

MEDIA SUSTAINABILITY INDEX

2006/2007

**The Development
of Sustainable
Independent Media
in Europe and Eurasia**



MEDIA SUSTAINABILITY INDEX 2006/2007

The Development of Sustainable Independent Media in Europe and Eurasia

www.irex.org/msi

Copyright © 2007 by IREX

IREX

2121 K Street, NW, Suite 700

Washington, DC 20037

E-mail: msi@irex.org

Phone: (202) 628-8188

Fax: (202) 628-8189

www.irex.org

Project managers: Mark Whitehouse and Drusilla Menaker

IREX Project and Editorial Support: Blake Saville, Drusilla Menaker, Mark Whitehouse, Michael Clarke, Leon Morse

Copyeditor: Kelly Kramer, WORDtoWORD Editorial Services

Design and layout: OmniStudio

Printer: Kirby Lithographic Company, Inc.

Notice of Rights: Permission is granted to display, copy, and distribute the MSI in whole or in part, provided that: (a) the materials are used with the acknowledgement "The Media Sustainability Index (MSI) is a product of IREX with funding from USAID."; (b) the MSI is used solely for personal, noncommercial, or informational use; and (c) no modifications of the MSI are made.

Acknowledgment: This publication was made possible through support provided by the United States Agency for International Development (USAID) under Cooperative Agreement No. DGS-A-00-99-00015-00.

Disclaimer: The opinions expressed herein are those of the panelists and other project researchers and do not necessarily reflect the views of USAID or IREX.

ISSN 1546-0878

USAID

The United States Agency for International Development (USAID) is an independent agency that provides economic, development, and humanitarian assistance around the world in support of the foreign policy goals of the United States. The agency works to support long-term and sustainable economic growth and advances US foreign policy objectives by supporting:

- Economic growth, agriculture, and trade
- Global health
- Democracy, conflict prevention, and humanitarian assistance

USAID provides assistance in four regions of the world:

- Sub-Saharan Africa
- Asia and the Near East
- Latin America and the Caribbean
- Europe and Eurasia

With headquarters in Washington, DC, USAID's strength is its field offices around the world. They work in close partnership with private voluntary organizations, indigenous organizations, universities, American businesses, international agencies, other governments, and other US government agencies. USAID has working relationships with more than 3,500 American companies and over 300 US-based private voluntary organizations.

IREX

IREX is an international nonprofit organization specializing in education, independent media, Internet development, and civil society programs. Through training, partnerships, education, research, and grant programs, IREX develops the capacity of individuals and institutions to contribute to their societies.

Since its founding in 1968, IREX has supported over 20,000 students, scholars, policymakers, business leaders, journalists, and other professionals. Currently, IREX is implementing 40 programs in more than 50 countries with offices in 17 countries across Europe, Eurasia, the Middle East and North Africa, and the United States. IREX serves as a major resource for universities, governments, and the corporate sector in understanding international political, social, economic, and business developments.

Hopes that the government would desist from its crusade against the free media after the election proved futile. The Media Sustainability Index (MSI) panel agreed that the state stuck to its policy of institutionalized harassment of the free press and forecast that the situation would only deteriorate, with the government expected to tighten its control over the Internet and possibly satellite television.



BELARUS

There were no signs of improvement regarding media freedoms in Belarus during 2006. Instead, as the government was trying to silence any dissenting voices, pressure on journalists and the few remaining independent media outlets increased tremendously, especially in the lead-up to the March presidential election. The balloting, widely believed to have been unfairly conducted, secured 82.6 percent of the vote for incumbent President Alexander Lukashenko, who has ruled the country of 10 million since 1994.

Shortly before election day, police attacks and confiscations of independent newspapers were stepped up, and those most critical—*Narodnaya Volya*, *BDG. Delovaya Gazeta*, and *Tovarishch*—were unable to reach their readers. The Belarusian Association of Journalists (BAJ), a domestic press-freedom watchdog, reported at least 40 accounts of journalists being harassed during the election period, including physical assaults of several correspondents, mostly photographers and cameramen. Separately, 23 Belarusian journalists and 11 foreign ones were handed brief prison sentences of three to 15 days over alleged public disorder.

Hopes that the government would desist from its crusade against the free media after the election proved futile. The Media Sustainability Index (MSI) panel agreed that the state stuck to its policy of institutionalized harassment of the free press and forecast that the situation would only deteriorate, with the government expected to tighten its control over the Internet and possibly satellite television.

Economically, Belarus witnessed some growth (up to 10 percent, officially). Though unsustainable and fueled mainly by subsidized imports of gas and oil from Russia, this growth made it possible for the government to improve living standards to some degree. Consequently, there was less room for expanded privatization or economic reforms that might have triggered at least some political liberalization. By and large, Belarusian society remained conservative and largely complacent. Ethnic, sexual, and religious minorities continued to be marginalized, and nonconformity and dissent generally were not welcome.

Opposition was weak and scattered: if the 2006 election were free and democratic, Lukashenko rivals would have secured only 25 percent of the vote, independent polls suggested. That figure was unchanged from the 2001 election.

Information channels were monopolized—if not owned, they were heavily controlled by the government—and spoke in a single voice, MSI panelists reported. Many Belarusians still believed in what is reported on official television and radio. In a 2006 independent opinion poll, 58.2 percent said they trusted Belarusian state-owned media, followed by Russian media (35.2 percent), Belarusian non-state media (12.0 percent), European and other Western media (10.2 percent), and the Internet (8.8 percent).

