



DISCUSSION PAPER | MEDIA VIABILITY

More than money | Rethinking Media Viability in the digital age

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This paper presents a new model for Media Viability at a time when media outlets face enormous difficulties delivering quality reporting while staying financially afloat. Many of these challenges come in the wake of the digital transformation, which has disrupted business models and changed media consumption habits. We argue that what is needed is a broader view of Media Viability, one that looks beyond the money. Our model looks at five dimensions—economics, politics, content, technology, and the community—and three levels: media organizations, networks, and the overall framework. This allows for the development of more effective Media Viability strategies and projects.



The challenge of Media Viability

It is no exaggeration to say that many news outlets around the world—in both the Global North and South—find themselves locked in an existential struggle. How can they deliver quality, relevant news coverage to their audiences while staying in the black economically? How can media organizations hire journalists, pay them a living wage, and invest in serious reporting when many can hardly afford the rent or to keep the newsroom lights on?

This is the challenge of Media Viability, which goes under a number of names: “media sustainability”, “financial sustainability”, “business viability”, or “economic sustainability” of the media. There is no common understanding, and most approaches focus on business plans and other monetary aspects. DW Akademie takes a holistic perspective: Media Viability is the ability of media outlets and media landscapes to produce high-quality journalism in a sustainable way.

This definition of Media Viability takes a step back from the traditional view of the individual, innovative business model—so often the suggested solution to viability problems—to examine the larger picture, including markets, networks, and individual outlets. Based on this wider angle, this paper presents a new model for Media Viability which considers the environment around the country’s entire media sector—looking at five dimensions relevant to Media Viability: economics, politics, content, technology, and community. It aims to give food for thought and hopefully start a larger conversation on a more comprehensive approach to this complex problem.

DW Akademie has developed this discussion paper along with media practitioners, targeting both media development professionals and media managers, and encouraging them to reconsider their understanding of Media Viability. It takes particular consideration of small and mid-scale media outlets in both developing countries and countries in transition whose primary goal might not be profitability, but rather staying in operation and making a difference in their communities.

The struggle to survive

Media Viability is a challenge that has been especially pronounced in the era of digital transformation, which swept through the media industry with both creative and destructive force. Digital communication opened up the media landscape to a host of new players and new possibilities, but it also marked the death knell of the media’s traditional business model. Suddenly, classified ads, a crucial revenue source for newspapers, moved from the back pages to online sites. Newspapers saw a precipitous drop in earnings. As advertisers flocked to the Internet, print advertising’s part of the total media spending began to contract, a trend that continues to this day.

Digital’s piece of the advertising pie today is approximately ten times larger than it was in 2001: Around one third of global ad spending goes to digital media content¹. That may sound good for media outlets with an online edition, but the picture is complicated by developments in the ad market. The online ad network sector is playing a bigger and bigger role. It is dominated by tech giants Google and Facebook, which together controlled close to 60 percent of the online ad market at the end of 2016². And content producers often receive only a fraction of the revenue they did when they controlled the ad buys; it’s as little as 30 cents on the dollar today³. This trend is expected to reach emerging economies, where most of Google and Facebook’s earnings are predicted to originate in the future. Add to that the growing use of blocking software, which scrubs ads from websites, and media outlets are confronted with a sobering truth: they can no longer sustain themselves from advertising revenue alone.

This digital disruption of traditional revenue streams has gotten the most press in the US and Europe, but it has been a reality for media outlets in the Global South for a while now as well. A survey by the World Association of Newspapers and News Publishers showed that newspapers in emerging democracies, including those in sub-Saharan Africa, are grappling with the dilemma of making money with their online offerings. The survey found that 36 percent of newspapers in emerging democracies had no Internet revenue⁴.

Even in countries with relatively free media landscapes like Namibia, ranked second in Africa by Reporters Without Borders in its 2018 press freedom survey, times are tough. A report by the country’s Institute for Public Policy Research found that

¹ Plummeting Newspaper Ad Revenue Sparks New Wave of Changes (Oct. 2016), www.wsj.com/articles/plummeting-newspaper-ad-revenue-sparks-new-wave-of-changes-1476955801

² The Dominance of Google and Facebook in One Chart (Dec. 2016), www.visualcapitalist.com/dominance-google-and-facebook-one-chart

