



STATE OF THE MEDIA INDUSTRY IN ARMENIA

*The study on the state of the media industry is implemented by the Yerevan Press Club through the **Alternative Resources in Media (ARM)** program, which is made possible with the support of the American people through the United States Agency for International Development (USAID). The “Alternative Resources in Media” (ARM) program aims to enhance and improve access to pluralistic and unbiased information in Armenia via traditional and alternative media through the use of new information technologies. The program is jointly implemented by Internews (USA), Media Initiatives Center, Eurasia Partnership Foundation and Yerevan Press Club.*

The research consists of:

- A survey conducted by the Caucasus Research Resource Centers-Armenia (CRRC-Armenia) among 1,403 households in Yerevan and the regions of Armenia. The main objective of the survey was to reveal media preferences of the Armenian public, including their expectations about media content, formatting, trust, ownership in the media, as well as their perceptions regarding media freedom and censorship;
- Monitoring of the Armenian media, carried out by the Yerevan Press Club, to determine the genre and thematic preferences of Armenian media;
- Expert survey using the Delphi method, carried out in two stages with consecutive deepening of the issues and with the participation of 21 experts from various areas of the media community in Armenia, as well as four thematic round-tables with a wide range of participants.

Armenian Media

TV Companies:

- national - 7;
- Broadcasting in Yerevan - 9;
- regional - 25, of which those that have a license until 01.07.2015 - 16;
- With satellite broadcasting- 4;
- Cable TV channels - 52, of which in the regions - 30

Radio Companies:

- Broadcasting in more than 1 region - 3;
- Broadcasting in Yerevan - 16;
- regional - 4

Periodicals:

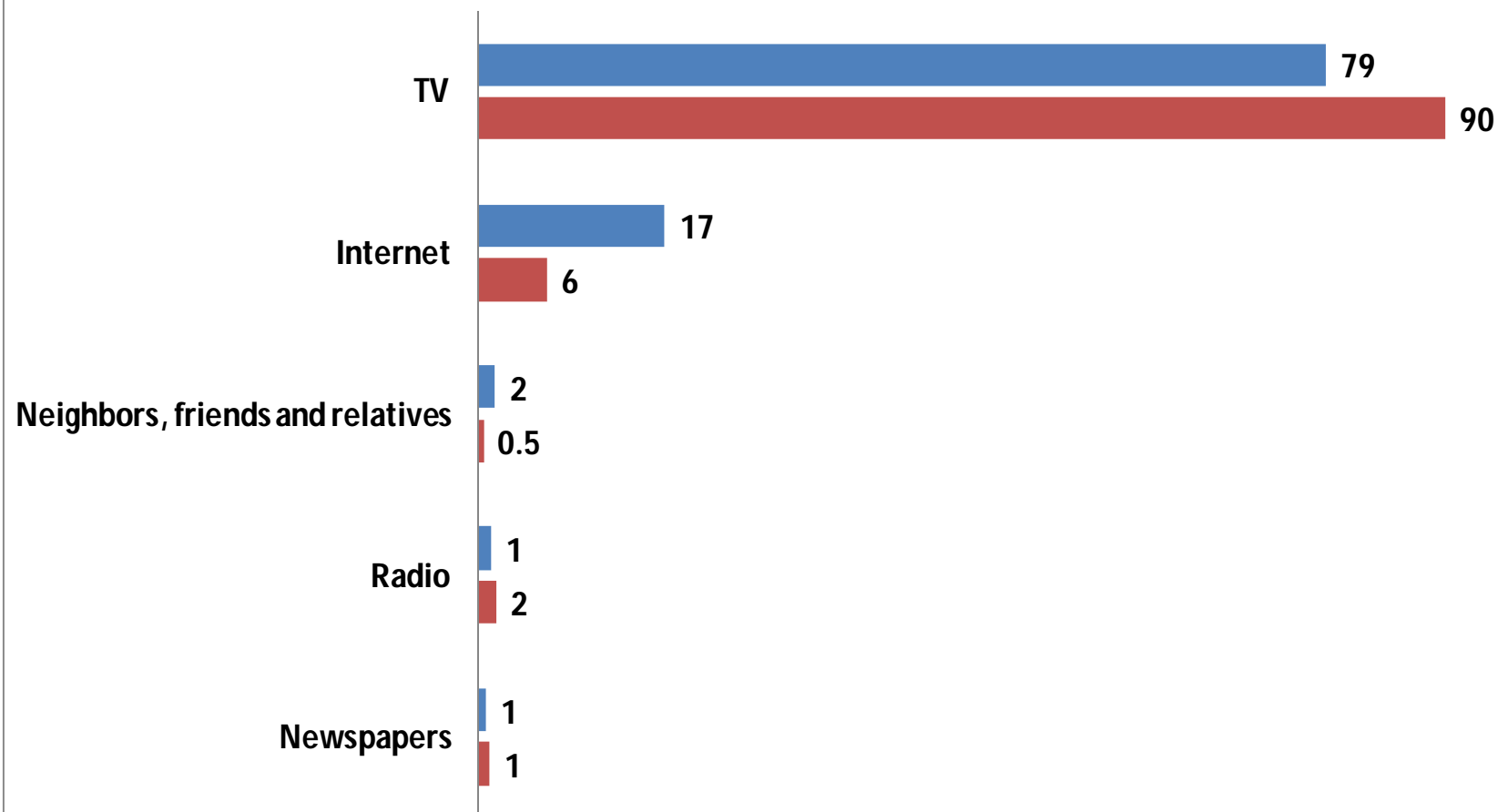
- In 2013 In 2013 in Armenia 72 newspapers were circulated (excluding periodicals containing only advertising, classifieds, crosswords, quizzes, etc.), including:
- 10 daily newspapers with a total daily (claimed) circulation of 35,000 copies;
- 28 regional newspapers with a total daily (claimed) circulation of about 20,000 copies.
- In total in 2013 the retail network spread 40 journals.

Online Media:

- News and information websites - 232

QA1. The most important source of information on current events and news

■ 2013 ■ 2011



Main achievements in the field of media (according to experts)

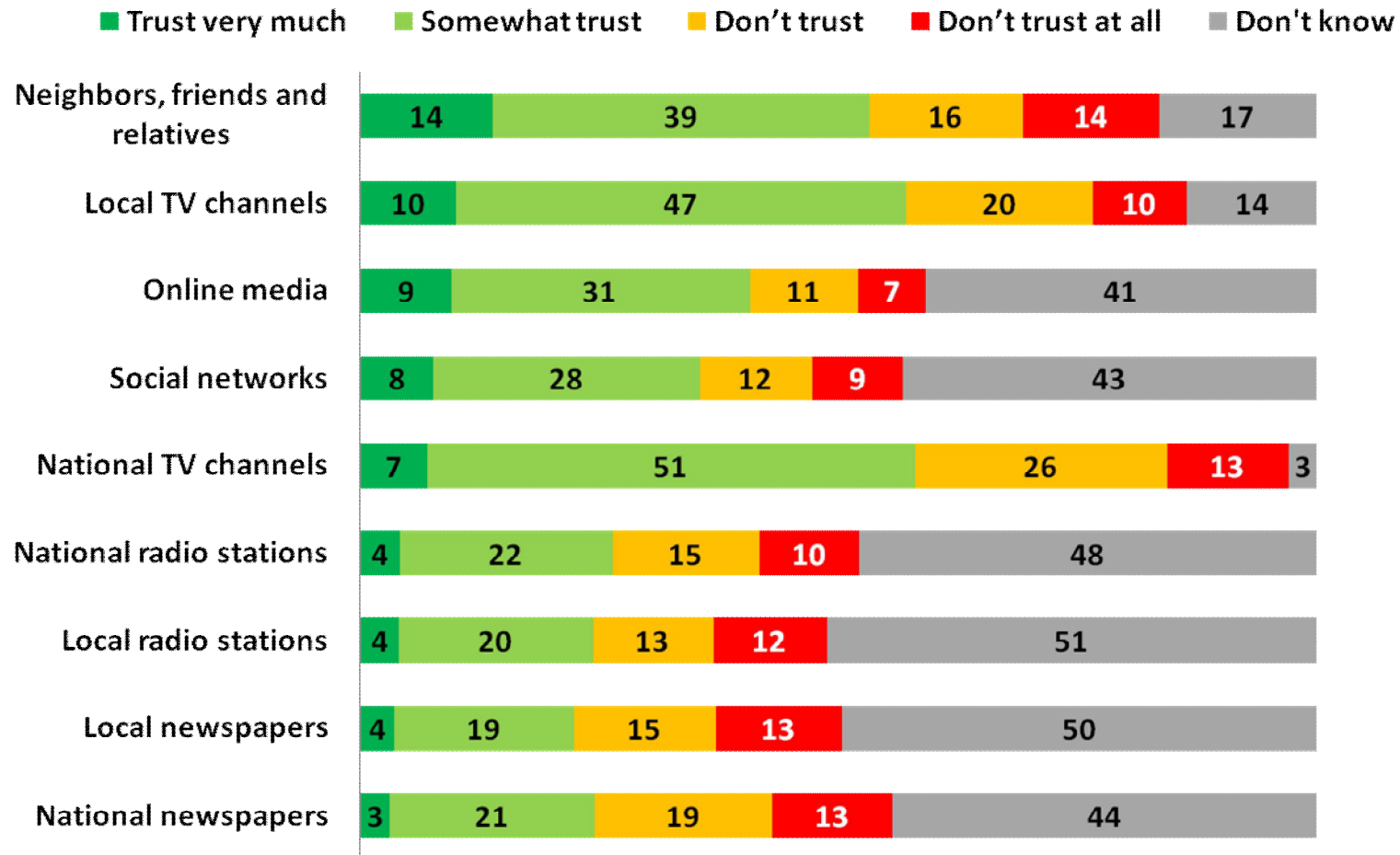
- Adoption of the RA law on “Mass Media” (2003)
- Adoption of the RA law on “Freedom of Information” (2003)
- Relative freedom of print and online media
- Avoiding specific regulation of new media
- Introduction of contemporary communication technologies in the media

