Consultancy Report

Prepared: 14th September 2005

Developing a strategy for interventions in media for SMEs in Sri lanka

Undertaken for the ILO Enterprise for pro-poor growth project in Sri Lanka

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Contents

This consultancy report has been prepared by Gavin Anderson, a consultant in private sector development and media in development for the ILO's Enterprise for Pro-poor Growth Project in Sri Lanka. The report provides details of activities undertaken during a 10 day mission from 23rd August to 1st September, recommendations for future activities and a preliminary draft strategy for interventions to develop business media in Sri Lanka.

1. Background
1.1 Enterprise for Pro-Poor Growth Project
The Enterprise for Pro-poor Growth (Enter-Growth) project is a 3 year project of the International Labour Organisation funded by the Swedish International Develoment Co-operation Agency (Sida). The project supports the implementation of the Government of Sri Lanka's strategy for poverty reduction and the generation of quality employment for women and men through an integrated micro and small enterprise development programme that targets four districts with a high incidence of poverty, Kurunegala, Polonnaruwa, Anuradhapura and Puttalam.

1.2 Interventions in Media and enterprise development
The Enter-Growth project includes an objective of providing 'greater access countrywide to market-led, sustainable business services for micro and small enterprises owned by women and men'. Under this objective, the project intends to establish radio and TV programmes targeting small and medium enterprises (SMEs). The specific output and proposed activities are detailed below.

Output 4.4
Commercial small business radio and/or television programmes established that provide information, offer a forum for discussion, and strengthen the demand for business services.

Activities
4.4.1   Promote the concept of small business programmes among stations in North West and North Central province as well as elsewhere in the country.
4.4.2   Select up to 10 who are interested and have the basic capacity required.
4.4.3   Conduct a training course for radio journalists and producers on interactive current affairs programmes for MSEs.
4.4.4   Provide on-the-job technical and marketing support to the stations, including through identification of potential sponsors, production of demonstration tapes, facilitation of contacts.
4.4.5   Conduct workshops bringing together radio stations and MSE development stakeholders, to improve their access to information and news.
4.4.6   Conduct workshops bringing together radio stations and business associations to enhance interaction between the stations and the MSE community.
4.4.7   Pursue other, related mass media options for reaching MSEs, such as commercial distribution of VCDs.

This proposed work is based on ILO's experience of supporting the growth of sustainable business radio programming in Africa. This work, which has recently been funded by Sida, succeeded in supporting the development of 25 regular radio programmes that provide small businesspeople with information, advice, platforms for debate and discussion and an enhanced voice for private sector advocacy. The programmes are being broadcast by private radio stations, attract commercial advertisers and are being copied within the industry.

A preliminary analysis of the Sri Lankan broadcast industry showed that replicating this work in Sri Lanka may be feasible. The broadcast industry in Sri Lanka is relatively liberalized and diverse but that there were few regular business programmes that focused

on the SME sector. The Start and Improve Your Business (SIYB) Project that had preceded the Enter-Growth project initiated and supported a series of radio programmes to promote SIYB trainers in 2003/4. A second series of 12 programmes has been initiated with Shakthi FM (a Tamil language radio station) that also intends to promote SIYB training but includes various programme segments. These initiatives indicated an interest in SME programmes among broadcasters in Sri Lanka.

1.3 Terms of Reference
The terms of reference for this consultancy is attached as annex 1. The consultancy is envisaged as incorporating 2 missions to Sri Lanka. These missions would be undertaken to answer a number of key questions:

- *Which media offer the best opportunities?*
- *Specifically, which stations and/or companies could the project work with?*
- *How can sponsorship be obtained, and among what kinds of firms is this most likely?*
- *What are the needs for capacity building?*
- *Could the activities take the four target districts as a basis from which to expand, or should the media work start nationally immediately?*
- *What are the potential linkages to other project components and how could these be made use of without compromising the integrity of the media activities?*

The activities detailed under the terms of reference were:

Prior to the first mission the consultant will as follows:

- *Review available information on media in Sri Lanka.*
- *Review the project document.*
- *Draft a TOR for the national media specialist.*
- *Guide the project in the selection of the national media specialist and the planning of the mission.*

During the mission, the consultant will:

- *Have a one-day meeting with the project team to reach a common understanding of the principles of the approach and to finalise the mission programme.*
- *Develop a detailed understanding of mass media in Sri Lanka, including those based in the four Districts covered by the project, through meetings with stations and media specialists. This will include issues with regard to commercial orientation, political independence, programming, programming and journalistic practices, geographical spread.*
- *Assess which media offer the best opportunities for commercial programmes or other products for MSEs.*
- *Prepare an outline for the strategy to be taken and discuss this with the project team.*
- *Draft a TOR for the national media specialist, for work to be done between the two missions.*

2. Activities undertaken under the consultancy
The following activities were undertaken under the consultancy:
- Preparation of a preliminary guide to meetings required during the first mission to Sri Lanka.

- Travel to Colombo to undertake a 10 day mission from 23rd August to 2nd September 2005.
- Meeting with the project team and district programme managers held in Colombo and a presentation on media in private sector development made to the team.
- Meetings and discussions held in Sri Lanka with key informants from the following areas:
  - Media Research
  - Radio and Television broadcasters
  - Newspaper publishers
  - Media development organisations
  - Advertising agencies
  - Advertisers
- Travel to Kurunegela and Anuradhapura for 2 days.
- Round table discussions held in Kurunegela and Anuradhapura with local freelance journalists, advertising salespeople and local government public relations officers.
- Presentation to the Enter-Growth project team on the preliminary findings of the consultancy.
- Preparation of briefing notes and presentation of background materials to the Enter-Growth project consultant who will plan a social marketing campaign in September 2005.
- Preparation of a preliminary strategy for the media component of the Enter-Growth project.

Unfortunately, a national media consultant could not be identified before the work commenced. The international consultant therefore undertook this work alone and it is planned to identify a local media consultant to work on the next stage of the project.

3. Media landscape in Sri Lanka

The following section provides a detailed overview of the information gathered on the media landscape in Sri Lanka. This is provided in detail as a background for Enter-Growth's future work in both media development and social marketing. The data is based on information gathered through reports, studies and through interviews. The information may therefore need further verification.

3.1 Media access
Sri Lanka is a country of approximately 20 million people of whom 79% of live in rural areas. According to the 2001 Sri Lankan Census, Sinhala is the first language for 74% of the population and Tamil is the first language for 18% of the population. English is commonly used in government and is spoken competently by about 10% of the population[1]. Sri Lanka has a high literacy rate of slightly over 90% but many Tamil speakers read Tamil but not Sinhala . The National media survey 2004 puts the figure who read Tamil and not Sinhala at 13.6% of all Sri Lankans.

Media that is intended to reach the majority must therefore be in the local languages of either Sinhala and Tamil while English media will reach policy makers and the educated and business elite.

Table 1, based on statistics from the Lanka Market Research Bureau 2004 national media survey, shows that media access is relatively high in Sri Lanka as compared to countries of a similar economic position. It was estimated (by the Lanka Market Research Bureau) that less than 5% of Sri Lankans have no access to any form of media (media dark).

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[1] **Sri Lanka Census** of Population and Housing, conducted on the 17th July 2001

Statistics show that access and usage to internet and cinema is low in Sri Lanka and that traditional broadcast and print media has by far the highest penetration. No information was gathered on street theatre.

Regular radio listenership	71%
Regular TV viewing	80%
Newspaper readership	65%
Cinema	4% regular 4% occasional
Internet	1% regular 4% occasional

Table 1: Media access in Sri Lanka. LMRB National Media Survey 2004

3.2 Radio Broadcasting in Sri Lanka

Based on statistics gathered during the mission, there appear to be 29 FM radio channels in Sri Lanka. 12 of these are state owned, 16 are private commercial and one is operated by the LTTE (Tamil Tigers). Listenership to radio appears to be lower than viewership of TV but many informants assert that radio remains the primary media for rural households and the poor. Table 2 show the percentage of those who own a radio and not a TV according to monthly household income. These statistics reinforce the view that radio is an important media for the poor, although it should be noted that the majority (71.6%) of even the poorest households own a TV.

Monthly household income	% of total population
Up to 5000 Rps (50US$)	28.4%
5,000 to 10,000 Rps (50 - 100US$)	13.4%
10,000 to 20,000 Rps (100 – 200US$)	8.5%
Above 20,000 Rps (200 US$)	3.5%

Table 2: Percentage of households that own a radio but not a TV

3.2.1 Private radio broadcasting in Sri Lanka

Broadcasting was liberalized in 1992 and the first radio station (Sirasa) began broadcasting in 1993. The 16 private radio stations are owned by 4 companies and ownership is therefore highly concentrated. Of these, there are 7 English, 7 Sinhala and 2 Tamil language stations. All of these stations broadcast from Colombo and aim to be national. There are no privately owned local radio stations in Sri Lanka. The names and ownership of commercial FM radio stations is detailed in table 3.

Company	Radio station	Language
Maharaja Broadcasting Corporation (MBC)	Sirasa Shakthi FM Yes FM Classic FM	Sinhala Tamil English English
EAP - Colombo Communications Limited	Shree FM Raja EFM	Sinhala Sinhala English
Asia Broadcasting Corporation (ABC):	Hiru FM Sha FM Sooriyan Sun FM	Sinhala Sinhala Tamil English

	Gold FM	English
TNL	Asura FM	Sinhala
	Isira Radio	Sinhala
	TNL Radio	English
	TNL Lite 89.2	English

Table 3: Private radio stations in Sri Lanka

The lack of local broadcasting appears to be primarily due to lack of broadcast liberalization. The consultant was informed that the allocation of frequencies is under the Telecommunication Regulatory Authority and it was reported by a number of informants that the process of licence application was not transparent and was based on political patronage. Informants involved in advocacy for Media Freedom raised serious doubts about the independence of private media but it appeared to be generally accepted that the commercial radio media is more interactive and involves more on-air debate and exchange of views than state radio but did have large studios..

The commercial radio stations visited (MBC and EAP) were well equipped and extremely well set up. This contrasted greatly with state owned radio stations which were operating with antiquated equipment.

