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BELARUS

It was a turbulent year for Belarus. The early months of 2011 were overshadowed by a wave of repression against the opposition, civil society, and free media. The crackdown began on election night, December 19, 2010 when tens of thousands gathered in Minsk to protest what they believed to be a stolen presidential election that saw incumbent president Lukashenka re-elected for the third time, with 80 percent of the vote. The police violently broke up the rally and in the weeks that followed continued harassing anyone who had even tangential affiliation with the opposition.

The media environment remained hyper-strict and the government was intolerant of critics. All sectors were dominated by state-owned outlets. Only on the Internet, and from a handful of private newspapers and offshore broadcasters, could Belarusians find independent news and analysis. Offices of several private newsrooms were raided. Autoradio, a private station in Minsk, was taken off the air in January 2011 for broadcasting opposition campaign advertisements. Several journalists were fired from state media, and some were arrested, placed under house arrest, or convicted of libel or organizing mass riots.

In April the country was hit by a severe economic crisis. The government had for years lavishly subsidized the economy: the state sector accounts for about 75 percent of the economy and until recently brought job security and rising incomes to many Belarusians. This model proved unsustainable and in May Belarus had to devalue its currency by 56 percent against the U.S. dollar. This did not, however, prevent further inflation, which caused even more difficulties.

As the economy slowed down, media outlets faced shrinking advertising revenues, stiffer competition, and skyrocketing prices. Critical reporting in many cases meant the loss of crucial advertising, or worse.

This crisis spurred discontent in June, when online social networks started promoting nonviolent protests, encouraging people to take to central squares of their cities and clap their hands in unison rather than shout slogans or hold signs. After a series of such flash mobs, the government responded by mass arrests and censoring of social networks. Several pro-opposition news websites and blogs were blocked altogether. The crackdown on opposition and economic troubles had cut deeply into Lukashenka's popularity. According to independent polls, in September his job-approval rating plunged to 20.5 percent, down from 53 percent the previous year. It took a \$3 billion bailout loan from Russia to prop up the economy.

As the use of Internet grows, the government has tried to extend restrictions on freedom of expression into cyberspace. Stricter filtering policies are in place and cyber-attacks against pro-opposition websites are becoming more commonplace. With parliamentary elections due in 2012, the prospects for freedom of speech look bleak, a panelist argued.

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 an article, "Discrediting the Republic of Belarus," that provides for criminal liability for giving international organizations "false information" about the situation in the country. Human-rights groups, both domestic and international, believe the article's vague wording makes it possible for the government to detain for up to six months anyone reporting negative information or to imprison them for up to two years.

BELARUS AT A GLANCE

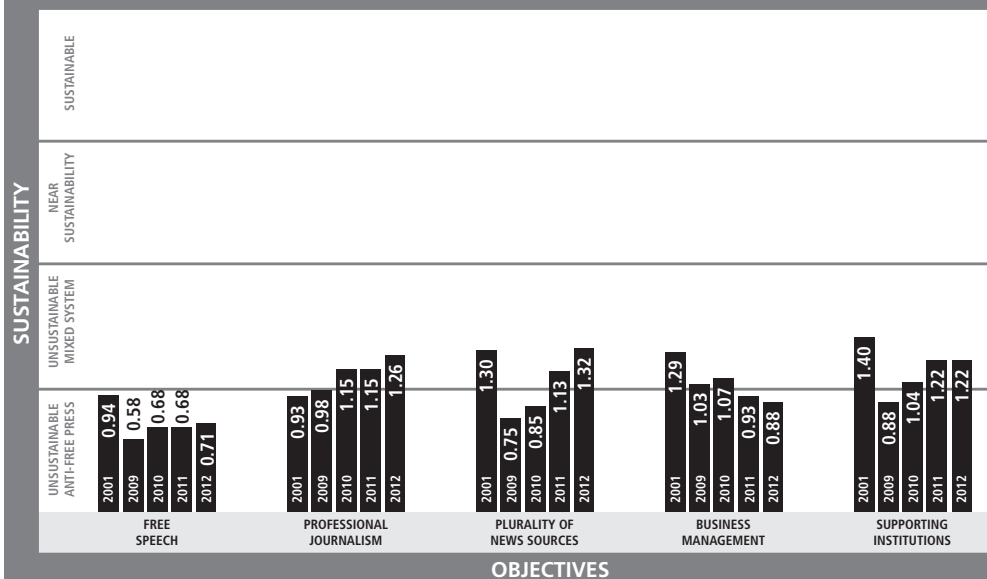
GENERAL

- > **Population:** 9,542,883 (July 2011 est., *CIA World Factbook*)
- > **Capital city:** Minsk
- > **Ethnic groups (% of population):** Belarusian 83.7%, Russian 8.3%, Polish 3.1%, Ukrainian 1.7%, other 3.2% (2009 census)
- > **Religions (% of population):** Eastern Orthodox 80%, other (including Roman Catholic, Protestant, Jewish, and Muslim) 20% (1997 est., *CIA World Factbook*)
- > **Languages (% of population):** Belarusian (official) 53.2%, Russian (official) 41.5% (2009 census)
- > **GNI (2010-Atlas):** \$58.17 billion (World Bank Development Indicators, 2011)
- > **GNI per capita (2010-PPP):** \$14,020 (World Bank Development Indicators, 2011)
- > **Literacy rate:** 99.6 % (male: 99.8 %, female: 99.4%) (1999 census, *CIA World Factbook*)
- > **President or top authority:** President Alexander Lukashenka (since July 20, 1994)

MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, and television stations:** 1,402 publications including 677 newspapers (9 regular dailies), 674 magazines and journals, 41 bulletins, and 9 catalogues; 162 radio stations (4 nationwide); 82 television stations (8 nationwide) (Belarus Ministry of Information, 2011)
- > **Newspaper circulation statistics:** The top three newspapers by circulation are *SB. Belarus Segonia* (state-owned, 2,000,000 weekly circulation), *Komsomolskaya Pravda v Belorussii* (independent, 589,300 weekly circulation), *Respublika* (state-owned, 245,000 weekly circulation) (Medusa Advertising Agency December 2011)
- > **Broadcast ratings:** The top three by audience share are ONT (20.7%, state-owned), NTV-Belarus (17.8 %, Russian-owned, broadcasting state-controlled), RTR-Belarus (11.1%, Russian-owned, broadcasting state-controlled) (GEVS, September 2010)
- > **News agencies:** BelTA (state-owned), BelaPAN (private), Interfax-Zapad (Russian-owned), Prime-TASS (Russian-owned), Ecopress (private), Agentstvo Grevtsova (private), Minsk-Novosti (state-owned), Registr Information and Legal Agency (private) (Belarus Ministry of Information, 2011)
- > **Annual advertising revenue in media sector:** \$84 million (\$52 million television, \$11 million press, \$7.7 million Internet, \$4.9 million radio) (ZenithOptimedia advertising group, July 2011)
- > **Internet usage:** 4 million (Gemius, November 2011)

MEDIA SUSTAINABILITY INDEX: BELARUS



Scores for all years may be found online at http://www.irex.org/system/files/EE_msiscscores.xls

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.

OBJECTIVE 1: FREEDOM OF SPEECH

Belarus Objective Score: 0.71

The Belarusian constitution and the media law both guarantee the freedom of opinions and their free expression. They also ban censorship and media monopolies, yet these provisions “are only declared, yet hardly enforced,” a panelist summarized. At the same time, the media law has provisions that inhibit the freedom of speech. Considerable restrictions are in place on what registered media outlets can report on. In particular, they cannot give publicity to unregistered groups or organizations that were shut down, making it risky to cover activities of the opposition. Likewise, according to the law on mass events, would-be rallies or pickets cannot be mentioned in media reports until they are authorized by the government.

The media law also bans distribution of extremist information, with the law on counter-extremism giving very vague definition of “extremism.” On January 11, 2011, Autoradio, a popular private station based in Minsk, was taken off air after its license was cancelled by the government. Autoradio was the only station that dared to broadcast campaign advertisements for opposition candidates in the run-up to the December 2010 presidential election. Three weeks after the controversial vote the station was

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 or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > 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 available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets' access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

shut down. The supervisory body, headed by the hard-line information minister, Aleh Praliaskouski, claimed Autoradio “failed to stick to its declared programming concept and distributed information that contained public appeals to extremist actions.” On top of that the Ministry of Information handed them a back-dated warning over distribution of appeals to extremism.