BELARUS AT A GLANCE

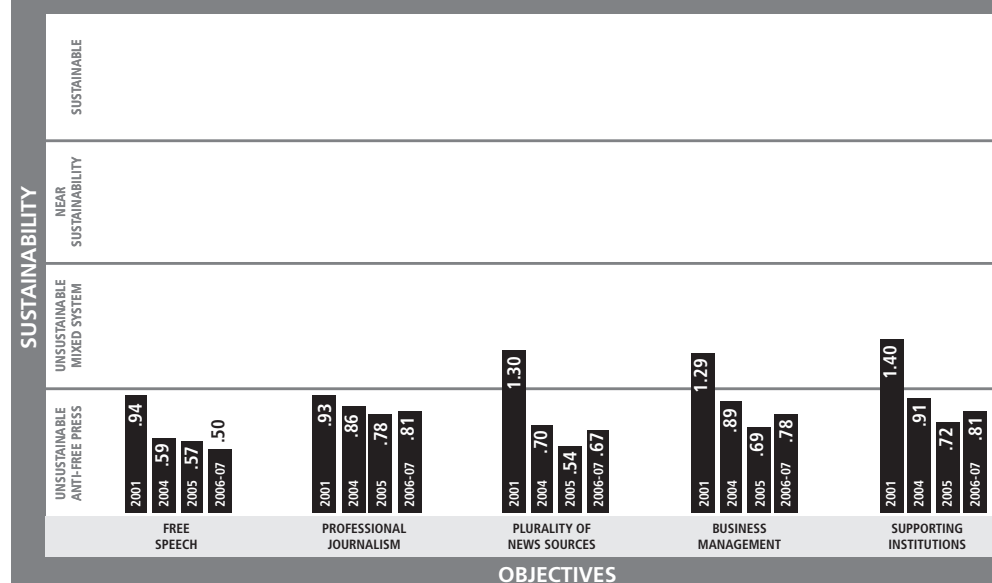
GENERAL

- > **Population:** 9,714,000 (Belarus Ministry for Statistics and Analysis, 2006)
- > **Capital city:** Minsk
- > **Ethnic groups (% of population):** Belarusian 81.2%, Russian 11.4%, Pole 3.9%, Ukrainian .4%, other 1.1% (1999 Official Population Census)
- > **Religions (% of population):** Russian Orthodox 80%, Catholic 14%, Protestant 2% (from an interview with Leonid Guliako, chair of the State Committee on Religions and Nationalities at the Council of Ministers, February 22, 2006, *Belorusskaya Niva*)
- > **Languages (% of population):** Belarusian 73.7%, Russian 24.1% (1999 Official Population Census). However, only 7.8% speak Belarusian on a daily basis, 16.1% speak both Belarusian and Russian, 52.3% speak Russian only, and 23% speak a nonstandard "mixture" of both languages. (Opinion poll by the Independent Institute for Socio-Economic and Political Studies, November 2006)
- > **GNI (2006-Atlas):** 32.800 billion (World Bank Development Indicators, 2007)
- > **GNI per capita (2006-PPP):** \$8,810 (World Bank Development Indicators, 2007)
- > **Literacy rate:** 97% (1999 Official Population Census)
- > **President or top authority:** President Alexander Lukashenko, since July 20, 1994 (re-elected in 2001 and 2006)

MEDIA-SPECIFIC

- > **Number of print outlets, radio stations, television stations:** 1,232 print outlets, 8 news agencies, 51 television stations, 154 radio stations (Belarus Ministry of Information, March 2006)
- > **Newspaper circulation statistics:**
 - Sovietskaya Byelorrussia* is a state-owned daily with an official print run of 502,850 copies per issue and a weekly circulation of 2,514,250 copies.
 - Komsomolskaya Pravda v Belorussii* (Belarusian edition of a popular Russian daily) is the largest independent daily with an official print run of 51,000 copies per issue (325,000 copies on Fridays) and a weekly circulation of 529,000 copies.
 - Narodnaya Volya* is the largest opposition daily with an official print run of 11,000 copies per issue and a weekly circulation of 44,000 copies. (Medusa Advertising Agency)
- > **Broadcast ratings:** Share of television audience: ONT 21.9%, RTR 15.0%, Channel One TV 12.2% (Institute for Sociology at the National Academy of Sciences, June 2006)
- > **News agencies:** BelTA (state-owned), BelaPAN (private), Interfax-Zapad (Russian-owned), Prime-TASS (Russian-owned), Ecopress (private, economic news), Agentstvo Grevtsova (private, economic news), Minsk-Novosti (state-owned, Minsk City news), Register Information and Legal Agency (private, economic news) (Belarus Ministry of Information, 2006)
- > **Annual advertising revenue in media sector:** \$50 million (\$20 million television, \$10 million press, \$8 million outdoor advertising, \$1 million to \$1.5 million Internet) (Advertising agency Starcom MediaVest Group Belarus)
- > **Internet usage:** 1.6 million users (Independent Institute for Socio-Economic and Political Studies, 2006)

MEDIA SUSTAINABILITY INDEX: BELARUS



Unsustainable, Anti-Free Press (0-1):

Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2):

Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3):

Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4):

Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

In a positive development, use of the Internet was growing, and, at least in the capital and bigger cities, broadband was getting more available and affordable, albeit still more expensive than in neighboring countries.

The MSI overall ranking for Belarus in 2006 was 0.79, relatively unchanged from the previous year. No objective reached even 1.00, and the country remained categorized as anti-free press. The slight increases in scores might be attributed to the growth of the Internet—largely unrestricted, compared with other media—and efforts by the few remaining independent media to uphold professional and ethical standards.

Note: MSI panelists in Belarus agreed to participate only if they were not named publicly. Amendments to the Criminal Code were introduced in December 2005 to add a new article, “Discrediting the Republic of Belarus,” that provides for criminal liability for submitting to international organizations “false information” on the situation in the country. Human-rights groups, both domestic and international, believe the article’s vague wording make it possible for the government to penalize anyone reporting negative information with detention of up to six months or imprisonment of up to two years.

