Report

Consultation on media viability in Tunisia

A partnership between

Al Khatt
Global Forum for Media Development
Pamt2
Pencils Consulting
UNESCO IPDC

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Table of contents

1. Executive Summary
2. Context for this report
    2.1 General context in Tunisia
    2.2 Organisation of the round table
    2.3 Conduct of the round table
3. Recommendations proposed by recent literature and policy papers
    3.1 Defining viability
    3.2. Proposals for media and journalist associations
    3.3 Proposals for public support for the media and journalism
    3.4. Proposals for donors and media support organisations
    3.5. Proposals for the private sector
4. Main findings from the round tables
    4.1 Structuring the media market
        4.1.2 Making data-based decisions
        4.1.3 Observations and recommendations
5. Reforming public policies
        4.2.1 Observations
        4.2.2 Recommendations
    5.1 Economic regulation
        5.1.1 Observations
        5.1.2 Recommendations
    5.2 Rebuilding public trust in the media
        5.2.1 Observations
        5.2.2 Recommendations
6. Structuring the advertising market
        6.0.2 Recommendations
    6.1 Re-evaluating the advertising value chain
        6.1.1 Observations
        6.1.2 Recommendations
    6.2 Reallocation of public advertising
        6.2.1 Observations and recommendations
    6.3 Reviewing the relationship of media organisations and advertisers
        6.3.1 Observations
        6.3.2 Recommendations
7. Supporting digital transformation
    7.1 Support existing media in their digital transformation
        7.1.1 Main findings
        7.1.2 Main recommendations
    7.2 Support in the implementation of technological infrastructures
        7.2.1 Main findings and recommendations
8. Aligning donor funding with local issues

8.1 Main Findings
8.2 Main recommendations
9. Better management in the media sector which considers the situation of journalists
9.1 Improving conditions for journalists
9.1.1 Main observations
9.1.2 Main recommendations
9.2 Better media management
9.2.1 Main findings
9.2.2 Main recommendations
9.3 Introducing management into the knowledge of journalists and media teams
9.3.2 Main recommendations
9.4 Challenging existing business models
9.4.1 Main findings
9.4.2 Main recommendations
10. Final considerations

1. Executive Summary

Tunisia faces challenges in terms of media sustainability, due to the unstable economic and political situation in the country, which has led to financial and political pressures on local media. Indeed, most Tunisian media depend on the advertising market and international donors. The situation has worsened since the Covid-19 pandemic, which has caused a decline in advertising investments and managerial complications for some media. To discuss this issue, a roundtable on media sustainability was organised in collaboration with several stakeholders in the sector, to propose concrete policy recommendations to ensure the sustainability of media organisations.

The roundtable brought together local media representatives, media development organisations, academics and donor representatives to discuss ways to improve the enabling environment for media sustainability in Tunisia. Discussions focused on topics such as viable business models for independent media, professional ethics and self-regulation, press freedom and the role of big technology.

During the roundtables, five key recommendations were made to improve the media industry. The first recommendation is to structure the media market by collecting data, reforming public policies, regulating economically and rebuilding trust with the public. The second recommendation is to structure the advertising market by better measuring the audience, reassessing the advertising value chain, reconsidering the relationship between media and advertisers and reusing public advertising as the first lever. The third recommendation is to support digital transformation by helping existing media to digitally transform and platform, as well as by supporting the implementation of technological infrastructures. The fourth recommendation is to align donor funding with local issues to ensure that the media support the interests of their local community. Finally, the fifth recommendation is to increase skills on economic and managerial issues, in particular to media management and the challenge of existing business models.This last part also addresses the question of the situation of the profession of journalism.

The recommendations that have been established should lead to concrete actions in the near future to strengthen the viability of the media in Tunisia.

2. Context for this report

2.1 General context in Tunisia

Media sustainability is a critical topic for Tunisia, a context where the media's independence can play a fundamental role in strengthening democracy and better governance in public institutions. However, the volatile political situation in the country over the past twelve years has posed many challenges for local media, who face increasing financial and political hardship.