The ministry argued that an advertisement of Andrei Sannikau, an opposition candidate for the presidency who said the “fate of the country is determined in the square, not the kitchen,” contained calls to extremist activities. Sannikau was calling on the Belarusian people to attend protest rallies at Minsk’s main square against expected fraud during the presidential vote. Autoradio argued the same words were used in Sannikau’s platform materials published by the presidential administration’s mouthpiece *SB. Belarus Segonia* and in his television and radio presentations aired by state-owned broadcasters. None of them were challenged. Furthermore, according to the counter-extremism law, only the court can rule on whether information materials are “extremist.”

The station appealed both the canceling of its license and the warning. In an unprecedented development, the Supreme Economic Court upheld the appeals and even ordered the ministry to reimburse Autoradio’s court fees. Observers were surprised as Belarusian courts offer very little, if any, protection in such politicized cases, as all Belarusian judges are appointed by the president himself and are financially dependent on the presidential administration and local governments. Salaries of judges are totally up to the president, who also has an exclusive right to dismiss any judge, with no safeguards against arbitrary dismissal. Houses of judges are considered “official dwellings,” which judges lose if they are dismissed. In less than two weeks, however, another panel of judges of the Supreme Economic Court cancelled the previous ruling and endorsed both the warning and cancelling of Autoradio’ license.

The media law gives the government powers to penalize the media even for minor violations, like technical mistakes, and more importantly over any information the government considers inaccurate or misleading. Furthermore, confidentiality of news sources is protected by the media law yet could be lifted by order of a criminal investigations authority or by a court ruling.

The panel also mentioned the law “On Information, Informatization, and Protection of Information.” Although it has a disclaimer that it does not regulate media activities and intellectual property rights, its nature is comprehensive as far as access to information is concerned. Defamation laws are strict and also come into tension with freedom of speech. Defamation is criminalized and both the Civil Offences Code

and the Criminal Code offer greater protections to public figures, most notably the president.

Presidential Edict #60 on Measures to Improve the Use of the National Segment of the Internet, came into effect in July 2010 and provided for Internet filtering. That prompted fears of Internet censorship, as the 35 blacklisted websites included two leading pro-opposition news sites. Despite private fears, freedom of speech violations did not cause a public outcry apart from some complaints on the Internet. Panelists failed to recall any agitation after the government shut down Autoradio or attempted to axe two leading opposition newspapers, *Narodnaya Volya* and *Nasha Niva*.

Print media with a circulation of more than 299 copies and broadcast media reaching more than 10 people, as well as information agencies, must obtain registration from the Ministry of Information. This registration is in fact an official authorization, rather than just a notification procedure. Although the media law provides for registration of Internet media and the Council of Ministers was supposed to have adopted pertinent regulation by the end of 2008, online media still is not subject to registration.

A media outlet can be started up by an organization or an individual, yet newsroom activities shall only be performed by an organization. The registration procedure requires the applicant to list numerous details about the outlet, including the proposed specialization (topics to be covered), frequency, area of distribution, sources of funding, and detailed information about the would-be editor-in-chief. There is a registration fee ranging from \$100 (for a print media) to \$1,000 (for a national broadcaster), depending on the type of the outlet and the proposed area of distribution. Would-be editors must have journalism diplomas and at least five years of editing experience and the outlet is supposed to have a residential address. Under the law, this registration process takes 30 days to complete.

Registration is highly politicized, the panel agreed. The last time the Ministry of Information registered a private newspaper that could cover political and social issues was in 2002, according to a panelist. Private outlets are finding it increasingly difficult to register or update their registrations. The ministry tends to nitpick and denies registrations even to free newspapers and legal advice journals. A panelist alleged that private media outlets were being discriminated against so as to give a competitive advantage to state-controlled outlets.

The Ministry of Information reported in October 2011 that since the beginning of the year it registered 86 new media outlets (23 newspapers, 56 magazines and journals, five bulletins and two catalogs). Only 13 of them were

state-owned. At the same time, registrations of 32 outlets were cancelled (10 newspapers, 19 magazines and journals, and three bulletins), including seven state-owned ones.

One needs a frequency from the Republican Commission on Television and Radio Broadcasting as well as a license from the Ministry of Communications and Informatization to operate an over-the-air broadcasting station in Belarus. First, a media outlet (television or radio) should be registered with the Ministry of Information, then a frequency is allocated via a tender administered by the Republican Commission on Television and Radio Broadcasting. The National State Television and Radio Company—a conglomerate of four television channels, five radio networks and five regional television and radio companies—as well as television and radio stations founded by the president and the Council of Ministers receive frequencies without a tender.

While commenting on whether the process was politicized, a panelist said: “Several years ago Ministry of Information officials openly admitted that frequencies were being granted neither by the Republican Commission, nor the ministry, yet by the Presidential Administration. Thus, despite the seemingly open process of allocation of frequencies, there are absolutely no grounds to speak of a fair and open procedure.”

The broadcast media market was far from being crowded. Only 29 FM stations operated in Belarus, 15 of them in the capital, Minsk. There were 82 television channels, yet most of them are local ones. By the end of 2011, 94 percent of Belarusians were reached by digital terrestrial television. However, the digital package included only eight television channels (seven state-controlled and one private that offers only entertainment content) and one state-run radio station.

Other than the aforementioned registration and licensing roadblocks, market entry for media outlets remain the same as for businesses in other industries. The media law, however, restricts direct foreign ownership of media organizations to 30 percent. Another media-specific restriction is that operations of any media outlet can be suspended for up to three months without a court ruling, following a written warning from the Ministry of Information.

Taxation is also the same as for other businesses and laws do not provide for tax breaks for media. Still, a presidential decree in September 2009 exempted state-controlled television channels ONT and STV as well as the National State Television and Radio Company from value-added tax and income taxes for three years.

Crimes against journalists remained rare. Panelists traditionally spoke of intimidation and harassment of journalists and media by authorities. Obstructing lawful

professional activities of journalists and forcing them to spread or hush certain information, committed with violence or threats of violence, destruction of or damage to property, violation of the rights and lawful interests of a journalist is a crime in Belarus, punishable by up to three years in prison.

Most often journalists were attacked during opposition rallies, most notably during the series of social-network-driven “silent protests” where thousands of Belarusians gathered in main squares of cities without any banners and simply stood silently or clapped in unison. The protests took place at least once a week, usually on Wednesdays, throughout most of the summer of 2011. Crackdowns usually followed the same pattern: protesters were attacked by skinhead-type men in sportswear and violently dragged into unmarked buses. Journalists who tried to film the arrests were hit or thrown to the ground and sometimes had their equipment damaged. Journalist IDs and protests were largely disregarded. At least once, tear gas was used against journalists to prevent them from filming the dispersal. Hundreds of protesters were detained after every such rally, with most of them getting fines or arrests for up to two weeks. According to independent media reports, there were at least 77 counts of journalists being briefly detained while filming or photographing “silent protests.”

Journalists tried to address the problem in an organized way. In July 2011, a group of 30 journalists filed a complaint with the Office of the Prosecutor General and the Ministry of Internal Affairs asking to investigate the unlawful detentions and identify the perpetrators and those in command. European Radio for Belarus, an offshore broadcaster beaming news to Belarus from Poland, also filed a complaint after three of its journalists were arrested while covering the “silent rallies.” The subsequent investigation admitted the detentions were unlawful and rights of journalists were violated. The Office of the Prosecutor General urged the Ministry of Internal Affairs to “consider disciplinary actions” against the police officers who violated journalists’ rights. However there were no reports that they were actually punished.

Sometimes journalists also received threats. In February 2011, private regional newspaper *Brestskii Kurjer* received several anonymous letters with clippings of its stories about harassment of opposition activists, as well as insults and threats. Separately, several investigative reporters received threats and had to quit their investigations, according to a panelist. However, he was reluctant to provide more details because of the risk of jeopardizing his colleagues. Although publicized by independent media and human rights defenders, cases of attacks against journalists hardly caused an outcry apart from discussions on the Internet.

