



Regional report
Surveys on the State of the Media
In Egypt, Jordan, Lebanon, and Morocco.
Draft

I- Methodology overview

ACRLI developed a set of principles aimed to assess the state of the media (SOM) in Arab countries. This set of principles was translated into a questionnaire targeting expert users in four Arab countries: Egypt, Jordan, Lebanon, and Morocco. A public opinion survey was also conducted to assess the public's perception of the SOM.

The expert questionnaire tapped into 3 dimensions and contained 76 question items, 65 of which asked participants about their evaluation of specific aspects of the media, and 11 asked about the reforms needed.

Two questionnaires were developed separately, one for the general public, and one targeting experts. Sample selection and population parameters for the expert survey are outlined in the table below:

	Egypt	Jordan	Lebanon	Morocco
Location	Cairo	Amman	Greater Beirut	Rabat, and Casablanca
Sample size	150	150	150	150
Refusal rate %		16.6	22.7	23.5
Gender ration ♂-♀ %	69 - 31	57 - 43	58 - 43	76 - 24

Descriptives for the public opinion survey are outlined in the table below:

	Egypt	Jordan	Lebanon	Morocco
Location	Cairo, Alexandria	Amman	Greater Beirut	Rabat, and Casablanca
Sample size	800	400	400	800
Immediate Refusal rate	11%	27.2%	negligible	18.3%
Gender ration ♂-♀ %	58 - 42	52-48	50-50	50-50

This report provides a summary of the data measuring attitudes toward the media along various dimensions in each of the four countries. The report does not, with some exceptions, provide data for individual items or questions that constitute these dimensions. The reader is encouraged to read the individual reports on each country if they are interested in the data on individual items. These reports are publicly available from ACRLI.



II- Expert opinion findings

Experts on the media in each of the four countries were asked to answer several questions in order to provide an evaluation of the state of the media along various dimensions. The table below highlights that in each of the four countries, the majority of items that comprise these dimensions were rated negatively by the experts.

		Egypt	Jordan	Morocco	Lebanon
Independence	Guarantees	5	5	4	3
	Regulatory framework	5	3	4	2
	Absence of Censorship	3	3	3	1
	Personal independence	5	5	4	5
Integrity	Ethical standards	2	2	2	2
Competence	Qualification	1	2	1	1
Total		21	20	18	13

Note: total number of items explored = 27

The table above does not include three dimensions: “Independence from governmental and non governmental influences”, “Diversity of the Media”, and “Open access to the profession”. These dimensions are discussed separately in the frequency section below.

Of the number of items reported above, about 75% were rated negatively in Egypt and Jordan, two thirds (66%) were rated negatively in Morocco, and 50% were rated negatively in Lebanon. these results are indicative of the expert perception of the state of the media in each country.

Dimension analysis:

Further statistical testing of the data shows that even though a majority of items are rated negatively in each country, there are differences in the emphasis placed on specific dimensions of the state of the media (SOM) in each country. The table below summarises the rank order of the main grievances by experts in each of the four countries after the items are clustered together.

		Jordan	Egypt	Morocco	Lebanon
Independence	Guarantees of media independence	1	3	2	2
	Explicit and fair regulatory framework for media activity	5	2	3	3
	Absence of Censorship	2	1	1	
	Independence from governmental and non governmental influences:	Refer to frequencies section			
	Personal independence	3	4	4	1



Integrity / Impartiality	Clear professional and ethical standard			5	
	Diversity of the Media	Refer to frequencies section			
Competence	Adequate qualification	4			
	Open access to the profession	Refer to frequencies section			

Note: empty cells in the table above indicate that the dimension in question is not rated among the top five grievances by experts in that country (e.g. censorship in Lebanon)

Censorship seems to be the most prominent grievance in Egypt, Jordan and Morocco (but not Lebanon). This concern is also reflected in associated dimension of guarantees for media independence. Expert in Lebanon do not seem to perceive the independence of the media as negatively as experts in the other countries surveyed.

As can be seen in the table above, experts in all four countries surveyed voiced complaints about the lack of “Guarantees of media independence”, “Explicit and fair regulatory framework for media activity” and “Personal independence”, three of the independence principles of the SOM.

Moreover, participants in Jordan voiced concern about the “adequate qualifications” (competence) of media professionals while in Morocco, experts negatively evaluated the “clear professional and ethical standards” (integrity) within the SOM.