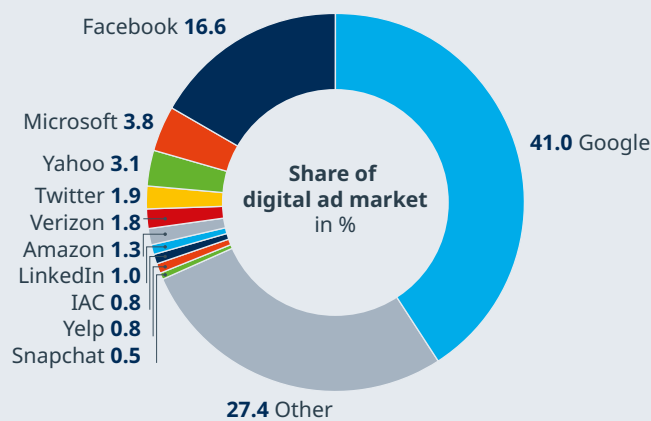
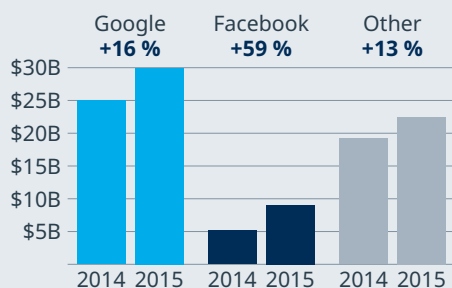
³ The Guardian is suing adtech outfit Rubicon Project for breach of contract (March 2017), www.thedrum.com/news/2017/03/28/the-guardian-suing-adtech-outfit-rubicon-project-breach-contract

⁴ Catherine W. Gicheru, The Challenges Facing Independent Newspapers in Sub-Saharan Africa (2014), <https://reutersinstitute.politics.ox.ac.uk/sites/default/files/research/files/The%2520Challenges%2520Facing%2520Independent%2520Newspapers%2520in%2520Sub-Saharan%2520Africa.pdf>

The dominance of Google and Facebook

Google and Facebook control 57.6 % of the digital ad market, and their slices of the pie are only growing.

Digital ad revenue growth



Source: eMarketer (data); Visual Capitalist, December 2016

traditional media outlets were in decline due to falling advertising and the above-mentioned difficulties generating revenue online. The financial constraints are affecting the overall quality of journalism and the independence of journalists⁵.

These developments mean that new kinds of business thinking are needed. Unfortunately, this is lacking in many emerging economies and among new media players. Many have innovative journalistic visions, but lack the necessary business acumen to face the new challenges. A survey of digital start-ups in four Latin American countries found that only one in four had a paid sales person and at more than half, only the founder was tasked with raising revenue⁶.

The struggle to keep up with changing user habits

The era of the Internet and smartphone has also brought about a change in news and information consumption habits. TV, online sources, and social media now significantly beat printed newspapers as people's main sources of news.

Often that online content is free. So while few consumers would pick up a newspaper at a news stand without paying for it, they are far less likely to reach into their wallets for digital content. A 2015 study found that worldwide, only about 10 percent of people pay for online news⁷. And they appear to be abandon-

ing paper all together. Print circulation figures are stagnant or declining in most places around the globe, with Asia being the exception⁸.

But online media struggles as well. Digital content is increasingly abundant and immediately available, but that also means that capturing users' attention has become difficult. If content does not grab them instantly, many move on to something else. As a result, many media observers talk about a decline in the quality and quantity of serious news coverage as editors conclude that attention-grabbing headlines and pictures are more likely to get clicks than a story on cybercrime legislation with implications for online speech.

Yet Media Viability faces challenges that also go higher up the power structure. In many countries, political and legal frameworks work against the media. Political figures or groups can put pressure on the media to stop critical coverage by passing restrictive legislation or putting procedures in place that make reporting more difficult or legally risky. The Malaysian online news portal Malaysiakini found itself in the sights of the government in 2016 after it broke stories on a financial scandal involving the country's prime minister. Officials claiming the outlet violated a law criminalizing activities deemed "detrimental to parliamentary democracy"⁹. In Cambodia, a quality English-language daily and frequent critic of the powerful, The Cambodia Daily, was abruptly shuttered in 2017 after the government hit it with a spurious six-million-dollar tax bill.

⁵ Namibia: Traditional media survival threatened (May 2018), www.namibian.com.na/177207/archive-read/Traditional-media-survival-threatened

⁶ Janine Warner, Mijal Iastrebner et al., *Inflection Point—Impact, threats, and sustainability*.

