

MONITORING MEDIA PLURALISM IN THE DIGITAL ERA

APPLICATION OF THE MEDIA PLURALISM MONITOR IN THE EUROPEAN UNION, ALBANIA, MONTENEGRO, THE REPUBLIC OF NORTH MACEDONIA, SERBIA & TURKEY IN THE YEAR 2020

Country report: Cyprus

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Research Project Report

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1. About the project

1.1. Overview of the Project

The Media Pluralism Monitor (MPM) is a research tool designed to identify potential risks to media pluralism in the Member States of the European Union and in candidate countries. This narrative report has been produced on the basis of the implementation of the MPM carried out in 2020. The implementation was conducted in 27 EU Member States, as well as in Albania, Montenegro, the Republic of North Macedonia, Serbia and Turkey. This project, under a preparatory action of the European Parliament, was supported by a grant awarded by the European Commission to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute.

1.2. Methodological note

Authorship and review

The CMPF partners with experienced, independent national researchers to carry out the data collection and author the narrative reports, except in the case of Italy where data collection is carried out centrally by the CMPF team. The research is based on a standardised questionnaire developed by the CMPF.

In Cyprus the CMPF partnered with Christophoros Christophorou (Independent expert), Nicholas Karides (Ampersand), who conducted the data collection, scored and commented on the variables in the questionnaire and interviewed experts. The report was reviewed by the CMPF staff. Moreover, to ensure accurate and reliable findings, a group of national experts in each country reviewed the answers to particularly evaluative questions (see Annexe II for the list of experts). For a list of selected countries, the final country report was peer-reviewed by an independent country expert.

Risks to media pluralism are examined in four main thematic areas: Fundamental Protection, Market Plurality, Political Independence and Social Inclusiveness. The results are based on the assessment of a number of indicators for each thematic area (see Table 1).

Fundamental Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political independence of media	Access to media for minorities
Protection of right to information	News media concentration	Editorial autonomy	Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Online platforms concentration and competition enforcement	Audiovisual media, online platforms and elections	Access to media for women
Independence and effectiveness of the media authority	Media viability	State regulation of resources and support to media sector	Media Literacy
Universal reach of traditional media and access to the Internet	Commercial & owner influence over editorial content	Independence of PSM governance and funding	Protection against illegal and harmful speech

Table 1: Areas and Indicators of the Media Pluralism Monitor

The digital dimension

The Monitor does not consider the digital dimension to be an isolated area but rather as intertwined with traditional media and existing principles of media pluralism and freedom of expression. Nevertheless, the Monitor also extracts digital-specific risk scores and the report contains a specific analysis of risks related to the digital news environment.

The calculation of risk

The results for each thematic area and indicator are presented on a scale from 0 to 100%.

Scores between 0 and 33%: low risk

Scores between 34 to 66%: medium risk

Scores between 67 and 100%: high risk

With regard to indicators, scores of 0 are rated 3% while scores of 100 are rated 97% by default, to avoid an assessment of total absence or certainty of risk.

Disclaimer: The content of the report does not necessarily reflect the views of the CMPF, nor the position of the members composing the Group of Experts. It represents the views of the national country team that carried out the data collection and authored the report. Due to updates and refinements in the questionnaire, MPM2021 scores may not be fully comparable with previous editions of the MPM. For more details regarding the project, see the CMPF report on MPM2021, soon available on: <http://cmpf.eui.eu/media-pluralism-monitor/>.

2. Introduction

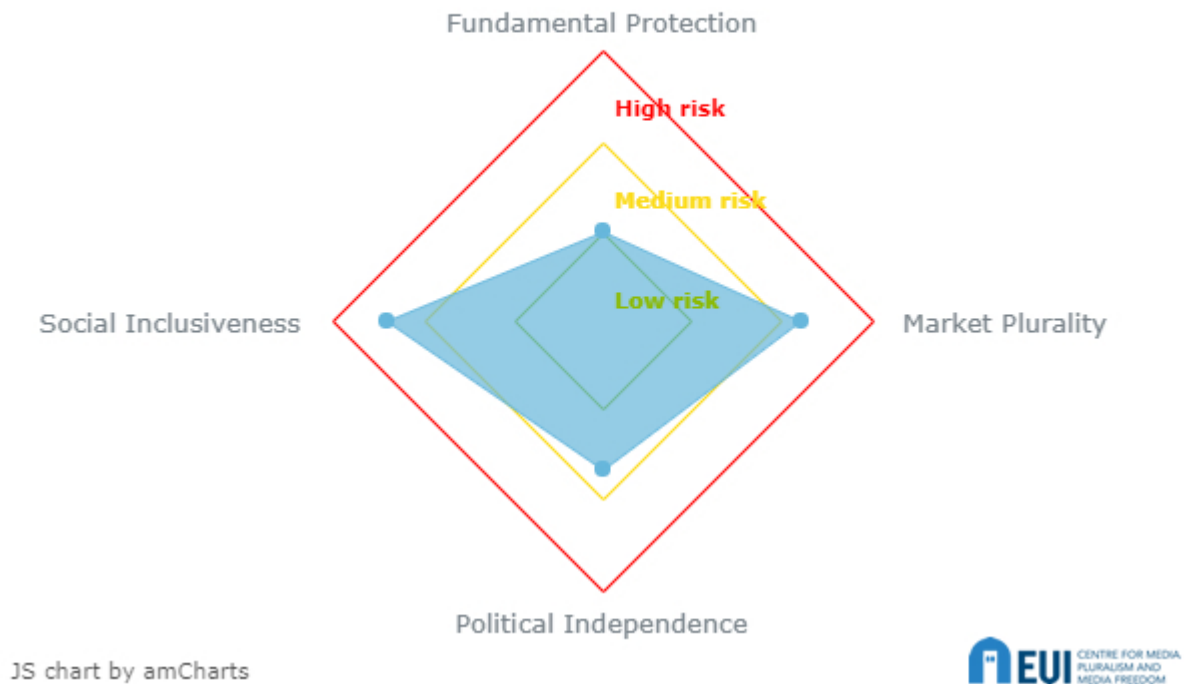
- **Population:** Cyprus has an area of 9,251 km² with a de jure population of 888,000 (2019) of which about 18% are non-Cypriots.
- **Languages:** The official languages are Greek and Turkish.
- **Minorities:** The 1960 Constitution of the Republic of Cyprus recognises two power-sharing communities, the Greek and the Turkish communities. These live segregated since the collapse of the bi-communal arrangement in 1964 and the 1974 Turkish invasion that has since de facto divided the island. Many rounds of negotiations under the auspices of the United Nations aiming to end the division have so far proved unproductive. Armenians, Maronites and Latins are recognised as religious groups. They were given the option in 1960 to 'join' either one of the two communities and they chose the Greek community. They constitute around 1.3% of the Greek Cypriot community. Other-EU and non-EU citizens represent 12.5% and 8.6% of the employed labour respectively (2019).
- **Economic situation:** The economy had been recording steady growth rates in recent years (3.2% in 2019) following the exit from a EC-ECB-IMF program that aimed to assist Cyprus after a severe crisis. This was interrupted by the COVID-19 pandemic with the European Commission forecast that Cyprus' GDP would record a 6.2% fall for the year 2021. (November 2020 report)^[1].
- **Political situation:** Until recently strong trade unions and a clear left-right polarization had dominated social and political life. Significant changes are taking place since the rejection of a UN settlement plan of the Cyprus Problem and Cyprus' membership to the EU in 2004. An unprecedented level of political alienation of citizens has been evident, made worse by a series of cases of corruption of state officials and the firm conviction of the public about the unwillingness to tackle it. With 2021 being a parliamentary election year, it remains unclear whether the abstention rates, which reached 33.5% in the previous election (2016) and 55% in the 2019 European Parliament elections will continue to rise.
- **Media market:** The 2020 media landscape registered a considerable shift towards online media, also due to the pandemic. Available data show that newspaper readership (there is no data on actual circulation) remained fairly stable. In the last quarter of 2020 newspapers retained their readership at around 11% during weekdays and at 15% on Sundays which does not deviate when compared to the last quarter of 2019. It must be noted that these are readership figures produced by the publishers, not by independent sources.^[2] Equally, visits to news websites showed a marked upward trend, as did legacy media web content, and digital native media when comparing December 2019 to December 2020. The figures for December 2020 show a combined 14.5 million unique visitors compared to 9.1 million in December 2019.^[3] Television continues to be the main medium from which people get their news. No data is available about direct access or via social media and platforms. OMEGA's main news bulletin topped ratings in November 2020 (similar trends in March 2021) at 16.9% followed by ANT1 at 15.7%, ALPHA 13.4%, CyBC1 13.3% and SIGMA at 11.9%. In overall TV audience share over 24 hours ANT1 was first with 15.1% followed by ALPHA, OMEGA, CyBC and SIGMA. There was a slight increase of 1.7% in broadband penetration in 2020 over 2019 reaching 92.8% with IPTV and cable TV remaining stable. The second half of 2020 saw a significant increase (18%) in higher speed (≥100Mbps) subscriptions as a result of the upgrading of providers, a trend expected to rise in 2021. The key players in the broadband telephony market remain the same with figures in the last quarter of 2020 showing Cyprus Telecom, CYTA, at 56.6% followed by Cablenet (22.8%), Primetel (13.7%) and