There was, however, more solidarity across the independent media community.

As noted above, several state media journalists were fired surrounding the December 2010 presidential election. Siarhiej Darafejeu, a popular presenter with the state-owned television channel ONT was suspended after the live election night show on December 19, 2010. While the show was being filmed thousands of people were gathering in downtown Minsk to protest against what they believed was a rigged election. Darafejeu challenged the chair of the Central Election Commission over alleged violations of campaigning rules and the right of people to protest. As a result, the chair left the studio in the middle of the show. Darafejeu was fired in April 2011 and went to Ukraine to work for a private news channel.

Separately, Ales Liauchuk, a Brest region correspondent with the state-owned youth newspaper *Znamia Yunosti*, was fired in January 2011 after he refused to write derogatory stories about the opposition and their participation in the December 2010 presidential election.

The media law claims editorial independence of newsrooms while censorship and unlawful interference with newsroom activities are banned, but state media that dominate in all sectors, apart from the Internet, are far from being editorially independent. Editors-in-chief of key national media outlets are appointed by the president himself. The Presidential Administration also approves the appointment of editors of all national and regional (oblast-level) state media outlets. Regional governments, in their turn, approve appointments of editors of local state-run outlets.

The state media does not allow diversity of viewpoints and voices, panelists agreed. The political opposition is effectively banned from state media unless it becomes a target of smear campaigns. As a rule, state-owned outlets shy away from criticizing the government, yet national media, most notably *SB. Belarus Segonia*, a daily published by the presidential administration, are allowed to give bad press to local authorities. Meanwhile, in an opinion poll by Independent Institute of Social, Political, and Economic Studies (IISEPS) in June 2011 only 10.3 percent of the respondents said they believed Belarusian media were independent.

Under Belarusian laws, libel can be both a civil and criminal offence. Libel contained in a public speech or in printed or publicly performed work, or in the media, is criminalized and thus punishable by up to two years of correctional labor, or imprisonment for up to six months, or restraint of liberty for up to three years. The same applies to insult inflicted through the media. The Criminal Code gives greater protection to public officials, most notably the president. “Insult of the

representative of the authorities” can be punished by up to six months in prison, or restraint of liberty for up to three years. “Calumny toward the president” is penalized by up to four years in jail. “Insult of the president” is punishable by up to two years of correctional labor or imprisonment.

On July 5, 2011, a district court in the northwestern city of Hrodna near the Polish border convicted Andrzej Poczobut, who writes for Poland’s largest daily, *Gazeta Wyborcza*, of insulting President Lukashenka. The journalist was arrested in April 2011 on charges of libel and insulting the president in eight of his print articles, as well as on pro-opposition news website *Belorusskii Partizan* and his blog <http://poczobut.livejournal.com>. In a closed trial in Hrodna, the court convicted him of libel and gave him a three-year suspended sentence. Insult charges were dropped. The court told Poczobut that the offending matter in question was that he had called Lukashenka a dictator. The journalist said his articles only contained criticism of President Lukashenka’s 17-year regime, not insults. Poczobut was released after the court announced the verdict, but his case would be reviewed later. In September 2011, the Hrodna Oblast Court upheld the verdict against him. He was also banned from leaving the country, and changing his place of residence without a police permit. Previously in 2009, the Belarus Ministry of Foreign Affairs canceled his press accreditation and denied his applications to renew it, on the grounds that his reporting was biased and insulting to the president. A month earlier he had received threats warning him to stop his critical reporting or else face retribution.

The last time criminal libel provisions were used was 2002, when two editors and a journalist of two different newspapers were handed two years of corrective labor each over libeling President Lukashenka. More common are honor, dignity, and business reputation suits, falling under civil law. Every year media organizations receive several dozen of such suits, in most cases stemming from reports on local issues and with compensation claims ranging from several hundred to several thousand U.S. dollars. For such cases the plaintiff does not have to prove malice, claiming moral damages is enough. Unless cases are politicized, media outlets tend to avoid publicity over such lawsuits for fear of receiving warnings from the Ministry of Information over inaccurate reporting. After two written warnings a media outlet might be shut down.

Neither Internet service providers nor hosts are held responsible for what users post on the Internet, yet illegal content must be removed following a court ruling or an order from law-enforcement agencies, the office of the public prosecutor, or tax authorities. Still, managers of websites that offer feedback tend to moderate comments and delete the most controversial posts, according to a panelist.

On one hand the law guarantees the “right to receive, store, and disseminate complete, accurate, and timely information about the activities of state bodies or public associations; political, economic, cultural, and international life; and the environment” and thus it is in compliance with international standards. But on the other, this law restricts access to state, commercial, and professional secrets, and in fact access to any information may be restricted by other legislation. In practice, state bodies are given wider rights to classify the information at their disposal and thus withhold it from the public. According to a presidential decree adopted on March 2, 2011, 58 state bodies and organizations as well as regional governments can classify their information as secret. The list includes the cabinet of ministers, the parliament, supreme and higher economic courts, all law-enforcement agencies, all ministries, the national bank, and several government agencies and state-owned holding companies. Most notably, Belarus’ biggest media organization, the National State Television and Radio Company, is also on that list.

In June 2011, when most of the country was unsettled by the deepening financial crisis, a deputy economy minister told an interviewer the government did have a crisis plan, yet added that it was secret and thus would not be made public. Information from government agencies could only be obtained via their press services or after approval from top officials, in accordance with the presidential edict adopted in 2009. As well, many events including press conferences require accreditation to be covered by a journalist, but the system of accreditation remains unregulated and private media are often barred from attending events; bloggers and freelancers are not considered journalists and are not eligible for such accreditation. Only his personal photographer and photojournalists from the state news agency BelTA can photograph President Lukashenka. Even for big open-air celebrations attended by the president, cameras with lenses longer than 1.5 inches are not allowed.

“The media law does not contain specific mechanisms for journalists to obtain information. The authorities refuse to provide information without giving any reasons. Journalists do not fight to try to change the situation,” a panelist commented.

Media outlets’ access to and use of local and international news and news sources remains unrestricted, apart from several pro-opposition news websites that are being filtered for state-owned organizations. The Internet is getting more affordable and becoming an increasingly important source of news for media organizations. However, many journalists are still held back by their poor foreign language skills and the cost of subscriptions to foreign news services. As a result they have to rely either on local Internet media or foreign Russian-language news sites.

Entry into the journalism profession remains unrestricted, but lack of accreditation can create difficulties. The government, however, introduced special requirements for editors-in-chief, who must have a journalism diploma and at least five years of previous editorial experience. As mentioned above, bloggers, citizen journalists, freelancers, and those working for foreign media outlets without accreditations from the Ministry of Foreign Affairs are not considered journalists.

While the profession remains open, the government does control admission to state journalism schools and the employment of graduates. Would-be students have to provide recommendations from local governments and undergo an interview that basically screens them for political loyalty. Graduates of state journalism schools have to work for two years wherever the government tells them (usually regional newspapers) or cover the cost of their education and stipends. At Belarus' biggest journalism school, the Journalism Institute at the Belarusian State University, the annual tuition fee is around \$1,000.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Belarus Objective Score: 1.26

Speaking in general, reporting is far from being spin-free and balanced, the panel said. At the same time, panelists found it hard to generalize about the media sector as a whole, because state-owned media differs from private media so greatly in this sense. Therefore, the final MSI scores reflected a sort of a "compromise" between estimates of state-owned and private media.

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 and retain qualified personnel within the media profession.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exist (investigative, economics/business, local, political).

State-owned media were referred to as "suppliers of propaganda that violate all norms of professional journalism." "The traditional picture of distorted facts, censorship, and outright libel in 2011 was complemented by a whole series of sponsored stories that discredited opposition leaders, leading human rights defenders, and the democratic movement as a whole," one panelist commented. Private media and news agencies were more likely to follow standards of professional journalism. Still, the restrictive and secretive environment and lack of resources impaired the quality of their reporting.