3.2.2 National state radio broadcasting
The state broadcaster, Sri Lanka Broadcasting Corporation (SLBC) operates 6 national radio channels. Four of these are predominantly Sinhala, one is Tamil and one, an international service, is English :

	Radio Station name	**Language**
Sri Lanka Broadcasting Corporation (SLBC)	City FM	Sinhala
	Pavana SLBC Commercial	Sinhala
	SLBC Swadesheeya	Sinhala
	Radio News Network	Sinhala
	Thendral	Tamil
	Radio Sri Lanka	English

Table 4: National state run radio stations in Sri Lanka

Interviews with SLBC managers supported views voiced by other informants that state radio is highly influenced by the incumbent government. SLBC is heavily reliant on government funding[2] although they do accept and seek advertising revenue. The programming approach appeared to be quite supply driven with senior management asserting that their role was to 'educate' and 'make propaganda with doctors, scholars and the educated'. Despite this, SLBC has established commercial services in Sinhala and Tamil as a way of addressing the rise in popularity of commercial FM stations in the nineties. SLBC also recently launched the Radio News Network Channel that focuses, as its name suggests, on news and current affairs.

3.2.3 Regional state radio broadcasting
SLBC operate 4 regional radio stations. One of the stations (Rajarata in Anuradhapura) was visited by the consultant. These stations produce most of their content locally but have poor equipment and little field recording equipment. While it was not possible to assess the quality of programming, it was generally perceived by local informants that these stations were not very popular. This appears to be supported by statistics from the Lanka Market Research Bureau.

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[2] A radio license fee operates in Sri Lanka but it was not ascertained how effectively this is implemented or how much of the revenue to SLBC is derived from this license fee.

Location	Station Name	Language
Jaffna, Northern	SLBC Jaffna Service	Tamil
Kandy, Central Province	Kandurata	Sinhala
Anuradhapura, Northern Central Province	Rajarata – (Sinhala)	Sinhala
Mathara Southern Province	Rahuna (Sinhala)	Sinhala

Table 5: Regional State run radio stations in Sri Lanka

3.2.4 'Community radio'
Community radio initiatives have been supported by UNESCO and UNDP and at least 4 radio stations have been established that claim to operate as community radio. Despite the name, these stations remain under the ownership of SLBC and the term community appears to relate more to their geographic focus than to actual community ownership or participation. One informant closely linked to UNESCO's work in this area noted that 'once the project ends, the community stations fall like a pack of cards' and a number of the stations appear to have gone off-air. It was difficult to ascertain whether the community radio stations that have been established remain operational. 3 of the stations were reported to be off air, while the fourth Uva Community Radio was reported to be operational.

Location	Station Name	Status
Badulla District	Gandurakotte	Off air (?)
Anaradhapura District	Mahailupplana	Off air (?)
Nuwara Eliya District	Kothmale	Off air (?)
Bandulla District	Uva Community Radio	Operational

Table 6: 'Community' radio stations in Sri Lanka

3.2.5 Relative popularity of radio stations
State radio was perceived to have lost popularity to commercial broadcasters by advertisers, advertising agencies and impartial informants (those not directly involved in either state or commercial broadcasting). This is borne out by the listenership statistics from the Lanka Market Research Bureau (LMRB) detailed in table 7.

Station Name	Type	Company	Listenership
Sinhala			
Sirasa FM	Private	MBC	23.34%
Shree FM	Private	EAP	20.17%
Sha FM	Private	EAP	16.93%
Hiru FM	Private	ABC	16.46%
Swadesheeya	State	SLBC	11.05%
Raja FM	Private	EAP	10.64%
Tamil			
Tamil			
Shakti FM	Private	MBC	13.73%
Sooriyan FM	Private	ABC	8.07%
Thendral	State	SLBC	4.07%

Table 7: Regular listenership to radio stations in Sri Lanka (Lanka Market Research Bureau radio Point Survey 2005)

<u>3.2.6 Programming on radio in Sri Lanka</u>
English language radio is dominated by music and channels such as TNL Lite and EFM actively minimize talk on radio. The perception, which is also true in other countries where English is a language used in government and business, is that listeners to English language radio who will be the political and educated elite do not want news and informative programming on radio and receive news and information through other media sources (print and TV). In contrast, vernacular audiences and particularly rural and poorer communities do demand talk and serious content from radio and some of the Sinhala and Tamil stations are actively programming talk into their line-ups.

The Executive Director of EAP's Colombo Communication Limited which operates 3 radio stations stated that all their stations, including their Sinhala and Tamil stations, are music stations and that they would not be interested in developing talk programming. While they have developed plans to launch a talk radio station in Sinhala, they were not able to secure frequencies and these plans are on hold.

The Sinhala and Tamil radio stations operated by Maharaja Broadcasting Corporation (Sirasa and Shakthi) on the other hand incorporate talk programmes in their programme line-ups and they have already worked with Start and Improve Your Business to run business programming.

There appears to be very little existing business programming on radio in Sri Lanka. TNL Lite runs a twice weekly Business Focus but these are very short headlines that were said to be primarily focused on corporate, large business and economics. The only other example identified during the consultancy was the SIYB supported programme on Shakthi FM, Nallaya Shakthi ('the force of tomorrow'). The programmes manager of Shakthi was very positive about this programme and stressed their interest in continuing the programme after SIYB support stops.

3.3 TV Broadcasting
Information gathered during the consultancy appears to show that there are 13 TV channels in Sri Lanka. 12 are terrestrial (can be picked up by a TV aerial) while the other, TV Lanka, is a satellite service targeting Sri Lankan expatriates. Of the 12 terrestrial channels 9 are commercial, 2 are state owned and 1, ITN, is owned 60% state and 40% private shareholder.

Status	Ownership	Station name	Primary Language
Commercial	MBC	Sirasa TV	Sinhala
		Shakthi TV	Tamil
		MTV	English
	EAP	Swarnavahini	Sinhala
		ETV	English
	TNL	TNL TV	Sinhala
	IWS	Art TV	English
	?	Comet	?
	?	Teledasun	?
State	SLRC	TV Lanka	Sinhala
		Rupahavahini TV	Sinhala
		TV Eye	Sinhala
	60% State / 40% private	ITN	Sinhala

Table 8: Private TV stations in Sri Lanka

Household ownership of TV in Sri Lanka is around 79% while regular viewing is around 80%. TV is therefore the media with the greatest reach, but as noted above some households, particularly poorer households, do not own TVs.

3.3.1 Commercial TV
Three of the companies that own radio stations also own 6 of the 9 commercial TV stations (MBC, EAP and TNL). Broadcast media ownership can therefore be seen to be dominated by these large companies. The consultant was unable to ascertain the ownership of Comet or Teledasun which appeared in media research.

Commercial TV in Sri Lanka does not have total national coverage and no station reaches nationwide. All the TV stations are Colombo based and there appear to be no programmes produced regularly outside Colombo. The commercial (and state) TV stations have local freelance correspondents and camera-people. These camera-people usually run commercial businesses offering filming of local social, business and government events and filming for national TV is a side-income.

3.3.2 State TV
The state broadcaster SLRC (Sri Lanka Rupavahini TV Corporation) operates 2 terrestrial channels. SLRC operates independently of government funding and it was seen that they appeared to be better equipped and more dynamic than SLBC Radio. SLRC was perceived by a number of informants as biased and non-objective and doubts were raised about their willingness to host truly independent, interactive or debate type programmes. Rupavahini TV appears to be the only TV channel that reaches nationwide (this needs to be verified by other sources)

ITN (Independent Television Network) is majority owned (60%) by the state. It was perceived by informants that ITN is more independent than SLRC but that it still has bias towards government.

3.3.3 Relative Popularity of TV stations

Station	ownership	Viewership	Primary language
Rupavahini	State - SLRC	57.09%	Sinhala
ITN	State (60%)	45.31%	Sinhala
Svarnavahini	Commercial - EAP	40.37%	Sinhala
Sirasa TV	Commercial - MBC	38.11%	Sinhala
Shakthi TV	Commercial - MBC	17.27%	Tamil
Channel Eye	State - SLRC	15.59%	Sinhala

Table 9: Relative popularity of TV stations in Sri Lanka

Unlike Sri Lankan radio, State TV stations have greater viewership than commercial TV stations. This is due to the greater reach of state TV, but informants also suggested that commercial TV was very Colombo focused and elitist. It was perceived that state TV was particularly popular in rural areas where it is often has a monopoly.

While state TV has the greatest reach, it should be noted that commercial TV appears to dominate the Tamil audience. Shakthi TV is the only station that is primarily Tamil.

3.3.4 Programming on TV in Sri Lanka
Soap operas are the most popular programmes on Sri Lankan TV and dominate prime-time. TV programming incorporates news, talk shows and current affairs programmes.

It was found that there were a number of business and agricultural oriented programmes already running of Sri Lankan TV. Table 10 below provides details of some of the business

programmes. While presenters and producers linked to some of these programmes (Art TV, Shakthi, SLRC) claimed that they cover SME issues, there remains some doubt in the consultants mind about this. The coverage of business on TV in Sri Lanka needs to be analysed in more detail.

Station	Name	Length	Frequency	Time
SLRC	• Business Brief	5 min	Daily Mon-Sat	9.15 – 9.20
Shakti TV	• Varthaga Ulagam (Business Journal)	30 minutes	Weekly - Sun	11.00 – 11.30
ITN	• Situ Medura	?	?	?
ETV	• Lanka Business Report	?	?	?
ART TV	• The state of business • Business roundup • Achievers	15min 30min 15min	Daily Mon-Fri Weekly Weekly	3 repeats 3 repeats 3 repeats

Table 10: Business programmes running on TV stations in Sri Lanka

3.4 Print Media
While print media was not the primary focus of this consultancy, information was collected on the print industry. There are over 200 registered publications in Sri Lanka and readership appears to be quite fragmented. As noted above, Sri Lanka has a high literacy rate (over 90%) and with 65% claiming to be readers of publications, Sri Lanka has a correspondingly high reach for print publications relative to countries of a similar economic status.

The State publisher, Lake House, publishes a number of daily, weekly and monthly newspapers and magazines. Again, these are perceived as being biased towards government. As table 11 below shows, private newspapers are the most popular in both Sinhala and Tamil and there are clear market leaders.

