Police used a water cannon against both protestors and journalists covering the stand-off, damaging professional equipment. According to official data, at least 14 journalists, camera operators, and photographers were injured while covering the police operation.

ARMENIA

ARMENIA

Suspense built in Armenia throughout 2015 for the year's crowning political event: a referendum on constitutional reforms. The referendum would essentially convert the governmental system from semi-presidential into a parliamentary republic, depriving the president of his main powers and rendering him a ceremonial figure. State authorities cited the ever-increasing need to enhance the political system and strengthen the opposition as justification for the reforms. However, the opposition and many citizens saw the move as an attempt to perpetuate current president Serzh Sargsyan's "reign" after the end of his second (and last, according to the old constitution) term in 2018.

The referendum was held on December 6, 2015 and passed with 66 percent of the vote, although the watchdog groups Citizen Observer Initiative and European Platform for Democratic Elections pointed to election violations such as ballot stuffing, intimidation, violence, and vote-buying and qualified the referendum as illegitimate. The current president will keep his full power until April 2018, after which the new constitutional provisions on presidential entitlements and powers will come into effect. Despite Sargsyan's public statements that he will not seek a top government post at that time, many political observers are certain that he will be able to remain in actual power as the head of the ruling Republican party (assuming it preserves its majority in the next parliamentary elections).

An otherwise calm climate for journalists was marred by violence during the summer rallies against proposed electricity rate hikes—a clash that became known as "Electric Yerevan." Protesters blocked one of the capital's main streets, Baghramyan Avenue, barricading themselves with garbage cans and staging 24-hour sit-ins for days. Police used a water cannon against both protestors and journalists covering the stand-off, damaging professional equipment. According to official data, at least 14 journalists, camera operators, and photographers were injured while covering the police operation. In a statement to the press on June 23, 2015, Interior Minister Vladimir Gasparyan apologized for police actions and said that authorities would launch an investigation, also promising to reimburse journalists for their ruined equipment.

The switchover from analog broadcasting to digital was postponed yet again, from July 2015 to January 2016, with officials citing the need to provide socially vulnerable segments of the society with the decoders needed to receive digital broadcasting through analog televisions. In the end, some 48,000 people will receive free decoders. It is not yet clear when and how these decoders will be distributed, but according to the head of the National Commission on Television and Radio, analog broadcasting will not be shut down until all the decoders are in place. Moreover, the regional television stations still lacking licenses for digital broadcasting will continue broadcasting in analog mode for the time being and will not be shut down.
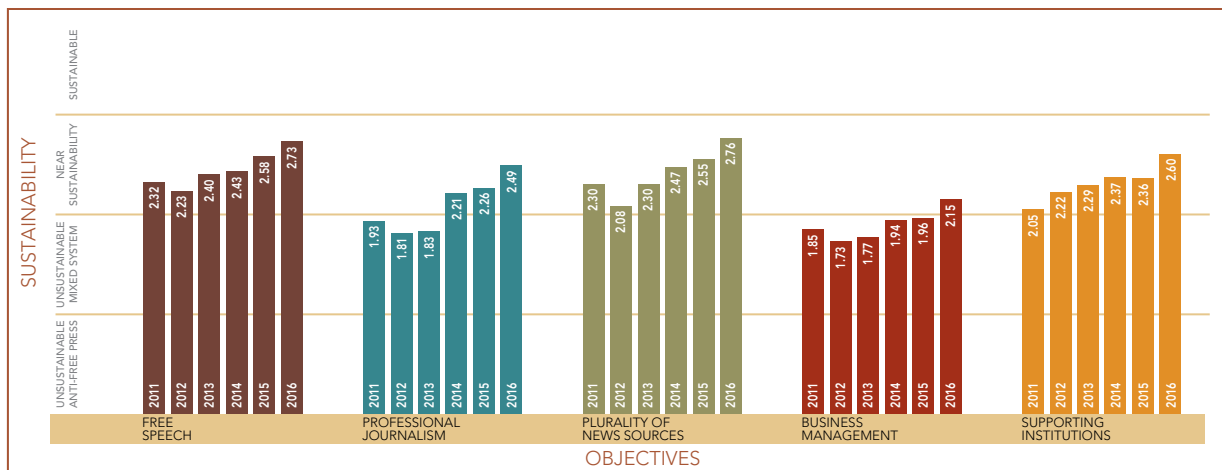
ARMENIA at a glance

GENERAL

> **Population:** 3,060,631 (2014 est. *CIA World Factbook*)