Main Problems (according to experts)

- The media have not succeeded in becoming a profitable business / hence the dependence of media-industry on political forces

As a result, low level of trust towards media

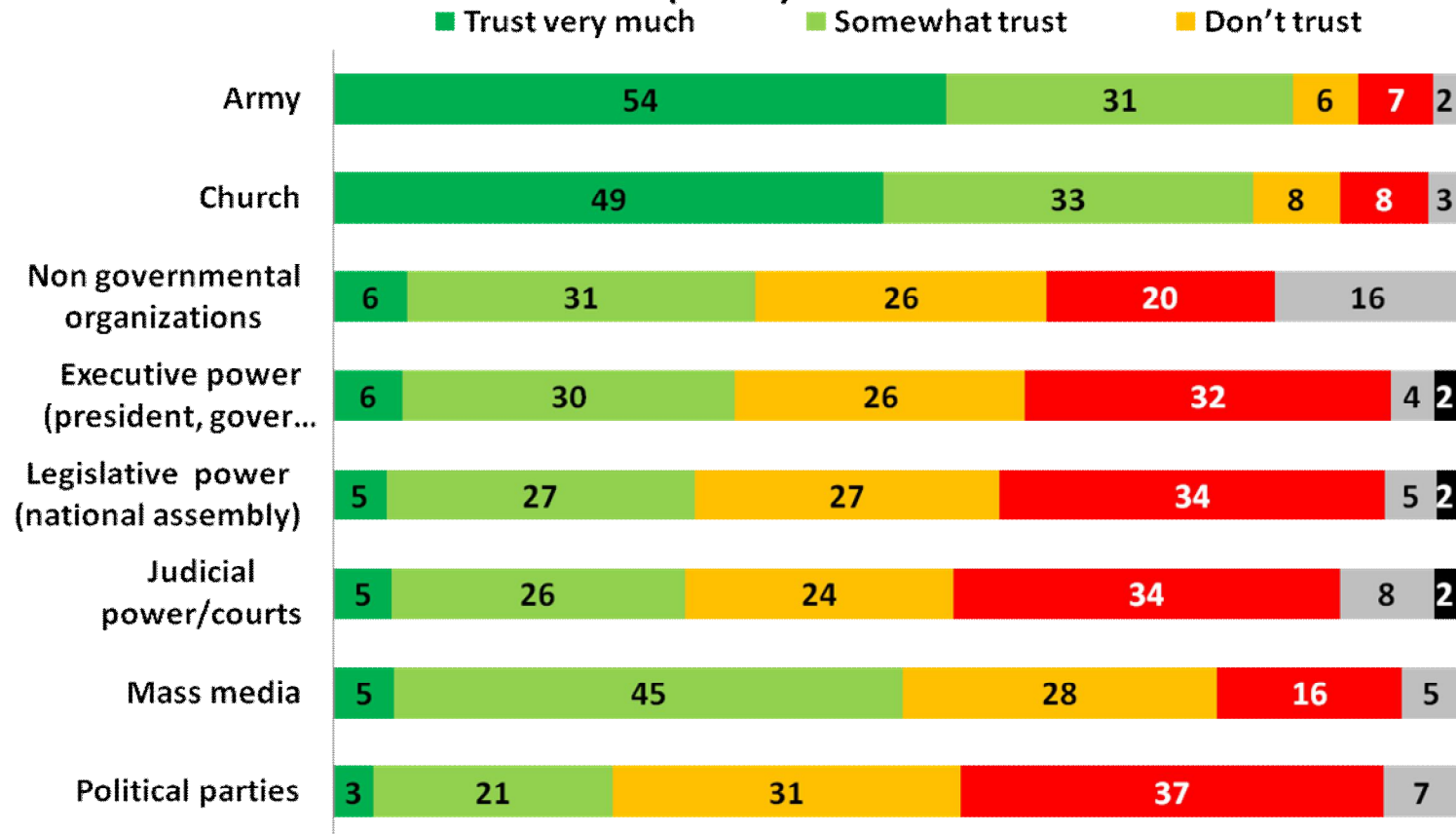
QA6. The level of trust towards each of the sources (2013)



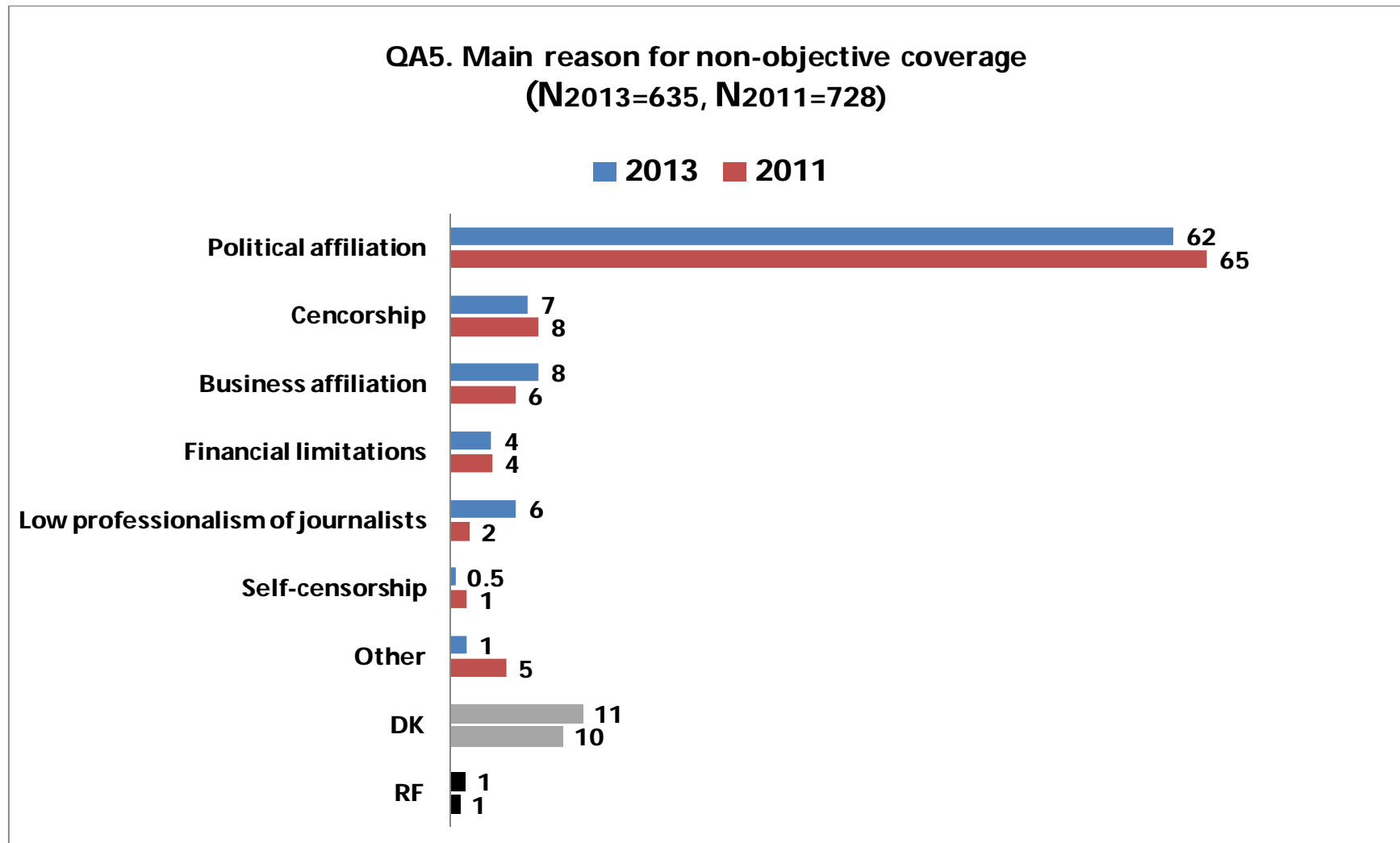
Trust Towards Institutions in General

QA19. How much do you trust each of these institutions?

(2013)