OBJECTIVE 1: FREE SPEECH

Belarus Objective Score: 0.50/4.00

Although the Belarus Constitution guarantees freedom of speech and basic legal infrastructure has been put in place, MSI panelists agreed that this right is not enforced. “In a courtroom, public prosecutors just turn a deaf ear to your reference to the Constitution. And state officials, from municipality clerks to information ministry *apparatchiks*, are outspoken: ‘Yes, I know it’s illegal. You may take the matter to the court.’ They are absolutely aware that these constitutional norms are not enforced,” a panelist said. Furthermore, politicized courts offer no protection or opportunity for a fair hearing of a case.

The legal framework has not changed since 2005, and MSI panelists were not expecting any improvements. Instead, they said, the government would try to regulate the Internet (which is not a media under current press law), restrict access to satellite television (as an independent television channel is expected to start broadcasting from Poland soon), and hinder the work of foreign broadcast correspondents.

Meanwhile, the new draft laws on the press and “informational security” were expected to be sent to the parliament. Not surprisingly, there was no public discussion

“In a courtroom, public prosecutors just turn a deaf ear to your reference to the Constitution. And state officials, from municipality clerks to information ministry apparatchiks, are outspoken: ‘Yes, I know it’s illegal. You may take the matter to the court.’ They are absolutely aware that these constitutional norms are not enforced,” a panelist said.

of these bills, and independent experts were not invited to contribute.

However, violations of freedom of speech caused little or no public outcry. Young opposition activists staged several protests in Minsk in support of independent newspapers, but they were seen as reacting mainly to the election results than to be demonstrating any specific belief by the society in free speech.

Elsewhere, some newspapers have seen their readers filing complaints with local governments or even lawsuits against postal service and press distribution monopoly, trying to get these publications back to the newsstands and mailboxes. These efforts have been in vain. “It is mostly opposition activists, who are protesting, those who have nothing to lose. They’ve already lost their jobs ... The retired are also active:

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

Under a presidential decree adopted several years ago, official bodies have the right to classify their activities and documents as top secret. "That has gone down to education authorities in smaller towns that are just withholding information," a panelist said. "State officials have grown more astute as to working with independent media. They are not afraid of inviting independent media to a committee seating or a press conference. The point is that all the information is on paper and they are just voting that through quickly. We sit there and listen, but we can't hear anything."

the government would not stop paying their pensions," a panelist commented. In general, MSI panelists said, Belarusian society remains quite conservative and complacent and is afraid of criticizing the Soviet-style state.

On the subject of broadcast media licensing, panelists were unanimous: it is "unfair, uncompetitive, and far from being apolitical." Only two licenses were granted in 2006, one to an unspecified FM radio and another to TV Center-Bel, which is broadcasting Russian channel TV-Center (TVC) and producing none of its own programming. Furthermore, TVC is controlled by Moscow Mayor Yury Luzhkov, an ally of President Lukashenko.

In August 2006, the state commission for radio frequencies, which had been supervised by the Ministry of Posts and Telecommunications since 1994, was assigned to the Security Council, a body that controls and coordinates the work of Belarus law-enforcement agencies.

As an industry, the media sector is highly regulated. Licensing comes from the telecommunications and information ministries, and, in an additional media-specific requirement, approval must be sought for office locations from local governments. The latter is "just in case" it is necessary to deny approvals to political and general news media outside of the governmental control, the panel said. "I doubt anyone will start [an independent] TV or a newspaper at all," a panelist noted. Also industry-specific is that media outlets can be suspended without a court ruling, after receiving two to three warnings from the Ministry of Information.

Numerous privately owned titles entered the market in 2006, but most are narrowly specialized. The Ministry of Information said it registered 113 new titles—35 newspapers (31 non-state) and 78 journals and magazines (67 non-state).

Crimes against journalists remained rare. However, there were reports that independent journalists and their families had been harassed for their political reporting and writing on alleged corruption cases of governmental officials. Independent newspapers *Intex-press* in Baranovichi and *Vitebskii Kurjer* in Vitebsk reported that they received threats from Russian National Unity, an outlawed far-right, ultra-nationalist paramilitary organization based in Russia that advocates the expulsion of non-Russians and an increased role for traditional Russian institutions such as the Russian Orthodox Church. Outside of newspaper offices there were graffiti reading "Down with venal press" and "Hornet's nest of CIA." No prosecutions resulted.

Similar to previous years, journalists were targeted during the election campaign, when around 1,000 protesters also were jailed or fined nationwide over alleged participation in post-election street demonstrations in March 2006. The BAJ, an independent press watchdog, reported around 40 incidents of journalists being harassed. Twenty-three Belarusian journalists and 11 foreign ones from Canada, Poland, Russia, and Ukraine received brief prison sentences of three to 15 days over alleged public disorder.

At least three journalists were severely assaulted by state security during the election period. On March 2, Oleg Ulevich, a correspondent for *Komsomolskaya Pravda v Belorussii*, was reported beaten by plainclothes commandos and had to be hospitalized. He suffered a concussion and a broken nose. Ulevich was among the journalists who went to a police department in Minsk to obtain news about presidential candidate Alexander Kozulin, who had been arrested earlier that day. Jan Rybarz, a correspondent with Czech paper *Mlada Fronta Dnes*, was beaten and robbed by unidentified individuals in the center of Minsk on March 19 and hospitalized with head injuries. On March 25, Pavel Sheremet of Russian Channel One TV, well-known for his criticism of the Belarusian government, was grabbed by plainclothes police officers in central Minsk. He was then "put into a minibus, handcuffed, beaten for 20 minutes and driven around the city, and then taken to a police station. In the police station, a protocol was made, stating the use of bad language and insulting the president," he said later in an interview.

There was an inquiry into Ulevich's case, but it came to a halt later that year. Separately, panelists recorded little if any progress in the investigation of the disappearance of Dmitry Zavadski, a cameraman for the Russian Channel One TV,

in 2001 and the murder in 2004 of Veronika Cherkasova, a journalist for the independent weekly *Salidarnasc*.