A study of Latin American Digital Media Entrepreneurs (2017): <http://data.sembramedia.org>

⁷ Digital news consumers unlikely to pay for content and increasingly block ads (June 2015), www.cjr.org/analysis/reuters_digital_news_report.php

⁸ World Press Trends 2017: Facts and Figures (March 2017), www.wptdatabase.org/world-press-trends-2017-facts-and-figures

⁹ Independent Malaysian news website faces threats, harassment (Dec. 2016), <https://cpj.org/2016/11/independent-malaysian-news-website-faces-threats-h.php>

Governments and powerful economic interests, sometimes working together, can use other kinds of levers—such as control over advertising markets—to silence outlets whose coverage they do not like. And it is not uncommon for independent, critical media outlets, often the ones on shaky economic ground, to simply be bought outright by the powerful. In Honduras, media ownership is concentrated in the hands of six families, which have vast holdings in other sectors and close ties to the government. While these media outlets do not depend on government advertising to survive, they do suppress investigative reporting in order to protect the regime and their beneficial relationships with it¹⁰. Critical voices are nowhere to be heard.

Media Viability goes hand in hand with free expression

A viable, critical media is crucial for freedom of expression and access to information, both part of Article 19 of the Universal Declaration of Human Rights. If critical, independent voices go silent due to economic failure, political pressure, or a combination of factors, fewer viewpoints are expressed and a fair public debate becomes impossible. If a media outlet does remain financially sustainable but stops delivering high-quality content, it will fail to achieve its core mission: serving as a watchdog over the government, holding the powerful to account, defending minorities, and reporting honestly and accurately on developments that affect the society as a whole. In short, independent, high-quality journalism depends on a viable media sector. It requires a variety of sources—from money and infrastructure to community support and strategic alliances. Those who wish to impose restrictions on free media and manipulate the public debate often prey on imbalances or weaknesses in the media system. They often use economic means to set their agendas or limit access to information. Therefore, viable media are crucial players in the protection of freedom of expression as a whole.

While the above-mentioned economic and political developments have made the production of quality journalism more difficult, there is still a strong thirst for it, especially in countries with an unprofitable media sector¹¹. That is why media development needs to work closely with stakeholders on all levels of society to find context-appropriate strategies that will enhance Media Viability and safeguard free expression and access to information.

Beyond the money—aiming for a healthy media ecosystem

Up to now, media development has had a rather myopic view of Media Viability and has come in for criticism because of it. Some have argued that media development tends to adopt a piecemeal approach, supporting projects which correspond to the flavor of the year—for example, data journalism or verification tools—without considering the systemic issues affecting viability in a particular locale. Others remark that approaches tried in one country are simply transferred to another despite a very different economic, political, and social context.

In addition, a main focus of media development organizations has been on boosting revenue streams, creating more efficient business and marketing plans, and monetizing social media feeds. While these aspects can be important, no doubt, in our view they are only part of the picture.

Viability does not only mean being profitable, especially in rural areas. It also includes the integration of a media outlet into its community, a sense that the viable newspaper or radio station is a tool that contributes to the well-being of that community. A community radio station in a rural area might always face funding challenges, but can remain viable because it enjoys a supportive legal framework, has close ties with other stations, and is part of a network working in its interests. It has developed a diverse group of modest revenue streams and is deeply rooted in the community, whose members help ensure its survival. The station has become an integral part of community life.

A more comprehensive approach to Media Viability, therefore, takes a step back from looking solely at revenue at the level of an individual media outlet. This wider approach also considers the environment around the country's entire media sector—the media ecosystem.

In a healthy natural ecosystem, diverse plants and animals have access to food and water and possess the traits they need to flourish in their specific habitat. Similarly, a healthy media ecosystem depends on an enabling environment—a suitable business model, for certain, but also a supportive legal environment, an equitable advertising market, journalism training institutions, professional associations, distribution networks, a reliable Internet infrastructure, the trust of the community, etc.

Without these kinds of conditions, even the most innovative business model or reporter training program cannot ensure long-term viability. If the government controls the majority of

¹⁰ Michelle Foster, *Calling the Shots: How Ownership Structures Affect the Independence of News Media* (2012): <https://www.cima.ned.org/resource/calling-the-shots-how-ownership-structures-affect-the-independence-of-news-media-2>

¹¹ Janine Warner, Mijal Iastrebnier et al., *Inflection Point—Impact, threats, and sustainability. A study of Latin American Digital Media Entrepreneurs* (2017): <http://data.sembramedia.org/>