On 25th July 2021, President Kais Saied suspended the country's Parliament in what is now seen as a power grab on his behalf -bringing profound changes to the Tunisian regime, including a high concentration of power for the President, new governance, a new constitution, and legislative elections. During this period, many journalists, human rights activists, and defenders of freedom of expression shared their concerns about a possible human rights and media freedom regression. Many have encountered difficulties in reporting news and events.

On February 13th 2023, Noureddine Boutar, the CEO of Mosaïque FM, the first local independent radio station, was arrested, with no disclosure by authorities for the reason no charges were filed. Around the same time, Mahdi Jlassi, the National Syndicate of Tunisian Journalists president, was questioned. The Presidency of the Republic continues reiterating its disapproval of the foreign funding of Tunisian CSOs, associations and organisations.

Tunisia has not been immune to misinformation and disinformation, primarily shared on social networks. The lack of resources (human and technical) makes the fight against misinformation difficult. Misinformation is one of the main challenges to professional journalism in a context where trust in the media is declining due to widespread mis- and disinformation and in parallel with growing political interference over the past 12 years.

From an economic perspective, apart from state-funded public media, the Tunisian media sector largely depends on the advertising market and/or international donors. Options to diversify revenue streams, for example, through subscription models or crowdfunding, are, at best, limited. Since the Covid-19 pandemic, Tunisian media have also suffered from decreased advertising investments, impacting operations. In addition, several media platforms have recently had to deal with organisational complications arising from their economic problems, for example, media closures, inability to pay broadcasting fees, human resources, and staffing restraints.

Thus, the question of the viability of the media in Tunisia is central in an unstable economic and political context where, paradoxically, their role in informing society becomes even more critical.

2.2 Organisation of the round table

To address these challenges, a roundtable on media sustainability in Tunisia was organised in collaboration with the Al Khatt Foundation, the European Union-funded Tunisian Media Support Programme (PAM2TEU), UNESCO-IPDC and the UNESCO Office in Tunis.

The event took place on January 24th 2023. International and national Tunisian stakeholders organised the day, and the process was locally led and held under Chatham House rules.

The conference brought together Tunisian media actors around the following questions:

- What is "media viability"? How can it be measured? What is needed for it to be achieved?
    - UNESCO: a presentation of studies and proposals to strengthen the sustainability of the media;
    - Case Studies: Successful Management Models and Independent Tunisian Media;
    - Recommendations from recent research on how to improve the conditions for sustainable media in Tunisia.
- How to promote the sustainability of Tunisian media
    - How do we create an environment that is conducive to media sustainability?
    - What is the role of digital platforms, funders, and the public sector?
    - Public policies and support for Tunisian media: how to promote media sustainability?

The consultation aimed at developing concrete policy recommendations to support media organisations' viability. The recommendations discussed and outlined in this report will potentially lead to concrete actions in the near future.

2.3 Conduct of the round table

The discussion during the roundtable focused on enabling constructive dialogue around concrete recommendations. Participants focused their discussions on the challenges faced by media organisations in Tunisia and explored potential solutions. The recommendations were drawn from UNESCO's media sustainability recommendations, helping to frame the discussion.

Participants also focused on media sustainability issues, which included a range of topics such as revenue generation, editorial independence, the situation for journalists, and digital transformation. The discussions were open and frank, with participants sharing their experiences and knowledge.

The meeting was led by a group of Tunisian stakeholders, who, in addition to other Tunisian participants, brought their perspectives and experiences to the table. This ensured that the

recommendations put forward were rooted in the local context and reflected the realities of the media industry in Tunisia.

At the end of the round tables, a meeting was held between the event organisers and the rapporteur for the consultation. During this meeting, the key points discussed during the round table were grouped together to develop concrete actions.

3. Recommendations proposed by recent literature and policy papers

At the beginning of the roundtable, the GFMD representative presented recommendations which had emerged from previous GFMD/ UNESCO work on media sustainability. The following section outlines the main recommendations of this presentation.

3.1 Defining viability

Sustainability: a word with many meanings

> *While the focus tends to be financial, most scholars believe that sustainability is also conditioned on a range of factors to ensure professional standards, editorial independence and pluralism.*
>
> *PRIMED, 2021. Media Viability Learning Brief (MDIF)*

Sustainability: an ideal or a measurable result?