EPIC at 6.9%. The IPTV/Cable TV share remained stable with CYTA at 45.6%, Cablenet at 36.9% Primetel at 14.7% and EPIC at 2.8%.^[4]

- **Regulatory environment:** The media regulatory framework for both the commercial media and the PSM remains unchanged since the mid-2011 transition to digital television.^[5] Cyprus is among the 22 member states of the EU that had failed to timely enact the new Audiovisual Media Services Directive. In April 2021, the Directive was still not transposed into Cyprus Law.

3. Results from the data collection: assessment of the risks to media pluralism

Cyprus: Media Pluralism Risk Areas



The state of media pluralism in Cyprus appears to have remained dangerously stagnant since last year's report and it is found overall to be in a High Risk position. Most sectional criteria show an increased risk figure – mainly due to the lack of data, the fact that the regulatory framework has not been adapted to the changing media landscape and to a degree due to the economic crisis brought on by the COVID-19 pandemic.

The risk to **Fundamental Protection** of the freedom of expression in Cyprus has decreased from 37% in the last report to 33% falling into the upper level of the Low Risk bracket. Fundamental protection through constitutional and legal provisions and the application of the ECtHR case-law by courts continue to offer citizens safeguards and effective protection of their rights connected to freedom of expression. Issues of concern are the existing digital underdevelopment but broadband penetration and higher speeds showed some improvement. The right of access to information is now protected, following the implementation of the Law on the Right to Access No. 184(I)/2017^[6] in December 2020. Incidents of **verbal** attacks by state officials **against** the media negatively impact on the free expression environment.

The overall risk rating for **Market Plurality** remained high at 73% slightly down from the last report (74%) and very much higher than the 36% recorded in 2017. Law enforcement ensures a relative transparency in media ownership and avoidance of cross media concentrations but only in broadcasting. The absence of obligation for ownership transparency in the written press and digital sectors remains a serious threat. In addition, the lack of audited or other reliable data, the absence of a digital media legal framework as well as the increased corporate influence in media, and pressures on journalists' employment conditions – exacerbated by the pandemic – are also key factors to the increased risk.

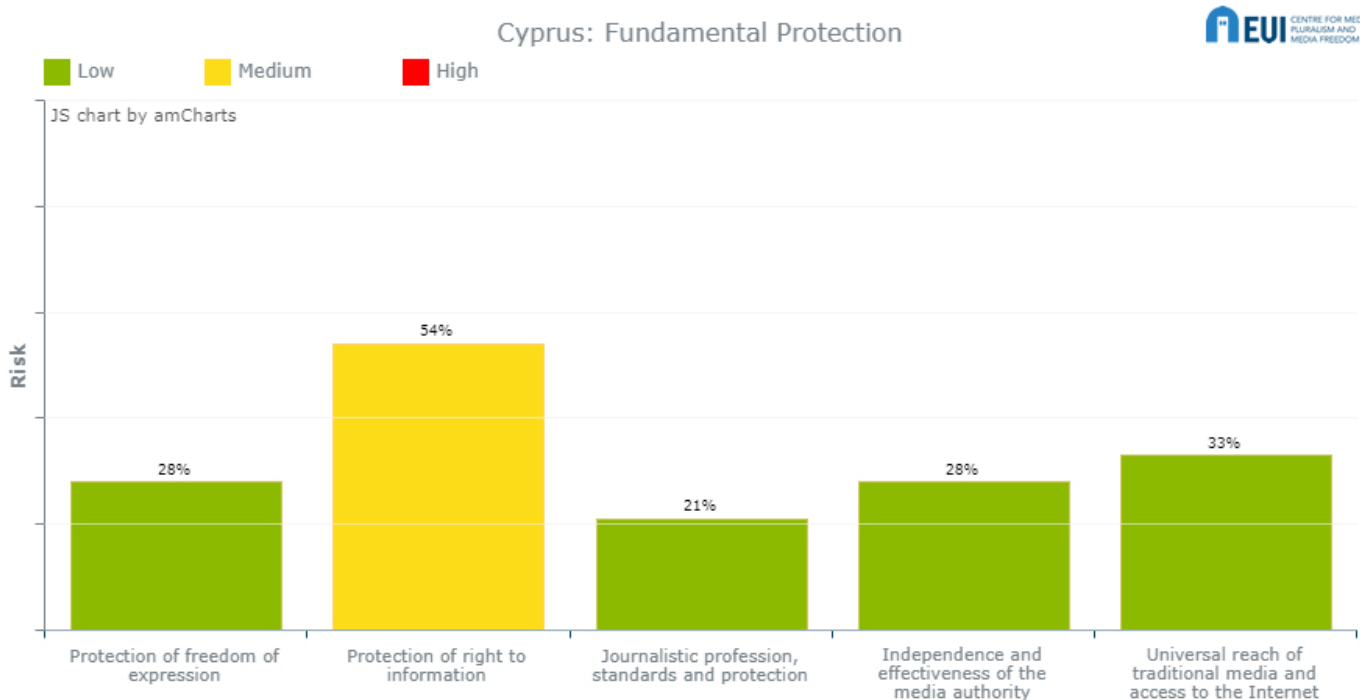
The risk to **Political Independence** decreased slightly from 59% to 55% and remains within the boundaries of Medium Risk. Media coverage of elections is fair and there is extensive media access by political actors.