Project example: Strengthening networks in Ecuador

In Ecuador's highly polarized media landscape, the country's indigenous, largely rural population faces particular difficulties around free expression and access to media and information. Community radio has proven effective in providing information and a voice to these marginalized communities, but there has been little progress in allocating frequencies to community broadcasters. They also face challenges with financing and attempts by outsiders to exert political influence. To support Ecuador's community broadcasting sector, DW Akademie has partnered with the national community radio alliance CORAPE and four of its members to develop alternative business models to ensure the stations' long-term viability and lessen their dependence on state funding. For example, member station ERPE has begun generating income from quinoa production and an organic grocery store. Network members have also received social media training so they can better reach young people and encourage them to get involved. The CORAPE member stations working directly with DW Akademie are transferring their knowledge and experience to the other network members. The overall goal is to establish CORAPE as a center of expertise for the country's community radio sector where communities and social organizations interested in starting their own media operations can get advice on sustainable business models. CORAPE also launched its own ad agency to handle advertising buys for the entire network. This strategy makes it easier to get bigger contracts than if each station had to look for their own advertisers.



the advertising market and decides to withhold ad placements from a certain media outlet, a well-thought-out business model will not save the day. If access to information is difficult due to a restrictive legal environment, even a healthy revenue stream will not enable reporters to provide quality coverage. If a local community loses trust in a media organization, its stories will not reach the intended audience.

A new model for Media Viability

In order to follow the more comprehensive approach described above, DW Akademie has created a Media Viability model that goes beyond the individual media outlet level and its revenue streams.

DW Akademie's Media Viability model



DW Akademie's Media Viability model centers around the media users having access to reliable, independent information. It widens the scope of traditional sustainability approaches and focuses on more than just the business models of individual media outlets.

3 levels: Organizations, networks and the overall environment (including markets, legal systems, politics and technological infrastructure) are the relevant levels for Media Viability.

5 dimensions: Media Viability is about finding a stable balance between the aspects of politics and economics, the community, technology and content.

Our model features five dimensions (economics, politics, content, technology, and community) in addition to the cross-cutting levels of the media landscape—overall environments, networks, and organizations (also known as meta, meso, and micro levels).

The economic dimension relates to economic and funding-related aspects, often the primary or sole consideration taken into account in Media Viability strategies. The political dimension refers to a country's political and legal frameworks, both national and local, that can affect the media sector. It can also

relate to internal dynamics and decision-making processes within media outlets or networks. The content dimension focuses on the journalistic side of the endeavor, from media practitioners to the content they produce. The technology dimension looks primarily at (digital) delivery systems—from the production workflows that can cut costs to users' access to the Internet. Finally, the community dimension considers aspects related to the media outlet's audience, such as its general makeup and capacities as well as its relationships with media outlets themselves—its level of trust or emotional attachment. The support communities of a media outlet might be one of the most powerful defenses against political interference.

Each of these dimensions is in no sense a walled-off garden unto itself, and there is a good amount of interplay among them. For example, in the economic dimension, a market (meta) level analysis could look at income levels to see if the national and local audiences can afford the journalistic product on offer, an aspect which relates to the community dimension as well. On the network (meso) level, the establishment of marketing associations to seek advertising revenue could be considered, which can apply to the technology dimension when talking about communications and information-sharing capacities. On the media outlet (micro) level, the lack of a sound business plan and corruption among employees can be challenges, both of which link to the political dimension, where internal policies and management practices are key considerations, or to the community level, where corruption can harm credibility and a sense of identification with the outlet.

These dimensions allow for a more comprehensive analysis of the media environment and key approaches and challenges can be clustered in each. The result is a fuller picture of the factors involved in creating long-term viability.

The five dimensions are presented in the table below along with a number of salient aspects and challenges in each (but not all of them). Some of these aspects and challenges could be placed in more than one dimension.

Project example: Boosting quality and viability in Ukraine

Ukraine's Independent Association of Broadcasters (IAB), made up of more than 100 local and national broadcasters, expressed a strong need for comprehensive media management training for its members to better ensure their long-term viability. In 2015, IAB and DW Akademie launched the Ukrainian Media E-School with the two programs in Media Management and Digital Journalism, focusing on improving the financial foundation of local media outlets and reporting. The "blended learning" concept of the E-School combines the advantages of online and classroom instruction and takes into consideration the tight schedules of working media professionals, giving them the opportunity to learn at any time and in any place—an especially important factor in rural areas.