Language	Newspaper	Ownership	Readership
Sinhala	Lankadeepa	Private	12.44%
	Divaina	Private	8.47%
	Dinamina	State	6.34%
	Lakbima	Private	3.52%
Tamil	Virakesari	Private	3.33%
	Udayan		2.56%
	Thinakural	Private	1.45%
	Thinakaran	State	1.36%

Table 11 : Readership of daily newspapers in Sri Lanka (% of total adult population)

3.4.1 Business publications
There are few dedicated business publications in Sri Lanka. Those that were found are detailed in table 12. These publications tend to be English language and aimed towards business executives and policy makers. The one exception identified was Aratuwa which

was a Sinhala weekly published by the Ceylinco group, a conglomerate involved in banking, finance, insurance, property development and micro finance among other activities. Aratuwa apparently targeted SMEs but was perceived by one newspaper wholesaler to be too promotional of Ceylinco services and therefore lost popularity. The publication closed in 2005.

Publication	Language	Frequency	Readership
Business Today	English	monthly	0.28%
Lanka Monthly Digest	English	monthly	0.13%
Business Standard	English	weekly	0.25%
Aratuwa	Sinhala	weekly (closed)	0.29%

Table 12 : Business Publications identified

Many of the Sri Lankan newspapers have business supplements but again much of the coverage appears to be on corporate, large business or economic with little that is directly relevant to SMEs.

3.4.2 Local newspapers
There are surprisingly few local newspapers in Sri Lanka outside Jaffna where local media exists because of the divisions that are a result of the ongoing war. The monthly Kandy News that was established with development assistance funding was the only example identified. This, combined with the lack of local radio stations, means that there is very little local news and information being provided through the media in Sri Lanka. While a number of newspapers include regional supplements or pages, informants at the regional level believed that information on local issues, events and news was very poor in Sri Lanka. While the reason for the lack of local radio is legislative (government not providing licenses for local radio) the reasons for the lack of local newspapers is unclear. Reasons cited about the small size, low population and lack of wealth in Sri lanka do not appear to explain the lack of local media.

3.5 Media bias and freedom of expression
Despite the fact that both broadcast and print media is liberalized, Sri Lanka is rated 109th (out of 167 countries) in the worldwide press freedom index[3]. This poor rating is primarily due media issues around journalism in conflict reporting, but the Sri Lankan media is perceived by many independent observers to be biased and lacks objectivity. As explained above, the ownership of broadcast media is concentrated in the hands of a small number of companies who are perceived to be close to the different ruling elites and the allocation of broadcast licenses is controlled and not transparent.

Some informants with international experienced questioned whether there was a culture of open expression and debate in Sri Lanka and whether the lack of vibrant interactive broadcast media is a function of self censorship by the media itself, government influence or Sri Lankan culture. While this is open to debate, it is clear that the current ownership structure and centralized nature of the media has not provided Sri Lankan's with diverse and open platforms to debate and voice their opinions, ideas and views. Until programmers and journalists actively seek to create such platforms, it will be difficult to ascertain the level of interest for such programmes.

3.6 Media Research in Sri Lanka
Sri Lanka has a relatively well developed media research industry. There are three main companies involved in media research and monitoring the Lanka Market Research Bureau (LMRB), AC Nielsen and Service Research Lanka (SRL). The consultant had meetings with LMRB and AC Nielsen.

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[3] See Reporters Without Borders, Worldwide Press Freedom Index, http://www.rsf.org

LMRB appears to be the key player in systematic, regular market research in Sri Lanka. Their services in media are:

National Media Survey (NMS): The national media survey provides data on radio, TV, cinema and internet usage but is particularly focused on print media. The survey is undertaken annually with a sample of 9,000 individuals. The next NMS survey is due out in late 2005. The full NMS survey is accessed by a subscription fee of 160,000RPs + VAT (approx US$1,600) which includes a database and software. Enter-Growth should be able to access the data through an advertising agency so does not necessarily need to purchase this.

Radio Audience Point (RAP): The RAP is a quarterly radio listenership survey. The last survey involved a sample of 9000 people in 3000 households and now includes the North and the East of Sri Lanka. The RAP provides information on listening times and changes in listening habits. RAP is logged using a diary method (interviewees fill in their own daily diary) which is obviously not as accurate as electronic measuring methods and excludes the illiterate and semi-literate. An annual subscription to RAP costs 180,000 Rps + VAT (approx US $1,800).

TV rating Point System: LMRB have recently installed the 'people's metre' system. This system is a box that logs actual household TV viewing. The results are tabulated quarterly. There are currently 220 meters installed in Sri Lanka. This system gives accurate household viewing statistics but the small sample is its obvious weak point. A subscription to the TV rating point system is 200,000 Rps a year (approximately US$2,000).

It should be noted that experience elsewhere shows that media research tends to be biased towards the urban and more wealthy. The break down of categories for employment also show that there are some obvious inaccuracies in the basic demographic data or sampling methodology, for example according to the NMS there are more students (9.07%) than farmers (6.44%) in Sri Lanka. The NMS states that 9.24% are small traders/shop owners and a further 1.03% are businesspeople. The survey results should be seen as indicative and there should be some caution in segmenting the sample too narrowly or trying to extract businesspeople from the sample.

All the companies mentioned above will provide tailor made research services on various areas of media, impact of advertising and marketing, brand awareness etc. AC Nielsen also provides a media monitoring service and for a fee of 30,000 Rps per month (approx US$300) will provide reports, press clippings and tape on media coverage of specific issues, brands etc.

3.7 Advertising in Sri Lanka
The advertising budget in Sri Lanka is said to be 10.7 Billion Rupees of which approximately 21% is spent on print media, 22% on radio and 57% on TV[4]. As in most countries the large advertisers dominate the advertising market and statistics on advertising expenditure of the biggest advertisers is available from the Sri Lanka Institute of Marketing (SLIM) and advertising agencies. According to SLIM statistics in 2002, the largest advertisers are providers of Banking Services, Cellular Services, Real Estate, lotteries, insurance, sort drinks and packaged food products.

From a business media perspective, the Sri Lankan advertising industry is relatively undeveloped in B2B advertising. There are few adverts that are specifically targeted

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[4] Source: JWT Advertising Agency. This figure does not include outside advertising (billboards etc.) and direct marketing.

towards businesses as consumers of products and services. When questioned on this, advertisers (Leo Burnette and JWT) stated that some companies such as banks and telecom companies are already interested in specifically targeting the business market but few have developed specific campaigns.

3.8 Donor activities in media in Sri Lanka

A number of donors have been involved in supporting the development of the Sri Lankan media but much of this support is related to media coverage of the Northern war and conflict resolution through the media, and media related initiatives connected to the Tsunami disaster. The Centre for Policy Alternatives (CPA), an organisation focused on governance, has a dedicated media section that monitors the media and is actively involved in lobbying for changes in media law, protection of journalists and more balanced reporting of the conflict and politics in Sri Lanka.

UNESCO, and more recently UNDP, have supported the development of community radio stations in Sri Lanka. The World Bank has also recently commissioned a study of the potential to support the set up of community owned radio stations in two pilot areas of Sri Lanka.

The Friedrich Ebert Foundation has been involved in supporting media freedom initiatives in Sri Lanka but is now primarily concentrating their efforts on stimulating a debate on the way of transforming the state media into a truly public media.

There is no structured donor co-ordination in media development in Sri Lanka, and the picture developed by the consultant was of fairly short term, adhoc and sometimes overlapping activities. The greatest coherence appeared to be around the Sri Lankan Press Institute that was opened in January 2004 with support from Sida and NORAD. The Sri Lankan Press Institute was founded by the Free Media Movement, the Editors Guild and the Newspaper Society (an association of publishers). Despite its name and the print bias of its founders, the Press Institute covers the broadcast as well as the print media. Its main activities focus on media training, policy advocacy, and promotion of media ethics and self regulation. The Press Institute has opened the College of Journalism which runs a one year diploma in journalism and a series of one week mid-career journalism courses. The institute is also working with other donor organisations such as UNDP to run projects in media.

3.9 Coverage of SMEs in the media in Sri Lanka

The preliminary analysis of the Sri Lankan media suggests that corporate and large business issues dominate business coverage in the Sri Lankan media. While there are some TV programmes that cover SME issues (e.g. Art TV), the rationale behind some of this coverage is unclear when the target audience appears to be the educated elite. There appear to be no dedicated print publications and no regular radio programmes targeting SMEs apart from the SIYB initiated programming.

It was difficult during this mission to assess the quality of SME coverage that does exist in the media. Anecdotal evidence suggests that the media lack sources of information on SME issues and the coverage appears driven by political priorities or the interests of producers, journalists and editors rather than the interests of the businesses themselves.

Meetings with media professionals appears to highlight that there is an interest among some broadcasters and journalists in covering SME issues more effectively and to develop programming. This interest needs to be assessed among the main vernacular broadcasters.

4. Recommendations for a preliminary project strategy
4.1 Feasibility of an intervention
The preliminary analysis of the media landscape, existing SME coverage in the media, the advertising industry and donor activity suggests that an intervention in broadcast media is feasible. This analysis is based on the following points:

- While the broadcast industry (radio and TV) is surprisingly centralized in terms of location and ownership, the industry is liberalized, competitive and fairly vibrant. Broadcasters appear interested in new programming ideas to enable them to compete for new audience and raise advertising revenues.
- Both radio and TV have a high reach and popularity in Sri Lanka and media companies are aiming to reach mass audiences and not just the urban, educated or wealthy elite.
- There is no regular radio programming targeting SMEs in Sri Lanka other than the programme initiated by SIYB. There is little TV programming focused on SMEs and business programming appears to be dominated by corporate, large business and economic news.
- As in most developing countries, after agriculture, SMEs are the largest employer and are a significant contributor to the national economy[5]. SME issues are therefore not minority issues and should be a feature of mainstream media.
- Broadcasters, journalists and media companies appeared interested in the concept of SME programming and media and SME talk programmes appeared to fit into the programming philosophy of some of the major broadcasters.
- Large advertisers such as banks and telecommunication companies already appear to be interested in the SME sector and there are potential sponsors and advertisers for such programmes.

The consultancy did not explore SMEs interest in business programming and an important next step will be to undertake an analysis of the demand and interest for SME business programmes.

4.2 Focus of an intervention
An intervention could focus on any or all of the following:

1) Stimulating the set up of new radio programmes focused specifically at SMEs
2) Stimulating the set up of new TV programmes focused specifically at SMEs
3) Widening the scope of existing business TV programmes to include more coverage of SME issues and news.
4) Improving understanding of SME issues among journalists and editors to improve and increase the amount of SME coverage in existing media.