> **Capital city:** Yerevan

> **Ethnic groups (% of population):** Armenian 98.1%, Yezidi (Kurd) 1.1%, Russian 0.5%, other 0.3% (2011 est. *CIA World Factbook*)

> **Religions (% of population):** Armenian Apostolic 92.6%, Evangelical 1%, other 2.4%, none 1.1%, unspecified 2.9% (2011 est. *CIA World Factbook*)

> **Languages (% of population):** Armenian (official) 97.9%, Kurdish (spoken by Yezidi minority) 1%, other 1% (2011 est. *CIA World Factbook*)

> **GNI (2014-Atlas):** $12.08 billion (World Bank Development Indicators, 2016)

> **GNI per capita (2014-PPP):** $8,450 (World Bank Development Indicators, 2016)

> **Literacy rate:** 99.6%; Male 99.7%, Female 99.5% (2011 est. *CIA World Factbook*)

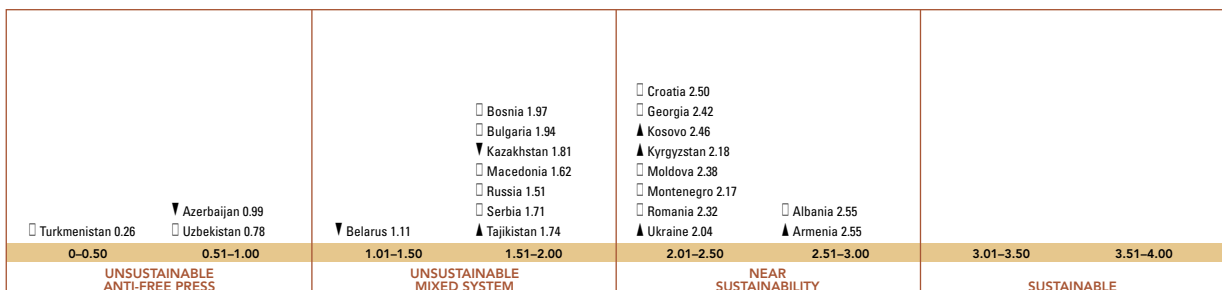> **President or top authority:** President Serzh Sargsyan (since April 9, 2008)

MEDIA-SPECIFIC

> **Number of active media outlets:** Print: over 36; Radio stations: 20; Television Stations: 13 stations in Yerevan, 3 Russian relay channels; 26 television stations in regions; Internet news portals: over 200

> **Newspaper circulation statistics:** Average reported circulation is between 1,000-3,000

> **Broadcast ratings:** Top three most popular television stations are H1 (public), Shant TV (private), Armenia TV (private) (AGB Nielsen)

> **News agencies:** ARKA, Armenpress, Arminfo, MediaMax, Photolur

> **Annual advertising revenue in media sector:** $60 – $70 million, estimated by panelists

> **Internet Users:** 1.3 million (2015 est., CIA World Factbook)

MEDIA SUSTAINABILITY INDEX: ARMENIA

Bar chart — SUSTAINABILITY axis (SUSTAINABLE, NEAR SUSTAINABILITY, UNSUSTAINABLE MIXED SYSTEM, UNSUSTAINABLE ANTI-FREE PRESS). OBJECTIVES across bottom.

FREE SPEECH: 2011 2.32, 2012 2.23, 2013 2.40, 2014 2.43, 2015 2.58, 2016 2.73

PROFESSIONAL JOURNALISM: 2011 1.93, 2012 1.81, 2013 1.83, 2014 2.21, 2015 2.26, 2016 2.49

PLURALITY OF NEWS SOURCES: 2011 2.30, 2012 2.08, 2013 2.30, 2014 2.47, 2015 2.55, 2016 2.76

BUSINESS MANAGEMENT: 2011 1.85, 2012 1.73, 2013 1.77, 2014 1.94, 2015 1.96, 2016 2.15

SUPPORTING INSTITUTIONS: 2011 2.05, 2012 2.22, 2013 2.29, 2014 2.37, 2015 2.36, 2016 2.60

MEDIA SUSTAINABILITY INDEX 2016: OVERALL AVERAGE SCORES

0–0.50	0.51–1.00	1.01–1.50	1.51–2.00	2.01–2.50	2.51–3.00	3.01–3.50	3.51–4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

Scores listed:

Turkmenistan 0.26 (0–0.50)

Azerbaijan 0.99 ▼, Uzbekistan 0.78 (0.51–1.00)

Belarus 1.11 ▼ (1.01–1.50)

Bosnia 1.97, Bulgaria 1.94, Kazakhstan 1.81 ▼, Macedonia 1.62, Russia 1.51, Serbia 1.71, Tajikistan 1.74 ▲ (1.51–2.00)

Croatia 2.50, Georgia 2.42, Kosovo 2.46 ▲, Kyrgyzstan 2.18 ▲, Moldova 2.38, Montenegro 2.17, Romania 2.32, Ukraine 2.04 ▲ (2.01–2.50)

Albania 2.55, Armenia 2.55 ▲ (2.51–3.00)

CHANGE SINCE 2015

▲ (increase greater than .10) ⬜ (little or no change) ▼ (decrease greater than .10)

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.