One of the panelists, a regional editor, said: "Speaking of regional independent media, a new trend became apparent: stepped-up self-censorship and decay of journalists' professionalism. This is due to a number of reasons, most notable being journalists' weariness over having to fight ideological authorities, low wages, and the decline in the prestige of journalism in the country. However, most journalists are aware of their ethical responsibilities to obtain information from multiple sources, check facts, and provide the public with objective information. But because of these reasons, regional journalists are increasingly becoming either politicized or vigilant to avoid covering controversial issues."

Many media outlets conduct background research and experts are approached for comments, but given the restricted access to information, that hardly improves their stories. This is especially true of economic and political reporting, since government policymaking is opaque and comments and forecasts tend to be mere guesswork. The "pool of experts" remained small, making many news outlets look very much alike in terms of comments they offer, a panelist complained.

Two journalistic organizations operate in Belarus, the independent Belarusian Association of Journalists (BAJ) and the state-controlled Belarusian Union of Journalists (BUJ). Both have their own codes of ethics that are quite universal and share the common principles of truthfulness, accuracy, objectivity, impartiality, and public accountability. Private media, the panel agreed, are much more likely to adhere to these principles. The participants mentioned numerous stories in state-controlled newspapers and odious documentaries on state television channels meant to mudsling opponents of the government. Most notably, "Social shadows" an August 2011 documentary by Belarus 1 TV, lambasted social network activists, political opposition, independent media, foreign governments, and international NGOs over being part of a conspiracy to overthrow the government. No one of them was given an opportunity to comment on the allegations. The documentary equated social-network-inspired rallies in Belarus to "Arab Spring" upheavals that swept away despotic regimes in Tunisia, Egypt, and Libya. Footage of violent attacks, dead bodies, and wounded people (including

children) were shown from these countries. The television channel received numerous complaints, yet refused to name the authors of the documentary and later accused the complainers of trying to interfere with Belarus 1's editorial independence, putting pressure on independent journalists, and even restricting the freedom of speech in the country. Still, some staff wrote in their Facebook accounts that they felt ashamed to work for that organization, without any apparent repercussions.

Meanwhile, twelve media managers, editors, and journalists representing leading state media outlets were on the list of 180 senior Belarusian officials banned from entering the European Union. The travel ban was imposed on January 31, 2011 over violations of electoral standards in the December 2010 presidential election and the crackdown on the political opposition, civil society, and independent media.

There is some selling of stories, mostly in the form of hidden advertising, and often to sidestep a requirement that puts a cap on the maximum amount of advertising. The Law "On Advertising" limits advertisements to 25 percent for state-owned general news publications, 30 percent for privately-owned. For radio and television, advertising is restricted to 20 percent of total daily broadcasting (30 percent from 6 p.m. to 10 p.m.).

Self-censorship "is the basis of Belarusian journalism," a panelist argued. His colleague added that it was exercised everywhere: in the state-run media via planning of stories and selective search of information. In private, especially regional, newspapers self-censorship is done via "editing" to mitigate the wording of, and sometimes leave out entirely, potentially controversial stories. Another panelist claimed that not all private outlets practice self-censorship: some independent media, like the news agency BelaPAN, do cover all news and report on all issues.

Still, not all key issues are covered by both state and non-state outlets, since both government bodies and civic, non-governmental institutions remain taciturn and there is lack of reliable alternative sources of information, a panelist summarized. The business interests of President Lukashenka and top officials remain the topics that are largely avoided. One of the panelists added that the media could easily come under pressure over reporting on environmentalists' criticism of the Russian-designed nuclear power plant Belarus is building.

There were hardly any events or issues that were covered exclusively by bloggers or users of social networks. "I have not heard that they offered more complete and better-quality coverage of any problem or issue, as compared to the press. Yes, their posts can spark leads for further searches, yet they

can never do a better job," a panelist argued. Sometimes though, interesting news or analysis makes the jump to "bigger" media from blogs or citizen reports.

Pay levels for media professionals varied greatly. Those working for state-controlled outlets remain better off, even more so compared with previous years. In 2010, journalists working for private media earned 25 to 30 percent less than their counterparts in state-funded media. A year later, with the raises for public-sector employees, the spread widened to 50 to 55 percent, according to a panelist. In rough terms, reporters at small regional papers earn around \$150 a month, \$200 to \$250 at medium sized papers and around \$400 to \$500 at large national newspapers. State-controlled national television channels and newspapers like *SB. Belarus Segonia* are even more generous in terms of salaries, especially for political reporters and editors who might earn three or four times more than their coworkers who cover other topics. On top of that, until recently journalists working for state-owned media received housing loans on very generous terms.

Meanwhile, the median Belarus monthly salary (nationally, not just in the media) was \$468 in January 2011 and \$339 in December 2011. The financial crisis pushed consumer prices up—those of imported goods tripled—while the salaries largely remained the same. As a result most journalists were dissatisfied with their salaries, regardless of the size of their news organizations and whether they worked for state media or private. Many would like to leave, according to a panelist, yet pay levels were approximately the same across the sector. Instead, journalists tend to work for multiple outlets.

However, the panelists do not feel that the low salaries at private outlets encourage corruption, since very few businesses would dare buy favorable coverage there, for or fear of government reprisals over supporting opposition media. State press, television, and radio, should, in accordance with international standards, all be considered corrupt, a panelist argued, speaking of their remuneration practices. Since state media mostly pushes propaganda, twisting facts and not offering objective coverage, they tend to disregard ethical standards in return for higher salaries.

The news-to-entertainment ratio varied dependent on the sector. Around 60 to 70 percent of programming on state-controlled television is entertainment, a panelist estimated. On FM radio stations news is limited to approximately 5 to 10 percent. Newspapers and news websites, in contrast, offer very little entertainment content.

With advances in technology, basic facilities for newsgathering and content production are available and affordable to all newsrooms. Still, newsrooms are in need of faster PCs for such demanding tasks like video editing or page

design. The idea of “backpack journalism” with one person shooting video, recording audio, making photos, writing a story, and then posting it online gained some popularity after trainings offered by international media development organizations. Yet newsrooms are finding it next to impossible to equip all of their reporters with camcorders, laptops, or even smartphones. Bigger media outlets need professional photo and video equipment.

Internet subscriptions are by and large affordable, yet mobile Internet remains too expensive for most journalists. Non-licensed software remains the sore point. Although small independent media organizations can legalize part of the pirated software via Microsoft’s NGO software license donation project, the procedure itself takes a lot of time and licenses are about to expire when they finally arrive, as a panelist described in his experience of trying to legalize the software for his NGO.

Although there are no reports about fines over the use of illegal software, some newsrooms understand the danger. Still, most media professionals are reluctant to use free or open source software, as free versions of accounting, page design, audio- and video editing packages remain lacking in features, according to a panelist.

Niche media themselves generally cannot support their own activities, the panel agreed. And amid budget struggles very few traditional media organizations can afford beat reporting. Still, there is some specialized reporting on the economy (panelists mentioned weeklies *Belarusskaya Gazeta*, and *Belorusy i Rynok* and e-paper Ej.by), sports (newspaper *Pressball* and website Goals.by), and cars (newspaper *Avtobusiness* and its website abw.by). Big portals like TUT.by and Onliner.by offer, amongst other topics, IT news and analysis. Elsewhere, 34 multimedia magazines are doing a good of job of covering youth culture. Local newspapers and websites tend to concentrate on covering local issues.

Investigative journalism has almost gone extinct. Still, panelists mentioned reports by Yauhen Valoshyn, an investigative reporter with state-owned daily *Zviazda*. Most notable was a series of his stories about the unrestricted sale of opiate-containing poppy seeds used to produce highly addictive hard drugs. The stories were widely publicized. Valoshyn later said that the Belarusian secret service, the KGB, had been trying to recruit him on several occasions. *Zviazda*’s editor-in-chief Vladimir Narkevich came under pressure to fire Valoshyn several times. In November 2011, Narkevich was dismissed after 22 years as the editor-in-chief. In December 2011, the newly-appointed editor forced Valoshyn to resign over unexcused absences despite being notified by the Ministry of Information that Valoshyn was traveling abroad for several days. Valoshyn’s had traveled to neighboring

Ukraine to participate in the Global Investigative Journalism Conference and later to visit his grandmother who had fallen seriously ill.