It is recommended that the project focuses on developing programming with both radio and TV stations. The ownership structure of broadcast media in Sri Lanka provides an opportunity to work with key media partners (e.g. Maharaja Broadcasting Corporation) to develop both radio and TV programmes. Focusing primarily on either radio or TV would limit the potential synergies that could be built between TV and radio programming within the media houses.

It is also recommended that the primary focus be on commercial rather than state media. This is particularly the case for state radio broadcasting which is less popular than commercial radio, extremely poorly equipped and, in programming, very supply driven.

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[5] Unfortunately there were no statistics available on the size or economic importance of the SME sector in sri Lanka.

The preliminary analysis shows that the state media is less likely to provide an effective voice for the private sector which is one of the key objectives of the project activities.

4.3 Key constraints to be addressed

Work to develop commercially viable business programmes is based on the premise that it makes commercial sense for media companies to target programming specifically at SMEs. While this is not the case for every media company, it makes commercial sense for broadcasters who are:

- Located in countries where SMEs are a major employer and SME issues are therefore relevant to mass audiences.
- Aiming to reach mass audiences (e.g. Socio-economic groups C and D) as distinct from those targeting specific segments such as the high income earners (A and B).
- Incorporate 'talk' and serious content (news, documentaries, magazine programmes etc.) into their programming line-up.

As noted above, Sri Lanka is a country in which small business plays an very important role, most broadcasters are aiming at mass audiences and a number are involved in talk and serious programming. The key question to answer is why have SME radio programmes not already been established on radio and TV in Sri Lanka. While this question cannot be answered categorically at this stage, it is apparent that the answer is likely to be a function of the following:

Perceptions of SMEs among journalists, editors and media managers and owners
The importance of SMEs is often overlooked and SMEs are viewed as small, fragmented groups rather than a large and important segment of the economy and population. The lack of voice and effective representation for SMEs exacerbates this problem and little data exists in Sri Lanka to quantify the importance of the SME sector. SME programming may therefore be perceived as being of minority or fringe interest.

Perception of business programming and news among editors and media managers
Business programming is often perceived to be primarily about corporate and economic issues and therefore of interest to the business and educated elite. This may be due to foreign models for business programmes from countries where small business plays a less significant role. It may also be based on inherited models from a time when media was more focused on targeting the urban, wealthy elite. Business programming may also be viewed as potentially boring which is partially due to poor programme approaches and possibly a legacy of poor 'educational programming' on state broadcasters.

Low level of existing B2B advertising
While some advertisers are aiming towards business groups (e.g. banks, telecom companies) the level of sophistication in advertising towards businesses is low. This is a vicious cycle where lack of specific B2B advertising results in media investors not recognising the potential of B2B media and a lack of B2B media channels in Sri Lanka which results in advertisers not developing tailored advertising for the business audience.

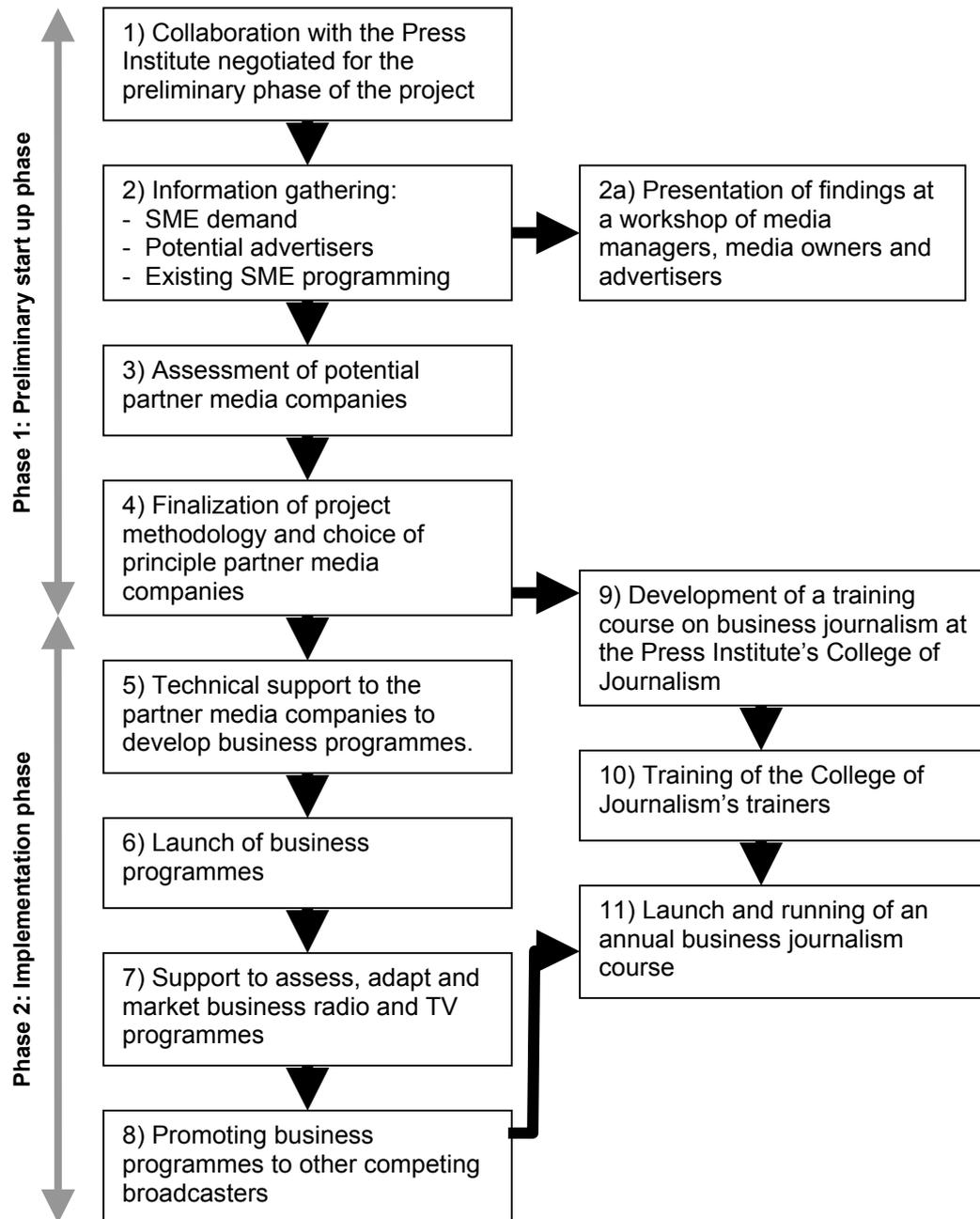Interventions will therefore aim at changing perceptions among journalists, editors, media managers, media owners and advertisers.

4.4 Draft project approach and strategy

4.4.1 Objective of the activities
It is recommended that the project activities have the objective of supporting the growth of new commercial radio and TV programmes that target SMEs as the primary listeners and viewers.

These programmes would provide not only information but a platform for the debate and discussion of business issues and a voice for SMEs to promote policy, legislative and business environment changes. The project would target both TV and radio broadcasters and primarily focus on commercial broadcasters.

It is recommended that the project's ultimate aim be to stimulate the development of a variety of competing business programmes on radio and TV rather than focusing on one broadcaster. Having said this, there are two approaches to achieving this as shown in figure 1 below. The choice of which approach to take will depend on the analysis of potential partners, but experience from other countries would suggest that approach 2 is the most feasible. With this approach primary partners are chosen and supported to develop model programmes that are likely to be copied by competing companies. These preliminary partners need to be industry leaders, in other words broadcasters which are respected and have a reputation for innovating new programming. The second step in approach 2 is to promote the set up of new programmes among the competing companies of the original project partner.

Approach 1

Work with multiple broadcasters from the start of the project

Approach 2

Work with one or a limited number of broadcasters to prove the concept of SME programmes.

Promote SME programmes to competing broadcasters and if necessary provide support to launch competing programmes

Variety of radio and TV programmes being broadcast by competing companies and offering varied and diverse programming

Fig 1: Approaches to developing competing service providers

4.4.2 Project rationale
A causality chain for a media intervention is attached as annex 3. This causality chain provides the logic of a media intervention that has the ultimate aim to promote SME development. While the focus is on changing the way in which the media operates by stimulating improved and increased coverage of SME issues, the ultimate objective is to improve the operation of businesses as a method of increasing employment and reducing poverty.

4.4.3 Proposed methodology
Figure 2 details the proposed methodology for the activity. It is suggested that the activities take place in two phases. The first phase will involve collecting additional information and identifying key project and media partners. This phase will lead to the finalization of the plan for the implementation phase of the activities.

The preliminary proposal for the implementation phase of the project is to work both with principle media partners to develop pilot business programmes and to develop a

journalism course in business TV and radio programme production at the Sri Lanka Press Institute's College of Journalism. The course at the Press Institute will be used as a method of encouraging other media companies other than the project's principle media partners to launch business programmes.

Phase 1: Preliminary start up phase

1) Collaboration with the Press Institute negotiated for the preliminary phase of the project

2) Information gathering:
- SME demand
- Potential advertisers
- Existing SME programming

2a) Presentation of findings at a workshop of media managers, media owners and advertisers

3) Assessment of potential partner media companies

4) Finalization of project methodology and choice of principle partner media companies

Phase 2: Implementation phase

5) Technical support to the partner media companies to develop business programmes.

6) Launch of business programmes

7) Support to assess, adapt and market business radio and TV programmes

8) Promoting business programmes to other competing broadcasters

9) Development of a training course on business journalism at the Press Institute's College of Journalism

10) Training of the College of Journalism's trainers

11) Launch and running of an annual business journalism course

Figure 2: Proposed methodology for the intervention

<u>1) Collaboration with the Sri Lanka Press Institute formed</u>
The preliminary analysis undertaken under the consultancy indicates that the Sri Lankan Press Institute is the most appropriate local organisation through which to work. The Press Institute is interested in promoting developmental content on radio and TV and in promoting improved business journalism. The Institute is also involved in training having established the Sri Lanka College of Journalism.

It is therefore proposed that a preliminary collaboration be formed between the Press Institute and Enter-Growth to undertake the first phase of the work. A local consultant will need to be contracted to manage and oversee the work in this phase and this consultant would work under supervision of both the Press Institute and the Enter-Growth project.

2) Information gathering

It is important that the project develops a credible and tangible offer to potential media partners. To enable the project to do this additional information is required. This additional information will also assist in finalising the project strategy. Ideally this information would include:

- Preliminary information on the demand for radio and TV programmes from SMEs. This could be collected through simple questionnaires and focus group discussions.