Despite strong democratic credentials and fair election processes in Cyprus, political interference in the media is also strong. The PSM, in particular, its governance, its funding and operation, still suffer from sustained political interference.

The risk to **Social Inclusiveness** has remained high at 80% showing no substantial improvement from last year's 83%. Access to the media is mostly reserved to mainstream groups, a practice that is side-lining communities, minorities, women and other social actors in a societal context of plurality and multiculturalism. Media Literacy actions have picked up, deployed by various stakeholders, but remain limited and lack a coherent policy direction.

3.1. Fundamental Protection (33% - low risk)

The Fundamental Protection indicators represent the regulatory backbone of the media sector in every contemporary democracy. They measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for freedom of expression and the right to information; the status of journalists in each country, including their protection and ability to work; the independence and effectiveness of the national regulatory bodies that have competence to regulate the media sector, and the reach of traditional media and access to the Internet.



The risk to Fundamental Protection of the freedom of expression in Cyprus has decreased slightly to 33% from 37%, on the limit of Low to Medium Risk, thanks to improvements regarding the right to information and universal access to media.

Constitutional and Regulatory safeguards exist and remain effective. Cyprus is a signatory to all relevant European and international legal instruments. In the period covered by this report there have been incidents of attacks by officials against media and journalists, thus, the State failing to ensure an enabling environment for freedom of expression. Even though there is no regulatory framework in place for online media, aspects relating to freedom of expression are dealt with by the existing framework. There has not been any evidence of state interference in terms of filtering or removing content in an arbitrary manner and individuals do have access to effective legal remedies in the event that State or non-State violations occur.

Cyprus is among the few EU countries that have decriminalised defamation, even though the Attorney General can authorise criminal prosecution in very specific cases.

Regarding the right of information, restrictions are those defined in accordance with international standards. A Law on the Right to Access Information Held by Public Authorities No. 184(I)/2017 ^[4] came into force in December 2020. This warrants the right to access to information, it sets obligations for public law bodies and the administration, and establishes appeal mechanisms for citizens. Considering this report covers data collected in 2020, it was not possible to conduct an assessment on the effectiveness of the law. In any case the existence of a freedom of information law allows an improvement of the score of the indicator on Protection of the right to information, which remains within the Medium Risk bracket (at 54%). No development on the establishment of a regulatory framework to protect whistleblowers is registered.

Access to and exercise of journalism are not hindered by any formal obstacles and the indicator Journalistic professions, standards and protection rates Low Risk at 21%. However, despite institutional protection of rights, the Cyprus Union of Journalists, which is active and respected, is not able to effectively protect journalists' rights and benefits nor guarantee editorial independence and the respect for professional standards. Given the overall uncertainty that dates a decade back, and the pandemic related layoffs, the continuing risk of dismissal, in particular for financial reasons, the Union's focus is more on securing employment and benefits and mitigating the crisis than on editorial independence. These compromises made it difficult to accurately record the risks, which are higher. Shrinking revenues, the upheaval in the news media sector from the online tech shift and the new post-pandemic circumstances have brought more pressures on journalists in terms of professional standards, as well as a growing overall employment uncertainty. Direct interference in editorial work is not rare, while growing media concentration, and the continued lack of transparency in ownership have contributed to a resigned sense of self-censorship among journalists. This affects mainly the editorial line, and to a lesser extent individual columnists. The regulatory safeguards for the protection of journalistic sources are recognized while the necessary derogations provided for by the GDPR ensure journalistic protection. Though no serious threats or attacks to the physical safety of journalists have been recorded, unofficial reports of journalists - particularly through social media exposure – show them being subjected to digital harassment. What has however given cause for concern have been allegations – though hard to substantiate - of surveillance and hacking of journalists. The fact that there is no available data that can conclusively preclude and measure threats to the digital safety of journalists remains a considerable risk for pluralism.

The media regulatory system ensures a legally independent authority with its own budget and adequate powers to conduct its mandate. Its decisions are published regularly and are subject to judicial review only, with no room for government interference. The overall assessment points to a Low Risk at 28%, although other parameters are considered as posing medium risks. Such is the case of the appointment of members by the government in terms of deficient selection criteria, doubts about independent/efficient operation in practice, transparency and accountability issues.

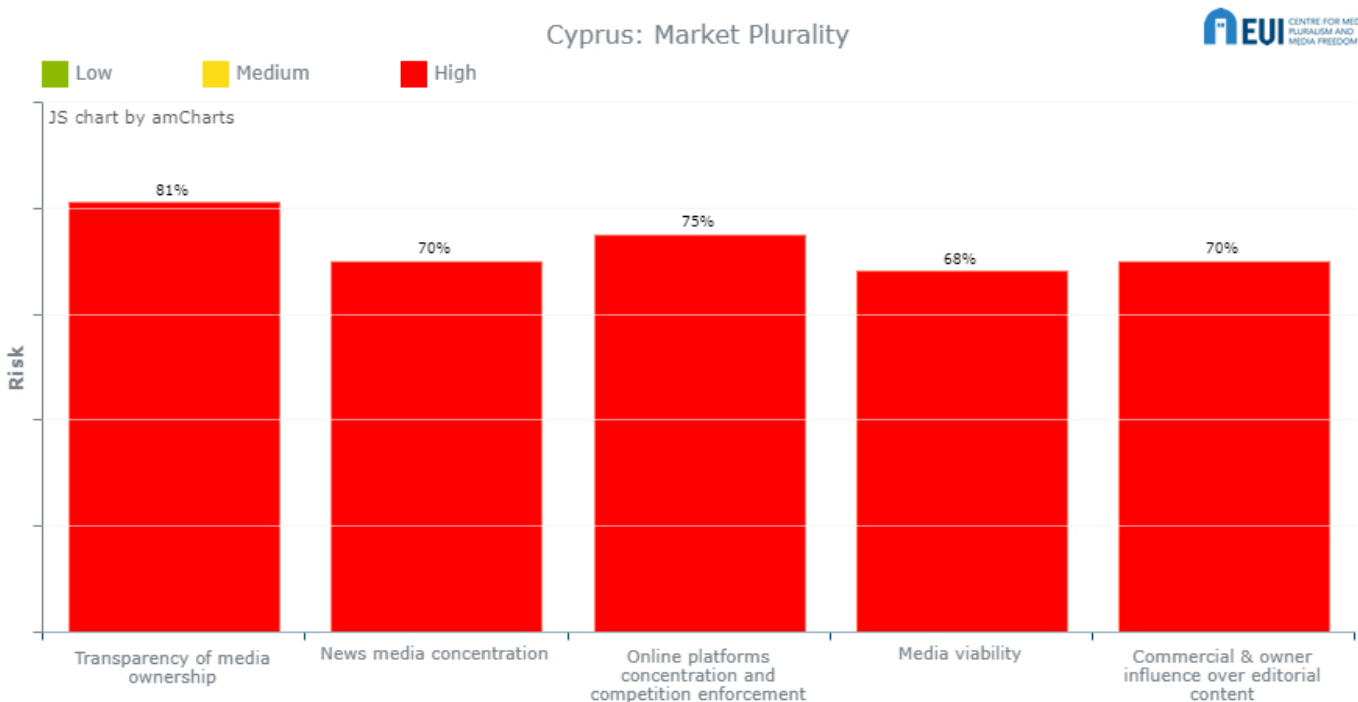
There was a slight increase of 1.7% in broadband penetration in 2020 over 2019 reaching 92.8% with IPTV and cable TV remaining stable. In 2020, 92.8% of households in Cyprus had broadband connection, up slightly from 2019. Internet speeds remained low at 16 Mbs despite an increase compared to the previous year, with the country falling further in world ranking on average internet speeds from position 64 to 89. These developments improved the risk rate to 33%, from 52%, for Universal reach of traditional media and access to the Internet.