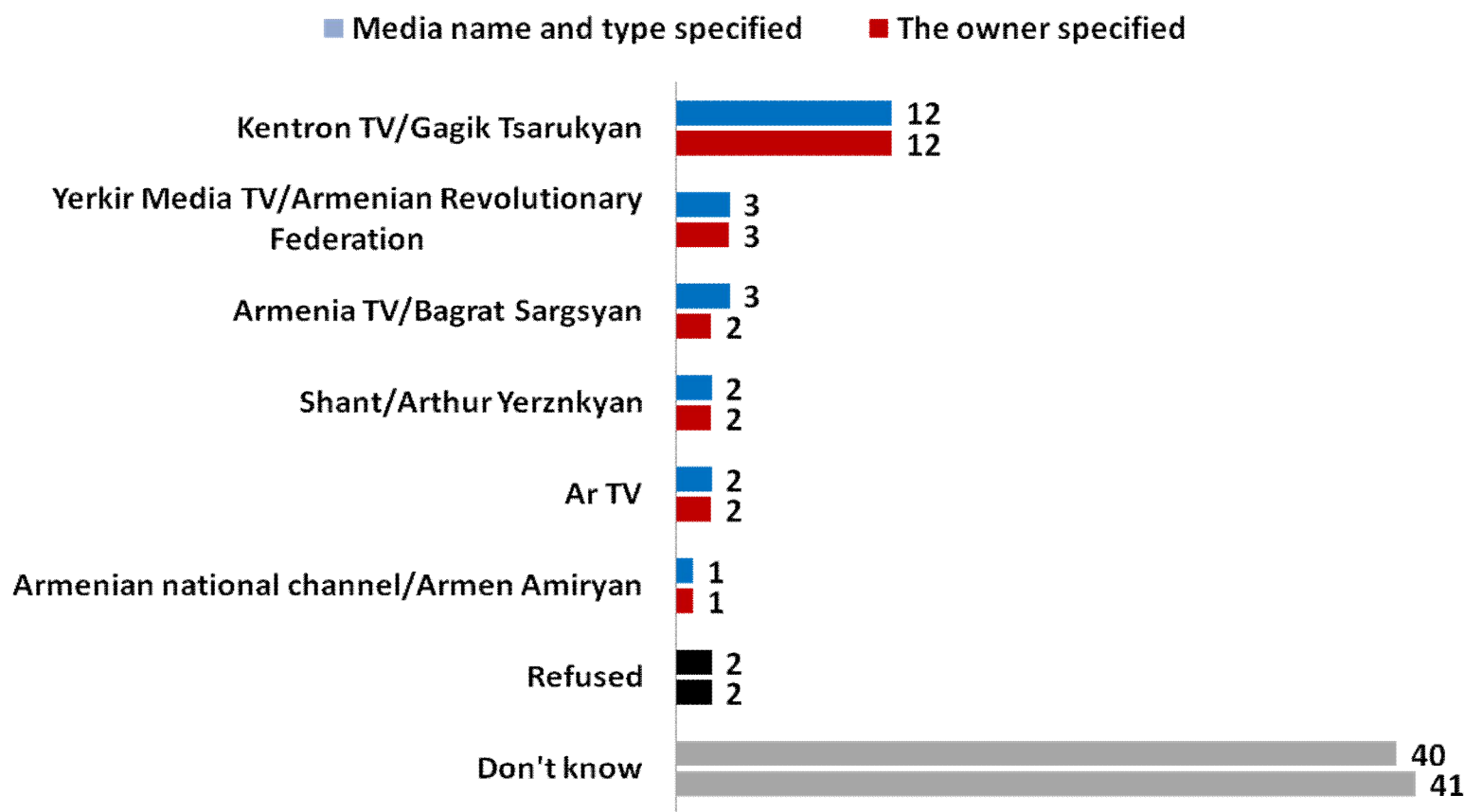


Reasons for Lack of Trust (Political influences)



Lack of Information Regarding Ownership of the Media

QA9. Are you informed who are the media owners in particular?/Specify the media name and type (number of cases)



Attitude of the experts to statements regarding political dependence of the media

- Armenian information market depends on the political interests and preferences of the media owners. It is not business per se, as it does not depend directly on its audience.

Main Yes 18 - No 3

Supplimentary Yes 18 - No 0

Total Yes 36 - No 3

- Authorities apply political pressure on critical media, as a result many media are forced to chose the path of self-censorship

Main Yes 16 - No 5

Supplementary Yes 15 - No 3

Total Yes 31 - No 8

Necessity of Changes in the Legislation

**(according to the order of importance,
as indicated by the experts)**

- Regarding transition to digital broadcasting
- Regarding media regulatory bodies (independence of bodies regulating broadcast media - to turn licensing into a purely trade transaction; although there is no general understanding neither of the problem itself, nor of the ways of its solution)
- Regarding protection of intellectual property/copyright (through stricter legislation, as well as, general opinion is that the issue needs to be solved through media self-regulation mechanisms)
- Regarding civil rights (insult, privacy, presumption of innocence; Constitutional Court's ruling on November 5 2013 regarding moral damage compensation – first step)
- Comprehensive liberalization, when media will be completely considered a field that does not have the need for special regulation and information-related disputes will be solved by self-regulation bodies
- Regarding harmonization of the regulations in the fields of traditional and new media

Attitude of the experts to statements regarding political dependence of the media

• Traditional media, especially print media is behind times and is unable to compete with the new media. In the coming 5 years print media of Armenia are bound to dissapear, if they do not converge and search for new models compatible with the international practices.

Main Yes 18 - No 3 *Supplementary* Yes 12 - No 6 *Total* Yes 30 - No 9

• In the near future television will lose its informative function and will perform solely the function of entertainment.

Main Yes 5 - No 16 *Supplementary* Yes 7 - No 11 *Total* Yes 12 - No 27

• In spite of the development of online technologies, the informative function of television will preserve its primary function in the near future

Main Yes 15 - No 6 *Supplementary* Yes 13 - No 5 *Total* Yes 28 - No 11

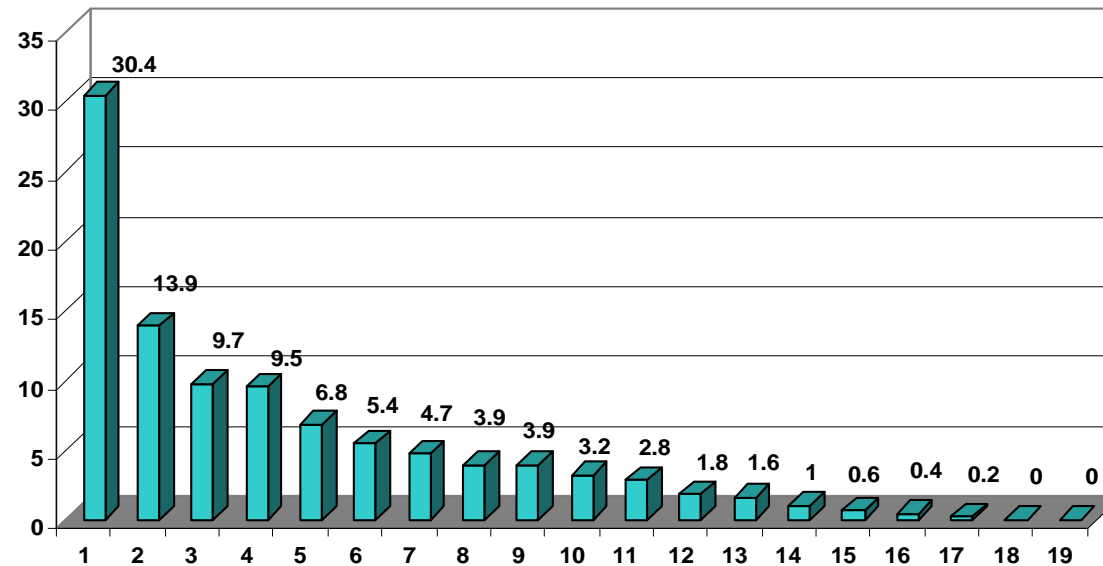
Which programs are watched (according to the survey)

**QB8. What kind of TV programs mentioned below do you watch on TV?
(%, the list was refreshed and re-worked for 2013)**

TV programs	2013	2011
News	65	69
“Soap opera” (series)	35	37
Music	34	40
Humor programs	26	NA
Feature films	25	42
Sports	16	23
Political Debates	14	14
Educational (culture, health, training, etc.)	13	18
Interviews with guests	11	NA
Talk shows	8	NA
Documentaries/special reports	7	NA
Publicist programs, analytical programs	4	NA
Popular science programs	4	NA
Programs about Celebrities	3	NA
Interactive programs (with calls of TV viewers)	3	3
Games, quizzes	3	NA
Entertainment (games, quizzes)	NA	17
Current political events analysis	NA	6
Religious Programs	1	2
Reality shows	1	NA
Other	1	2

Genre Preferences of the Studied TV Channels

First Channel of the Public Television of Armenia (h1), "Armenia",
"Yerkir Media", "Kentron", Second Armenian TV Channel (h2)

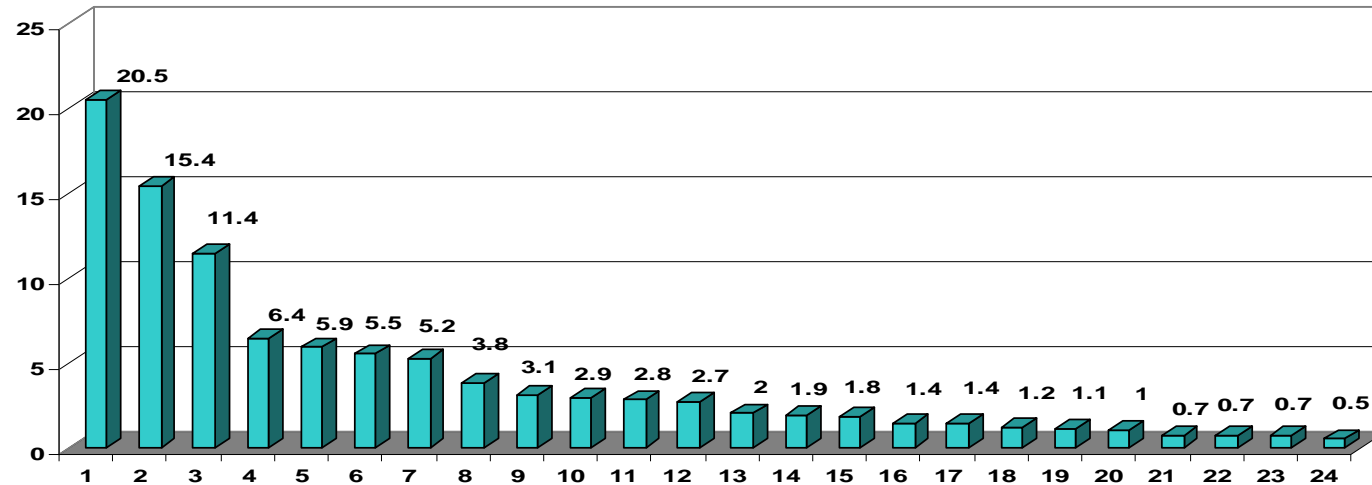


1. News
2. Educational programs (culture, health, education, etc.)
3. TV series
4. Movies and cartoons
5. Music programs
6. Talk show
7. Sport programs
8. Political debates
9. Documentaries, special reports
10. Humor

11. Other
12. Interviews with guests
13. Current affairs, analytical programs
14. Games, competitions
15. Science programs
16. Programs about celebrities
17. Religious programs
18. Interactive programs (with viewers' studio calls)
19. Reality show