OBJECTIVE 3: PLURALITY OF NEWS

Belarus Objective Score: 1.32

There are multiple news sources that provide Belarusians with local, national, and international information, yet these are not diverse enough in content, a panelist argued. The solution he offered is to privatize state media, first of all national television channels and “big” newspapers and news agencies, since there can be no diversity of viewpoints without diversity of ownership. Television, radio, and the press are still dominated by the state-owned outlets that essentially speak in one voice and do not allow a variety of viewpoints. For years, the opposition has been denied access to state media, with the exception of election campaigns. Yet several dozen private newspapers, a handful of expatriate broadcasters, and the web allow for more varying opinions or at least offer different perspectives.

In an opinion poll conducted in May 2011 by the Independent Institute of Socio-Economic and Political Studies, 75.7 percent of Belarusians aged 18 and older said they are getting information from the television, 34.0 said percent newspapers, 33.4 percent the Internet, 28.0 percent friends, 20.5 radio, and 2.2 percent social networks.

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens’ access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the 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
- > The media provide news coverage and information about local, national, and international issues.

Circulation-wise, heavily subsidized state-owned publications continued to prevail on the press market despite the unfolding finance crisis. Although private publications still outnumber state-controlled ones (997 versus 405), most of them offer only entertainment content. Throughout 2011, government-owned newspapers reported an aggregate weekly circulation of around 3,500,000 copies. Meanwhile, around two-dozen private newspapers with the aggregate weekly print-run of approximately 800,000 copies continue reporting on political and social issues. That figure however includes almost 600,000 copies of the popular Russian-owned tabloid *Komsomolskaya Pravda v Belorussii* that publishes a Belarusian insert.

Most radio stations in Belarus are state-owned, 139 versus 23. Four state-controlled radio stations each reach at least 95 percent of the population, according to the Ministry of Communications and Informatization. The Ministry reported that 30 to 40 percent of the population listens to state-controlled radio stations broadcast via a cable network of around 1,200,000 subscribers. Private radio stations offer very little news and those are mostly official information, sport, and entertainment. Meanwhile, all domestic radio stations are required to broadcast 75 percent Belarusian music. Three expatriate radio stations, European Radio for Belarus, Radio Liberty, and Radio Racyja broadcast on a daily basis to Belarus from the West and have several hundred thousand listeners, according to various estimates.

Out of 82 television channels, 50 are privately-owned, yet their reach is limited. Meanwhile, as noted above, seven state-controlled television channels reach 94 percent of Belarusians. Around 25 percent of Belarusians watch satellite television. Belsat TV, an independent satellite channel broadcasting news and current affairs as well as cultural programs into Belarus from Poland, is watched by around 800,000 people, according to Zerkalo-Info research center.

Luckily, as Internet subscriptions grow more affordable, more sources of news and analysis, and thus more perspectives, are becoming readily available, panelists said. In November 2011, the Belarusian Internet audience totaled 4 million people, with Internet penetration reaching 50 percent (amongst those aged 15 and older), according to Gemius, an independent Internet research outfit. The daily audience of news websites reached 650,000 visitors, weekly 1.4 million. Meanwhile, Belarus's most popular television channel, ONT, has a daily audience of 2.6 million people while weekly it totaled 5.5 million.

Foreign websites are more popular: 34.9 percent of those polled in June 2011 by ISEPS said they access Russian sites, 33.3 percent Belarusian, 13.3 percent European, and 2.2 percent American.

Social networks gained more popularity. According to Gemius, in November 2011, almost 70 percent of Belarusian Internet users visited at least one social networking website. By the end of the year over 2,500,000 Belarusians had accounts with VKontakte, Russia's most popular social network, followed by Russian social network Odnoklassniki (950,000), Facebook (350,000), and LiveJournal (105,000). Belarusian social networks i.TUT.by and Vseti.by had correspondingly 1,200,000 and 800,000 accounts. YouTube is the third most popular website in Belarus, after Google and VKontakte, according to Alexa.com traffic rankings.

Although there was discussion of politics and current affairs in social networks and youth even used VKontakte to coordinate a wave of protests in the summer of 2011, entertainment and networking definitely trump politics online. Meanwhile, as the financial crisis has deepened, economy bloggers are growing increasingly popular, a panelist noted. Two of them even started guest-blogging for TUT.by, Belarus's biggest web portal.

Panelists also mentioned Prokopovi.ch, a website where users post currency buy and sell offers and then agree to meet in person to execute the deal. The service, whose name mocks that of the Belarus central bank's head Petr Prokopovich, was created by a group of web developers in April 2011. After just a couple of weeks, it was attracting a daily audience of around 30,000 people. The website claims it facilitated millions of dollars in deals every day. More importantly, it offered currency exchange quotes that both individuals and small businesses rely on.

All in all, citizens may check one news source against another; yet for viewpoints different from those offered by the government one oftentimes must rely on assumptions, different versions, and surmises, the panelist generalized.

Access to domestic and international news sources is not restricted by law, with the exception of 35 websites that are blacklisted for access in state agencies, educational institutions, and libraries. The list is only available to Internet service providers and contains mostly pornographic websites. However, key pro-opposition news websites Charter97.org and belaruspartisan.org are blacklisted, just like the currency-exchange service prokopovi.ch and the website of human rights center Viasna (spring96.org). A satirical blog by Jauhen Lipkovich (<http://lipkovich.livejournal.com/>) is also blocked, together with around 300 more blogs on popular blogging platform LiveJournal, that all use the same IP address. Some news websites suffered distributed denial-of-service attacks. On April 12 and 13, 2011, Charter97.org and belaruspartisan.org were hit by a massive attack, suggesting a coordinated raid. The attacks came just a day after a metro station in Minsk was hit by a powerful blast

that killed 13 people and injured more than 100. Both news sites blamed the bombing on the government. The day before, the Office of the Prosecutor General told news agencies that those two websites are blocked. The reason behind the decision was the violation of the law "On mass events" which bans the media from reporting on planned dates and places for protest rallies until the gatherings get authorities' approval.

Access to Facebook, Twitter, and major Russian social networking sites was repeatedly blocked during the numerous opposition protests in the summer of 2011, after a new opposition group called "Revolution by Social Networks" held a series of Internet-organized rallies in about 30 cities and towns.

On December 29, 2011, pro-opposition news site Charter97.org once again came under attack. Anonymous hackers got access to the website's content-management system, deleted all stories and archives, and posted a fake story about Andrei Sannikau, an oppositional candidate for presidency in the 2010 election and a co-founder of the Charter-97 civil initiative, a group behind the website. He is now serving a five-year prison term on charges of staging riots following last December's presidential election.

Charter97 administrators said they identified the IP addresses hackers used. While most of the disruptions against Charter97 took place behind the shield of anonymizing services, one of the attackers was using a Belarusian IP address. The website's editor-in-chief, Natallia Radzina, who spent six weeks in a KGB jail, then fled house arrest and is currently living in exile in Lithuania, said she believes the Belarusian KGB was behind the attack. According to several reports, a keylogger trojan virus was deployed to steal login credentials from website editors. Computers of other of opposition activists and journalists were also infected, according to these reports.

Speaking of restrictions, panelists also mentioned a dozen embattled private newspapers that are banned from state-owned distribution networks. In 2005, they were expelled from the subscription offerings of Belposhta, the postal service, and banned from newspaper kiosks of Belsajuzdruk, a press distribution monopoly controlled by the Ministry of Information. Those who did sell via Belsajuzdruk reported that it imposed restrictions on the maximum number of copies independent outlets could sell.

The foreign press remains unaffordable, especially after the 178 percent devaluation of the Belarusian ruble against the U.S. dollar. Meanwhile, NewspaperDirect, a digital newspaper distribution and publishing operator, entered the Belarusian market in August 2011. The company offers 1,700 same-day international newspapers from 94 countries in 49 languages

that were to be printed on-demand in Minsk. However, the government notified NewspaperDirect that for foreign titles to be distributed in Belarus express permission from the Ministry of Information is needed. Such permits were issued to over 600 titles; most of them specialized journals or entertainment magazines. Some of the world's leading business publications like *Time*, *The Economist*, *Businessweek*, and the *Financial Times* did receive such permits. Meanwhile, information minister Aleh Praliaskouski told news state news agency BelTA in August 2011 that over 4,000 foreign titles were being distributed in Belarus. Unfortunately, the Ministry of Information provides data on successful applicants only, and there are no reports about foreign outlets that were denied permits.