3.2. Market Plurality (73% - high risk)

The Market Plurality area focuses on the economic risks to media pluralism, deriving from lack of transparency and concentration of ownership, sustainability of the media industry, exposure of journalism to commercial interests. The first indicator examines the existence and effectiveness of provisions on transparency of media ownership. Lack of competition and external pluralism is assessed separately for the news media (production of the news) and for the online platforms (gateways to the news), considering separately horizontal and cross-media concentration; the concentration of online advertising market; and the role of competition enforcement. The indicator on media viability measures the trend of revenues and employment, in relation with GDP trends. The last indicator aims to assess risks to market plurality posed by business interests on production of editorial content, both from commercial and owners influence

The risk rate to Market Plurality has slightly improved to 73% from last year (74%). Three indicators showed risk upward shifts; the level of risk has worsened for the indicators on **Media viability** and **Commercial and owner influence over editorial content**, while it lowered for **News media concentration** and **Online platforms concentration and competition enforcement**. **Transparency of media ownership** remained at the same high-risk level of 81% and **News media concentration** is lower but still very high at 70%. The **Media viability** risk indicator also rose to 68% and all indicators are at high risk now. The growing risks are in some way related to the economic challenges following the COVID-19 crisis.

With legal obligation of transparency on ownership only, and partially, applicable to broadcast media (where efficient implementation of rules remains doubtful), the written press and digital media landscape still remains worryingly nebulous^[8]. The very absence of a law specific to digital media contributes to the high risk assessment (81%). In both the written press and digital media it remains difficult or impossible to identify and verify ultimate owners or cross ownership.



News media concentration scores 70%, down from 83% in 2020. This small decrease of risk (still in the High Risk range), that appears here might be linked to measurement methods that the situation on the

ground. Ownership in the audio-visual media sector, closely regulated by the Cyprus Radio and Television Authority, mostly through the licensing procedure, lacks systematic scrutiny and full transparency. We note that four of the seven commercial TV channels and the PSM are drawing an almost equal share of audiences, which is a plurality indicator, albeit a numerical one. Surveys indicate that the principal news source is television, followed by internet sites, social media, radio and the press, but it's overall audience is shrinking.

Establishing a precise picture of the situation with regard to audience shares and circulation figures both for newspapers and their internet editions is marred by the absence of independently audited or any figures at all. During the whole of 2020 and the pandemic's several lockdowns and the very clear and substantial shrinking of advertising revenue, newspaper readership figures did not move as much as the situation would have suggested. And this, at a time when the Cyprus Online Publishers Association figures showed a considerable shift to online news sources. At the same time, while the online sector continues to thrive, it remains completely unregulated. When combined with the unclear situation of concentration, the risk for the indicator **Online platforms concentration and competition enforcement** remains at High at 75%, though down from 85% last year. As things stand, given also that most online outlets – especially in the midst of the pandemic – not using direct sourcing and relying on the state-owned Cyprus News Agency for news feeds, these outlets appear to be focusing less on original or quality content, and are vying instead, mostly, for visits and clicks.

Employment insecurity facing journalists in the pandemic context has made professionals more susceptible to owner pressures and reluctant to assert editorial independence. Based on concrete data for radio, television and web TV, and on informal sources for other media, we found that advertising income for most media has suffered falls ranging from 25 to 50%. This applies even to digital to which readers and viewers have turned to over the course of 2020. As a result, media viability at a high risk at 68%, up from 63% last year might be facing bigger problems given that the pandemic persists.

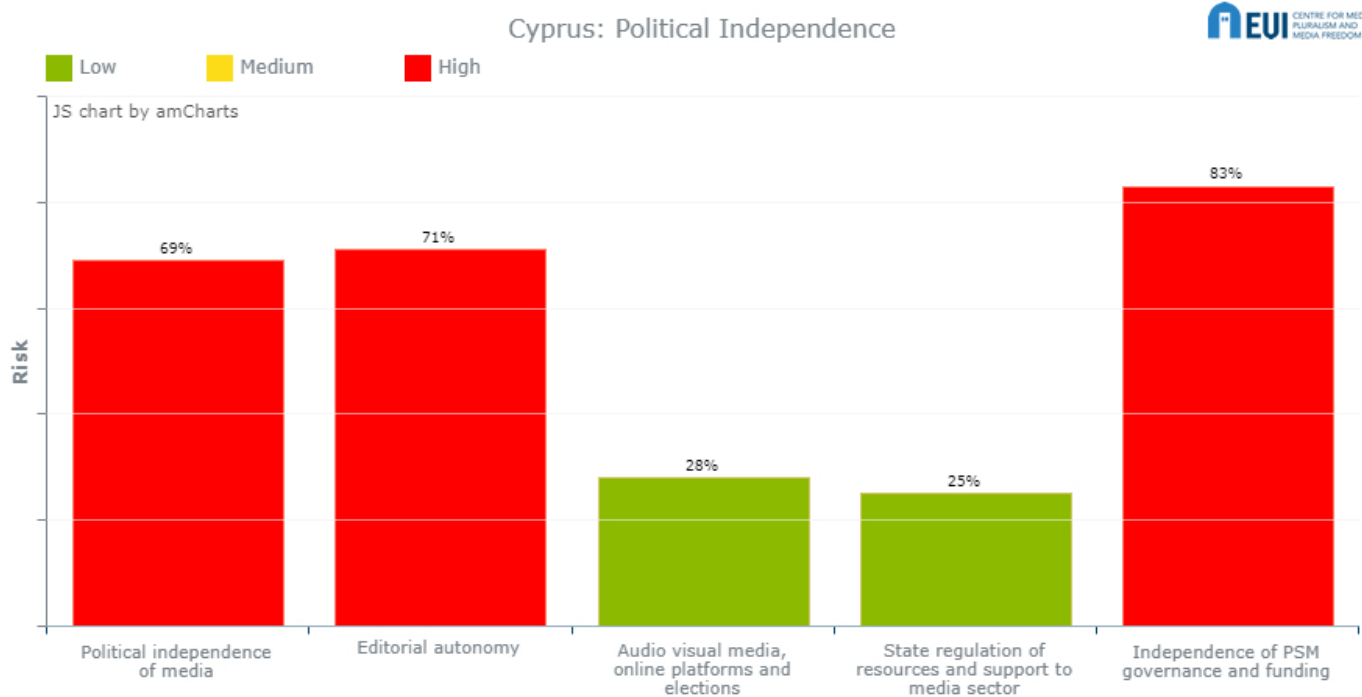
Crisis stricken press and digital news outlets continue to be heavily depended on corporate sponsorship with an increased presence of embedded content and corporate advertorials. There is also a growing trend of specific corporate news content getting frequent and priority reference and exposure online, often with no distinction between editorial content and advertorials. Under these circumstances commercial and owner influence over editorial content is recorded with a sharp increase from 58% to 70%. Equally both legacy and digital media organisations in the absence of advertising revenue appear to be expanding their operations to beyond news gathering moving into conference organizing and other corporate sponsorship attracting opportunities.