There is almost no investigative reporting in Belarus, except, to some extent, what is being done by the BAJ's Agency for Investigative Journalism. These investigations are occasionally published by electronic newspaper *Ezhednevnik*.

Even in-depth reporting on sensitive issues is not welcome. Panelists recalled a story by *Belorusy i Rynok* that carried top officials' salaries, which were calculated by journalists based on an easily available salary grid. When another independent newspaper, *Komsomolskaya Pravda v Belorussii*, reprinted the story with names of the officials attached, pressure was put on the newsroom to disclose their sources. Moreover, there was an investigation into whether the information had been leaked.

Editorial independence is declared, yet not enforced. Editors and directors of the state-owned media are directly appointed either by the president or by the ministry of information. There is no party press, apart from newspaper *Tovarishch* published by the oppositional Communist Party of Belarus (CPB). It has a weekly circulation of 10,000 copies and is distributed mostly via CPB structures. Other titles produced by political parties are mostly *samizdat*, or underground papers.

Panelists mentioned the firing of Yulia Slutskaya, editor-in-chief of *Komsomolskaya Pravda v Belorussii*, as an example of intervention by the government into the management and editorial policy of an independent newspaper. The newspaper was said to be writing too independently and too much about the opposition. The publisher had been fined \$60,000 over a minor mistake in a caption and, with one more suit from another state official pending, Russian owners of the newspapers sacked the editor.

Belarusian law includes criminal penalties for libel and offers greater protection for top officials, including the president. Most common, however, are "honor and dignity" cases falling under civil law, where the prosecution does not have to prove malice, or even falsity. It is enough that the article in question caused "emotional distress" to the one being described. Furthermore, there is no "expiration," and suits may be filed years after the story was published.

In 2006, there were several attempts by opposition activists to sue state media over mudslinging—all of them unsuccessful, panelists said. Independent media face honor and dignity suits now and then, but they are less frequent, since the number of titles dropped compared with previous years. As for compensations sought, figures are rising. "It is bad taste to demand less than 10 million rubles [about \$4,700],"

a panelist said. In 2006, the median salary in Belarus was approximately \$300, officially.

Although the law guarantees equal access to information for both state and privately owned newspapers, this norm is absolutely not enforced, MSI panelists said, with the former clearly receiving preferential treatment.

Under a presidential decree adopted several years ago, official bodies have the right to classify their activities and documents as top secret. "That has gone down to education authorities in smaller towns that are just withholding information," a panelist said. "State officials have grown more astute as to working with independent media. They are not afraid of inviting independent media to a committee seating or a press conference. The point is that all the information is on paper and they are just voting that through quickly. We sit there and listen, but we can't hear anything," he added.

Apart from the Ministry for Statistics and Analysis, which might charge independent media for CDs or brochures with statistical data at rates that are generally not affordable, there are no financial obstacles as to getting public information.

Panelists said a lot of public information is available through open sources, mostly from the Internet. But they said many journalists do not know where to go for information and for them it is often easier to say they were given no comments.

The Internet nonetheless generated the higher score for Objective 1—0.67, compared with 0.57 for 2005, panelists said. With fees going down somewhat, most newsrooms, including some smaller regional ones, went to broadband. There are no formal restrictions on access to international news. Although international media require the permission of the Ministry of Information to distribute or air in Belarus and are delivered via state-controlled channels, online news media, mostly Russian, were the primary source of international information for Belarusian newsrooms. The main obstacle to western news services is that of language and pricing. Still, Internet fees are high and connections slow for many of the staff, participants added.

By and large, entry into the journalism profession is free, and the government hardly controls admission to journalism schools. However, many events require accreditations, and some local governments were reported to deny those to independent journalists lacking a journalism diploma. Graduates of journalism schools are subject to the Soviet-style "distribution," when they have to work for two years wherever the government sends them. However, most graduates sidestep this requirement, not infrequently by applying to masters or doctorate programs.

Other restrictions affect Internet media workers, who do not enjoy journalist status and thus are less protected and a prohibition on a journalist working for a Belarusian media outlet also working for a foreign one. Those working for foreign media cannot do so without an accreditation from the Foreign Affairs Ministry.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Belarus Objective Score: 0.81/4.00

There was no significant change this year in the ranking for Professional Journalism. Still, panelists noted, the gap between state and non-state media is deepening, and some of the experts found it very difficult to provide a score that would assess Belarus media in general.

All in all, stories are not objective. "Government-owned media are pushing state ideology; their non-state counterparts are either doing the same or just drawing a negative picture," a panelist said. Providing viewpoints from both sides of an issue is problematic, since state officials refuse to give comments even when it is to their advantage.

Since Internet use is growing in Belarus, more people—mostly without professional training or any experience in mass communications—are jumping to online media. "They just don't know information and sources should be double-checked and have an illusory belief the Internet is something not regulated by the law. And subjectivity prevails absolutely over reporting," one of the experts noted.

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

There is a code of ethics developed by the BAJ, and some independent media came up with their own ethical standards. The BAJ used to have a committee for ethics, but that has not been very active recently, possibly because independent journalists are reluctant to confront their colleagues—already under pressure from the government—with "ethical charges."

However, there is much antagonism between the state propaganda machine and independent media. With knives out on both sides, it is ethical standards that suffer first and, according to a panelist, "media as an industry does not need self-regulation here."

Journalists of state-controlled Channel One TV were slammed for their smear campaigns against the opposition, use of police and secret-service footage, and, most notably, for staging footage of an improvised tent camp in downtown Minsk, installed as a token of popular protest against the March 2006 presidential election, which was widely described as fraudulent.