The long-term, in-depth media management program gives media managers skills and knowledge they can use to transform their operations into profitable businesses. The program takes a holistic approach and is dedicated to questions on (1) how to develop and implement a viable media business strategy; (2) how to create, promote, and sell content and build a media community; (3) how to generate revenue, especially in poorly developed ad markets, and how to save money; and (4) how to build and manage an effective team. Since 2017, the media management program of the E-School has been expanded to include media managers from Moldova and Georgia, who face similar challenges and threats. The program's learning-by-doing approach has media managers working in competitive teams, each developing its own media project serving a community they choose. Thus, media managers share best practices, seek and find innovative solutions to Media Viability challenges, and develop an entrepreneurial approach for the media in their regions.



Five key dimensions

DIMENSION ASPECTS/CHALLENGES (ENVIRONMENT, NETWORK, AND MEDIA LEVELS)

Economics	<ul style="list-style-type: none">- National and local income levels (Can the target audience afford the journalistic product?)- Level of competition (Many competitors scrambling for a limited amount of advertising)- Development of the digital advertising market (Dominance of Google and Facebook) and of local/regional advertising markets (Can they support strong local and regional media outlets?)- Financial oversight (Lack of oversight can lead to mismanagement, corruption, and fraud)- Market for services and non-media products (Additional revenue streams)- Marketing associations (Teaming up to find advertising revenue or access grants)- Platforms for alternative revenues (Micropayments or crowdfunding)- Lack of a sound business plan/strategy- Absence of well-developed business skills and know-how- Diversity of income sources (Economic dependency, loss of editorial independence, and financial problems should the sole income source dry up)
Politics	<ul style="list-style-type: none">- Laws, policies, and regulations enabling or hindering the media sector (For example, access to information, censorship, restrictions on free speech)- Transparency of the ownership structure of the media landscape- Government influence on advertising or outright control of advertising markets- Rules and regulations around media associations- A media outlet's internal policies (Are they transparent, inclusive, and democratic?)- Partnerships with other media outlets- Regulations concerning separation of editorial and marketing teams (Important for independence and credibility)
Content	<ul style="list-style-type: none">- General journalistic competence/skill in the country- Lack of journalistic training programs, experts, and trainers- Lack of knowledge about the audience (No audience research or data)- Exchange of editorial content- Spaces for content and format innovation- Quality of content- Relevance of content to community- Attracting and keeping experienced journalists- Online visibility of content (SEO, ease of finding site/information)

Technology	<ul style="list-style-type: none"> - Censorship (Does government have/use technological means to censor content?) - Internet infrastructure (How developed is it? Does Internet coverage extend to the entire country? Is it affordable?) - Transportation and road quality (Can newspapers be delivered to rural areas?) - Availability of digital payment systems (Possible important source of revenue) - Content distribution networks - Exchange of content (Via the Internet) - Distribution channels - New production technology - Technical equipment - Training on new technologies - Willingness to use new technologies
Community	<ul style="list-style-type: none"> - Perception of reporting (If seen as an attack in community values, can result in a loss of revenue such as donations and other forms of community support) - Innovation culture (Unwillingness to try and fail) - Media consumption habits (Literacy, Internet use, social networks) - Trust in media institutions - Sense that digital content should be free - User-generated content - Community ownership - Media outlet's credibility with community - Recommendations by community to others - Identification with/emotional attachment to media outlet - Political support for media outlet (Solidarity)

Why the new model matters: What we recommend

If media development analyzes Media Viability solely from a revenue-centric point of view, many of the outlets in need of our support will not benefit. Looking beyond the financial and economic aspects is crucial. Therefore, media development organizations need to change tack. Let's leave the media sustainability debate behind. Media development needs to look at Media Viability from a holistic perspective.

And this is where DW Akademie's new model comes in: By suggesting concrete dimensions and aspects crucial for Media Viability, it enables media practitioners, media development implementers, donors, and media policy actors to do more effective, needs-oriented, and sustainable work. It sets the framework for improved media development approaches and project strategies in the field of Media Viability. It helps to analyze and assess the complex concept of Media Viability, and thus gain a more detailed understanding of the shortcomings and potentials of particular media systems. It also broadens the horizon of the

international debate, hopefully contributing to a common understanding and joint, cross-regional efforts.

A more effective strategy than the current narrow focus would be to adopt a systematic development method to Media Viability projects, one that includes a multi-stakeholder approach involving media professionals, local experts, and media managers. Instead of pursuing a one-size-fits-all strategy, a strategy should be developed that responds to the local and regional context through close cooperation with local stakeholders.