Frequency analysis:

Results of the frequency analysis indicate that participants across the four countries negatively evaluate the state of the media. In Egypt and Morocco, 20 of the 36 items had an unfavourable evaluation, while participants in Jordan and Lebanon rated 24 items unfavourably.

Guarantees:

Most participants in all four countries believed that accessible government documents are inaccurate, not comprehensive, are not received in a timely manner and are not available without favoritism (towards some journalists but not others). This negative evaluation was most prevalent in Egypt.

Censorship

Most experts in Jordan (62.4 %) and Egypt (53.7%) believed that the media is not able to report openly on political issues. This was not the opinion though of the participants in Morocco (49.3%) and Lebanon (71.1%).

In Jordan, Egypt and Lebanon, the media does not seem to be independent when it comes to reporting openly on corruption matter; censorship prevails. However, this is does not seem to be an issue in Morocco.

In all four countries, the media does not seem to be able to report in an open manner on religious issues. On the other hand, no such difficulties exist when reporting on social issues.

Media outlet’s independence



Experts in all four countries believe that the media is highly influenced/pressured by the government (e.g. head of state, ministers, officials), political groups¹, advertisers, as well as the military, security services or police. Furthermore, experts in all four countries perceive that financial, political, and legal/judicial pressures are used to undermine the independence of the media. However, in none of the four countries were the civil organizations believed to have a significant influence on the media.

Interestingly though, individual country differences remain, highlighting specificities particular to each country. For example, in Jordan and Lebanon (but not Egypt or Morocco), experts believed the media to be pressured by foreign governments (e.g. embassies, etc). furthermore, in both Egypt and Lebanon experts perceived the threats of physical harm as mean to pressure the media as a significant threat.

Other country specific results are as follows:

- In Lebanon, religious/sectarian groups are perceived to pressure the media.
- In Jordan, social groups (tribal, ethnic etc.) seem to have strong influence on the media
- In Morocco, non advertisement related businesses seem to have an effect on the independence of the media.

Diversity

Experts in all four countries believe that the content of the media accurately reflects the gender, political and cultural diversity of society. However, in Jordan, Egypt and Morocco, the content of the media does not accurately reflect the ethnic and religious/sectarian diversity.

Open access

In all four countries, experts believe the government significantly uses political views/affiliations but not qualification criteria to select employees in public/official media.

Furthermore, experts perceive ethnicity to be an important factor in Jordan and Lebanon when it comes to the selection of employees in public/official media. This does not seem to be the case in Egypt and Morocco.

According to the experts surveyed, private media organizations significantly use political views/affiliations to select employees in the media profession in all four countries. They also have recourse to qualification criteria in Egypt, Morocco and Lebanon. In Jordan, Egypt and Morocco though, neither does gender nor ethnicity play a significant role in this selection.

Ethical standards

In Jordan, Morocco and Lebanon, the majority of experts believe that journalists are likely to accept favors and bribes. This is not the case in Egypt.

Reform:

¹ This was especially significant in Morocco (58.5%) and Lebanon (71.3%). It was much less significant in Jordan (35.3% for, 32.3% against) and Egypt (38.2 % for, 34% against)



The table below presents the ranking of the most important reforms according to the priorities identified in each country by the participants in the survey:

ITEM: reforms	Jor.	Eg.	Mor.	Leb.
10. Legal reforms are needed to enhance the independence of the media.	1	1	1	3
16. in the regulatory framework to enhance the independence of the media.	4	3	3	4
51. to guarantee the personal independence of journalists	2	5	2	2
67. to strengthen the competence and qualifications of journalists	3	2	2	1
42. to increase the independence of media establishments from governmental influences		4	4	
76. Reforms of existing laws and regulations that specify rules to select media employees are needed to create equal chances of access to the profession			5	2
25. Reforms in censorship practices to strengthen the media's independence	5			
57. Higher professional standards are needed to enhance the integrity of the media				5
64. More diversity within the media would enhance the media's integrity				5

As can be seen in the table above, experts in Jordan, Egypt and Morocco rated “legal reforms to enhance the independence of the media” as the top most reform priority. Many of the reforms requested are within the independence dimension. These include the need for reform in the legal system, regulatory framework and guarantees for personal independence of journalists. Please refer to the table above for details and ranking of other reform items.

III- Public opinion

A- Preliminary and background results:

Before presenting the main findings from the public opinion survey on the SOM, details from a few background questions shed some noteworthy light on the population surveyed in each country.