Thematic Preferences of the Studied TV Channels

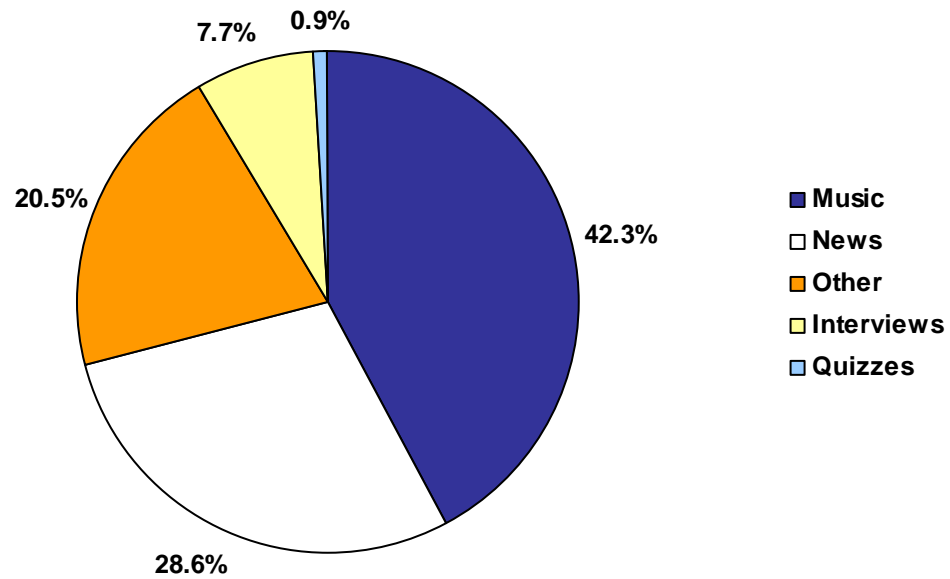
First Channel of the Public Television of Armenia (h1), "Armenia",
"Yerkir Media", "Kentron", Second Armenian TV Channel (h2)



- | | |
|--|---|
| 1. International political events | 12. Activities of artists and celebrities |
| 2. Culture, science, history and events related to these spheres | 13. Negotiations on the Mountainous Karabagh conflict resolution |
| 3. Armenia's relations with neighboring countries, developments in the region (situation in Iran, Turkey, Azerbaijan and Georgia, Russia's role in South Caucasus, etc.) | 14. Environmental issues |
| 4. Armenia and its representatives in international institutions (CoE, OSCE, UN, NATO, CIS, Collective Security Treaty Organization, etc.) | 15. Situation in Armenian army |
| 5. Issues of corruption, monopoly and oligopoly, unfair competition | 16. Public sector, activities of NGOs |
| 6. Elections in Armenia (parliamentary elections in 2012, presidential elections in 2013, local self-government elections), post-election situation | 17. Health issues in Armenia (quality of medical care, prices of medicines and treatment, corruption in the system) |
| 7. Armenia's relations with the great powers (USA, Russia, EU countries) | 18. Issues of education in Armenia (quality and cost of education, corruption in education system) |
| 8. Life of Armenian Diaspora | 19. Issues of human rights and fundamental freedoms |
| 9. Rising prices, low salaries, pensions and social benefits, unemployment in Armenia | 20. Tourism, tourism development in Armenia |
| 10. Daily life, conditions of life, ordinary people's problems | 21. Activities of wealthy Armenians |
| 11. Activities of the RA Police | 22. Freedom of speech and media independence issues, activities of media owners |
| | 23. Criminal world |
| | 24. Migration from Armenia |

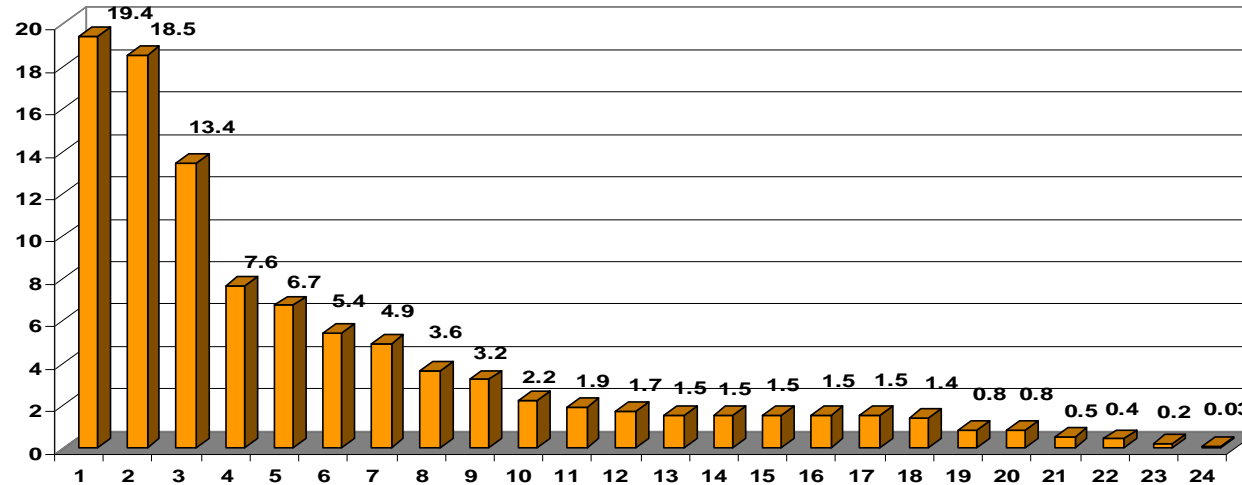
Genre Preferences of the Studied Radio Channels

Public Radio of Armenia, "Yerevan FM" Radio



Thematic Preferences of the Studied TV Channels

Public Radio of Armenia, "Yerevan FM" Radio

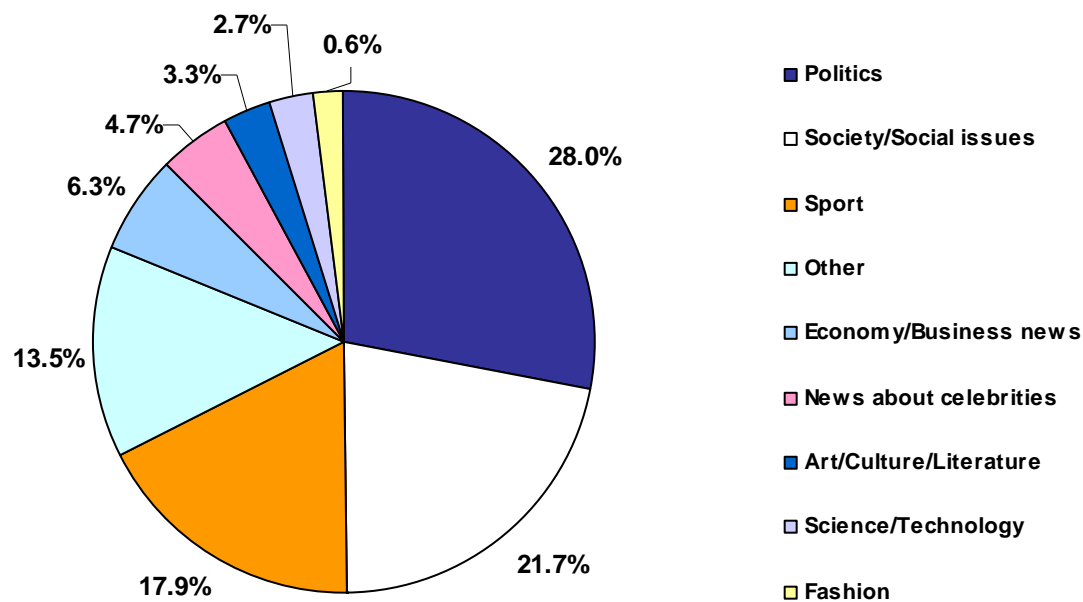


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What topics do you prefer to read in online newspapers/media? (% in total of online newspapers/news readers, QE20, 318 respondents in 2013; QE13, 175 in 2011; multiple-response question)		
Topics preferred	2013	2011
Politics	64	56
Society	49	33
Art/culture/literature	47	43
Sport	26	38
Fashion	28	35
Economics/Business news	18	23
Science/Technology	29	31
Celebrity news	42	41
Jobs/announcement	9	23
Other	3	5

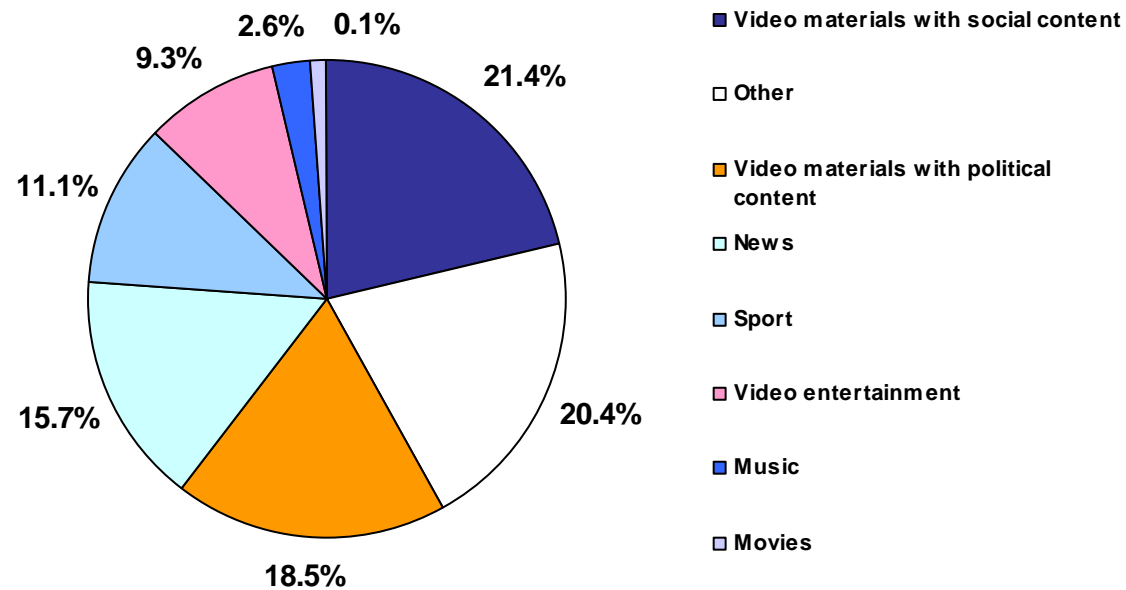
Genre Preferences of the Studied Online Media (text-based publications)