As regards competition the media and advertising markets are, as things stand, sufficiently fragmented reducing potential threats. Nonetheless, the scarcity of data and the absence of any legislation on digital media, coupled by the fact that there are no sectoral references in competition law do point to a much higher risk than the reality on the ground may reflect.

3.3. Political Independence (55% - medium risk)

The Political Independence indicators assess the existence and effectiveness of regulatory and self-regulatory safeguards against political bias and political influences over news production, distribution and access. More specifically, the area seeks to evaluate the influence of the State and, more generally, of

political power over the functioning of the media market and the independence of public service media. Furthermore, the area is concerned with the existence and effectiveness of (self)regulation in ensuring editorial independence and availability of plural political information and viewpoints, in particular during electoral periods.



The risk to political independence area has decreased to 55 % from 59%, still within the boundaries of Medium Risk. This is mostly due to the indicator State Regulation of Resources and Support to the Media Sector, which reflects the support provided to the media during the COVID-19 crisis.

Strict clauses regulating radio and television ensure pluralism in audiovisual media against ownership concentration or control, while also requiring content impartiality. The relevant ownership thresholds and other constraints cover all persons, including politicians, and are enforced by regulators. However, while parties are excluded, explicit legal exclusion of politicians from ownership and/or control of radio and television, as well as of the various types of media distribution networks, only applies to public officeholders. This is stipulated in a 2008 law on incompatibilities for persons occupying public offices (Law No. 7(I) of 2008, art. 3.1(e)). Still, enforcement clauses are not clear enough to warrant efficient control.

Political influence over the Cyprus News Agency is possible through the approval of its budget, which relies almost exclusively on state funding, and the appointment of its governing body. The Council of Ministers appoints the chairman and its members. The chairman and members coming from the Public Service outnumber the members who represent media professionals. Crucially as an agency in a monopoly position, and particularly as the sole provider of agency material to online media, there is an over-reliance on its output which shapes the news agenda and public opinion; this is, thus, judged as High Risk.

The above situation regarding the relationship of politicians and media still poses a High Risk (69%) for the specific indicator of Political Independence of media.

Editorial autonomy is in principle warranted by both regulatory and self-regulatory provisions. However, the rules make very limited provisions for mechanisms or procedures for the effective protection of journalists and avoidance of political interference with their work. While no rules exist with regard to the appointment or dismissal of editors in chief, the key issue remains the pursuit of the political agendas of media owners - sometimes without any visible interference – and often led by corporate rather than actual political aims, with a sitting government manipulating the media by developing a *quid pro quo* relationship with most media

owners. This triggers a degree of self-censorship and compliance among editorial staff. On top of this, the informal relations between the political class and media owners and journalists, as well as a widespread sense of 'duty' to defend (sometimes at any rate) the government, because of the Cyprus Problem, contribute to bias. Due to these components, the rating of the indicator Editorial Autonomy remains High Risk (71%).

During election processes, access for political actors, parties and politicians is generally open, fair and non-discriminatory, though small or marginal political and social groupings often complain of bias. Both PSM and commercial radio and television are legally bound to cover daily political communication and electoral campaigns alike. Equal opportunities apply to political advertising that has to be clearly identified as such. Matters are not clear when it comes to online platforms and advertising, as no rules exist, and transparency of both sources and labelling is limited. With regard to the PSM (RIK), the relevant regulation for ensuring access and impartiality vis-a-vis all social actors and groups in general and political groups during election campaigns are implemented efficiently and this area poses a low risk. Though the situation in the private audio-visual sector appears fair, the lack of transparency and the absence of reports on election coverage lead us to judge it as medium risk. The situation described above, as well as the absence of any regulation for online media have increased the risk for the indicator Audio visual media, online platforms and elections from 24% to 28%. It is still a Low Risk.

The Radio spectrum was, until 2016, the only state resource allocated in a transparent and fair manner. Though there is no statutory framework in terms of support for the media or of rules for the distribution of state advertising, the pandemic prompted subsidies that covered all types of media and were more diversified compared to schemes for dailies and television only, introduced in 2017. The main issue is not how many media were left satisfied in terms of the fairness of the distribution of state support but, rather, the extent this aid was sufficient enough to curb the dangers facing the media. The answer is a negative 'no, it didn't curb the dangers'. Nonetheless the inclusion of the media in the assistance schemes by itself drastically reduced the risk factor for the indicator State regulation of resources and support to the media sector, from a Medium risk of 50% to Low Risk at 25%.

As regards the independence of PSM governance and funding, the situation remains to a great extent the same, and poses obstacles for its smooth functioning and independence. The criteria regulating the appointment of the PSM's Director-General and the composition of its governing board are fairly broad and are exploited by the government of the day and political parties in a sharing-the-spoils attitude at the expense of independent experts' participation. Also, the State and the political party system decide on PSM budgeting, which allows for their strong influence and, often blatant, interference in its operations. Risks against the PSM's independence have not changed and remain high, at 83%.

