Level, versus Federal Level, as separate entities). Where state media are operated by one government unit/company, we continue counting them as one entity.

## Criteria

The key criteria used in the creation and structure of the State Media Database are threefold: a). funding; b). management and governance; c). editorial control.

The methods<sup>[5]</sup> used to categorize the state media are the following:

### Step 1: Collection of data on

a). Funding: the budget of state media and the source of funding

#### Sources:

Tier 1 sources: annual reports of state media, legal acts that establish the funding model of state media

Tier 2 sources: media articles, NGO reports, academic reports

Tier 3 sources: interviews with media experts or sources in the media outlet, information from investigative reports

b). Management and governance

#### Sources:

Tier 1 sources: annual reports of state media, legal acts that establish the governance model of state media

Tier 2 sources: media articles, NGO reports, academic reports

Tier 3 sources: interviews with media experts or sources in the media outlet, information from investigative reports

c). Editorial control

#### Sources:

Tier 1 sources: legal acts or statutes that establish the mission of the outlet as a state propaganda unit, public statements by government officials establishing the propaganda role of the outlet

Tier 2 sources: media articles, NGO reports, academic reports

Tier 3 sources: interviews with media experts or sources in the media outlet, information from investigative reports, content analysis (in specific geographical contexts)

### Step 2: Data analysis

Using the data gathered in each country and the criteria described in this study, the media outlets have been categorized according to the models introduced by the State Media Matrix.

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[5] The detailed methodology of the study can be accessed at <https://statemediamonitor.com/methodology/>.



## Research limitations

This paper is based on our latest collection of data between March 2023 and September 2023. It has used to a large extent the information gathered in the Media Influence Matrix project that has been run by the Media and Journalism Research Center, but also data collected through a network of 41 partner organizations and local experts.

The media is a very dynamic field, hence some media outlets can rapidly “upgrade” or “downgrade” to another State Media Matrix model, changes that cannot be captured in a paper of this kind. There is a chance that, at the time of publication, some media outlets qualify for another State Media Matrix model because of changes in their status or political developments at the national level that happened between the time of data collection and the drafting of the paper. Yet, the overall trends captured in this paper are not significantly affected by such incongruities. Moreover, all such changes are captured in the profiles of the media outlets presented on the website of the State Media Monitor, the most complete database of state media that as of 2023 has been updated on a regular basis.



**For a comprehensive and interactive list of all the media outlets profiled in this study, please access: <https://statemediamonitor.com>**



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Media and Journalism Research Center

**Legal address**

Tartu mnt 67/1-13b, 10115,  
Tallinn, Harju Maakond, Estonia

**Postal address**

6 South Molton St, London,  
W1K 5QF, United Kingdom

**Academic affiliation**

Universidade de Santiago de Compostela (USC)  
Colexio de San Xerome, Praza do Obradoiro s/n,  
CP 15782 de Santiago de Compostela.

[www.journalismresearch.org](http://www.journalismresearch.org)

Read our  
[Groundbreaking Media Research](#) newsletter

**Contact**

**Email:**

[mjrc@journalismresearch.org](mailto:mjrc@journalismresearch.org)

**Tel.:**

+34665084628  
+447447728324