1in.am, Aravot.am, CivilNet.am, News.am



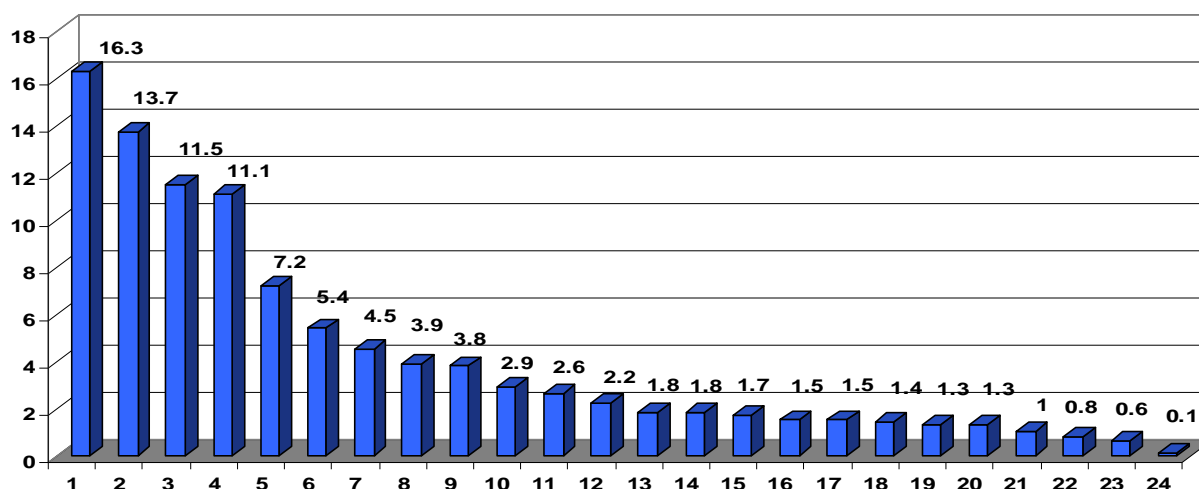
Genre Preferences of the Studied Online Media (multimedia publications)

1in.am, Aravot.am, CivilNet.am, News.am



Thematic Preferences of the Studied Online Media

1in.am, Aravot.am, CivilNet.am, News.am

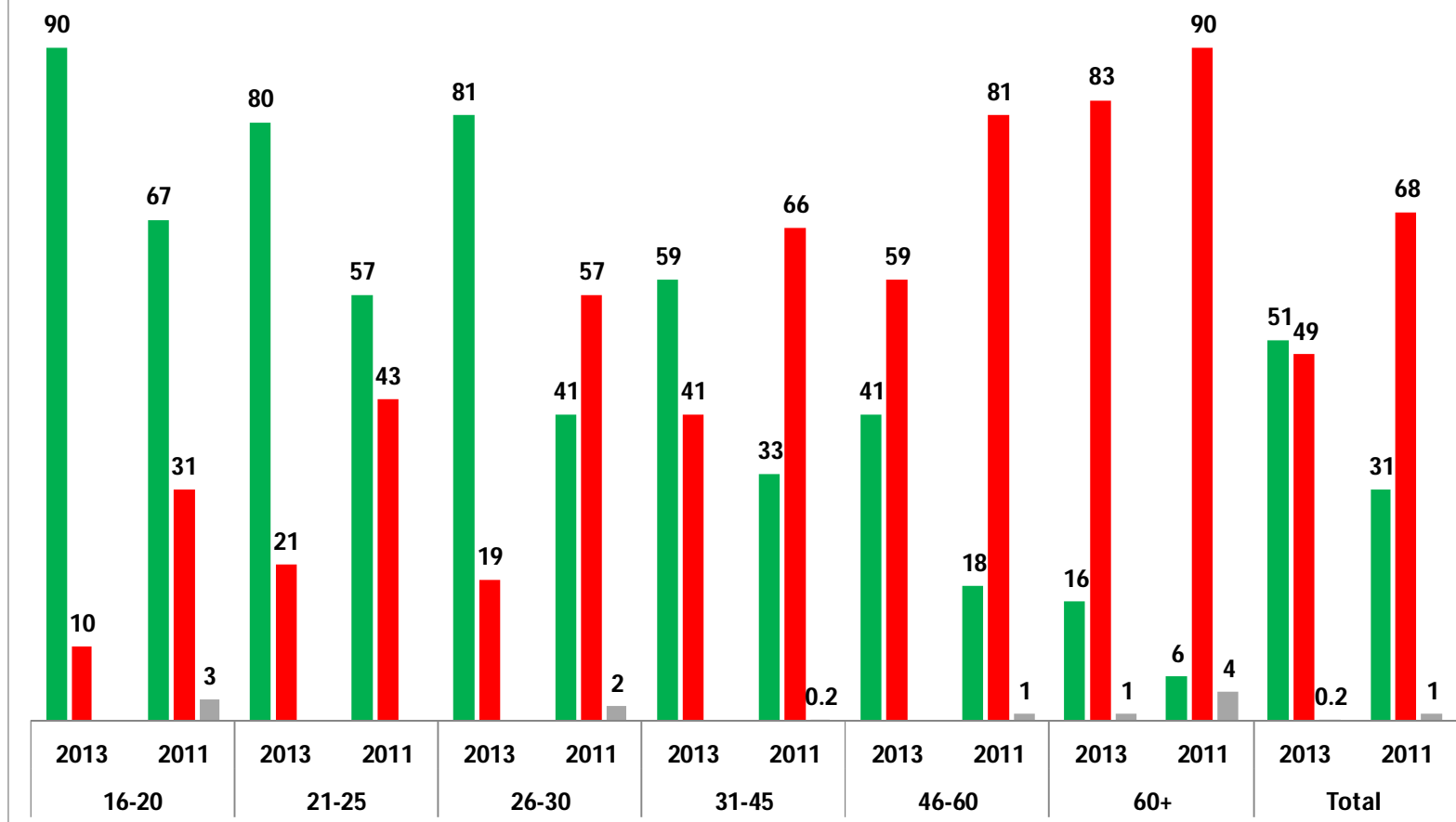


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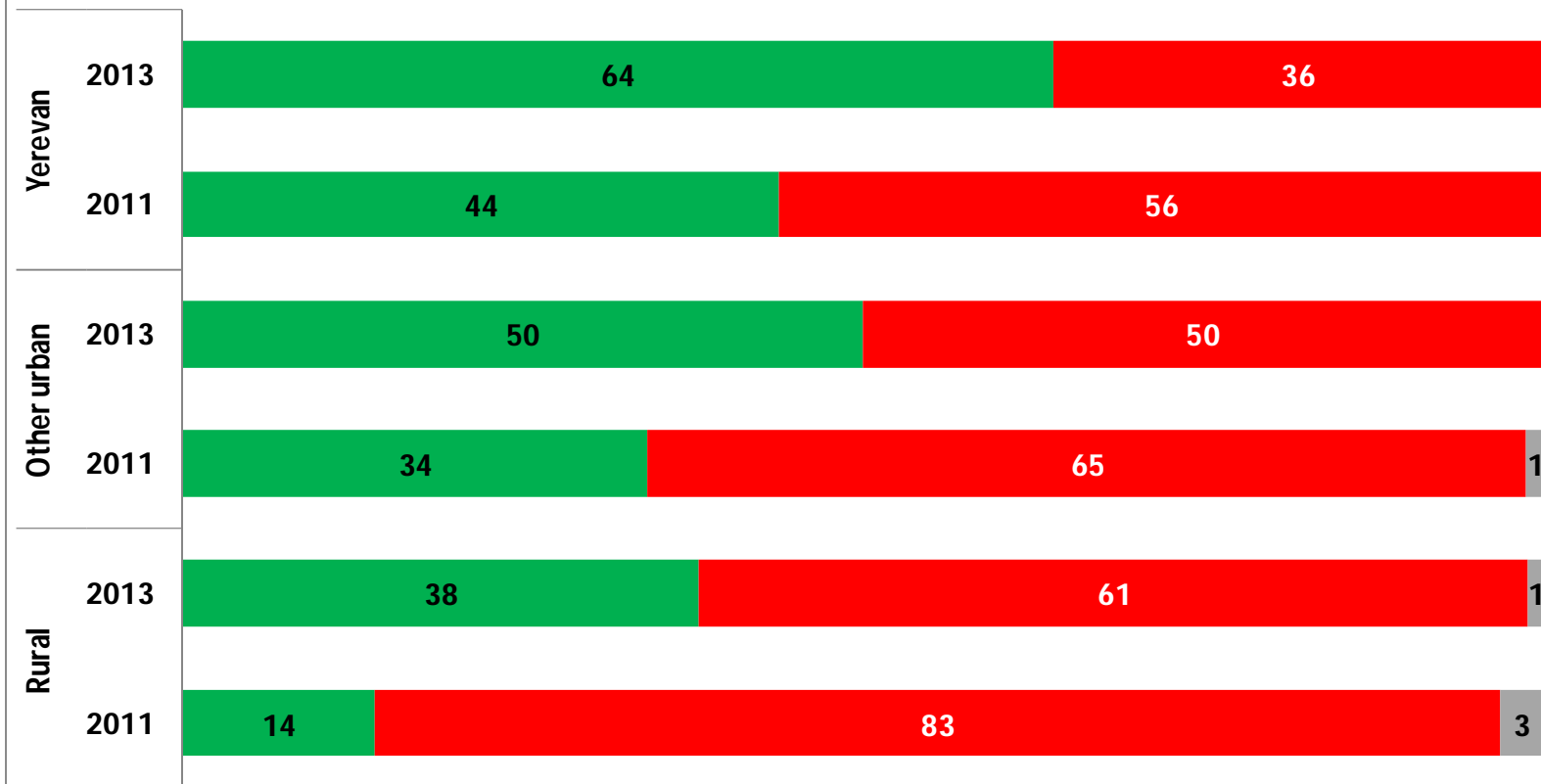
QE2. Have you used the Internet in the last 12 months? (by age)