- Additional information on potential advertisers for SME programmes. This could be put together by a marketing consultant with knowledge of the advertising industry.

- Additional information on current SME coverage on existing business TV and radio programmes. This could either be done by a consultant monitoring business programmes over a 2 -3 week period or could possibly be done under AC Nielsen's media monitoring service (see 3.6.1 above).

- Statistics on the number of SMEs in Sri Lanka. This may need to be done as an informed guess since statistics do not appear to be available.

2a) Presentation of findings

It is proposed that the findings of this preliminary information gathering be presented at a workshop (possibly a breakfast meeting if it is more appropriate) organised by the Press Institute. This workshop would present statistics and information highlighting that there is inadequate coverage of SMEs in the media in Sri Lanka and making the case for increased coverage from a newsworthiness, audience and commercial perspective. This workshop would assist with introducing the concept to media owners and managers and act as a step in the identification of media partners.

3) Assessment of potential partner media companies

Initial analysis undertaken under this consultancy showed that the Maharaja Broadcasting Corporation (MBJ) is a potential partner for the project whereas Colombo Communications Limited, the radio side of the EAP group, is not due to their focus on music formats and lack of interest in talk radio. The following broadcasters also need to be assessed as potential partners:

- EAP Group - Swarnavahini TV
- Asia Broadcasting Corporation (ABC) radio – Shaa FM, Hiru FM and Sooriyan FM
- TNL Group – Asura FM and Isira Radio and TNL TV.
- Independent Television Network

The assessment will need to be undertaken by meeting managers and programmers at the above stations and developing an understanding of their target audience, programming approach and interest in business programming. This could be undertaken by either the international or a local consultant.

4) Finalization of project methodology and identification of the principle partners for the project

Following the assessment of the above broadcasters, a choice will be made about whether to work with one or more principle partners (see 4.4.1 above). The project will then be able to assess the technical needs of the partner broadcasters and plan the technical support accordingly. The project methodology could be presented and finalized at a half day

project meeting involving the Enter-Growth project, Sri Lanka Press Institute and consultants involved in the work.

5) Technical support to partner media companies
The project will offer support to the media company to develop a pilot business programme. This technical support will depend on the needs assessment but could include:

i. Technical support from a skilled producer to explore a range of programme ideas with the production teams and develop pilot programmes.

ii. On-the-job training for the technical staff (journalists, presenters and producers) in techniques of running interactive programming.

iii. Testing pilot programmes with SME audiences in focus group discussions.

iv. Training and support to market a business programme as a niche offer to advertisers.

v. Support to identify and make contact with SME resource people.

vi. Training/orientation for journalists and presenters on issues concerning SMEs (e.g. microfinance, business management). These could be undertaken by a workshop involving SMEs, their representatives and selected experts in different fields.

The Press Institute's College of Journalism is currently in the process of recruiting full time TV and radio trainers and the project will need to assess whether these trainers can provide some of these supports (i.e. those detailed in i, ii and iii). A marketing trainer may need to be identified to provide sales and marketing inputs while the Enter-Growth project should be able to provide inputs to assist with developing SME sources and training/orientation in SME issues.

If the project decides to utilize an international media trainer to support the development of a business journalism course (see 9 below), then this trainer could be utilised to work with the partner media companies.

6) Launch of business programmes
The programmes developed would be launched and then run on a regular basis. These programmes may need to be launched without sponsorship so that they develop a reputation and track record. The project should not offer to provide any sponsorship or financial support for the running of the programmes.

7) Support to assess, adapt and market programmes
Once the programmes have been running for a few months (suggested to be at least 3 months or 13 weeks, but should depend on the views of the partner), the project could assist the media company to undertake a review of the programme with audiences and advertisers. If the programmes are not supported then the project may need to provide additional marketing support and inputs.

8) Promoting business programmes on other competing broadcasters
Once the SME programmes are deemed to be successful (both in terms of audience and advertising revenue) then the project should promote the concept to other broadcasters. The project should encourage other broadcasters to send their staff on the proposed training course in radio and TV business programme production at the Collage of Journalism.

9) Development of a business journalism training course
It is suggested that the project support the Press Institute's College of Journalism to develop a short training course for mid-career TV and radio journalists, producers and

presenters in producing radio and TV business programmes. This course could be adapted from the training modules developed under the ILO's SEMA project in Uganda. This could be undertaken with support of the international media trainer who developed the Ugandan course. This course is likely to be around 2 weeks in duration and it is hoped that it can become a regular annual or biennial event that is integrated into the course curriculum of the College of Journalism.

Unfortunately, the College of Journalism relies on external financing support to run courses and there remains a question about how these courses will be continued. This needs to be explored by the project during discussions with the Press Institute.

10) Training the College of Journalism's trainers
The project will build the capacity of the College of Journalism's in-house radio and TV trainers to run courses on business journalism. It is suggested that this be undertaken by the international media trainer who developed the business training materials for the ILO SEMA project in Uganda.

11) Launch and running of the business journalism course
The business journalism course will be launched and promoted to media companies and individual journalists, presenters and producers.

4.5 Human resources and project management
The Enter-Growth project does not intend to implement this activity using core project staff and will therefore require local consultants and partners. As noted above it is recommended that the project work in collaboration with the Sri Lanka Press Institute (SLPI) and that the activities be undertaken under their umbrella. A major issue for the project will be human resources and continuity to push the activities forward. Without dedicated full-time or at least part-time staff, there is a danger that there will be no 'project champion' and that the activities will lack momentum and cohesion. It is recommended that the project consider this issue once the collaboration with the Sri lanka Press Institute has been discussed and agreed.

Table 13 provides details of the possible allocation of human resources for the project.

Project activity	Human resources	Activities
1) Collaboration with press Institute negotiated	Enter-Growth manager and staff	Meetings undertaken and agreement drawn up.
2) Information gathering	Local media consultant with support from Enter-Growth/SLPI staff.	Analysis of SME demand for programmes
	Local media consultant or AC Nielsen.	Existing SME programming on TV and radio.
	Local marketing consultant co-ordinated by the media consultant.	identification of potential advertisers
2a) Workshop to present findings	Sri Lanka Press Institute	Preparation and running of the workshop.
3) Assessment of the potential partner media companies	Local and international media consultant	Meetings with potential partner media companies.
4) Finalization of project methodology	International media consultant in consultation with Enter-Growth, SLPI and local consultants	Mission and workshop with project partners and consultants.

5) Technical support to partner media companies.	College of Journalism trainers or local media consultant with possible inputs from the international media consultant.	Support for technical programming and skills
	Local marketing consultant	Support for marketing and sales.
	Enter-Growth Project	Support to developing SME sources and understanding of SME issues
6) Launch of business programmes	Partner media companies.	
7) Support to assess, adapt and market radio and TV programmes.	Local media consultant with possible inputs from a media research company	Assessment of popularity and success of SME programmes
	Local marketing consultant	Support to market programmes
8) Promoting business programmes to other competing broadcasters	Local media consultant in collaboration with the Press Institute and College of Journalism.	Meetings with managers and producers.
9) Development of business journalism training course	Press Institute with support from an international media trainer / consultant	Adaptation of training materials to local situation and to TV.
10) training of College of Journalism's trainers	International media trainer	Orientation and training followed by support to run the first training course
11) launch of the business journalism course	Press institute and College of Journalism	

Table 13: Human resource requirements for the proposed activities

4.6 Project timing
Table 14 provides an suggested timeframe for the project over the next 16 months.

Project activity	2005			2006												J
	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
1) Collaboration with press Institute negotiated	▓															
2) Information gathering	▓	▓														
2a) Workshop to present findings			▓													
3) Assessment of the potential partner media companies			▓													
4) Finalization of project methodology			▓													
5) Technical support to partner media companies.				▓	▓	▓	▓	▓	▓							
6) Launch of business programmes							▓	▓	▓	▓						
7) Support to assess, adapt and market programmes.											▓	▓	▓	▓	▓	
8) Promotion to other competing broadcasters																▓
9) Development of business journalism training course					▓	▓										
10) training of College of Journalism's trainers						▓	▓									
11) Launch of the business journalism course								▓								

Table 14: Suggested project timeframe

This feasibility of this suggested timetable needs to be assessed by the Enter-Growth project over the next few weeks. In particular, the recruitment of a local consultant is a critical step in initiating the work. If the Press Institute is unable to assist with this and the consultancy needs to be advertised then the initiation of activities will also be delayed. The timing of the second mission of the international consultant would ideally be towards the end of the analysis phase when the consultant can assist with meetings with media companies. This second consultancy may also be delayed if the recruitment of a local media consultant is delayed

The draft terms of reference for the media consultant is attached as annex 4.

4.7 Activity costs
It is difficult to define the budget for this activity until the details of the collaboration with the Press Institute has been finalized. The following table provides an overview of the significant costs envisaged but needs to be finalized by the Enter-Growth project and international consultant.

Project activity	Major costs	Estimated cost (US$)
Pre project planning, design and initial backstopping	International consultant	15,700
1) Collaboration with press Institute negotiated	none	-
2) Information gathering	Local media consultant - Approx 15 to 20 days + costs	To be estimated by ILO
	Local researchers/facilitators to undertake small sample questionnaire based survey and FGDs	To be estimated by ILO
	AC Nielsen. Media information	1,000
	5 days -Local marketing consultant	To be estimated by ILO
2a) Workshop to present findings.	Half day workshop costs	To be estimated by ILO
3) Assessment of the potential partner media companies	Local media consultant – approx 10 days + costs.	To be estimated by ILO
4) Finalization of project methodology	International consultant – approx 15 days including backstopping + mission costs	15,000
5) Technical support to partner media companies.	College of Journalism trainers	To be discussed between ILO and SLPI
	Local marketing consultant – possibly 10 days + costs	To be estimated by ILO
	International media trainer (cost included in 9 and 10 below)	-
6) Launch of business programmes	Support to publicise launches	5,000
7) Support to assess, adapt and market radio and TV programmes.	Local media consultant with possible inputs from a media research company	10,000
	Local marketing consultant – possibly about 10 days + costs	To be estimated by ILO
	Trainings/workshops and resource people costs – venue, materials,	5,000
8) Promoting business	Local media consultant –	To be estimated by ILO

programmes to other competing broadcasters	possibly 10 days + costs	
9) Development of business journalism training course 10) training of College of Journalism's trainers	International media trainer / consultant. Fee: 21 days @ $550, Flight: $1,200, DSA 20@ $108, costs: $100	15,000
11) Launch of the business journalism course	Course running Course overseeing support from International media trainer: Fee: 14 days @ $550, Flight: $1,200, DSA 13 @ $108, costs: $100	To be discussed between ILO and SLPI 9,500
Project management costs	Possibly the local media consultant on a part-time basis.	To be discussed between ILO and SLPI
Monitoring and evaluation costs	Audience surveys and focus group discussions	8,000

4.8 Monitoring and documenting impact

The project will need to undertake monitoring and documentation of impact. Measuring impact for a mass media intervention is notoriously difficult due to the scale of the target audience and the nature of a media intervention in terms of causality. A causality chain for this intervention is attached as annex 3. This chain provides the basic logic for the intervention which will start with changing perceptions and behaviour at the media level but ultimately aim to stimulate enterprise growth and increase business survival as a contribution to poverty reduction.