Of importance are the following:

- There is a high level of illiteracy in both Cairo and Alexandria; 16.5% of the sample surveyed reported being illiterates, and another 35% reported completing elementary school only.
- When asked about the type of media used to obtain the information needed, participants in the four countries revealed an extensive use of the general media outlets available (e.g. newspapers, TV, and Radio), with the TV being the most relied upon source for information in Jordan, Lebanon and Morocco. In Egypt, on the other hand, people were most likely to use newspapers and magazines. The internet was also highly used in Jordan, Egypt and Lebanon but not in Morocco. Informal networks of information such as religious and social groups were the least relied upon for information in any of the countries except for Egypt. No other means were mentioned.

To what extent do you use... to obtain the information you need		Egypt	Jordan	Lebanon	Morocco
Newspapers and Magazines	Large Extent +	73	69.4	72.1	59.7
	Neutral	11.8	10.1	11.3	.9
	Small Extent -	15.2	20.5	16.7	39.4
TV	Large Extent +	64.6	80.4	87.3	86.2



	Neutral	18.6	8.3	4.3	.8
	Small Extent -	16.8	11.3	8.4	13
Radio	Large Extent +	45.5	48.1	40.7	52.2
	Neutral	20.1	13.9	28.4	1.3
	Small Extent -	34.4	38	30.9	46.6
Internet	Large Extent +	51.8	57.2	44.8	41.5
	Neutral	19.3	11.8	18.5	1
	Small Extent -	28.9	31	36.7	57.5
Social and Religious groups	Large Extent +	40.9	24.7	23.3	34.2
	Neutral	23.5	24.1	14.2	9
	Small Extent -	35.5	51.2	62.5	56.8
Other means	No other means were mentioned				

B- State of the Media:

Assessment of individual item responses indicated a negative evaluation of the state of the media in all four countries. Out of the 9 items, Lebanese and Moroccan participants evaluated 5 items negatively while Jordan and Egyptian participants viewed seven items in a negative way.

To what extent/to which degree		Egypt	Jordan	Lebanon	Morocco
do journalists enjoy freedom of expression without fear of reprisal	+	31.6	22.3	77.7	50.4
	Neutral	19.6	18.5	5.6	4.3
	-	48.8	59.2	16.7	45.2
is the media influenced/ pressured by government	+	60.6	63.1	47.8	59.9
	Neutral	17.7	16.1	11.5	8.4
	-	21.7	20.8	40	31.7
is the media influenced/ pressured by non-governmental parties (exp: private corporations, political groups, other social groups)	+	28.8	40.8	53.1	50.9
	Neutral	30.2	24.6	26	10.5
	-	40.9	34.6	20.9	38.6
do journalists accept favors/bribes	+	47.9	31	38.6	36.9
	Neutral	24.1	42	32.6	17.2
	-	28	27	28.8	45.9
does the content of the media reflect the diversity in society	+	26.2	38.7	82.3	56
	Neutral	29.8	27.4	8.5	4.1
	-	44	33.9	9.3	39.8
the media provide you with impartial and balanced views (in your opinion)	+	23.8	27	25.8	42.3
	Neutral	28.2	22.2	29.2	5
	-	48	50.8	45	52.7
does the media provide you with the	+	30.1	26.9	60.7	44.5



diverse political, economic and social views that you need (in your opinion)	Neutral	23.5	21.7	11.7	3.8
	-	46.4	51.4	27.6	51.7
does the media hire its employees without discrimination (racial, gender, political)	+	18	24.1	34.6	26.2
	Neutral	23.5	24.6	14.7	10.3
	-	58.5	51.3	50.8	63.5
can you receive the various types of media that interest you (TV, Radio, printed press, internet)	+	57.1	68	81.5	77
	Neutral	24.3	16.4	8.4	2
	-	18.6	15.6	10.1	20.9

In all four countries, the public perceived the media to be highly influenced/pressured by government sources, that media does not provide impartial or balanced views, and media hiring procedures suffer from discrimination (political, racial, gender).

Other significant findings include:

- The public in Egypt and Jordan do not believe that journalists have freedom of expression.
- In Egypt, public perception indicates that the media does not reflect the diversity in society, and that non governmental sources have a significant influence on the media.
- Public perception in Egypt, Jordan and Lebanon indicate that journalists are susceptible to bribery.
- Finally, only in Lebanon is the media perceived to reflect diversity in covering political, economic and social views.