Around 140 foreign television channels (mostly Russian) are broadcast via cable networks, but news and satirical shows on channels that criticize Belarus' government are censored.

"Availability of information sources to a greater extent depends on the locality: in Minsk and regional capitals people have a real opportunity to use all sources of information, including state and private media, satellite channels, and the Internet. In smaller towns, where incomes and penetration of modern technologies are lower, opportunities to obtain information from various sources are fewer. People in these towns cannot use the Internet at work, so their access to information remains limited. Speaking of rural areas: in most cases only national state television channels and state-owned regional newspapers are available," a panelist said.

Although most consumer prices skyrocketed, Internet fees largely remained unchanged. The government "unofficially" ordered Internet service providers to keep tariffs low, thus making it affordable to many more people, according to a panelist. Satellite television, in particular Belsat TV, is quite popular, including in rural areas not reached by cable networks.

There is no truly public media in Belarus, while state-owned ones remain "absolutely biased" towards the government, a panelist said, adding that it is independent media that, where possible, reflect the existing political spectrum and public interests. But they are also not free from some of the biases in favor of certain non-governmental groups.

Artists and musicians who are critical of the government are marginalized. A growing number of Belarusian and Russian rock bands are on an unofficial blacklist that bans them from mention on state media. A number of rock songs calling for change and glorifying freedom are also banned. Influential U.S. and British actors and musicians including Oscar winners Kevin Spacey and Kevin Kline, the Pet Shop Boys, Jude Law, Sienna Miller, Ian McKellen, and Samuel West are on the

blacklist as well. Some of them recorded YouTube messages in support of free expression in Belarus, others performed with the dissident theatre group Belarus Free Theatre. Sources inside state television did not deny that the blacklist is in force, according to several reports.

Nine media companies—two state-owned and seven private—are registered as information agencies by the Ministry of Information, yet only four of them offer newswire services: BelaPAN, BelTA, Interfax-Zapad, and Prime-TASS.

Private news agency BelaPAN is “undoubtedly the leader in distributing unbiased information,” the panel agreed. Although it is regularly coming under pressure over its independent reporting, it is able to deliver high-quality products that include newswire service and roundups, photoservice, web-ready info-graphics, and interactive graphics, audio, and video. Its e-paper Naviny.by is one of the most popular news sites: almost 10 percent of Belarusian Internet users read it at least once a month.

BelTA is state-run and has been the official agency of the government for over 90 years. It offers news, photos, infographics, press roundups, television listings and analytical bulletins to over 700 subscribers, both domestic and foreign. In addition, it publishes the weekly *7 Dnei* and several journals and builds and maintains websites for local governments and state-owned newspapers. Two more agencies—Interfax-Zapad and Prime-TASS—are Russian-owned. Interfax is pro-government while Prime-TASS offers mostly business and financial news.

On average, agencies charge around \$300 per month for daily news updates to \$600 for real-time ones. One of the panelists argued that the fees are quite reasonable. Still, many smaller media organizations find them too expensive and thus tend to rely on what is available for free on the Internet. In most cases news agencies are quoted as sources, yet sometimes their stories are taken from other media and thus they are not mentioned as original suppliers. International agencies like AFP, Associated Press, and Reuters, however, are affordable only to big state-owned media.

Private outlets produce their own news and information content to various degrees. More news is produced by regional newspapers and websites. At the same time they too rely on news agencies and central media for coverage of national and international affairs. National newspapers and websites concentrate on analysis and comments. In general, most websites aggregate stories from other sources. Bloggers produce very little of their own news, but do comment on what is available online. Private radio and television stations rely on official information and the Internet.

The level of ownership transparency remains very low. The Media Law requires disclosure of immediate owners of registered media outlets. However ordinary citizens hardly have the understanding of who owns or influences specific outlets. “The consumer is absolutely unaware of who owns certain media. It is the product he or she is judging by,” a panelist argued.

Belarus has a 30 percent limitation on the immediate foreign media ownership, with the exception for those outlets that had been established before the latest Media Law came into effect in 2009. Foreign investment remains very limited and most of it is from Russia. Russian businesses own two news agencies, Interfax-Zapad and Prime-TASS, and three newspapers, popular daily *Komsomolskaya Pravda v Byelorussii* and weeklies *BelGazeta* and *Argumenty i Fakty*. Two Russian companies have stakes in VTV, an entertainment television channel.

Many social and minority issues remain disregarded by most mainstream media outlets. They are seen as unworthy of coverage unless there are situations of conflict or crisis. State media tend to promote collectivism, Soviet-style stability, and avoid “sensationalization” of stories. Independent media are understaffed and tend to report only on the issues of biggest concern, i.e. the economy and politics. “At the moment, these [minority] problems are not in the focus of public attention. The main and most urgent question now is the standoff between the authoritarian regime and the society. Of course, sporadic publications on such topics do appear, but they do not cause any agitation,” a panelist argued. Still, such issues as disability, gender, and sexual orientation are discussed online, mostly within pertinent communities.

In general, local, national, and international issues are being covered, yet to a different degree and from different perspectives. State outlets tend to push propaganda to boast the benefits of a “stronger state” and a “socially-oriented” neo-Soviet economy while covering local and national events. However, there is very little critical reporting: only big outlets and most notably the presidential daily *SB. Belarus Segonia* are allowed to criticize local governments. As for international reporting, they tend to concentrate on crisis, conflicts, disasters, and some entertainment.

Even with restricted access to official information, several dozen private regional newspapers do a better job of covering current affairs in their regions, a panelist said. There are also many small regional websites and blogs that tend to aggregate news from other news websites. For coverage of national and international news local media tend to rely either on news agencies or national/foreign websites. National non-state media focus on reporting about the capital, Minsk, and country-level news and developments.

And they are more likely to report on international affairs than local. Private newspapers do not have regional sections or inserts, yet some portals like TUT.by or news websites like ej.by or belta.by aggregate news for specific regions.

OBJECTIVE 4: BUSINESS MANAGEMENT

Belarus Objective Score: 0.88

Business-wise, 2011 was a tempestuous year. Skyrocketing fees and dwindling advertising revenues hit most media organizations regardless of ownership or sector. Still, some outlets got through the financial crisis less troubled. State media relied heavily on direct government funding and subsidized fees. Elsewhere, the Internet was the only sector that not only avoided shrinking advertising spending, but even saw a modest growth of 6.1 percent against a year earlier.

In 2011 state media outlets were slated to receive around \$70 million in direct funding from the government. Around \$55 million was earmarked for state-run television and radio stations. The actual amount was different because of the sharp devaluation of Belarusian currency. Twenty-five newspapers and magazines received subsidies to cover printing costs, newsprint purchase, and salaries. Meanwhile, the annual advertising market totaled \$84 million in 2011.

"The state media is completely on the government payroll. Therefore, any reflections on their efficiency and sustainability are pointless. Among independent media there are some outlets whose management practices would

allow for their sustainability and profitability. However, the external business environment, as well as objective obstacles in producing high-quality information products, created unfavorable conditions for their successful operation," a panelist commented.

Meanwhile, only 25 percent of local state-owned newspapers and 80 percent of television stations are self-sustaining (as revealed by the Minister of Information in an interview). On average, regional state-controlled papers cover only 85 percent of their operating costs, according to the Ministry of Information. The United Media, an association of privately owned regional newspapers, said in October 2011 that its members cover 95 percent of their costs. Private newspapers and magazines happened to be the hardest hit of all. "Today we can clearly ascertain that 2011 was a year of deteriorating economic conditions for the press. The growth of printing fees by an average of 270 percent, newsprint up to 300 percent, plus state intervention, made it difficult for a number of independent media outlets to run a profitable, legal business in Belarus. Restricted distribution, the ban against state-owned businesses from advertising in the independent media, and more and more small businesses that used to be the mainstay of regional advertising markets shutting down because of the currency turmoil all can be mentioned as examples of deteriorating economic conditions," one panelist said. To stay afloat, private newspapers had to cut down on the number pages by an average of 10 percent and circulation by 15 percent, according to the United Media. Advertisement sales were also down 25 percent.