■ Yes ■ No ■ Don't know

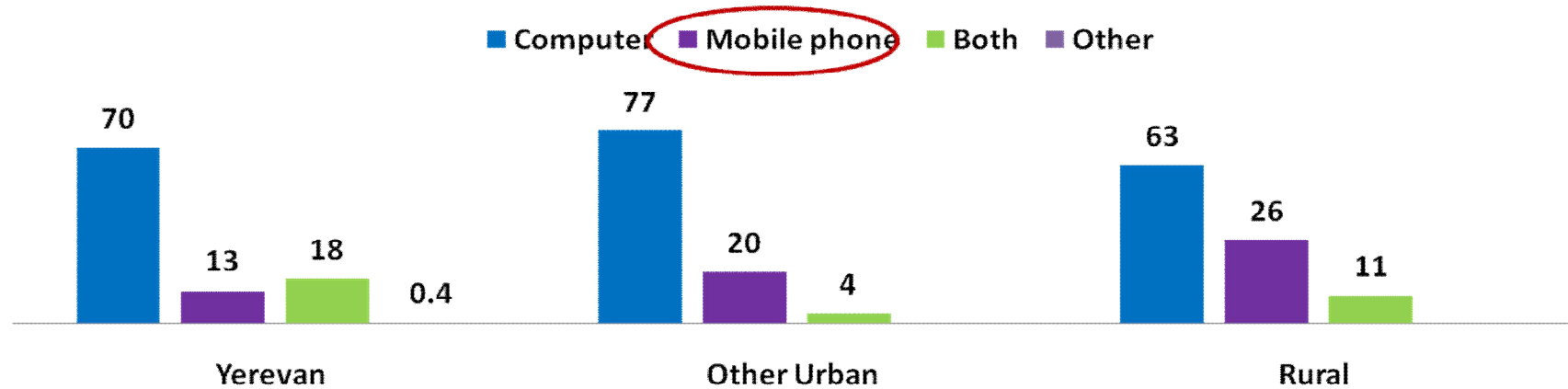


**QE2. Have you used the Internet in the last 12 months?
(by settlement type)**

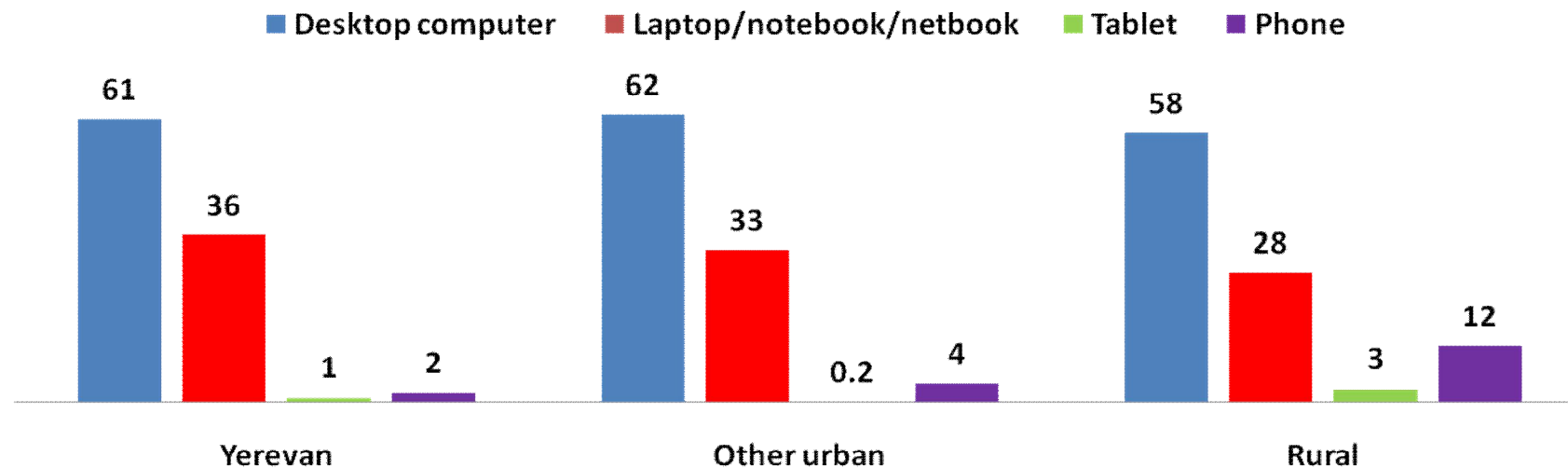
■ Yes ■ No ■ Don't know what the Internet is



QE4. Internet access primary device, 2011



QE9. Internet access primary device, 2013



Opinions of Experts on New Media

- In the coming 5 years the majority of Armenia's population will become Internet users.

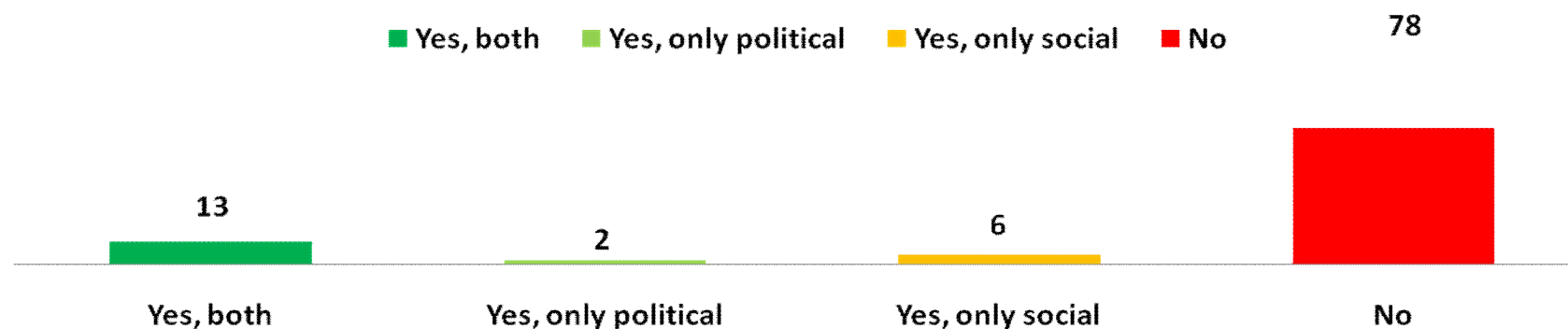
Main Yes 18 - No 3 **Supplementary** Yes 13 - No 5 **Total** Yes 31 - No 8

- In the future professional journalism will be replaced by citizen journalism and consumer generated content.

Main Yes 1 - No 20 **Supplementary** Yes 4 - No 14 **Total** Yes 5 - No 34

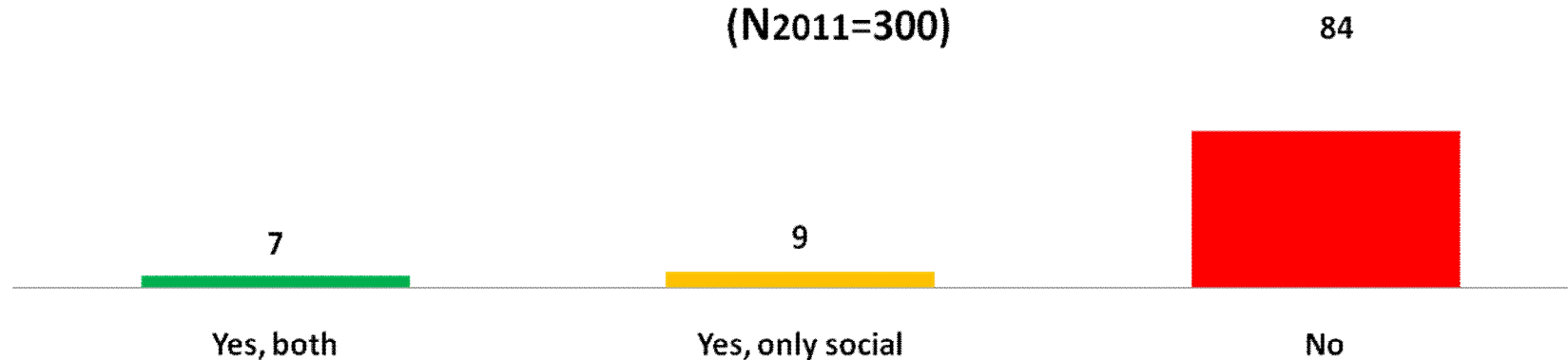
QE30. Do you use social networking sites to share political or social news?