Furthermore, sanctions against journalists are perceived to be arbitrarily imposed in Jordan and Morocco. Large percentages of the public also believe that the media is unable to report openly on political, religious and social issues in Jordan and Egypt (see table below for details).

	Jordan	Egypt	Lebanon	Morocco
Sanctions against journalists and media organizations are arbitrarily imposed (e.g. denial or suspension of credentials, closure., seizure) (R)	x			x
The media is able to report openly on all types of issues (political, religious, social)	x	x		
Generally, journalists have sufficient qualifications to perform their duties competently		x		

Reform questions:

Participants in all countries/cities were asked to rate/rank the priority of reforms within the media; results are presented in the table below:

	Jordan	Egypt	Lebanon	Morocco
Reforms are needed to enhance the independence of the media	3	3	2	1
Reforms are needed to enhance the integrity of the media	1	1	3	2
Reforms are needed to enhance the efficiency of the media	2	2	1	3



Participants in both Egypt and Jordan ranked reform priorities in a similar way (integrity, then efficiency then independence); these ranks changed for Lebanon (efficiency, then independence, then integrity) and for Morocco (independence, then integrity, then efficiency).

C- Brief Conclusions

Overall, the state of the media was negatively evaluated by experts and the public in the four countries surveyed.

Both expert evaluation and public evaluation of the SOM would rank Jordan and Egypt as worst, followed by Morocco then Lebanon. This accord between public and expert evaluation is noteworthy.

The most significant grievances reported by Experts rest in the independence principle:

- In Jordan, they relate to guarantees of media independence
- In Egypt and morocco: Absence of Censorship.
- In Lebanon: Personal independence

The profile of grievances differs per country and would thus require country specific interventions.

Reform questions:

Expert and public opinion reforms differed slightly.

Experts in Jordan, Egypt and Morocco rated the following reforms as the most urgently needed: “Legal reforms [...] to enhance the independence of the media” was viewed as the most important type of reform. In Lebanon though, “Reforms [...] to strengthen the competence and qualifications of journalists”.

Public evaluation was slightly different, in that the most needed reform in Jordan and Egypt were related to integrity, the most needed reforms in Morocco were related to independence, while the most important reform in Lebanon relates to efficiency.

Finally, it is important to note that the conclusions drawn above are subject to a series of limitations that threaten their validity. Some of these limitations are outlined below.

D- Limitations

Refusal rate and generalisation of results:

It is important to note that the refusal rate in sample selections may weaken the ability to generalise to the entire population. This applies to both the expert and public opinion surveys.

ACRLi and the contracted polling agency (Information International) were fully aware of the potential refusal rates within this population, and took several steps to increase the cooperation of the participants. Some of these steps included a careful and sustained approach to each individual participant, requesting appointments and following up with a series of visits and probes. The questionnaire clearly displayed a UNDP and ACRLi logo, with transparent information about the goals of the survey and the ACRL centre. Furthermore, clearance from the authorities was sought



wherever it was necessary, and this alleviated potential pressure off participants. Nonetheless, refusal rates warrant caution as to generalisation of results.

Cities and countries:

Both the experts' survey and the general population surveys were restricted to specific target cities in each country. As such, generalisation of the results should be confined to: Cairo and Alexandria in Egypt, Amman in Jordan, Beirut in Lebanon, and Casablanca, and Rabat in Morocco.

Questionnaire constraints:

Constraints attached to survey methods impact the validity of the survey: the list of principles measuring the SOM is too long to be completely incorporated in a survey. This difficulty prevented the construction of scales to measure each principle and its components, leading to some sub-principles to be measured with only one item, or leading to some unavoidable double barrelled questions (e.g. items that refer to “clear and objective” targets).

The complexity of the SOM principles may cause difficulty to participants from the general population. The necessity to construct a shorter and less specialised questionnaire targeting the general population prevents a direct comparison between the experts and general public results.

A few items had missing data; participants did not want to, or did not know how to respond to these questions. Missing data analysis may yield interesting questions for future research.

Response Style:

It is possible that a difference in response styles affect(ed) the results. It is possible (though unlikely) that participants in the various countries surveyed express themselves with different degrees of extremism.

Furthermore, it is possible that experience with surveys and the general level of freedom in the countries surveyed may have affected the results. For example, it may be possible that the degree of positive evaluations in Lebanon is inflated by the familiarity of participants with surveys and the greater freedom with which Lebanese citizens are familiar with.