Media Viability challenges will not be solved at the individual outlet level. Rather, it is necessary to bring different stakeholders together to look at the bigger picture and assess the health of a country or a region's media ecosystem. Then, partners can strategically plan projects that contribute to creating an enabling environment for the media, one in which outlets have a chance to survive—or even thrive. Networks can go far in boosting viability, acting as bulwark against political influence as well as helping outlets share resources and scale their potential to access all sorts of revenue sources.

Project example: Sharing content in Uganda

The Uganda Radio Network (URN) is a news agency providing news, scripts, audio, and photographs to some 102 news outlets all over the country. Founded in 2005, URN sees its role as providing an alternative to coverage offered by the nation's big media outlets and delivering breaking news and feature stories to outlets that cannot afford or do not have the capacity to cover stories outside their own localities. Stations can subscribe to the URN service by paying a monthly fee or they can buy individual pieces. In addition to its news agency work, URN trains journalists, especially those from marginalized communities, on topics such as new technologies and media ethics. In order to expand reporting into more remote areas of the country, URN launched a mobile app for Android phones, which takes citizen reporters step by step through the process of telling a news story. They use the app to send audio, pictures, and text to report on issues that are of concern to their communities. The material arrives at an Internet platform hosted by URN, which local radio stations in the network can access. The stories sent in by citizen reporters range from social and political events and public-service delivery to land conflicts and minor crime. Some of the stories about the daily struggles faced by Ugandans have generated debate and resulted in changes within communities.

The program has also boosted the viability of local radio. Due to financial constraints, many stations were unable to report stories or research news very far afield. They usually ended up broadcasting the same stories carried by every radio station in the country. This citizen reporting has resulted in richer and more colorful in stories aired on local radio. When the stations decided to broadcast more local content, they gained listeners. The increase has in some cases also translated into more business from advertisers.

URN's goal is to disseminate high-quality news and to raise the general standard of the nation's media. Its work is financed through a variety of sources, including membership fees, grants, and partnerships with media development organizations such as DW Akademie and others.



Finally, what is important to foster Media Viability at the level of individual media outlets? The most important step is to broaden the perspective beyond the isolated search for new sources of income. A viable strategy finds a balance between the different aspects of Media Viability—economy, politics, technology, content, and community—to set community radio stations, digital start-ups, and local newspapers on a more viable path.

There is no silver bullet for Media Viability, rather often only cause for despair when we confront the realities. But the fact that journalism is constantly developing also gives rise to optimism. Its vibrant nature creates room for innovative solutions, adapted approaches and new habits. We should accept these changes and embrace them as an opportunity. What we must never accept are threats to freedom of expression. Therefore, within this transforming environment all efforts should be focused on finding partners, structures and practices that support journalists in fulfilling their fundamentally important role in society.

What else?

- There is a need to research and share knowledge about specific economic challenges facing the media in a specific country¹². Few reports have focused on the experiences of journalistic start-ups in the Global South¹³.
- Audience research is important. Such research is a building block for the establishment of a common currency in advertising markets. Furthermore, if media outlets want to build their communities, they have to know their audience, its interests, and its needs. For that, not only the available digital analytics tools but also more traditional face to face methods are important.
- Many journalists are not natural entrepreneurs. Fostering an entrepreneurial spirit in journalism education or workshops is key to having a holistic perspective on viability. It is important for media outlets to have a strategic business plan in place from the very beginning.
- Trust is a currency in Media Viability. It can be monetized, but it is a fragile commodity. Any viable strategy takes the risks related to audience trust into account. User engagement is key to sustainability and relationships with users should be cultivated.

Acknowledgements: The authors would like to thank Vanessa Völkel and Samuel Gummah for their efforts and valuable contributions to this discussion paper as well as all the other numerous colleagues and partners who provided insights, feedback and ideas.

¹² DW Akademie has developed indicators to measure Media Viability, see “Measuring the Business Side: Indicators to Assess Media Viability” (2016) by Schneider, Hollifield and Lublinski. A more comprehensive measuring instrument for Media Viability is currently developed.

¹³ According to the SembraMedia report “Inflection Point” (2017); the AMI report “Mobile media services at Sub-Saharan African newspapers” (2011); the CIMA report “Calling the Shots” (2012); the Reuters Institute for the Study of Journalism report “Survival is Success: Journalistic Online Start-ups in Western Europe” (2012). One comprehensive report focusing on journalism start-ups in the Global South is “Publishing for Peanuts” (2015) by Robinson, Grennan and Schiffrin.

Supported by the



Imprint

PUBLISHER
Deutsche Welle
53110 Bonn
Germany

PUBLISHED
March 2019
© DW Akademie

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