> *No media, even the most successful, is really in a position to say that it will continue to exist in five years unless it is funded by the state or managed by a wealthy private foundation. It is a beautiful dream, betrayed in fact.*
>
> *GFMD, Skeyes, IMS 2021. Sustainability & journalism support in Lebanon.*

3.2. Proposals for media and journalist associations

- Business models that rely on advertising revenues need to be updated. Tunisian media must innovate and find new sources of income. (Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)
- Media literacy needs to be promoted to restore trust between the Tunisian public and the media. (Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)
- The exchange of knowledge between traditional and new media that have adopted successful or innovative business models should be promoted. (Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)
- The Tunisian media sector needs to reconnect with citizens by conducting audience research to understand public expectations and needs better, for example. (Proposal

made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)

- Support for independent media, including investigative journalism, can be improved by providing journalists with the tools and funding to launch their own media. (Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)

3.3 Proposals for public support for the media and journalism

- *There is a need to adapt the legislative framework or establish independent regulatory boards to ensure better transparency in allocating public advertising revenues based on objective criteria. (Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*
- Public subsidies which are dedicated to SMEs (small and medium-sized enterprises) or in support of the digital transition should pay particular attention to the needs of independent journalism, encourage an appropriate balance between private investment and public support (for example, through the establishment of matching grants) while avoiding projects are over-reliant on technology or Big Tech. *(Proposal of* the UNESCO *study "Finding the funds for journalism to thrive: policy options to support media viability")*
- Independent committees comprising stakeholders from academia, associations and journalists' unions should be created to subsidise Tunisian media while ensuring that the decision-making process is transparent and granting such funding has no impact on editorial independence. *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*
- There is a strong need for a public structure or body to ensure the fair and equitable redistribution of public advertising revenues to the media. *(Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)*
- Defence to whistle-blowers on corruption or the misuse of public funds should be made available. There is a need to support media whose investigations facilitate the revelation of such crimes or restore public trust. *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")* Legislative reform and competition policy development are integral to preventing media concentration and monopolisation of advertising revenue. *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*

3.4. Proposals for donors and media support organisations

- Tunisian media face significant challenges, given the increasingly repressive environment. Pending a more favourable context for political reforms, donors and other actors supporting Tunisian media should work more closely with local actors in a manner sensitive to existing realities. These actors must work together to define relevant long-term priorities and strategies. *(Source: Media Reform in Tunisia: A Volatile Process (CIMA))*
- International donors, media support organisations and other stakeholders must listen to actors in the field to learn how to better navigate the volatilities and challenges that

characterise the Tunisian media sector. *(Source: Media Reform in Tunisia: A Volatile Process (CIMA)*

- Awareness-raising and advocacy initiatives aimed at public authorities should promote the essential role that the media can and should play in consolidating democratic institutions and in facilitating diversity, pluralism, and citizen participation. *(Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)*
- Applications for grant funding should include consultation with independent experts for evaluation purposes which will help funders to recalibrate their financial support. *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*
- Advocating for better support to public interest media in Tunisia and internationally is essential. *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*
- Support small, independent media, including citizen journalism initiatives, that aim to reflect and convey the needs of local communities. *(Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)*

3.5. Proposals for the private sector

- *Private companies, particularly digital giants, which have become essential relays of content and news, must make audience data and information on advertising revenues available to the media that produce said content.*
- *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*
- *Private companies, including digital giants, should be encouraged to support or subsidise Tunisian media whilst ensuring transparency and editorial independence.*
- *(Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*
- *Tunisian media need to engage with digital platforms and social networks on the issue of advertising revenues, in addition to the impact of algorithms on the media sector. (Proposal made following the national consultations on "Media sustainability and independence of the media" organised by Free Press Unlimited and UNESCO)*
- *Private companies should engage in a dialogue with the advertising community on the importance of investing in traditional media. (Proposal of the UNESCO study "Finding the funds for journalism to thrive: policy options to support media viability")*

4. Main findings from the round tables

Five main areas of focus emerged from the discussions that took place during the round tables. The following section will the headlines and details of those findings.