(N2013=459)

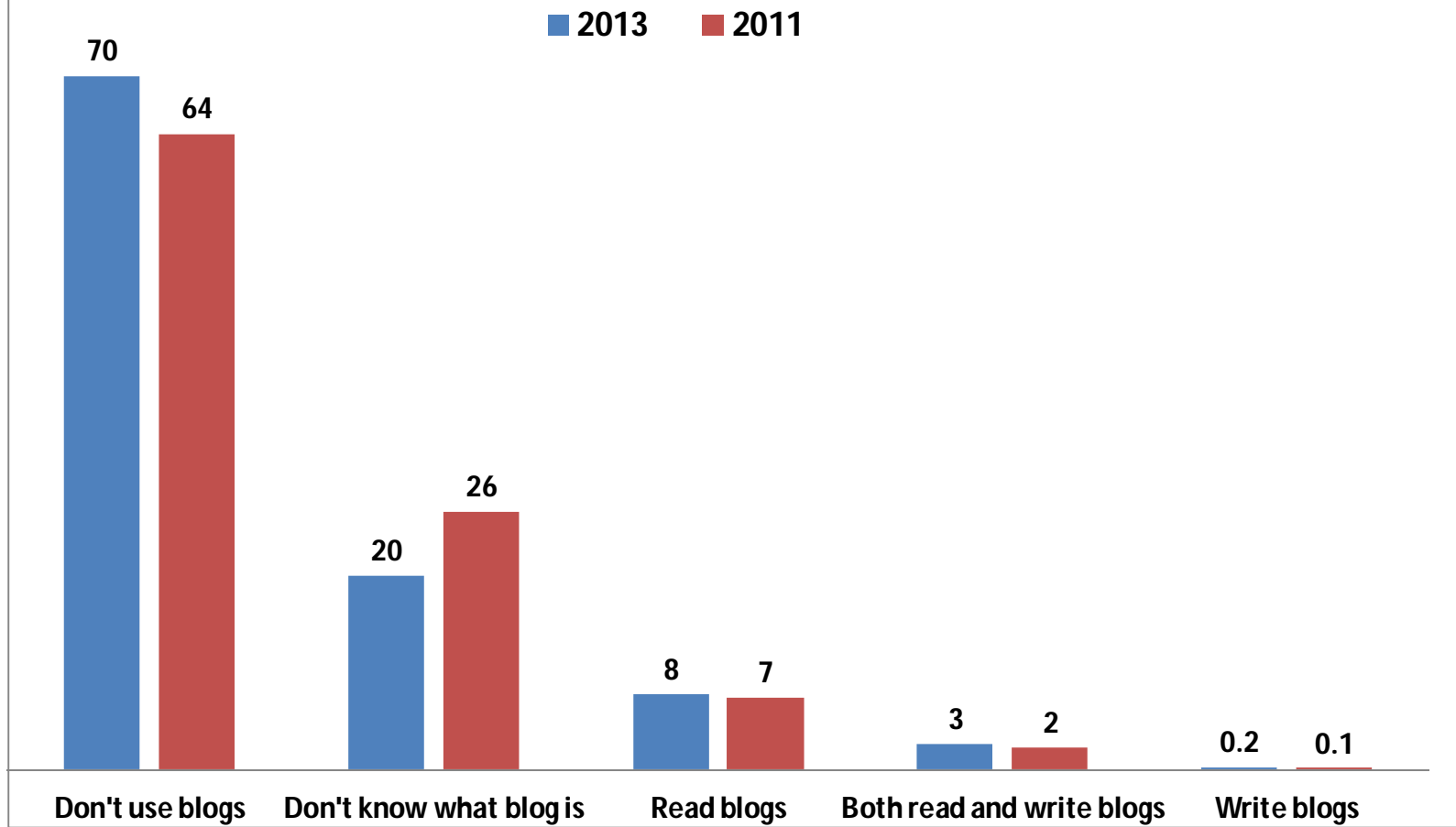


QE23. Do you use social networking sites to share political or social news?

(N2011=300)



Do you read or write blogs? (QE34, N2013=656, QE27, N2011=421)



Hopes of Experts Regarding New Media

- Attempts of the authorities to impose limitations on Internet will never be successful, because controlling Internet is impossible.

Main Yes 18 - No 3 *Supplementary* Yes 13 - No 5 *Total* Yes 31 - No 8

- The interactive and operative nature of the citizen journalism helps the traditional media to carry out their mission and to defend themselves from pressures.

Main Yes 17 - No 4 *Supplementary* Yes 12 - No 6 *Total* Yes 29 - No 10

- Development of the new media makes it impossible to conceal information and creates new opportunities for forming public opinion.

Main Yes 20 - No 0 (one expert did not answer) *Supplementary* Yes 16 - No 2
Total Yes 36 - No 2

- Technologies are helpful for the development of investigative journalism.

Main Yes 20 - No 1 *Supplementary* Yes 17 - No 1 *Total* Yes 37 - No 2

Concerns of the Experts Related to the New Media

- With the development of Internet and social networks cases of plagiarism are on the rise in the Armenian journalistic community.

Main Yes 18 - No 3 *Supplementary* Yes 18 - No 0 *Total* Yes 36 - No 3

- Aggregators, as new media, have the best perspectives for development.

Main Yes 12 - No 9 *Supplementary* Yes 11 - No 7 *Total* Yes 23 - No 16

- Social networks cannot be viewed as genuine information sources: they are simply supplementary means in the world of journalism.

Main Yes 18 - No 3 *Supplementary* Yes 13 - No 5 *Total* Yes 31 - No 8

Views of Experts on Other Media

- Radio can will easily replace newspapers for those “with busy hands and eyes” and will become interactive.

Main Yes 9 - No 12

Supplementary Yes 10 - No 8

Total Yes 19 - No 20

- Traditional media, especially print media, is lagging behind the times and is unable to compete with the new media. In the coming 5 years the print media of Armenia are bound to disappear, unless they converge and find new, appropriate business models based on international experience.

Main Yes 18 - No 3

Supplementary Yes 12 - No 6

Total Yes 30 - No 9

- Technologies are developing faster than business models, but in the near future it is possible that various media will unite on the basis of a common platform, accessible for all.

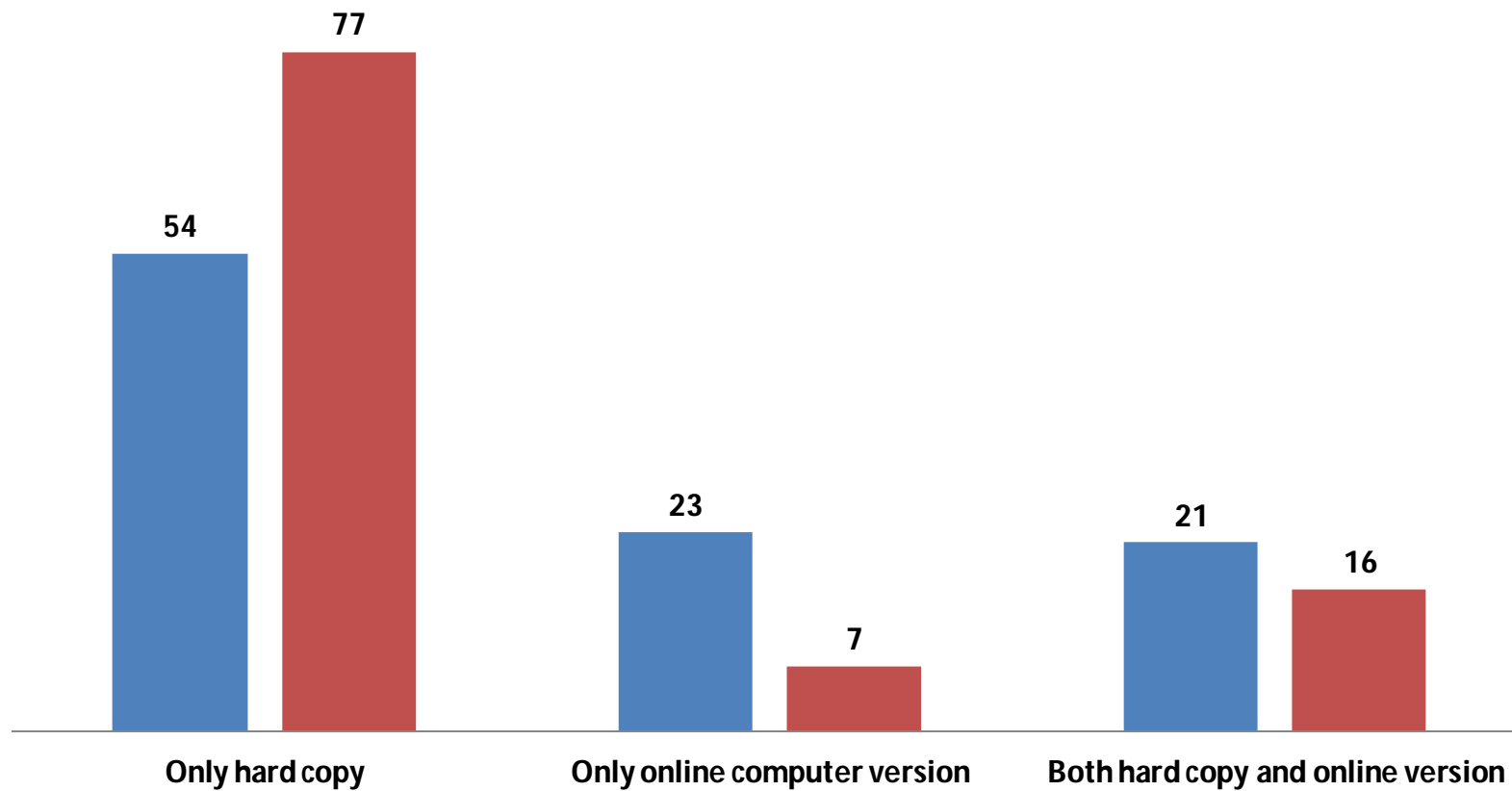
Main Yes 13 - No 8

Supplementary Yes 11 - No 6 (one expert did not answer)

Total Yes 24 - No 14

**QD2. In which form do you usually read newspapers? (% of the readers,
N₂₀₁₃=399, N₂₀₁₁=485)**

■ 2013 ■ 2011



What development of market mechanisms has brought into media industry?

- Market does not necessarily lead to a lower quality of the production (*14 experts*)
- Lower quality is a global trend (*4 experts*)
- For success in the market the following is necessary:
 - a) knowledge of the demand (*14 expert*)
 - b) abilities for business planning (*10 experts*)

At the same time (attitudes of the experts to certain statements)

- As long as information has not become a profitable business, and there is no free information market, it is impossible to clarify the real correlation between supply and demand.

Main Yes 17 - No 4 *Supplementary* Yes 15 - No 3 *Total* Yes 32 - No 7

- The media do not have a clear understanding of the specific features of their permanent audiences and are building their programmatic concept models on the principle “for everyone”.