3.4. Social Inclusiveness (80% - high risk)

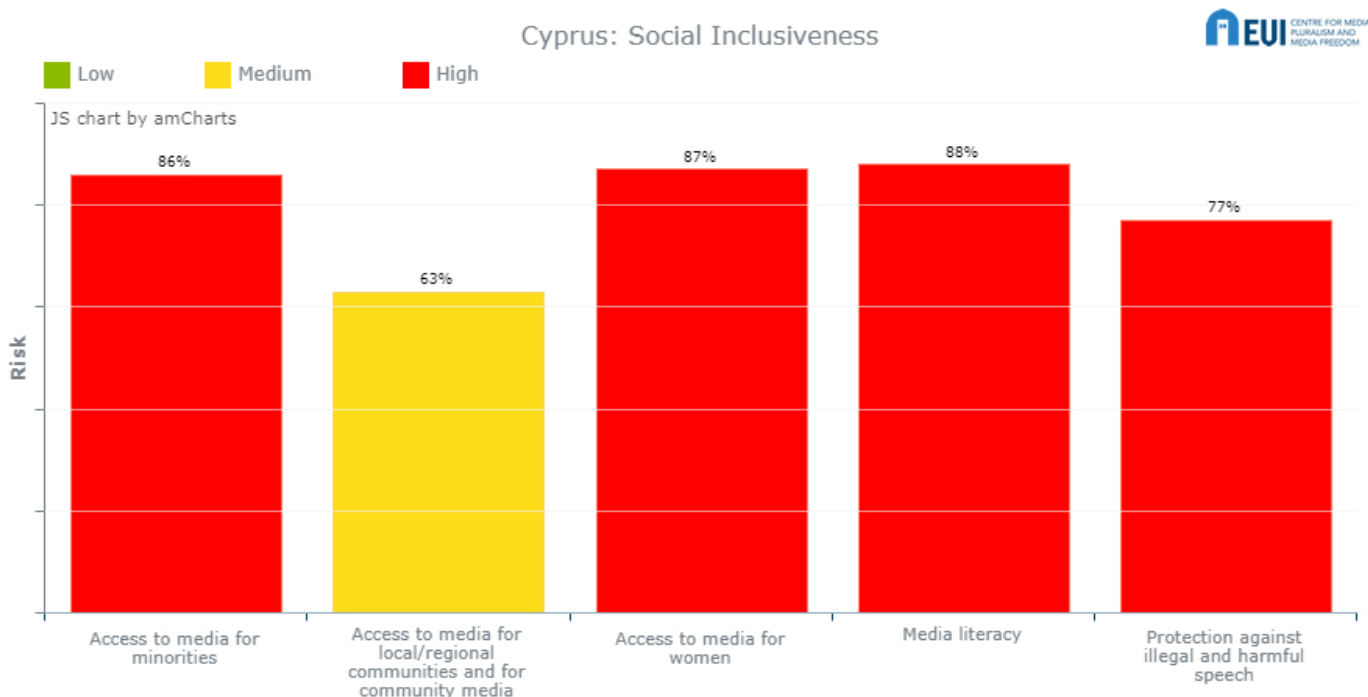
The Social Inclusiveness area focuses on the access to media by specific groups in society: minorities, local and regional communities, women and people with disabilities. It also examines the country's media literacy environment, including the digital skills of the overall population. In addition, for the 2021 edition of the MPM, a new indicator has been added to the Social Inclusiveness area in order to assess new challenges raising from the uses of digital technologies: Protection against illegal and harmful speech. Due to this modification of the indicators, comparison with previous editions of the MPM should be handled with extreme care.

The overall risk to Social Inclusiveness has also shown a marginal decrease, from 83% recorded last year to 80.2% this year. However, it remains entrenched in the High Risk boundary.

In Cyprus, access to media is still dominated by politicians and representatives of strong pressure groups.

Given the very limited or even no access for various groups, Social Inclusiveness continues to remain a very problematic area for media pluralism in the country. **Access to media for minorities** is a complex issue with multiple aspects: Minorities refers to small numbers of Cyprus citizens that belong to ‘religious groups’, as defined in the Constitution, and to a continuous inflow of diverse groups of immigrants into the country, starting in 1990. The PSM law^[9] requires that programmes be impartial and respect the interests and sensitivities of minorities (Art 19.1), with, however, no further provisions on access or other rights. Programmes addressed to ‘religious groups’ recognised by law, and in other languages, exist on radio but not on television. Access for people with disabilities is very limited despite media obligations under the law to attain specific thresholds^[10]. The situation leads to a rating of Access to media for minorities at High Risk (86%).

Access for regional/local communities and for community media is mitigated by the limited geographical size of Cyprus. However, the absence of any legal definition or recognition of community media, keeps this indicator at High Risk despite having dropped marginally from 75% to 63%.



Promotion of gender equality and respect for women’s rights is the subject of a variety of laws, some very detailed. These are binding for all, but neither the PSM nor commercial AVMS providers have developed any gender equality policy. Moreover, the presence of women in media management board or in executive positions remains very low as is the representation of women experts in news and current affairs broadcasting. This indicator Access to media for women continues to present a High Risk at 87% (88% last year).

There is still no official Media Literacy policy framework even though a draft policy plan has been pending since 2012. The Pedagogical Institute of the Ministry of Education, Academic and civil society bodies do undertake initiatives, which however do not come close to compensating for activities planned within a policy framework. Serious efforts by the Cyprus Pedagogical Institute of the Ministry of Education in training teachers as nuclei within schools to undertake relevant actions, and actions that focus broadly on online safety and the development of media skills have been enriched in the past year with initiatives to develop Digital Competences and Skills against Misinformation. This is promoted as part of the curriculum which is a promising step, for broader and generalised media literacy activities. Actions in this area as in most other

areas has been made more difficult by the pandemic. Some activities are also undertaken by the Cyprus Radio Television Authority, which is the body assigned by the Law as the main agent responsible for media education. Its work so far shows that this is a task that the Authority is not in a position to fulfill. The Media Literacy risk therefore remains High at 88%.

The indicator Protection against illegal and harmful speech also scores a High Risk (77%), because of the absence of any specific policy framework. There are laws to counter racism and hate speech, but no specific schemes and plans are drawn. At the same time, we lack concrete data on cases and how they may be dealt with. With regard to disinformation, no legal framework exists and there is no evidence that the authorities have any plans to tackle the problem. There are strong reactions against protective measures by various groups and the Church, with the government adjusting initial decisions and measures accordingly. The rate of vaccination refusal is more than double the EU average (26% against 12%).^[11]