Similarly to previous years, some of the MSI participants equated self-censorship with responsibility rather than fear. State media were said to have nothing to say about self-censorship. One of the panelists recalled a conversation with one of his ex-colleagues who had left independent press for *Sovietskaya Belorussia*, the country's biggest daily and a mouthpiece of the Lukashenko administration. He was told: "There is no such thing as self-censorship. We are writing freely; there is even no need to fact-check information and sources." In very much the same way, some independent titles are carefully selecting topics: "There are newspapers that would not carry even the name of the Belarusian Popular Front [a moderately nationalistic political party, legally registered by the government] on its pages," said another expert.

Among the most dangerous topics are the Lukashenko family and business interests of his closest allies. Also not welcome are Chernobyl-related issues, since the government claims that 20 years after the nuclear plant disaster polluted areas are now by and large clean, and it is beginning to repopulate them.

As to reporting on corruption, every now and then journalists and editors are approached by law enforcement trying to sell compromising materials of local officials, panelists said. Albeit "very interesting," that is too dangerous a source, they added.

Although Belarus boasted some economic growth in 2006 and salaries rose compared with previous years, journalism is poorly paid. In most independent newspapers, reporters earn only \$100–150 a month, similar to agriculture workers, the country's lowest-paid profession. Journalists at stronger

independent publications earned up to \$400 a month, still some 30 percent less than their counterparts from the state-controlled media. Leading government-owned titles and broadcasters, like *Sovietskaya Belorussia* or TV News Agency of Belarusian State Television and Radio Company, are more generous.

Some outflow of journalists to other professions and also to state-controlled media continues. Those who stay usually work freelance or part-time for other media outlets. As a result, the quality and exclusivity of reporting suffers.

Panelists agreed that there is some selling of stories or positive coverage, mostly to businesses, and in the form of hidden advertisements and endorsements. Sometimes, this is done to comply with the law that limits advertising to 30 percent of a newspaper's content. Sometimes businesses are afraid to openly purchase advertising from independent titles.

The market for political advertising shrank further, since at least three independent titles were forced to stop publication in 2006. Still, there remained newspapers willing to sell stories to politicians. "There is little corruption here; hence, there is no market, neither political nor economic. There is no need, no demand, and therefore no supply," a panelist said.

Quantitatively, the ratio of information to entertainment programming is high, especially by Western standards. Yet the quality of news—a strange mixture of show and propaganda—remains low.

On the technical side, Belarus independent media have some capacity but still lag far behind Western counterparts. At most newspapers, reporters still have to share computers. Newsrooms are desperate for digital cameras, sound recorders, graphic stations, laptops, and cheaper and faster Internet. One panelist noted that technical standards have skyrocketed during the previous years, while technical facilities largely remained the same. "I'm sure what's being used [by independent media] is not just used efficiently, yet extremely efficiently," he added.

Another panelist mentioned that state inspectors are beginning to inquire whether the software used by media outlets is licensed. The International Intellectual Property Alliance says Belarus piracy rates are "very high." Although no country-specific data are available, these rates may compare to Ukraine, which is reported to pirate 92 percent of its software. The issue might grow very pressing for independent media should the government choose to more actively enforce copyright laws. However, the panelist said, the situation at state media is not very different.

For television, which heavily relies on technology, things are even worse. Most independent broadcasters used to have

All in all, stories are not objective. "Government-owned media are pushing state ideology; their non-state counterparts are either doing the same or just drawing a negative picture," a panelist said.

a single camcorder (at best two) for both studio and field reporting. According to a panelist, the television stations haven't been purchasing much equipment recently—only computers. The television equipment, like camcorders, mixers, and editing stations, is being repaired and refurbished. His forecast is that these will not survive two more years of use.

By contrast, the government is providing more state funds on the media it controls. In 2006, it spent \$704,225 on computers and photo equipment for state media, while local government-owned newspapers received \$354,000 to purchase computers, cameras, and vehicles.

Some relatively high-quality niche reporting exists at some national newspapers. Regional newspapers are also working to provide specialized reporting, which is not typical of state media, even the bigger national dailies.

Although most reporters and editors at independent media had received specialized training from international media-assistance organizations and were professionally prepared to offer that kind of reporting, panelists noted that there was a big problem of finding experts willing to speak on subjects covered and, far more difficult, able to put their expertise into simple words.

OBJECTIVE 3: PLURALITY OF NEWS SOURCES

Belarus Objective Score: 0.67/4.00

This objective has earned a score of 0.67, compared with 0.54 for 2005, mostly because Internet use was growing and getting more affordable and the government was not very restrictive as to international news sources. There also has been an increase in independent radio broadcasting in Belarus, positively assessed by experts.

There is some plurality of news sources, panelists agreed, yet there is very little plurality of viewpoints, especially in the easily available media. For Belarusians, television has been and still is the main source of news. State-owned television networks Channel One and ONT cover the entire country, and one more—STV, originally a Minsk-based television channel—also went regional. However, they speak with a single voice, and are, as one of the panelists put it, "weapons

There is some plurality of news sources, panelists agreed, yet there is very little plurality of viewpoints, especially in the easily available media. For Belarusians, television has been and still is the main source of news. State-owned television networks Channel One and ONT cover the entire country.

of mass destruction rather than mass media.” There is a network of 17 privately owned regional broadcasters with very little of their own programming that panelists said provide hardly any relief.

Two Russian channels, RTR and NTV, are available through most of the country, at least in urban areas, but are broadcast and technically controlled by Belarus state television networks.

To be aired or broadcast on cable, foreign media need express permission from the Ministry of Information, which has already ousted Polish and Ukrainian channels from cable, a more harmful move than to ban Western channels like BBC or CNN. The former were much more popular, since there were hardly any language obstacles and audiences took more interest in the neighboring countries’ affairs than those of the rest of the world.