4.1 Structuring the media market

4.1.2 Making data-based decisions

> *"There is definitely a need for a comprehensive national study in Tunisia, integrating social media analytics, audience research, etc., to enable us to develop a national strategy on media sustainability."*

4.1.3 Observations and recommendations

- More comprehensive, reliable data on media consumption patterns and habits in Tunisia needs to be collected.
- Barring a small number of internal efforts by some media, there is minimal knowledge of Tunisian audiences' expectations and practices.
- Media are often launched without baseline expectations or editorial strategy by which to guide and monitor outcomes.
- A regular survey of Tunisians' media expectations and practices should be set up as a benchmark for the sector. [International support organisation - participant]
- This survey should explore usage, editorial expectations and technological expectations. [International support organisation - participant]

5. Reforming public policies

> *"The Tunisian media... We don't have an overall vision for the future (to reform the sector)"*

4.2.1 Observations

- There is an inadequate legal framework guiding the media sector in Tunisia.
- The government has withdrawn from the media sector creating an absence of genuine regulatory mechanisms or a public body which can enable the development of the market and the sector.
- Journalism and communication are not viewed as money-making/commercial activities.
- Previous attempts to restructure the sector have not been successful, partly due to political and governmental instability.

4.2.2 Recommendations

- It is becoming urgent to create **specific legislation for the media**. [UNESCO representative - organiser]
- Measures must be implemented to enable the sector to develop, if not survive, in a difficult context until significant reforms are implemented (e.g. lower social charges, state benefits, more manageable payments) [Private media - participant].
- **Public trust in the media must be maintained and monitored**, partly by means of an annual barometer: public trust in the media must be considered to improve the sector [International support organisation - participant].
- We must create an **intermediary structure/agency to help regulate the advertising market**. [Media association - organiser] Public policy reforms are needed to **support non-profit media** and guarantee pluralism in the Tunisian media landscape. [UNESCO representative - organiser]

5.1 Economic regulation

> *"Economic regulation is needed: we have a media market (local, national and global) that is simply not viable: between advertisers and big tech companies, **Tunisian media are struggling."***

5.1.1 Observations

- The media sector needs to be better financially regulated, with few measures to ensure good competition and support the emergence of players with viable economic initiatives.
- State bodies need to actively work on the issue of the media's economic development, including their international development and support for digital transformations.

- Evidence suggests that Tunisians are consuming quality international media and helping generate revenue via clicks for these media.

5.1.2 Recommendations

- Set up economic **support mechanisms for the media** - public or independent. [Media Expert - Organisation Team]
- There is a need to **reassess the relationship between the state and the media**, bearing in mind that even in democratic countries such as France or the UK, there are still **ministries of information/communication** that help develop the media sector. [Journalist - Participant]

5.2 Rebuilding public trust in the media

> *"Public trust (or lack thereof) in the media is a problem, precisely because the media is perceived as politicised or compromised by the political power. . .»*

5.2.1 Observations

- There are unique issues in the media sector, such as the problems of media concentration, independence, and neutrality. These are particularly heightened in countries such as Tunisia, where the political environment is restrictive and not conducive to independence.
- The government must support the media sector; though it faces challenges, it should guarantee independence and transparency.

5.2.2 Recommendations

- It is necessary to encourage media self-regulation and help them to establish these practices internally. [GFMD - organiser]
- The Journalism Trust Initiative can serve as an example, and its indicators can help assess the quality or credibility of information sources. [GFMD - organiser]
- Following the example of the Kantar barometer in France, it might be relevant to set up a barometer on trust in the media regularly. [International expert - participant]

6. Structuring the advertising market

6.0.1 Better audience measurement, main observations

- Current audience measurement methods in Tunisia's media sector are limited and continue to be challenged by several media players.
- The cost of reliable audience measurement is considerable.

6.0.2 Recommendations

- Establishing an **independent audience measurement institute** must be finalised to serve as a reference for all parties. [Private media - participant]
- The experience acquired by the media players and the support they receive will enable them to **measure audience ratings by their means**, to remedy the absence of a system and also to save on the high cost of these measurements. [Private media - participant]

6.1 Re-evaluating the advertising value chain

> *"The creation of an intermediary structure or agency to regulate the advertising market is necessary"*

6.1.1 Observations

- Large technology companies (GAFAM) increasingly monopolise advertising revenues at Tunisian digital media and across the sector.
- Advertisers are known to intervene in content which they finance.