This causality framework has begun to be used in media projects in Uganda and Bangladesh to track and document impact. The impacts (anecdotal, qualitative and quantitative) are noted at the various levels of the causality chain on an ongoing basis. While specific issues featured in the programmes can be researched to identify business level impacts, experience elsewhere shows that broad quantitative research that tries to assess business level impacts from media projects are too blunt a tool and are seldom effective. It is therefore recommended that the causality chain be used as a framework in which to note and document impact for this intervention.

The proposed initial information gathering phase of the project will assess and quantify the level of existing business programming and SME coverage on radio and TV in Sri Lanka. This can be used as a baseline on which to assess changes at the media level. While there will be little possibility to establish any type of control group to prove attribution, it should be relatively easy for the project to convincingly present the case for causality between project activities and increased SME programming and coverage on radio and TV.

4.9 Linkages to other project components

The initiative will work at the national level despite the fact that the Enter-Growth project has a district focus. This is due to the lack of district-level media in Sri Lanka and therefore opportunities to work at the district level. Linkages between the broadcast media activities and district-level activities will therefore be indirect through SMEs at the district level accessing the national SME programmes.

There is scope for the district-level initiatives to promote the set up of district or regional level newspapers, which we term here as local newspapers, under the concept of

'strategic local competitive advantage'. Local media plays an important role at the district level, increasing local information and potentially enhancing local democracy. From a business perspective, local media provides small businesses with more affordable, targeted and appropriate advertising opportunities, local business information and a platform to influence local policy makers.

With over 200 registered publications in Sri Lanka, the lack of local media is somewhat surprising and no significant constraints were identified by the consultant to explain this situation. Countries with lower literacy levels, countries as small both physically and in population terms, and poorer countries than Sri Lanka support profitable local media. While radio at the local level is blocked by legislative constraints and TV by economic constraints, there appears to be no economic or legislative constraints to the emergence of local newspapers. It is therefore suggested that this be presented as a possible area to explore within the district level activities.

An intervention would need to start with research into the feasibility of local media and could involve an investor seminar where potential investors are provided with information on how local media operates commercially in other countries in the region.

5. Conclusions and recommendations for immediate actions

The consultancy concludes that an intervention in supporting the growth and establishment of broadcast media for SMEs is feasible in Sri Lanka. The consultant has presented a proposed preliminary activity plan and methodology based on the following recommendations:

- The project should focus on both radio and TV. Encompassing both radio and TV is unlikely to significantly raise costs for the project, provides scope for greater scale and impact and offers the potential to build synergies within the media companies that run both radio and TV stations.

- The project should primarily focus on developing partnerships with commercial rather than state broadcasters. Despite the greater reach of state TV, the consultant believes that commercial broadcasters offers a better potential to provide effective platforms for debate and a voice for SMEs.

- The project should aim to stimulate the set up of a number of diverse, competing TV and radio programmes but it is likely to be more feasible to begin work with a limited number (1 to 3) of broadcasters at the initial stage of the project and expand this at a later stage by promoting programming with other competing companies..

- The project should attempt to work with a local partner organisation to create the correct image for the activities, ensure local ownership and maximize the potential for the activities to be sustained. Preliminary analysis suggests that the Sri Lanka Press Institute is the most appropriate partner organisation.

- The project should not only focuses on supporting media companies to develop SME programmes, but should support the Sri Lankan Press Institute's College of Journalism to develop a short (possibly 2 week), mid-career journalism course in radio and TV business programme production. This course will form part of the support provided to partner media companies as well as forming part of the strategy to promote new programmes among other broadcasters.

An area of specific concern is that of human resources. The project will require a local project overseer who can ensure continuity and cohesion. Preliminary plans are to identify a local media consultant to undertake this role and a draft terms of reference has been developed by the consultant and attached as annex 4. It was envisaged that this media

consultant will be hired on a part-time basis. Specific concerns remain on whether an appropriate consultant with adequate skills and available time can be identified and is affordable to the project. It is unlikely that the Press Institute can provide such a person, but the Institute may be able to assist in identifying this consultant. This needs to be discussed with the Press Institute and plans and timeframes may need to be adapted accordingly.

Immediate recommended activities to initiate the media activities are:

- Enter-Media to meet with the Sri Lanka Press Institute to discuss and explore the possibilities of a collaboration for the first phase of the project.
- The project to rapidly to begin the process of identifying a local media consultant. Possibilities of tapping into the Press Institutes network should be explored, but an advert may need to be placed for this position.
- Support to be provided by the international consultant from a distance to develop plans and TORs for the information gathering exercises including the preliminary audience surveys, surveys into business programmes and identification of potential advertisers.

It has been requested that the international consultant return to Sri Lanka in November for a second mission. Ideally the international consultant would return towards the end of the preliminary information gathering stage and at a time when the international consultant can work closely with the local consultant to meet with potential media partners. The identification of the local consultant is therefore critical to the timing of the international consultant's second mission. If recruiting the local consultant is delayed then this second mission may also need to be delayed.

Annex 1: Terms of Reference for the consultancy

Enterprise for Pro-poor Growth

Terms of Reference
Development of commercial radio and/or television programmes for small businesses

1.   Background

The Enterprise for Pro-poor Growth project supports the implementation of the Government of Sri Lanka's strategy for poverty reduction and the generation of quality employment for women and men through an integrated micro and small enterprise development programme that targets four districts with a high incidence of poverty, Kurunegala, Polonnaruwa, Anuradhapura and Puttalam. At the national level, the project supports, amongst others, the development of commercial media programmes that target the MSE sector.

The ILO's experience demonstrates that such programmes can play an important role in meeting MSEs' need for information and strengthening demand for business services. They also offer an opportunity for MSEs to voice their concerns and so affect policy makers. The content of the programmes is driven by the media and the MSEs themselves, rather than by projects or donors. They cover current issues of interest to MSEs, i.e. they are "news driven", not "message driven", and this is essential to keeping them relevant to MSEs and reaching a wide audience. They are sponsored by the private sector, generally larger companies for whom MSEs are a (potential) market. Experience in Africa has shown that, taking this approach, such programmes can become commercially successful (and so sustainable) and reach tens of thousands of MSEs. It is this potential for outreach, sustainability, and relevance that the project seeks to exploit.

2.   Mission objectives

This TOR covers the development of a strategy and work plan for the project's commercial media component. During the project formulation process a quick scan was made of the media environment, on the basis of which it was decided that such a component had a good chance of being relevant as well as feasible. The project document therefore includes the following output:

> *"Commercial small business radio and/or television programmes established that provide information, offer a forum for discussion, and strengthen the demand for business services".*

The document also mentions investigating and possibly developing other approaches, such as the production of VCDs that could be marketed through commercial channels (the relevant extract from the document is attached). A detailed assessment now needs to be done and a strategy developed for the realisation of this output. If the output as currently formulated proves not to be realistic or relevant, an alternative needs to be developed.
Some of the key issues that need to be addressed under this TOR therefore are:

- Which media offer the best opportunities.
- Specifically, which stations and/or companies could the project work with.
- How can sponsorship be obtained, and among what kinds of firms is this most likely.
- What are the needs for capacity development.
- Could the activities take the four target districts as a basis from which the component could expand, or should the media work start nationally immediately.
- What are the potential linkages to other project components and how could these be made use of without compromising the integrity of the media activities.

The overall strategy will be operationalised in a detailed work plan, that:

- Includes detailed activities set against a timeline.
- Specifies the need for national as well as international expertise.
- Provides a cost estimate.

3.   Mission composition

The consultant will work with a national media specialist and a representative of the project team. Although the consultant will work under the aegis of the project, he may have to work under a different identity in order not to raise expectations among the stations that funds will be provided for airtime and other purposes.

The project is also expected to develop a social marketing campaign to promote enterprise culture, which will focus on the four districts covered by the project. Missions for this component will be carried out in late September and November. Although there will be an exchange of information between the social marketing missions and the commercial media missions, in particular with regard to the make-up of the media sector, the two assignments will be carried out separately, since their objectives and approaches are radically different.

4.   Specific tasks

The consultant will carry out a mission to Sri Lanka. Prior to the mission the consultant will:

- Review available information on media in Sri Lanka.
- Review the project document.
- Draft a TOR for the national media specialist.
- Guide the project in the selection of the national media specialist and the planning of the mission.

During the mission, the consultant will:

- Have a one-day meeting with the project team to reach a common understanding of the principles of the approach and to finalise the mission programme.
- Develop a detailed understanding of mass media in Sri Lanka, including those based in the four Districts covered by the project, through meetings with stations and media specialists. This will include issues with regard to commercial orientation, political independence, programming, programming and journalistic practices, geographical spread.
- Assess which media offer the best opportunities for commercial programmes or other products for MSEs.
- Prepare an outline for the strategy to be taken and discuss this with the project team.
- Draft a TOR for the national media specialist, for work to be done between the two missions.

Subsequent to the mission, the consultant will finalise the strategy outline and draft a brief report that reflects the findings of the mission. He will also support the work of the national consultant, by e-mail.

A second assignment will be planned on the basis of the results of the present assignment.