Many media organizations do some basic business planning, usually short-term. However, with a 178 percent devaluation of the national currency and 108 percent inflation, the actual outcomes turned out to be much worse than any worst-case scenarios, a panelist argued. All media outlets employ professional accountants (which is a legal requirement), advertising managers, and sometimes lawyers. Many newspapers hire distribution managers to make sure that papers go out to newsvendors and customers. Dedicated marketing and human resource specialists are only affordable to big state-owned media organizations.

Sources of revenue remain varied, but somewhat traditional. State-controlled outlets rely on direct funding by the government, subsidized fees, advertising, tax breaks (the three biggest television stations), and state-imposed subscriptions and subsidized copy sales (the state-owned newspapers). Private newspapers and magazines live off advertising revenues and to a lesser extent copy sales and subscriptions. Private television and radio stations depend on advertising sales, sponsored programming, and (in the case of

MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > 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.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

regional media companies) congratulatory messages. Internet advertising spending remains the same as the year earlier and most outlets (with the exception of bigger portals like TUT.by or Onliner.by) still struggle to sustain their online operations, relying on other sources, such as direct funding by owners or grants from foreign donors. Bloggers rely on sponsorship or third-party advertisements served by Google. Foreign donors fund expatriate broadcasters as well as some private print and online media.

At the same time, most media organizations disregard such possible sources of revenue as merchandising (selling books, research), offering local searches through an online directory of businesses (charging businesses for inclusion in online directories), selling audience information to advertisers, direct content sales (photos or video footage), and paid access to archives. Partnerships with other media organizations to share expenses are also neglected.

Sources of revenue do affect editorial policies, panelists argued. With very few exceptions, noted above, state media outlets do not criticize the government. As a rule most media organizations avoid giving bad press to prominent advertisers, most notably banks and mobile phone operators. In 2011, the weakening economy caused the advertising market to slump 14 percent against the previous year, according to the advertising group ZenithOptimedia. Television was down 11.9 percent, print 21.4 percent, radio 9.3, and outdoor 30. Internet advertising spend was up 6.1 percent compared to 2010.

Many small and medium-sized businesses were hit by the financial crisis, and forced to axe their advertising expenditures. A survey by one advertising agency suggested 33 percent of businesses cut down their media advertising campaigns by an average of 50 percent. Budget-wise the market consolidated even further and was dominated by big multinational companies like Procter & Gamble, Nestlé, Unilever, Schwarzkopf & Henkel, and domestic mobile-phone operators. Their marketing accounts are managed by a handful of international advertising agencies. As a result, several agencies control 90 percent of all advertising spend, a panelist claimed, quoting industry sources. Furthermore, those advertisers and agencies tend to choose communication channels that offer a wider reach. Almost 62 percent of all expenditures are traditionally channeled to television stations, usually state-controlled networks.

Regional outlets and smaller media tend to be neglected by advertising agencies, a panelist argued. Local media companies receive a maximum of 10 percent of advertisement sales via agencies and have to rely on their in-house sales teams. In some cases, a panelist said, advertising agencies tend to choose outlets that offer bigger discounts rather than better demographics.

Furthermore, heavily subsidized state media outlets continue to undersell their private counterparts competing for advertisements. Many companies owned or controlled by the state face pressure not to advertise in outlets critical of the government. Businesses and non-profit organizations are also required to publish legal notices in state-owned newspapers.

Government subsidies are only granted to state-owned media, either in the form of direct funding or tax breaks for state-owned television channels, both detailed above. "Advertising is being channeled to state-owned media and the government does use subsidies to influence editorial policy of state outlets. Independent media have nothing to do with that," a panelist claimed.

Use of market research also remains limited. Professional polls, surveys, or focus groups are unaffordable to most outlets, except a small group of big state-owned broadcasters. Still, some private media organizations conduct their own market research and use this information for strategic planning and to better meet the needs of their audience, a panelist said. In most cases such in-house research incentives make use of questionnaires and phone calls or online polls. "Still, it is extremely rare when marketing research (both in state and independent media) becomes the determining factor in shaping editorial policy," another panelist argued.

For press circulations the industry relies on stated print runs only. Meanwhile, several private companies offer newspaper readership data, broadcast ratings, and Internet audience research. GEVS employs peplemeters to measure television viewing habits, and phone polls to produce ratings of 34 FM stations, 82 newspapers, and 18 magazines. The company also monitors advertising on television, radio, and in the press. NOVAK sells television and radio ratings as well as newspaper readership data obtained via diary panels and biannual face-to-face interviews. MASMI, amongst other things, researches media consumption and monitors television advertising. Ratings and audience data are available through subscription only and remain affordable only to big advertising agencies and large media organizations. Some generalized information on media audiences is sometimes available from Zerkalo-Info and ISEPS research companies.

Panelists praised Gemius, an Internet research firm, for its online audience measurement data that includes ratings and audience profiles. For its research and ratings Gemius integrates offline research, site-centric measurement, pop-up surveying, and user-centric measurement. Websites receive demographics of their audiences free of charge while site ratings and some technical data are available online. In 2010 key advertising market players agreed to rely on Gemius data for online media planning. Online ratings are also available from Akavita.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Belarus Objective Score: 1.22

Capacity building and supporting institutions remain weak and infrastructural facilities are politicized and insufficient to support independent and pluralistic media. Still, one of the panelists argued, "In general, the situation in this sector is more diverse than in areas directly related to ideology."

Amongst trade associations, panelists mentioned only United Media, an association of 13 private regional newspaper publishers that works to promote innovation via exchange of ideas, experience, and training opportunities to help its members grow and become more efficient as businesses. Elsewhere, almost 100 cable operators and television broadcasters are members of the Telecommunications Industry Union (TIU). It works to liberalize the telecommunications market and represents its members' views when the government proposes telecommunications laws. For example, telecom companies lobbied for the possibility of direct interconnection of networks between providers rather than via Beltelecom, a state-owned telecommunications monopoly. In December 2011, TIU organized a telecommunications conference that discussed industry trends related to television and radio broadcasts, operation of networks, and Internet technologies. The biggest Internet service providers and mobile phone operators are members of Belinfocom, an association of information and communication technologies organizations.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

It also works to promote the telecommunications industry and protect its members through lobbying activities. In general, the government tends to cooperate mostly with telecommunications industry groups, possibly because it relies on their technical expertise or because officials maintain closer ties with their former colleagues, many of whom are now employed by telecommunications companies, one of the panelists said.

Two associations of media professionals operate in Belarus. The Belarusian Association of Journalists (BAJ) has around 1,000 members and more young journalists are joining, a panelist added. Most BAJ members work for private media outlets. The association seeks to promote media freedom, professionalism, and ethical standards. Core membership services include legal advice and representation, as well consultancy and trainings. The BAJ publishes the quarterly journal *Abajour* and runs a website popular among journalists that aggregates industry news and advice, offers information about trainings and contests, and hosts a journalism jobs board and experts database. The association has been conducting monitoring of press freedom violations since 1998, but it often comes under pressure over its efforts to protect press freedom and rights of the whole of the journalist community rather than just protect its members.

The government-controlled Belarusian Union of Journalists (BUJ) brings together more than 2,000 media workers representing state-controlled outlets. Editors of big state-owned newspapers and the deputy information minister dominate its board and secretariat. BUJ similarly claims it works independently to protect press freedom, promote the industry, and defend rights of its members. The union also offers networking and training to its members. Panelists doubted the union was efficient in protecting journalists' rights. They can only recall letters and resolutions condemning the European Union's travel ban on several Belarusian editors and journalists. Both organizations unite rank and file journalists as well as editors and media executives, but the latter tend to play the major roles. Thus, in case of employment-related disputes, the rights of ordinary reporters can hardly be protected, one of the panelists argued.

NGOs remain marginalized. In 2011, a few embattled human rights groups came under fire over providing legal and practical support to victims of government abuses and acting as a key source of information about rights violations. Most notably, Ales Bialiatski, founder of Viasna, one of Belarus' leading rights organizations, was sentenced to four-and-a-half years in prison and confiscation of property over alleged tax evasion. He was arrested in August after Polish and Lithuanian authorities provided data about his overseas accounts apparently used to accumulate funds

coming from foreign donors. Viasna was deregistered in 2003 and operated unofficially ever since as Belarus' government repeatedly blocked his attempts to obtain legal status.