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens’ access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

Cable networks are available solely in urban areas and are quite affordable. There are 121 cable operators in Belarus, of which 97 are privately owned. In some areas not reached by television at all, there has been growth in the use of satellite television. According to panelists, 450,000 households have access to that, and they mostly watch free-to-air Russian and Ukrainian channels.

Panelists recalled only one count of authorities trying to restrict access to satellite television, that being in the northwestern town of Lida, in November 2006. Housing authorities ordered removal of unauthorized—apparently meaning all, since there is no regulation to register the dish with the local government—satellite dishes. Local officials inventoried all the dishes and threatened fines unless they were dismantled. By early 2007, it was unclear whether that was an attempt by the government to restrict access to satellite television with the opposition expected to start an independent satellite channel at some point in 2007.

In radio, state-owned media also dominate: 134 of 151 radio channels are state-owned, with the government covering the country with a cable network known as *radiotochka*. Only 30 radio stations broadcast on FM, including 15 in the capital, Minsk. Under threat of losing their licenses, FM stations stopped broadcasting independent news several years ago. An order two years ago to air 75 percent Belarusian music further undermined them.

Given the vacuum in the country, MSI panelists spoke positively of radio broadcasters based outside the country, listing Radio Liberty (RFE/RL), Radio Racyja, Deutsche Welle, and European Radio for Belarus (ERB). The latter, funded by the European Union and other donors, started broadcasting from neighboring Poland in February 2006. Though donor-funded, these radios were referred to as domestic rather than foreign because their programming is produced by Belarusian journalists. They offer independent news and some music content, but their reach is limited largely to the west of the country because they broadcast mostly on short and medium waves with quality often so low that it is hardly audible. Separately, these stations are offering news via their websites, including Internet broadcasting. ERB is also available via satellite and on FM in the west of the country from Poland and southwest from Ukraine. Still, according to opinion polls, they reach barely 5 percent of Belarusians. There were no reports that those stations were jammed, and panelists doubted they would be.

The newspaper market is dominated by the state press, which has a share of at least 80 to 85 percent, panelists said. The government subsidizes these outlets’ rent, subscription, printing, postage, and distribution.

Throughout 2006, the total one-off print run of local state-owned newspapers increased from 867,000 to 887,000 copies, including a build-up of 20,000 subscribers to 761,000 against 741,000 a year earlier. Furthermore, 50 regional state-owned newspapers added pages and went color.

Banned from state-owned distribution and subscription networks, independent titles have seen a slump in circulation by some 30 percent on average. Some suspended printing altogether: the national daily *BDG. Delovaya Gazeta* and the regional weekly *Himik*, based in Novopolotsk in the north of the country. These chose to move fully online because their resources were depleted by falling revenues. One more newspaper, *Zhoda*, was suspended by the Ministry of Information and later closed by a court after the weekly carried the Danish cartoons of the prophet Mohammed that outraged so many Muslims around the world. Panelists said they believed that case was an excuse to silence the newspaper, which had long been very critical of the Lukashenko regime.

Extra pressure was put on the market by advertising papers in some cities, including Baranovichi, Brest, and Molodechno. These publications, distributed for free, were offering classified ads and, more important, television listings. On average, 30 percent of readers are buying newspapers because of television listings, a panelist noted.

Affordability was not much of a problem for independent press, experts argued. Rather, they said, because of the restricted access, fewer readers were willing to overcome obstacles to get their papers.

Some increase in the use of the Internet was recorded. Opinion polls said that at least 1.6 million Belarusians were online, but mostly for entertainment, with only 12 percent using the Internet to read political news. Although decreasing, Internet fees are too high even compared with neighboring countries. However, non-password dial-up is available from state communications monopoly Beltelecom almost everywhere in the country. Broadband is becoming more available, yet not widely affordable.

Panelists recalled that there were attempts to restrict access to independent news sites during the election period. Most were just blocked, they said, but in some cases more sophisticated techniques, such as traffic shaping (bandwidth prioritizing and limiting), were used. Users proficient enough with IT to use proxies or other means to circumvent those restrictions are too few to count, said a panelist, an online editor. Either way, all outbound Internet traffic is controlled by the state via Beltelecom. Satellite uplink transmissions are banned.

Media ownership is apparently transparent, but there are cases where real owners may not be known—though, panelists noted, the public does not seem to care. “At least, by just looking at a newspaper you can always tell whether it’s state-owned or not and what’s inside,” a panelist said.

Some panelists argued that other, nontraditional formats should be used. Political documentaries are already being circulated on CDs, just like the youth multimedia magazine *CD-MAG*. With the price of a blank CD already being two-thirds of that of a newspaper copy and given all the restrictions related to printing and distribution, it is an alternative at least worth considering, said a panelist, an independent editor.

There are no “public” media in the Western sense, panelists said. There are independent media that are objective to varying degrees and state media that are used mostly for propaganda and offer no alternative viewpoints.

BelaPAN was named the most professional domestic news agency, and by and large the only independent one. Its services are widely used by independent media, and the only obstacle here is affordability. Domestic broadcasters, both independent and state-owned, were banned from using BelaPAN in 2003 and have relied on the state news agency BelTA ever since.

There are also two Russian-owned agencies—Prime-TASS, which is more or less unbiased, and Interfax-Zapad, which engages in propaganda duels with the government, a panelist said.

Media ownership is apparently transparent, but there are cases where real owners may not be known—though, panelists noted, the public does not seem to care. “At least, by just looking at a newspaper you can always tell whether it’s state-owned or not and what’s inside,” a panelist said.

Apart from the state, media ownership is not concentrated. However, conglomerates are likely to emerge in the future. Despite generous subsidies and repressions against their independent counterparts, many state-owned newspapers are not even breaking even. The government was said to plan merging inefficient newspapers or, as is done elsewhere across the highly controlled economy, to “attach” loss-making companies to more efficient ones. The information ministry

“suggested” that *Sovietskaya Belorussia*, published by the Lukashenko administration, should be responsible for state propaganda abroad. The newspaper has been a publisher of *Soyuz* (a newspaper insert on the Belarus/Russia union state distributed in Belarus and Russia) and the *Minsk Times* (an English-language weekly). In 2007, it will take over *Holas Radzimy*, a newspaper for ethnic Belarusians living abroad.