Annex 2: Causality Chain for the Intervention

IMPACT LEVEL	Media System Level			Business Level				Household level
	Perception Change	Behavioural Change	Media operation / environment	Perception Change	Behaviour Change	Business operation/ environment	Business Impact	Socio-economic impact
FOCUS OF CHANGE	• Media managers • Journalists • Producers • Advertisers	• Media managers • Journalists • Producers • Advertisers	• Radio Broadcasters • Television Broadcasters • Advertisers and advertising agencies.	• SMEs • Policy Makers • Business service Providers	• SMEs • Policy Makers • Business service Providers	• Businesses	• Businesses	• Employers • Employees • Households
NATURE OF THE CHANGE	• Improved understanding of SMEs • Improved understanding of potential of SME targeted media. • Improved skills in business programme production • Improved understanding of advertising on SME media	• New media practices in business journalism/ business programme production • New practices in B2B advertising.	• New radio & TV programming targeting SMEs • Improved coverage of SMEs in existing business programmes. • Increased advertising targeting SMEs	• Improved understanding and awareness of a range of business related issues.	• Improved or new business practices: policy making, regulation, representation, services, business activities	• Direct business benefits: reduced burdens, better infrastructure, access to opportunities, services, and inputs.	• Improved bottom-line performance • Increased sales • Increased productivity • Increased profitability • Increased start-up • Increased resilience.	• Increased employment • Improved quality of employment • Increased incomes.

Annex 3: Debriefing presentation made to Enter-Growth staff

Slide 1

Opportunities to develop sustainable media for SMEs in Sri Lanka

Preliminary findings

1st September 2005

Gavin Anderson
Enterprise Development Consultant
gavin@ganderson.biz

Slide 2

Meetings Undertaken

Media Experts and Media Organisations
- Free Media Movement – Victor Ivan
- Centre for Policy Alternatives – Sunanda Deshapriya
- Tilak Jayratne – Radio Consultant (UNESCO/World Bank)
- Sri Lankan Press Institute
- Sri Lanka College of Journalism
- Freidrich Ebert Foundation

Slide 3

Meetings Undertaken

Advertising Agencies
- JWT
- Leo Burnette Solutions

Advertisers
- Dialogue GSM

Media Research
- Lanka Market Research Bureau Ltd.
- AC Nielsen

Slide 4

Meetings Undertaken

Media Professionals
- Tamil / Sinhala Radio Service – SLBC
- Deputy Director General: SLRC – Rupavahini
- Station manager – Rajarata FM (state regional media Anaradhapura)
- Director – E FM
- Executive Director – Shree FM, E FM, Raja FM

  Board Member – Swarnavahini TV, E TV
- Programmes Manager – Shakthi TV
- Producer – Varthaga Ulagam (Business Journal) Shakthi TV

Slide 5

Meetings Undertaken

Media Professionals (cont.)
- Director Programming – Shakthi FM (producer of Nallaya Shakthi (Power of Tommorrow) SIYB linked business programme.
- News manager – ART TV Business programmes/news
- Business Editor – Sunday Times
- Chief Editor – Ya TV (development programme production company)
- Regional journalists in Anuradhapura, Kurunegala and Polonnaruwa

Slide 6

Information/Media access in Sri Lanka

Regular radio listenership	71%
Regular TV viewing	80%
Newspaper readership (claimed)	65%
Cinema	4% regular 4% occasional
Internet	1% regular 4% occasional

Source: LMRB National Media survey

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Media Landscape - Radio

Radio
- Liberalized in 1992/3 (1st private station MBC's Sirasa)
- 29 FM Channels   12 State (including community)
                          16 Private
                          1 LTTE (Voice of Tigers)
- Ownership of radio: 84% (JWT)
- Regular listenership to Radio 71% (LMRB)
- Attracts 22% of advertising expenditure

Slide 8

Media Landscape - Radio

Radio
- Those who own a radio and not a TV (JWT):

Monthly household income	
Up to 5000 Rps	28.4%
5,000 to 10,000 Rps	13.4%
10,000 to 20,000 Rps	8.5%
Above 20,000 Rps	3.5%

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Commercial radio in Sri Lanka

Colombo	MBC –	Sirasa (Sinhala)
		Yes FM (English)
		Shakthi (Tamil)
		Classic (English, Older)
	EAP -	Shree FM (Sinhala)
		E FM (English)
		Raja (Sinhala)
	ABC -	Sun FM (English)
		Gold FM (English, older)
		Hiru FM (Sinhala)
		Sha FM (Sinhala)
		Sooriyan (Tamil)
	TNL -	TNL Radio (English)
		TNL Lite 89.2 (English)
		Asura FM (Sinhala)
		Isira Radio (Sinhala)
Upcountry	None	

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State Radio in Sri Lanka

Colombo	City FM (Sinhala) Pavana SLBC Commercial (Sinhala) SLBC Swadesheeya (Sinhala) SLBC News Station - Radio News Network (Sinhala) Thendral: SLBC Commercial (Tamil) Radio Sri Lanka (English)
Regional Services	SLBC Jaffna Service (Tamil) Kandurata (Sinhala) Rajarata (Sinhala) Rahuna (Sinhala)
'Community' Radio	Gandurakotte - Badulla (closed?) Mahailupplana – Anaradhapura (closed?) Kothmale – Nuwara Eliya Uva Community Radio – Bandulla District

Slide 11

Most Popular radio stations
(LMRB radio point survey Jan 2005)

Sinhala

- Sirasa FM   Private   MBC   23.34%
- Shree FM   Private   EAP   20.17%
- Sha FM   Private   ABC   16.93%
- Hiru FM   Private   ABC   16.46%
- Swadesheeya   State   SLBC   11.05%
- Raja FM   Private   EAP   10.64%

Tamil

- Shakti FM   Private   MBC   13.73%
- Sooriyan FM   Private   ABC   8.07%
- Threndal FM   State   SLBC   4.07%

Slide 12

Radio in Sri Lanka

Perceptions/observations

- State radio is biased and will stifle open discussion and criticism of the state (FMM, CPA, Tilak Jayaratne)
- 'Community radio' has little community involvement – 'state takes over control once projects end'
- Lack of diversification of ownership in commercial radio (limited to 4 companies).
- While these private broadcasters are biased they are more likely to allow debate / be interactive.
- Radio and particularly commercial radio, is very music oriented.
- Some companies not interested in 'talk radio' on existing stations (EAP)

Slide 13

Radio in Sri Lanka

Perceptions/observations

- But at least 1 media house is interested (MBC) in talk radio and business radio programmnes – at least at the programme manager level.
- SIYB work with MBC is a good springboard for interventions in radio in Sri Lanka.
- Lack of growth of local radio is primarily due to lack of liberalization.
- No small business programmes except SIYB/Shakthi
- The appears to be little general business programming on radio in Sri Lanka. One example is Business Focus (twice a week on TNL Lite)

Slide 14

Radio in Sri Lanka

Consultants preliminary conclusions

- Radio appears to be the media that can reach the poorest and most rural households in Sri Lanka.
- Radio is a possible focal media but only with some of the broadcasting companies (MBC but not EAP – TNL and ABC need to be assessed)
- Work on radio should focus primarily on commercial broadcasters (popularity, sustainability and independence)
- Possibility to work with TV and radio within one media house (e.g. MBC)

Slide 15

Media Landscape - TV

Television

- 13 TV Channels   3 State (terrestrial)
                          1 state (satellite for expats)
                          9 Private
- Ownership of TV: 79% (JWT)
- Regular viewership of TV: 79.7% (LMRB)
- Attracts 57% of advertising expenditure

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TV in Sri Lanka

Commercial	**MBC –**	Sirasa TV (Sinhala) MTV (English) Shakti TV (Tamil)
	EAP -	ETV (English) Swarnavahini (Sinhala)
	TNL -	TNL TV (Sinhala)
		Art TV Comet? Teledasun?
State	TV Lanka (Sinhala) - satellite for expat Sri Lankans Rupahavahini TV – SLRC (Sinhala) ITN (Sinhala) – 60% State / 40% private TV Eye	

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Most Popular TV stations
(LMRB National Media Survey 2004)

- Rupavahini   State   SLRC   57.09%
- ITN   State (60%)   45.31%
- Svarnavahini   Private   EAP   40.37%
- Sirasa TV   Private   MBC   38.11%
- Shakti TV (Tamil) Private   MBC   17.27%
- Channel Eye   State   SLRC   15.59%

Note: The National Media Survey is biased against Tamil speaking media since it does not cover the North and North-East of Sri Lanka

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TV in Sri Lanka

Perceptions/observations

- State TV (SLRC) is biased particularly news (FMM,CPA, Thilak Jayaratne). 'ITN is more balanced'?
- State TV operates independently of government finance (no TV license) is popular and has greatest reach (can be received by the most number of people).
- TV has a high reach even in rural areas but does not appear to reach the poorest households.
- There are existing business programmes on state and commercial TV but these appear to mostly focus on large business/corporate/stockmarket news.
- Lack of manpower/capacity a problem in commercial TV production (Shakthi TV Producer)

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Examples of business TV programmes

Note: This list is not comprehensive and additional analysis is required

Station	Name	Length	Frequency	Time
SLRC	•Business Brief	5 min	Daily Mon-Sat	9.15 – 9.20
Shakti TV	•Varthaga Ulagam (Business Journal)	30 minutes	Weekly - Sun	11.00 – 11.30
ITN	•Situ Medura	?	?	?
ETV	•Lanka Business Report	?	?	?
ART TV	•The state of business	15min	Daily Mon-Fri	3 repeats
	•Business roundup	30min	Weekly	3 repeats
	•Achievers	15min	Weekly	3 repeats

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Business coverage on TV in Sri Lanka
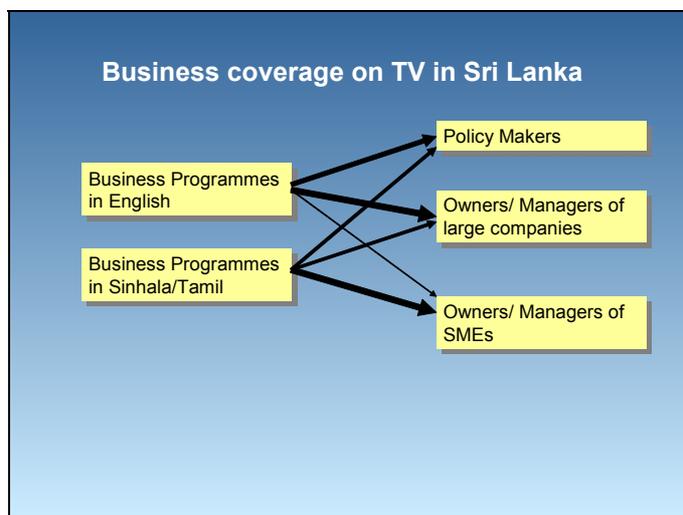
Slide 21