Main Yes 20 - No 1 *Supplementary* Yes 18 - No 0 *Total* Yes 38 - No 1

- Of media representatives who took part in the survey as experts, only one claimed to have a 4 years strategic plan. Others claim to have plans for 3,6 months (1-1.5 years in the best case).

In Armenia problems of media management are almost exclusively associated with the field of commercial advertisement

- **Obstacles for the development of the commercial advertisement market (according to the experts): lack of specialists in the media (10 experts); lack of understanding of the media among the advertisers (8), lack of data regarding the media audience (7).**
- **Research has indicated low level of knowledge about the size of the commercial advertisement market and distribution of advertising money . Lack of interest? Unavailable information?**
- **The media community has a low level of trust towards measurement:**
- **Rating agencies in Armenia are connected to other organizations, including media companies, which affects their objectivity.**

Main Yes 14 - No 7

Supplementary Yes 16 - No 1 (one expert did not answer this question)

Total Yes 30 - No 8

Progress in the commercial advertisement market (according to experts)

- **Perspective of selection of one measurement of TV audience, presumably with a regular independent audit.**
- **Based on Gross rating point (GRP)**
- **Formation of Sales House as a form of advertising flows coordination and countering dumping**
- **Decline in the share of the shadow component in advertising.**
- **Exclusion of advertising from the airwaves of the public broadcaster.**

Missing factors and elements necessary for a civilized advertising market

- **Relatively narrow scope of inclusion of the media into the Sales House**
- **Accordingly, insufficient segmentization of media audience vs. advertisers /types of goods and services, as well as excessive concentration of advertising money (60-70%) by 3 channels.**
- **Almost complete lack of audience targeting**
- **The lack of reliable measurement tool for the audience of new media. Circle.am is strongly affected by manipulations. Google tools, more or less protected from manipulations, are inaccessible for many Armenian new media.**
- **Disproportionally small (related to the size of the audience) amount of commercial advertisement in the Internet. As one of the consequences - politicization of advertisement.**
- **Extremely high share of outdoor advertisement within advertisement money (particularly, 70-75 % for television, 15-20 % - outdoor, 5-10 % - Internet , radio and print media 1-2 % each).**
- **Extremely high proportion of advertising of communication services (3 operators account for 30% advertisement money), indicating the lack of involvement of other goods and services.**
- **A relatively low percentage of network advertisers (objective problem, which is partly a consequence of the use of GRP).**

Some forecasts and expert evaluations regarding the development of media industry in Armenia

- In order to survive the small media will have to join and form media-holdings:

Main Yes 16 - No 5 *Supplementary* Yes 13 - No 5 *Total* Yes 29 - No 10

- Variant: the bigger media will swallow the smaller ones
- Along with the transition to market principles the degree of political influence on the media will be reduced (according to 9 out of 21 experts): the trend towards "idealization" of the market is preserved. (Commentary: but will the 27-28\$ mln of the cumulative advertisement income be enough for neutralizing the interest of the political actors in using media as a political weapon?).

Some forecasts and expert evaluations regarding the development of media industry in Armenia

- In the coming years smartphones and tablets will become primary tools of consuming media products, and it will be necessary to create specifically adjusted content for their users.

Main Yes 19 - No 2 *Supplementary* Yes 18 - No 0 *Total* Yes 37 - No 2

- Thus, the trend of the content development is towards short texts and stories. Even blogs are giving way to micro-blogs.

- Currently the consumer prefers operative and laconic facts to professional and lengthy pieces.

Main Yes 20 - No 1 *Supplementary* Yes 16 - No 2 *Total* Yes 36 - No 3

Some forecasts and expert evaluations regarding the development of media industry in Armenia

- **Prospects of technology penetration: if there was money, the process would go ahead (9 experts); the process will go ahead in all circumstances (8 experts); certain technology achievements are impossible to use in Armenia and there is no need for them because of the specificity (size) of the audience (7 experts).**
- **Experts, representing media strongly diverge in their opinions, pointing at the main technology achievements, which are actively implemented in practice. Coincidences are rare: 1) converged newsroom (while only ARM aided two media in this regard); 2) journalists using social networks in search for the news...**

Possibility of representatives of media industry of coming together in order to solve common problems (industry problems)

● Commercial advertisement will never help the development of the media market, as long as there are no industrial associations joining together media and organizations dealing with advertisement:

Main Yes 15 - No 6 *Supplementary* Yes 14 - No 3 (one expert did not answer)
Total Yes 29 - No 9

· Why there are no media associations? – Media in Armenia join together according to political motives, i.e. according to the will of the owner(s), who have become close to each other within a certain political alliance (14 experts); media market players have immense mistrust toward each other (6)

· The survey showed a strong range of opinions on the format and nature of the desired associations, indicating the absence of clear ideas and interest. Same refers to the ideas regarding which kind of association is realistic and which is not.

Possibility of representatives of media industry of coming together in order to solve common problems (quality and responsible journalism)

- Media self-regulation will become a serious alternative to legislative regulation:

Main Yes 14 - No 7 *Supplementary* Yes 13 - No 5 *Total* Yes 27 - No 12

- According to the experts surveyed (10 of 21), using self-regulation instruments has to lead to clear differentiation in the market between "quality" and "yellow" (tabloid) media.
- HOWEVER! As previous research has shown, the obligations of journalists before the media owner, political environment, family and friends bind them much stronger than the obligations they have before the media community and the wider public. This is not favorable for consolidation of ethical norms and development of the self-regulation system.
- Though to a lesser extent than in the 1990s, but mechanisms of the self-regulation are viewed as limitation of the freedom of speech. Often statements are made that the journalist or the media have to be responsible only before the law and their audience (without any mediators, such as ethic codes and press councils).

Possibility of representatives of media industry of coming together in order to solve common problems (building civilized work relations)

- *Trade Unions are needed, first of all, for building civilized work relations (15 experts out of 21).*
- The labor rights of a common journalist are not defended in the legal sphere, they do not even have well-formulated labor contracts.

Main Yes 19 No 1 (one expert did not answer this question)
Supplementary Yes 18 - No 0 Total Yes 37 - No 1

- However, there is also the point of view of certain large employers in Armenian media industry that their workers have too many rights.
- Trade unions represent a form of self-organization of citizens, who are ready to defend their rights collectively and successively. This phenomenon is not yet rooted enough in the public life of Armenia.

Situation in the field of education of media professional

- University education is detached from the needs of industry and is unable to prepare the necessary and fully qualified cadres for media companies:

Main Yes 18 - No 3 Supplementary Yes 16 - No 2 Total Yes 34 - No 5

- Armenian journalists are not interested in the constant improvement of their professional qualities, since there are no opportunities for development and no material motivation.

Main Yes 19 - No 2 Supplementary Yes 11 - No 7 Total Yes 30 - No 9

- *The professionalism of graduating journalists can be enhanced through practice, internships in the media (11 experts out of 21)*
- There is especially strong need for media managers and producers, but there is no one to teach these professions...
- The workers of the media themselves must think about improving their qualification (9 experts); regular seminars can help them in this regard (7 experts)
- *The media need to have their own human resources specialists: 7 of the surveyed experts representing media have such specialists, another 7 would like to be able to employ them, but cannot afford it because of their financial situation.*

RECOMMENDATIONS: LEGISLATION AND REGULATION FIELD

(the order: according to the level of priority, as decided by the experts).

- a. Regarding the transition to digital broadcasting:
 - Concretization of the principle of creating a social package (families that need help);
 - Speedy information campaign regarding all the standards and parameters for digital broadcasting in Armenia
- b. Regarding broadcasting regulators:
 - higher level of independence of the members of the regulating bodies (choosing the most effective model of their formation in the conditions of Armenia);
 - maximum reduction of licensing procedures to decisions of purely technical, commercial character.
- c. Regarding defense of intellectual property (copyright):
 - Implementation of corporate mechanisms of action;
 - before these mechanisms start working, intensive practical application of updated legislation, harmonizing the principles of intellectual property protection and the rights of citizens to obtain information.
- d. improving the protection of civil rights in conjunction with the guarantees of freedom of expression:
 - introduction of the institute of moral damage compensation in cases involving libel, slander, privacy protection, the presumption of innocence. It is however necessary to comply with the principle of proportionality of the imposed liability to the degree of the dissemination of information and the material conditions of the media;
 - Promoting methods of solving information disputes through media self-regulation bodies. Discussion of the applicability of the institution of arbitration in Armenia.
- e. reforming general media legislation:
 - progressive liberalization of the legislation, approximation of the principles governing the media industry to those areas of economic activity that do not require special regulation;
 - universalization of communication and media legislation, in order to harmonize the regulation of traditional and new media.

RECOMMENDATIONS: DEVELOPMENT OF THE MEDIA AS BUSINESS

- movement towards the formation of industrial committees. To this end, organization of regular consultations with representatives of the media industry, in order to discuss the situation on the basis of objective data and research. In the course of these consultations searching for common interests, on the basis of which the institutionalization of cooperation is possible;
- spreading the ideas of Sales House. Formation of the latter on the basis of different types of media
- formation of funds (both by government, donors, and alternative means) for ordering (through tenders) of media production important to the public. Creating competition in this field for the Public Broadcaster of Armenia, both to ensure quality consumer demand and to overcome the monopoly of PTRC on government orders;
- deepening the methodology of media measurements with the prospect of targeting of the advertising.
- Promoting segmentization of the advertizing market.
- using progressive technologies of measuring the audience of the new media;
- special trainings for the introduction of modern methods of attracting advertising in the "Armenian Internet".

RECOMMENDATIONS: EDUCATION

- A careful study of the demand for media profession. Formation of flexible training structures, able to respond quickly to the needs of the labor market in the media;
- Study of the possibility of establishing a center of media education and research, which would be involved in updating and developing new curricula, producing educational literature, conducting research and organization of trainings for trainers;
- Effective use of the technical base of media, NGOs for training, organizing internships and practice for future journalists;
- Responding to the needs of journalists to acquire new skills, contributing to their employers' demand (searching the web, photography, shooting videos, editing, multimedia production, etc.) Organization of appropriate training activities.

Thank You!