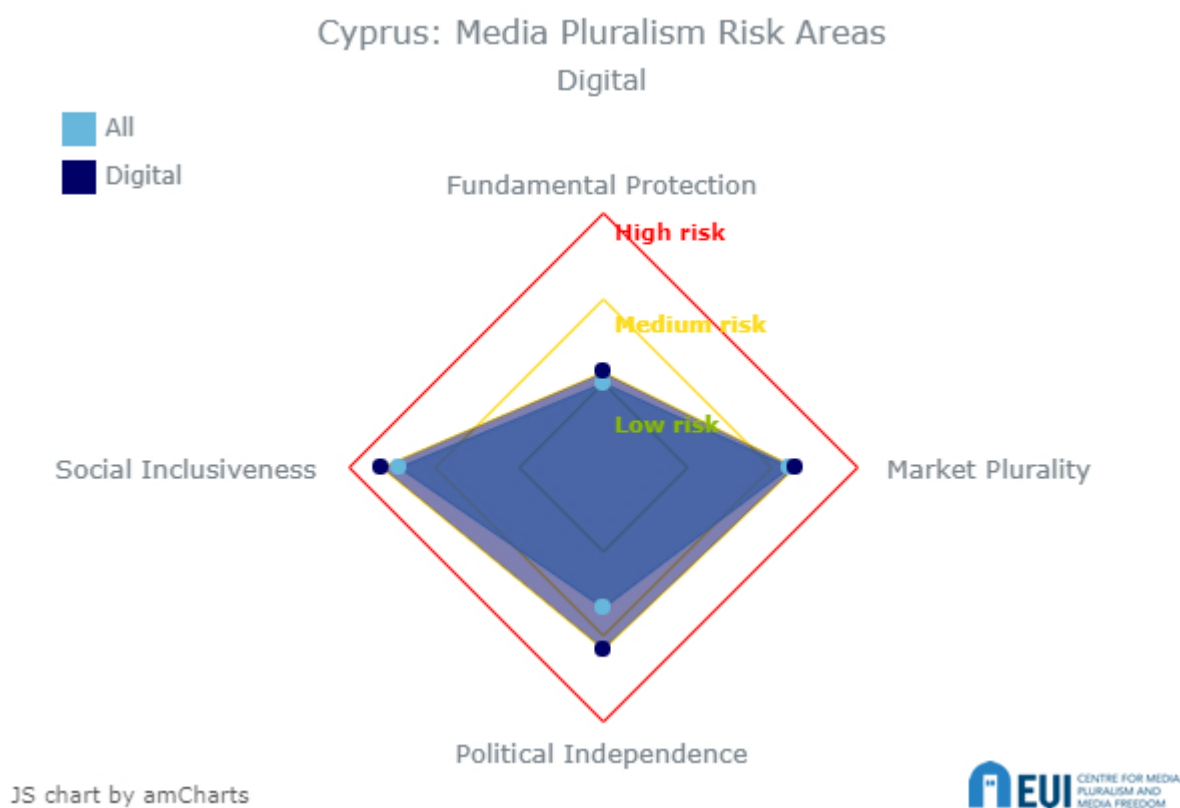
4. Pluralism in the online environment: assessment of the risks

Media Pluralism in the Online Environment

The overall standing of Cyprus in the MPM evaluation of the online environment is defined by two crucial factors that are affecting a range of important indicators. These factors are:

- the total absence of a digital legal framework or explicit mentioning of digital aspects in media laws
- the absence of independently audited data on various aspects and activities related to the online media.

The evaluation per area is as follows:



Fundamental Protection

Despite the absence of a law for online communication, freedom of expression is covered by the broader protection under the constitution, which also ensures legal remedies in case of violations. No incidents of arbitrary filtering or content removal by the State or ISPs have been made public. The absence of any relevant reports poses an issue of transparency and maybe uncertainty, although if incidents had occurred they would most probably be made public.

With regard to the digital safety of journalists, though no specific incidents have been recorded the question of state surveillance or digital interference remains open.

Allegations in a recent book by a former aide of the President of the Republic that the President was aware of spying on the communications of the then Governor of the Cyprus Central Bank were never

denied.^[13] Silence on this and on other occasions, where very limited information was made available raise serious concerns for the digital safety of everybody, including media professionals. At a different level, that of privacy and data retention obligations, and protection of journalists, the laws adopted by the Republic fully comply with the European Convention of Human Rights and the GDPR.

Broadband coverage and broadband subscription data place Cyprus in the low risk area. Internet speeds remain well below the EU average, while EU standards on net neutrality and ISP data usage are enforced. There are only four ISPs, which are operating impartially and with transparency. The **Fundamental Protection** area in the online environment faces a Medium Risk of 37%, against 44% in MPM2020, and marginally higher than the overall area risk of 33%.

Market Plurality

The absence of a specific legal framework for online media and of any thresholds and obligation for transparency of ownership - except in broadcasting media - and the lack of audience and other data pose a High Risk for **Market Plurality**, at 75%, against 84.6% in the previous report. This is again slightly higher than the overall risk for this area (73%). Existing laws on oligopolies and monopolies and competition in general are normally applicable to online media and the advertising market. However, explicit reference in the competition laws is made to media alone – not to online or digital, which is considered by the project methodology as inducing risks.

We equally face a lack of reliable independently audited data on digital native news media – an issue which is a problem for the whole media sector. This constitutes a significant risk as market and audience shares are difficult to establish and assess.

No surveys provide data on how people access news and the share of news consumption via social networks and aggregators. Also, surveys that could establish exact figures and trends are rare and not audited, while the lack of transparency regarding world portals/carriers raise big obstacles in any attempt to evaluate the online sector. General market and audience figures on national online media shed some light, which, however, cannot compensate for the lack of accurate data noted above.

Finally, no audited or verified data on the revenues of digital news media are available. This has prevented a comprehensive and accurate assessment of the market, although unofficial data do point to a significant decline in advertising revenue in 2020, for both online and offline media.

Media revenues in general, even when positive trends are noted, in the small Cyprus market, remain an issue of concern. Extraordinary and COVID-19 specific forms of state assistance to media outlets are welcome but not sufficient enough to warrant an untroubled future for the sector.

Political Independence

Ownership or control of digital media may only be regulated for politicians in public office, on the basis of the law on incompatibilities, though the text is not explicitly mentioning digital media. There is also doubt whether this is effectively applied.

Beyond the general principles in Codes of conduct, which is signed also by the association of online media, there are no specific guidelines for digital media.

No clauses exist in media or other laws or the Code of Ethics that regulate online advertising and online political activity during or outside election campaigns. While there are rules in place for political parties and candidates to report campaign spending online, there are gaps and doubts about their effective implementation. With regard to the question of data protection, the competent authority examines issues

related to the use of personal data by politicians and political parties, but it does not act proactively.

Finally, the law on the PSM RIK (CyBC) makes explicit reference to its state funding and the operation of Internet and digital services. The law provides that the use of funds from State aid should not distort competition.

The absence of rules or clauses in the Code of Journalistic Ethics with specific and explicit reference to the use or control of online digital media and some deficiencies in regulating online media use and activities by politicians constitute risks for the **Political Independence** area. The medium level risks related to reporting spending for online political advertising, some /limited transparency by online platforms and the specific rules on funding the online services of the PSM have increased the risk for the area to 53%, against 42% in MPM2020. It is significantly lower than the overall area High Risk (71% against 59% in the past).

Social Inclusiveness

Media Literacy activities have increased, but remain limited in numbers and scope, mainly due to the absence of any policy framework and any comprehensive action plan. New activities are becoming part of the curriculum. Digital competencies score a High Risk because 41% of the population have low digital skills, and 45% have basic or above basic overall digital skills ^[14].

While there are laws, specific for fighting hate speech, media literacy activities do not provide any training on hate speech avoidance. As with some legacy media, digital media and social networks are also carriers of a discourse with racist intonations, presenting migrants and refugees as a threat against the native. Also, State officials are presenting the high rates of not documented migrants in ways that spread hate speech. There is no systematic effort to monitor and remove online hate speech towards women and persons with disabilities. Despite the absence of any official plan for action against disinformation, the development of digital skills as part of the curricula promoted by the Pedagogical Institute is a hopeful initiative against disinformation. At present, however, various groups and Church officials are reacting against protective measures from the pandemic, they spread disinformation through social media and high rates of people are failing to abide by the orders issued by the authorities. The latter tend to adjust measures, they succumb to pressures by the Church.

The **Media literacy** indicator for online media remains at high risk (87% against 88% in 2020), which is higher than for the entire area (80% against 83%).