TV in Sri Lanka

Consultants preliminary conclusions

- TV has the greatest reach and there is business programming on TV than radio but not SME focused.
- Sinhala and Tamil TV would appear to offer a feasible entry point for the project.
- Focus could be on both commercial and state TV (although state TV is less likely to provide an effective 'voice' for the business sector).
- Possibility to link the work with TV and radio within one media house (e.g. MBC)
- Existing programming needs to be analysed in more detail

Slide 22

Media Landscape - print

Print Media - Newspapers
- Over 200 registered publications
- Highly Fragmented
- High literacy rate in Sri Lanka 80-90%
- Regular readership of newspapers : 55% (LMRB)
  regular and occasional readership: 65% (LMRB)
- Attracts 21% of advertising expenditure

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Most Read Dailies
(LMRB National Media Survey 2004)

Sinhala
- Lankadeepa   Private   12.44%
- Divaina   Private   8.47%
- Dinamina   State   6.34%
- Lakbima   Private   3.52%

Tamil
- Virakesari   Private   3.33%
- Udayan   2.56%
- Thinakural   Private   1.45%
- Thinakaran   State   1.36%

Note: The National Media Survey is biased against Tamil speaking media since it does not cover the North and North-East of Sri Lanka

Slide 24

Publications with a business focus
(LMRB National Media Survey 2004)

- Business Today   English   monthly   0.28%
- Lanka Monthly Digest English   monthly   0.13%
- Business Standard   English   weekly   0.25%
- Aratuwa   Sinhala   closed (0.29%)

- Business pages in most newspapers but smaller in Sinhala papers.
- Weekly business supplements e.g. Silumina

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Print media in Sri Lanka

Perceptions/observations

- Print media has influence on policy makers and has relatively high reach but not in rural and poorere households.
- Existing business coverage could be improved to include more on SMEs.
- Existing interest in SMEs among some in the print media (Biz Editor- Sunday Times, Press Institute)
- More analysis of business and SME coverage would be required.

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Local Media

- Few local publications (Kandy News, Kandy Times)
- No private local radio and lack of liberalization key reason for lack of growth.
- 4 government regional radio stations but popularity appears low
- Regional supplements in national newspapers but coverage is limited.
- Local journalists perceive that coverage of local issues is very poor in the national media.
- No conclusive reasons identified for the lack of growth of local print media.

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Donor/Development activities in media

- Fragmented with little co-ordination among donors.
- Greatest coherence around the Free Media Movement / Centre for Policy Alternatives / Press Institute.
- But FMM / CPA mostly focused on Peace processes, conflict resolution, journalism safety.
- Variety of media activities focusing on Tsunami (Internews, UNDP).
- FES – Media framework and role of state/public media
- UNESCO – community radio, UNDP Uve Community radio
- But nothing identified on promoting local provincial media / provincial journalists apart from UNDP in tsunami effected areas.

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Overall analysis
- Little coverage of SMEs across all the media
- Very little media focused on SMEs as the target audience
- Existing business coverage targeted at the corporate/large business owners and managers and policy makers.
- Low level of understanding among media professionals of importance of SMEs within the Sri Lankan economy.
- Low level of skills in journalism generally and business journalism specifically
- Appears to be little understanding among senior media managers/owners of the business reasons to target mass audiences/cover issues for the mass rather than the urban elite.

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Feasibility of an intervention

Output: Commercial small business radio and/or TV programmes established.

Indicator: At least 4 radio and/or TV stations run MSE programmes without financial support

These are feasible within the Sri Lankan context although the activities need to be adapted.
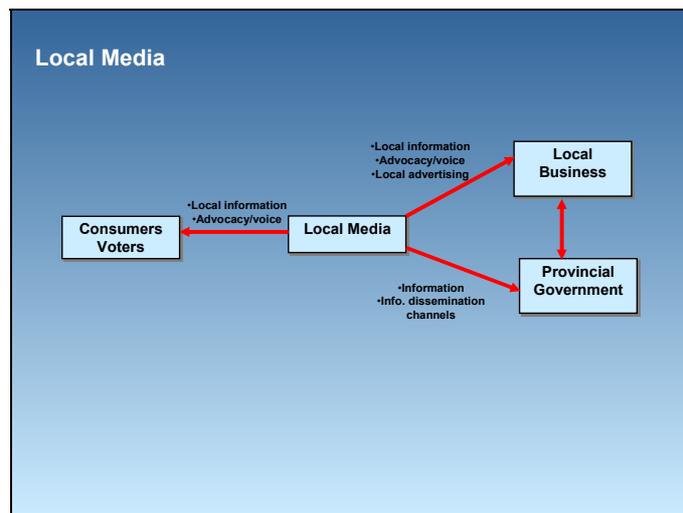Other donors/development agencies are not working in this area.

Slide 30

Intervention possibilities
- Radio Intervention only – commercial (national level)
- TV intervention only – commercial and state (national level)
- Joint Radio and TV intervention working with one or two of the 'media houses' e.g. MBC+ (national level)
- Business journalism training and orientation – possibly in collaboration with Sri Lankan College of Journalism (national and provincial)
- Catalyst to the emergence of local/provincial/regional print media under the 'strategic local competitive advantage' component (provincial)

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Local Media

Consumers
Voters

•Local information
•Advocacy/voice

Local Media

•Local information
•Advocacy/voice
•Local advertising

Local
Business

•Information
•Info. dissemination
channels

Provincial
Government

Slide 32

Possible partner organisation

- **Sri Lanka Press Institute**
  - Formed in Jan 2004
  - Formed by Free Media Movement, Editors Guild, Newspaper Society (Publishers)
  - Funded 50/50 by Sida /NORAD
  - A lot of donor involvement but appears to have 'buy in' from media.
  - Set up Sri Lanka College of Journalism that is involved in 1 year diploma and mid-career journalism training.
  - Interested in Biz Journalism, Provinsial Joirnalism training (UNDP project on capacity building journalists in tsunami affected areas).

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Individual Consultants

- **Tilak Jayaratne ??**
- **Feizal Samath – Business Editor, Sunday Times**
- **Possible sourcing through the Press Institute**
- **Follow up with Sunanda Deshapriya ?**

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Follow up actions

- **Review and draw up a preliminary plan of action and TOR for local consultant by Friday 9th Sept.**
- **Brief prepared on meetings and submitted to Chris Seeley by 9th Sept along with relevant media documents.**
- **Find out about the activities conclusions of the 9th, 10th and 11th Meeting of provincial journalists (CPA)** Note: interest in ILO presentation on Freedom of association
- **Identify local consultants based on the TOR (Feizal and Press Institute)**
- **But follow up and start of work will be effected by November elections!**

Annex 4: Draft TOR for Local Media Consultant

1. Background
The Enterprise for Pro-poor Growth (Enter-Growth) project is an enterprise development project implemented by the International Labour Organisation (ILO). The project is working to promote the growth and development of small and medium enterprises (SMEs), a sector that is a major employer in Sri Lanka.

As part of this work, the Enter-Growth project is planning to support the development and launch of radio and television programmes that focus on the SME sector in Sri Lanka. This work is based on experience in other countries where the media has been seen to provide businesses with:

- A critical source of up-to-date business information and news
- A platform to discuss and debate business issues
- A voice to influence policy and legislation

These business programmes have been developed in other countries by commercial broadcasters who have recognised the potential of SME programmes to attract significant audiences and advertisers that are interested in penetrating the huge market the SME sector offers.

Preliminary analysis of the media industry in Sri Lanka undertaken by the Enter-Growth Project has highlighted that business news and programmes are dominated by corporate, large business and economic news and that the issues and news relevant to SMEs is often neglected. The Sri Lankan media is yet to recognise the potential for business programmes that target the vast majority of businesses in the SME sector.

The Enter-Growth project therefore plans to work with commercial broadcasters in Sri Lanka to explore the opportunity that exists to develop programming that targets the SME sector. To enable the project to initiate this work, Enter-Growth is seeking a local consultant with media experience. This local consultant will work with an international consultant with experience of developing SME business programming to undertake the background work for the preliminary planning of this project.

2. Consultancy Objectives
The objective of this consultancy is to initiate and oversee preliminary activities to develop a project that will support the development of business programmes on radio and TV that target small and medium enterprises (SMEs).

3. Duration of the consultancy
The consultant will work between 30 -50% part-time for the preliminary phase of the project from October to December (approximately 20 to 35 days)

A further contract is anticipated for support to the project in 2005

3. Specific Tasks
The consultant will carry out the following tasks:

- To read the project document and consultancy report on media interventions.
- In collaboration with the International consultant, develop a methodology for undertaking an analysis of the business coverage and business programming on radio and TV in Sri Lanka.

- Undertake this analysis in collaboration with appropriate organisations (for example AC Nielsen's media monitoring division). The analysis will provide information on existing business programming and assess and quantify the proportion of these programmes that are focused on corporate, large business, economic and local SME issues and news.
- Identify a local research organisation that can undertake audience research.
- In collaboration with this research organisation and in consultation with the international consultant, develop and plan a survey into audience interest in SME programmes. This research is likely to be in the form of a basic questionnaire based survey followed by focus group discussions.
- Support and oversee this audience research.
- Identify a local marketing consultant with significant experience of media marketing to undertake a preliminary identification of potential sponsors for SME programmes.
- In collaboration with the Sri Lanka Press Institute, support the planning and running of a workshop to present the findings of the media, audience and advertising research to media managers and media professionals.
- Arrange meetings with programmes managers or producers of at least 6 local TV and radio stations.
- Participate in meetings between these programmes managers and producers and the international consultant and assist in the appraisal of potential media partners for the Enter-Growth project.
- In collaboration with the international consultant, assess the needs for capacity building in the potential media partners.
- Provide inputs to the finalization of the project strategy that will be developed by the international consultant.

Profile of the media consultant
It is essential for the media consultant to:

- Be fluent in English (both written and spoken)
- Have significant media experience either in journalism, production, editing or management.
- Have an already established network within the commercial broadcast media in Sri Lanka.
- Have good experience of either television or radio broadcasting in Sri Lanka.

This consultancy requires an individual who is able to liaise with various organisations and individuals to undertake the work. Ability to work as part of a team and to be flexible in learning and being guided by others is therefore essential.