There is some presence of Russian business: ProfMedia owns the popular daily *Komsomolskaya Pravda v Belorussii* and has a stake in analytical weekly *BelGazeta*. However, as of December 2006, it was going to sell *Komsomolskaya Pravda*, published in Russia and some other former Soviet republics, most likely to Russian gas monopoly Gazprom. Two more mass-circulation Russian newspapers, weeklies *Argumenty i Fakty* and *Trud*, publish their Belarusian local editions.

There are some minority-language newspapers, most notably in Polish. However, they are insignificant. All in all, minority issues—ethnic, religious, or social—are marginalized and do not get very much public interest, with the media following suit.

OBJECTIVE 4: BUSINESS MANAGEMENT

Belarus Objective Score: 0.78/4.00

On the business side, Belarus media outlets are similarly victimized by the government via its direct ownership and control of distribution and printing facilities, numerous legal and economic restrictions, and direct harassment of media outlets and advertisers. These conditions make it all

INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

but impossible for non-state media to operate as efficient, profitable, and transparent business, panelists agreed.

Nonetheless, the experts gave a higher score for this objective: 0.98, compared with 0.69 for 2005. They attributed the growth mostly to Indicator 5—“Independent media do not receive government subsidies”—which was seen as a positive aspect given the degree of antagonism between the government and the independent media.

State-owned media are both being heavily funded and having the media landscape cleansed of their independent rivals. Even so, many government-controlled newspapers with artificially inflated print runs and unsold copies of around 30 percent are finding it very hard to break even. The government was said to have ordered them to come up with business plans and adopt more feasible business models, panelists reported.

All Belarus printing houses are either owned or directly controlled by the state, namely by the Ministry of Information, which also is the media regulating authority. Although the government has invested millions of dollars to purchase new presses, the quality remains low, even at the biggest printers. “Dom Pechaty [Belarus’s biggest newspaper printer, based in Minsk] stopped printing non-color papers, yet didn’t learn how to produce full-color ones. Every time the supposedly same color looks different on paper. That speaks for itself,” a panelist said. The panelist contended that both printing and distribution are inefficient and unprofessional, yet still make profits because of high fees. In 2006, Belarus’s printing houses produced 307.7 million copies of newspapers, a 6.5 percent increase from 2005.

Some independent newspapers were unable to find a printer in Belarus and had to go to Smolensk, in western Russia. These included the largest opposition weekly, *Narodnaya Volya*, the leading analytical weekly *BDG. Delovaya Gazeta* (before it suspended print publication shortly after the March 2006 presidential election), and the weekly *Tovarishch*, published by the oppositional Communist Party of Belarus.

Similarly to previous years, distribution remained a sore point for independent media. In 2003, the government introduced licensing of press distribution, thus totally monopolizing an already highly regulated sector. Since then, the Ministry of Posts and Telecommunications has issued 53 press distribution licenses; however, no significant alternative distribution networks emerged, and the press distribution is largely divided between Belsoyuzpechat (a nationwide network operating 1,350 newspaper kiosks) and Belpochta, the state postal service that covers subscriptions and also offers some retail sales via post offices.

Unlike during previous years, Belsoyuzpechat made a profit in 2006, with annual sales of around \$83 million, a 24 percent increase from 2005, reports said. Approximately 55 percent of the annual cash flow was generated by press sales. Foreign titles (mostly Russian magazines and journals with very few news publications) account for only 10 percent of sales; the remaining 90 percent are Belarusian.

In 2006, the total one-off subscription circulation was 5 million copies, Belpochta reported. Around 5,000 Russian titles are offered on subscription, yet their individual sales are marginal. All in all, 93 percent of subscription sales were generated by Belarusian press.

Some regional publishers operated their own house-to-house delivery systems and relied on privately owned shops to sell their newspapers.

For broadcasters, all transmitters—even if initially purchased by the broadcaster itself—are to be owned by the government.

The sources of revenue for media outlets are varied, yet they are not contributing to more professional, responsible, and sustainable media, MSI panelists said. Using their subsidized status, the state media are distorting the market by offering lower sales prices and advertising rates. Advertising in non-state media is only 5 percent tax-deductible, but fully deductible in government-owned media. In addition, the law limits advertising in non-state general news publications to less than 30 percent of content. Separately, the government forbids state-owned companies—and more frequently, private businesses—from advertising in independent media. Local media complained that government's harassment of small and medium-sized businesses has further depleted their revenues.

As a result, in order to survive independent media must rely on other, often very unsustainable sources, including foreign donors, and must sell stories and favorable coverage to businesses and politicians. Not infrequently, media shy away from criticism of prominent advertisers, such as mobile telephone operators.

Barring some exceptions, Internet media are almost 100 percent donor-funded, which makes them very vulnerable to pressure from a variety of sources. Independent broadcasters, in their turn, rely solely on advertising.

In 2006, the Belarus advertising market totaled \$50 million annually, with \$20 million spent on television ads, \$10 million on press, and \$8 million on outdoor advertising. Internet advertising was worth up to \$1.5 million. The top five advertisers were big multinational corporations—Procter & Gamble, Reckitt Benckiser, Unilever, Colgate-Palmolive, and Nestlé. Very little of their business reached independent media, since advertising agencies were more willing to work

Although the government has invested millions of dollars to purchase new presses, the quality remains low, even at the biggest printers. "Dom Pechaty [Belarus's biggest newspaper printer, based in Minsk] stopped printing non-color papers, yet didn't learn how to produce full-color ones. Every time the supposedly same color looks different on paper. That speaks for itself," a panelist said.

with television channels that reached larger audiences. On average, media buyers account for 5–7 percent of advertising in regional press, a panelist said. So far, these media find that their mainstays have been local, privately owned businesses. Still, he added, agencies and national advertisers have gone regional, and those towns closer to Minsk, including Bobruisk, Borisov, and Molodechno, have seen more money coming from agencies.