6.1.2 Recommendations

- An **agency should be set up to regulate the advertising market**, particularly how agencies operate and the media-advertiser relationship. [Associative media - organiser]
- **Raising the awareness of advertisers and media agencies** about impact is a prerequisite for reforming the sector. [Media expert - organising team]

6.2 Reallocation of public advertising

> *"The State must set an example with its management of public advertising."*

6.2.1 Observations and recommendations

- The State has previously financed the media through public advertising investments, including advertising calls for tenders and public service communications.

- This practice has declined since the revolution.
- **Reintroduce public advertising investment to support the media sector** - there are foreign examples where independent institutions manage public advertising investment with internal control measures, financial transparency and ethical responsibility. [Journalist - participant]

6.3 Reviewing the relationship of media organisations and advertisers

6.3.1 Observations

- Although they are the primary funding source, Tunisian advertisers are not involved in any reflection on the development of the media sector.
- They need to be made aware of the impact of their decisions on the quality of local content and journalism.
- However, some advertising agencies are beginning to question the impact and effectiveness of their advertising campaigns.

6.3.2 Recommendations

- It is essential to **convince advertisers that investing in quality media will impact their profits**. [Journalist - participant]
- The **advertising/marketing industry needs to be more involved** in the discussions on reforming the sector. [Media expert - organisation team]
- Some French media can only accept advertising revenue from fossil fuel companies - undermining the fight against climate change [International expert - participant].

7. Supporting digital transformation

7.1 Support existing media in their digital transformation

> *"How to deal with this situation ... There are Tunisian radio stations that are suffering in the face of digital transformation, the closure of media in recent years... »*

7.1.1 Main findings

- Most of the Tunisian printed media has yet to see the window of opportunity for the transition to digital. Many newspapers have disappeared and closed down despite the quality of their content and the reliability of the information.
- Audiovisual media continue to operate traditional broadcasting formats and have yet to begin to adapt to new uses, for example, delineating content consumption, mobile formats, and developing new narratives for the digital age.
- The Big Tech companies monopolise audiences and advertising revenue. They also use algorithms that can often lead to managing what content is available to audiences.

7.1.2 Main recommendations

- **Audiovisual media must be supported and encouraged to transition to digital uses** (e.g., the BBC declared that it would stop linear broadcasting in 10 years). [Private media - participant]
- From a regional sector perspective, local media should be supported to **influence the choices made by major technology companies**. [Media expert - organisation team]
- A **programme that delimits know-how and budgets** is needed to ensure a successful digital transformation. [International expert - participant]
- Digital transformation needs to be taken into account when **updating media business models**. [Media association -- organiser]

7.2 Support in the implementation of technological infrastructures

7.2.1 Main findings and recommendations

- Technological investment, including human resources and infrastructure aspects, is costly for Tunisian media.
- This impacts small independent media and associations that need help to compete with the larger numbers of other media organisations.
- Support programmes need to take account of the need for support in digital transformation, particularly in terms of infrastructure and its use. [Private media - participant]

8. Aligning donor funding with local issues

> *"We need to present a positive image of the Tunisian sector to donors, highlighting success stories."*

8.1 Main Findings

- Non-profit media are over-reliant on donations and donors.
- Donors sometimes invest large amounts, but there needs to be more communication about media support measures and activities.
- There are several donor initiatives to support the media, but they often need to be more varied with duplication of efforts.
- Donor programs can be disconnected from the realities on the ground, especially regarding editorial needs.
- There is growing public distrust of international donors based on a common perception of their interference in media outputs and decisions.