5. Conclusions

While Freedom of expression in Cyprus remains strong and legally well protected, the risks for media pluralism have increased further in MPM2021. There is lack of adequate action to respond to challenges emerging in the digital environment. Existing limitations in ensuring ownership transparency have increased, and the lack of independently audited data renders the task of regulators harder. The absence of updates makes the under-developed regulatory framework inefficient.

Despite strong democratic credentials and a fair role of the media in election processes, political bias, and political interference in the media compromise their operation. The media appear also increasingly vulnerable to influences by commercial interests, while they are prone to reflect the owners' corporate and political agendas. Media literacy actions remain limited, with no policy framework.

New challenges have been added to the already existing ones that need to be addressed in order to improve media pluralism. They are becoming more urgent in the rapidly expanding digital environment:

Fundamental Protection:

- Authorities must urgently update the regulatory framework and keep pace with the challenges of the digital and online environment. This needs effective ownership transparency rules covering all media.
- Unionised and non-unionised journalists and all media stakeholders need to reaffirm their role and reclaim their status to regain the public's trust. Promoting quality and excellence in journalism is a major requirement to the above.

Market Plurality:

- The media need to clear content from external influences and redeem their social role.
- State schemes to assist the media must be fair and transparent, and effective in warranting media viability.

Political Independence:

- Government officials and political parties should revise their approach to media. Through amending the law and their practices, they should warrant the unhindered operation of a PSM that is independent in all respects, and enable a free expression environment for all.
- Media professionals should seek ways to strengthen their Union and effectively defend their labour rights. This is the key for journalists to claiming their editorial independence.

Social Inclusiveness:

- The legal frameworks of both the PSM and commercial media need to be revised in order to broaden access by persons and groups. Rules should include the obligation for the adoption of policy frameworks on gender equality and media access by all minority groups.
- Community media must find a place in the law, with provisions for implementing a comprehensive policy framework.

- Given the identified risks to pluralism media literacy is critical in enabling citizens to respond to challenges, and the need for authorities to adopt and implement a policy framework is urgent.

6. Notes

- [1] European Commission: https://ec.europa.eu/info/sites/info/files/economy-finance/ip136_en_2.pdf
- [2] Gnora Mediagnosis Report 2020 Q4 - <https://gnora.com/mediagnosis-october-december-2020/>
- [3] Cyprus Online Publishers Association - <http://copa.com.cy/μέλη/στατιστικά-μελών/>
- [4] Data for Q4 2020 by OCECPR - https://ocecpr.ee.cy/sites/default/files/ec_report_fixedtelephonybroadbandtelecombuletin_gr_29-03-2021_pkmp.pdf
- [5] Iris Merlin Legal Database - <http://merlin.obs.coe.int/article/8641>
- [6] The Law on the Right to Access Information Held by Public Authorities No. 184(I)/2017, http://cylaw.org/nomoi/enop/non-ind/2017_1_184/full.html
- [7] The Law on the Right to Access Information Held by Public Authorities No. 184(I)/2017, http://cylaw.org/nomoi/enop/non-ind/2017_1_184/full.html
- [8] The Law on Radio and Television, 7(1)/1998, [https://crtc.org.cy/images/users/1/FINAL CONSOLIDATED LAW 16.3.17.pdf](https://crtc.org.cy/images/users/1/FINAL_CONSOLIDATED_LAW_16.3.17.pdf), and Law 145/1988 (The press law)
- [9] The Law on the Cyprus Radio Foundation (KEF.300A), http://www.cylaw.org/nomoi/enop/non-ind/0_300A/full.html
- [10] In line with European Directives, article 30B (1) of the Law on Radio and Television Organisations, L. 7(I)/1998, provides that media service providers under the jurisdiction of the Republic shall ensure that their services are gradually made accessible to people with a visual or hearing disability. Par. 2 provides that each broadcaster is obliged to broadcast between the hours of 18.00 and 22.00 a special newscast comprehensible by deaf people, of a duration of at least five minutes of the hour. It is provided that the presentation of the above mentioned special news bulletin is at least half of the TV screen. Par. 3 provides that media service providers, after consulting with the Authority, should submit, within one year of the entry into force of this article, a plan establishing concrete ways to gradually raise the rate of programs made accessible to people with a visual or hearing disability, by at least 5% more, besides news bulletins. Provisions relevant to introducing measures in order to meet the needs of persons with disabilities are also found in the Law on Persons with Disabilities of 2000 (L.127(I)/2000). Article 8(3) of this law provides that TV stations must make all necessary arrangements so that some news bulletins per day are also broadcast in sign language.
- [11] A quarter of Cypriots say they'll never take the jab, Cyprus Mail, 24 April 2021 <https://cyprusmail.com/2021/04/24/coronavirus-a-quarter-of-cypriots-say-theyll-never-take-the-jab-survey/>
- [12] A quarter of Cypriots say they'll never take the jab, Cyprus Mail, 24 April 2021 <https://cyprus-mail.com/2021/04/24/coronavirus-a-quarter-of-cypriots-say-theyll-never-take-the-jab-survey/>
- [13] Makarios Droushiotis, He Symmoria (The Gang), Alfadi, Nicosia, 2020
- [14] https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=isoc_sk_dskl_i&lang=en

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Annexe I. Country Team

First name	Last name	Position	Institution	MPM2021 CT Leader
<i>Christophoros</i>	<i>Christophorou</i>		<i>Independent expert</i>	X
<i>Nicholas</i>	<i>Karides</i>	<i>Ampersand Director</i>	<i>Ampersand</i>	

Annexe II. Group of Experts

The Group of Experts is composed of specialists with a substantial knowledge and recognized experience in the field of media. The role of the Group of Experts was to review the answers of the country team to 16 variables out of the 200 composing the MPM2021. Consulting the point of view of recognized experts aimed at maximizing the objectivity of the replies given to variables whose evaluation could be considered as subjective, and therefore to ensure the accuracy of the final results of the MPM. However, it is important to highlight that the final country report does not necessarily reflect the individual views of the experts who participated. It only represents the views of the national country team that carried out the data collection and authored the report.

First name	Last name	Position	Institution
<i>Costas</i>	<i>Stratilatis</i>	<i>Associate Professor</i>	<i>University of Nicosia (UNIC)</i>
<i>Giorgos</i>	<i>Frangos</i>	<i>Chairman</i>	<i>Union of Cyprus Journalists</i>
<i>Antigoni</i>	<i>Themistocleous</i>	<i>Regulator - Officer</i>	<i>Cyprus Radio Television Authority</i>
<i>Xenia</i>	<i>Xenofontos</i>	<i>Director Corporate Affairs & CSR at Digital Tree</i>	<i>Digital Tree</i>
<i>Eleni</i>	<i>Mavrou</i>	<i>Board of Directors</i>	<i>Dialogos Media Organisation</i>
<i>Marios</i>	<i>Drousiotis</i>	<i>Chairman</i>	<i>Cyprus Consumers Association</i>
<i>Andreas</i>	<i>Frangos</i>	<i>Chairman of the Governing Council</i>	<i>RIK - Cyprus Broadcasting Corporation (PSM)</i>

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