The share of advertising revenue for media is too low, panelists agreed. Belarus is lagging far behind Nordic countries and, lately, Ukraine, where 80–90 percent of revenue is generated by advertising. Furthermore, independent Belarusian publishers have to subsidize distribution with advertising revenues.

Given the degree of hostility, independent media are not receiving subsidies from the government. It should be noted that with the score for this indicator higher than in previous years, the overall objective rate was skewed upward.

There are market-research companies in Belarus. However, unless subsidized by international assistance organizations, their services are prohibitively expensive for independent media. Some non-state media have developed their in-house research efforts, albeit less sophisticated efforts such as questionnaires and phone polls. Alternatively, state-owned media and some independent ones stridently critical of the government tend to decide by themselves what their audiences want. The Lukashenko administration was rumored to have directly assigned individualized "specializations" to five leading state-owned newspapers.

Some professional research is being done, mostly by Novak, a major market- and opinion-research company, to benefit big international companies and advertising agencies. These are the only ones that can afford regular broadcast ratings, also produced by Novak. In 2006, the Institute for Sociology at the

The share of advertising revenue for media is too low, panelists agreed. Belarus is lagging far behind Nordic countries and, lately, Ukraine, where 80–90 percent of revenue is generated by advertising. Furthermore, independent Belarusian publishers have to subsidize distribution with advertising revenues.

National Academy of Sciences launched use of PeopleMeters to produce television ratings. However, a subscription was so expensive and data of audiences so generalized that even the richest of advertisers chose to stick to Novak, which is still using a diary panel, panelists said.

Circulation figures remain suspect in Belarus. Independent media show real print runs because the printers have long been under pressure from the government and are still vetted, but panelists said state-owned ones tend to show inflated figures. There are no independent audit circulations firms operating in Belarus.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Belarus Objective Score: 0.81/4.00

Given the degree of repression any dissenting voices face, media-support institutions remain weak. The minimal increase for this objective—from 0.72 in 2005 to 0.80—resulted from

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists' rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

higher scores given to professional associations, primarily the BAJ, that are working to protect journalists' rights.

Among trade groups, an association of independent regional publishers, the Foundation for the Local Press Development, closed down altogether in 2006. A similar organization of local television broadcasters, Television Broadcasting Network (TBN), and cable operators, BANT, remained underdeveloped and ineffective at protecting their members against the government.

Panelists spoke highly of the BAJ, which unites around 1,000 (and growing) independent journalists and works to protect their rights via legal advice and defense, professional development, and publicity. However, its possibilities are limited and its resources stretched, and it has to fight for its own survival, which further hampers its ability to protect journalists. One of the panelists said it was not good that the BAJ brings together both publishers and journalists but rather that it "should be protecting my journalists against me and act more like a trade union."

Human-rights groups, such as Viasna, Charter 97, and the Belarusian Helsinki Committee (BHC), among other things monitor violations of media freedoms and make them public. However, in 2006 only BHC remained legally registered, and there were attempts by the government to close it down over alleged tax violations.

There are no domestic institutions offering high-quality journalism courses. Belarus State University in Minsk and other schools in Gomel, Grodno, and Vitebsk are offering Soviet-style degree programs with little or no practice-oriented training. A panelist said some of his younger journalists were turning propagandists with rigid thinking and lots of ready-made clichés just a year after they joined the journalism school, and despite having been trained in Western reporting standards before that.

There are degree programs abroad, most notably a journalism school at the European Humanities University in Vilnius and the Kalinouski program in Poland, both funded by international donor organizations and foreign governments. However, these are newly established opportunities (2005 and 2006, respectively), and it was too early for panelists to judge whether they will be offering high-quality journalism training. Furthermore, panelists argued, the graduates might find it impossible to apply locally the knowledge and experience they have gained abroad.

Short-term courses and in-service training are more readily available to journalists from both independent and state-owned media. The latter, however, shun even the most innocuous opportunities, such as trainings in the use

of the Internet, for fear of repressions because in most cases they are being offered and funded by international media-assistance agencies. Increasingly often these programs are held abroad, which understaffed media outlets find very time-consuming, panelists said. The applicability of experience gained abroad was another concern, with panelists saying that such trainings tend to pay attention to the problems of journalistic ethics and other “general issues” and fail to concentrate on practical journalism, especially Belarus-specific. Most needed are further training programs for experienced journalists and editors, “survival courses” for young journalists, and trainings in photojournalism and the use of new technologies, panelists said.

Printing and distribution, as noted relative to media business-management issues, are mostly owned or at least controlled by the government. State-owned distribution structures that dominate the market were de-listed from the register of monopolies and thus cannot be legally challenged over distribution bans. Even privately owned facilities are growing increasingly selective as to printing and distributing non-state press.

The government also directly controls the Internet, and although interference was not very significant, panelists

There are no domestic institutions offering high-quality journalism courses. Belarus State University in Minsk and other schools in Gomel, Grodno, and Vitebsk are offering Soviet-style degree programs with little or no practice-oriented training

said it puts some pressure onto the medium, not least of all through the high fees it charges service providers and users.

In a discussion about whether media distribution channels were apolitical and unrestricted, a panelist said: “Except for the Internet, zeroes are everywhere (on the MSI indicators). And there could be some ‘temporary misunderstanding’ here [with the Internet], to be ‘corrected’ soon.”

Panel Participants

As noted above, the MSI panelists for Belarus agreed to participate only if they were not named publicly in order to avoid criminal prosecution.