8.2 Main recommendations

- Donors need to allocate a communication budget to highlight the work of the media, their importance in the democratic landscape, and even their role in reforming the sector. [Journalist - participant]
- It is necessary to pay attention to donors' desire for neutrality. [Journalist - participant]
- Communicating the main issues in the field to donors when they define their programmes would be relevant. [Association media - organiser]

9. Better management in the media sector which considers the situation of journalists

Since 2011, the media sector has undergone many training sessions to develop journalists' editorial and technical capacities. Regardless, Tunisian journalists and media managers still lack organisational and financial management skills. These skills are necessary to operate a media organisation as a business better and ensure minimum viability.

9.1 Improving conditions for journalists

9.1.1 Main observations

- Freedom of expression is under attack in Tunisia, with concerns among journalists about the security of their work.
- Many media organisations have closed down due to the economic situation and/or the inability to adapt to digital.
- A career in journalism is unstable.

9.1.2 Main recommendations

- Assess the current situation of journalists and draw up an action plan to protect the profession [Journalist - participant].
- Defend the rights of journalists individually [Journalist - participant].
- Establish a clear legal framework to make the media sector sustainable and indirectly guarantee better income for journalists [Journalist - participant].

9.2 Better media management

9.2.1 Main findings

- The current model where organisational management is centralised around the Editor in Chief is considered insufficient.
- Over the past decade, legislative, regulatory and editorial issues have been highlighted without really taking into account the financial needs of the media.

9.2.2 Main recommendations

- Better media management is needed in the Tunisian sector. [General]
- It is recommended to work on strategy by collecting and combining data to develop skills in converting data. [Research Institute - participant]
- The economic issue of media is also essential, and it is recommended to determine the best strategy based on market trends, local economic opportunities and potential obstacles. [Media expert - organising team]

9.3 Introducing management into the knowledge of journalists and media teams

9.3.1 Main findings

- Talent and skills management is essential for journalists, editors and media practitioners across the board.
- Journalists often work in editorial and business silos.
- Some Tunisian case studies demonstrate how professionals outside journalism can make an important contribution to the media.
- The media, particularly the public media, can be managed by people from the private sector and from commercial backgrounds, as in many international media organisations.
- The challenge of building management capacity in the media is related in part to funding media financing.
- There is a sense of great precarity among Tunisian journalists, especially among women and young people.

9.3.2 Main recommendations

- It is necessary to maintain and improve the professional skills of journalists through ongoing training. [International expert - participant]
- It is vital to integrate management and other professions that are inseparable from the journalistic sector, but not editorial, into the curriculum of journalism schools. [Media expert - organisation team]
- It is crucial to find a solution to introduce management into journalism school training and journalism into business schools. [Media expert - organising team]

9.4 Challenging existing business models

9.4.1 Main findings

The main business models for the Tunisian media are the following:

- The sponsorship and advertising model:
    - This is the most common business model, and there is a strong dependence in Tunisian media on the advertising market.
    - This model needs more clarity between independent editorial content and sponsorship.
- Transactional and membership-based models:
- These are rare in Tunisia, where there is no culture of subscribing to content in Tunisia, unlike in Morocco, for example.
- Many business models of Tunisian media have a high dependence on advertising revenue.

9.4.2 Main recommendations

- New approaches need to be implemented to finance Tunisia's media, particularly by raising awareness among the public, decision-makers and the media. [Associative media - organiser]
- It is necessary to explore with partners such as telecoms or financial operators as well as other media remuneration methods. [Private media - participant]

10. Final considerations

The recommendations presented in this document will lead to the implementation of concrete actions, in particular by organisations supporting Tunisian media:

The report will be made available for Tunisian stakeholders to give them food for thought and facilitate decision-making, particularly Tunisian authorities if they wish to identify priorities for the sustainability of Tunisia's media sector.

The report will also be used to guide donors and other stakeholders in the future. For example:

- AMTP 2 will use them to shape some of the following actions in their programme to match the priorities raised during the discussions (including quantitative studies on usage, triggering discussions with advertisers...)
- GFMD will present these as part of the S4D/Hague process.
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This round table enabled us to address some key issues and provided an opportunity to examine issues that are not often addressed, despite their vital importance in a context that is undermining the existence of many media operators and journalists in Tunisia. The economic question (employment, viability, business model, to name a few.) and the support provided by support organisations must become an increasingly important part of the sector's concerns in Tunisia between decision-makers and practitioners.