Still, those few surviving rights groups do monitor and publicize cases of violations of journalists' rights and sometimes provide legal assistance. One of the panelists expressed his concern that legal representation was becoming a sore point for private media critical of the government. He recalled that lawyers who protect opposition political prisoners came under pressure in 2011 and some of them even had their licenses canceled. As a result many advocates tend to avoid politicized cases.

There are a handful of other non-profit groups—some registered as NGOs, others as for-profit companies or operating without registration—working to support media outlets. Their services include legal advice, technical assistance, capacity building via trainings, and organizational development. However their resources are stretched thin and thus few media outlets benefit from such assistance. Moreover they try to operate with a low profile so as to steer clear of government repression. As well, NGO access to foreign funding is restricted and requires approval by the government, and use of unregistered foreign aid is criminalized.

Journalism degrees are available via traditional on-campus programs or distance learning from both domestic and foreign universities. Most notable is the Journalism Institute at the Belarusian State University in Minsk with about 1,500 students. The institute offers majors in print, broadcast, and web journalism, as well as in media management, editing, and international journalism. Panelists praised its technical facilities yet criticized its archaic curriculum. Although it provides for six months of hands-on internships, graduates gain few practical skills, one of the panelists argued. According to some reports, students still have little access to the state-of-the-art television studio that was set up three years ago. Instead, commercial programming and most notably a lottery show are produced there. Student-run media is limited to a monthly newspaper (circulated in 70 copies and online in PDF) and a web site. Both tend to concentrate on student life and the journalism institute. Meanwhile, the institute cooperated with foreign media development organizations, most notably with FOJO, a Sweden-based media institute.

State universities in Homiel, Hrodna and Viciebsk, as well as several private institutes in Minsk, offer similar journalism programs. Training in regional institutions is in many cases offered by faculty who have never worked as journalists and thus are even less practice-oriented, according to a panelist.

As a result, after a couple of semesters some students try to relocate to the journalism institute in Minsk.

Discussing foreign study opportunities, panelists first of all mentioned the European Humanities University (EHU), once a leading Belarusian university now in exile in Vilnius, the capital of Lithuania, just 20 miles from the Belarusian border. Around a quarter of all its students study for free, for others annual tuition fees are below \$2,000. EHU has around 200 full-time and almost 500 distance-learning students divided amongst three majors: mass communication and journalism, visual culture (cinema, television and Internet), and design and visual media. In November 2010, IREX Europe in partnership with BBC Media Action opened a multimedia training facility for EHU's Department of Media and Communications. The facility includes a purpose-built digital television studio, a radio studio, and a newsroom. In addition, the project provides for training of faculty and students. The latter are expected to receive practical training in television broadcasting, radio, print, and modern multimedia journalism by producing regular news reports. EHU students also publish their own newspaper and gain experience during internships with foreign media and private media in Belarus, one of the panelists added. EHU does not offer master programs in journalism, so graduates have to choose majors in culture studies or go to other universities.

Unfortunately, very few graduates come back to Belarus to work as journalists. "Every year 30 graduates receive bachelor's degrees in journalism, yet none of my colleagues have seen them," a panelist said. Moreover, another panelist argued that the state media would not recognize EHU's journalism diplomas since Belarus' government views the university as a political project. Another panelist cited a poll, conducted by EHU's alumni association of 2011 graduates—not necessarily with journalists degrees—that suggested only 25 percent of them returned to Belarus.

Separately, there are several scholarship programs funded by foreign governments.

A variety of short-term training opportunities are available from both local and foreign organizations, ranging from seminars and workshops to online courses, study tours and in-practice training. Most of them are offered only to non-state outlets and tend to target newsroom staff rather than technical specialists, a panelist said. Although at times training opportunities seem to be plentiful, coordination between media development projects is insufficient, leading to overlapping and duplication of activities. Sometimes trainings are announced on short notice, making it difficult to plan participation and send people who would benefit most, another panelist complained. The panel differed on the efficiency of study tours abroad. Some participants doubted

knowledge and skills gained in different media environments would be readily applicable in Belarus. Another panelist, a regional editor, said he found hands-on in-house trainings by visiting practitioners to be most efficient and less time consuming. In most cases trainings are donor-funded and thus offered for free; sometimes participants or their outlets cover domestic travel costs. Paid-for courses are available from the Journalism Institute at the Belarusian State University. They last four to ten days and cover 15 different topics from newspaper and broadcast journalism to advertising, media management, and website promotion.

Printing facilities are monopolized by the state. Although there are several privately-owned printing firms, they remain under tight governmental control and thus are similarly politicized.

In principle, newsprint sources are not monopolized. Yet dozens of private papers faced restricted access in July 2011 when Belarus' only newsprint factory stopped selling to non-state outlets. At the same time newspapers were unable to import newsprint themselves, as they could not convert Belarusian rubles into foreign currency because of the government-imposed restrictions on the currency market. As a result they had to pay exorbitant prices, a panelist said. Meanwhile, the locally produced newsprint is still of poor quality, a panelist argued. In October 2011, a state-owned printing firm in the city of Brest informed its clients it would not use standard newsprint because it had been causing breakdowns of its high-speed presses. Outlets were advised to purchase improved, i.e. more expensive, newsprint. Other big printing companies adopted similar practices, according to media reports. At the same time many magazines prefer to place their orders with printing companies in Russia or Lithuania because of much better quality and lower prices.

Access to distribution channels remains a sore point, both for print and broadcast media, a panelist claimed. Most of the press is sold via Belsajuzdruk, a state-owned network of around 1,500 newspaper kiosks, managed by the Ministry of Information, and postal service Belposhta (almost 3,800 post offices and kiosks), owned by the Ministry of Communications and Informatization. Around a dozen private newspapers have been banned from these networks since 2005. Some regional outlets respond to this difficulty by running their own distribution incentives offering subscriptions and street sales of newspapers.

Belarus' government controls broadcast facilities and most of them remain state-owned. Some private television and radio stations own broadcast equipment and cable networks, but hard-to-obtain licenses are needed to operate them.

The telecom infrastructure is almost entirely state-owned and dominated by Beltelecom, a state company. Beltelecom controls international Internet traffic and interconnections of domestic Internet service providers. The same arrangement is in place for phone operators. Almost 60 Internet service providers operate in Belarus and in most cases they own their last-mile networks. With about 1.1 million ADSL subscribers, Beltelecom is the country's biggest Internet provider. Additionally, more than 400,000 subscribers use its IPTV service. Its near-monopolistic hold pretty much everywhere outside Minsk and some bigger cities turned out to be to the benefit of users, one of the panelists argued, as the company kept Internet fees low. It sells two-megabit Internet subscriptions without a traffic cap for less than \$10 a month. Other providers, therefore, had to keep their fees in line.

Meanwhile, by the end of 2011 more than 60 percent of Belarusian Internet users used broadband connections, around 12 percent used mobile Internet, and about 9 percent used dial-up connections, according to Internet research company Gemius. The mobile phone penetration rate is 113 percent of the population and mobile Internet is available everywhere in the country, industry reports said. At the same time, all Internet service providers are supposed to restrict access for state-owned organizations, educational institutions, and libraries to websites on government's blacklist.

Hosting is another problem. As required by a presidential Internet regulation edict adopted in 2010, all companies that sell goods or service via the Internet must use domestic hosting and .BY domain names. While quality of hosting services remain poor, fees are at least two times higher than in Western Europe or Russia, according to a panelist. As a result, popular news websites or those offering a lot of heavy content like streaming video or flash have to either pay those exorbitant fees or employ traffic balancing solutions so that their non-Belarusian users are redirected to mirrors of those websites hosted abroad.

List of Panel Participants

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 an article, "Discrediting the Republic of Belarus," that provides for criminal liability for giving international organizations "false information" about the situation in the country. Human-rights groups, both domestic and international, believe the article's vague wording makes it possible for the government to detain for up to six months anyone reporting negative information or to imprison them for up to two years.