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

OBJECTIVE 1: FREEDOM OF SPEECH

Armenia Objective Score: 2.73

Again this year, the panelists agreed that constitutional provisions and laws protect and guarantee free speech on paper, but the reality is starkly different—with minimal, albeit slightly improved, enforcement. "It's the journalists who coerce [the authorities] to enforce these laws; they have become more courageous," said Anahit Nahapetyan, owner and editor-in-chief of *Tufashkharhi Arorya* in Artik. Samvel Martirosyan, a blogger and IT security expert, said that journalists are more familiar with the laws than the authorities, and in confrontations with police, try to educate them. "Most of the time, the police officer himself doesn't know that there are constitutional provisions, norms," he said. However, a single call from a powerful leader often can overrule the finest law or constitutional provision, and these provisions are more about image than serving their purpose of fostering and guaranteeing free speech.

Still, Armenian citizens value the freedom of speech more and more, with soaring demand for uncensored speech and information. "Media is a live organism," observed Suren Deheryan, chair of Journalists for the Future NGO. "It evolves together with the evolution of society. And at the moment, it reflects the problems, the evolutionary stage of today's society, with low media literacy. We're in a transitional period, developing and growing together."

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.

Journalists have become more consistent in their efforts to fight for their right to free speech. Melik Baghdasaryan, owner of Photolur photo news agency, said that the younger journalists are leading the way. "I'm a person with Soviet heritage, and I wouldn't be as daring in my work as these young guys are. Things change. A lot has changed, and will change even further. This is a new, more daring and knowledgeable generation."

Whether or not a result of these efforts, the press indeed has become more free, and authorities permit more exercise of freedoms, the majority of panelists agreed. Editorial frames are somewhat expanded to allow for more liberal views and opinions. However, the panelists pointed out that this type of free speech has its limits, because it can be curbed in an instant on the government's whim. An example is the aforementioned police handling of the 2015 Electric Yerevan incident.

These violations cause public uproar, with people expressing their outrage through "Facebook democracy." They post various indignant comments that serve as a cathartic tool, as a platform for letting off steam, scolding the government and others to their hearts' content. But the energy quickly fades out and the protests end right there.

The judiciary hardly ever acts independently in dealing with free speech issues. When a case does address such issues, a cynical public perceives the verdict as a direct order from the government, fairly or not, according to the panelists.

The law generally respects the confidentiality of news sources, and so far, no Armenian journalists have been imprisoned over not revealing sources. However, they have not been immune from pressure to reveal names, as previous MSI studies have shown.

Only broadcast media need licensing in Armenia. As in past years, the panelists agreed that issuance of licenses by the National Commission on Television and Radio is not fair, competitive, or apolitical. Essentially, the commission must pre-approve a media outlet to win a broadcasting license. There is also a perception among panelists that title transfers, acquisitions, and mergers of broadcast media are controlled tightly and pre-approved by those in power, and have been for a number of years. In 2015, the commission did not issue any new tenders, and therefore it approved no applications.

The market entry and tax structure for media remain the same as other industries. An owner just has to set up (with the specified minimum capital) a regular Ltd./LLC (limited liability company) and start operating. Print media are still exempt from value-added tax for distribution.

The indicator for crimes against media professionals, citizen reporters, and media outlets remained one of the lowest rated by panelists within Objective 1 this year, given the harsh police reaction to the public unrest during Electric Yerevan. Armine Gevrogyan, a journalist at Armenian Public Radio, recalled her experience of being hit by water cannon while she was covering the sit-in at 5:00 one morning. The police removed some reporters from the scene and deposited them in other parts of the city and in suburbs. According to the panelists, the 10 or so press members that resisted while being taken away suffered bruises and minor injuries.

Commenting on crimes against journalists, Martirosyan said that cases have decreased in quantity, but the outrageous nature of the events at Electric Yerevan were unprecedented in the past decade. Then again, he said, these were milder versions of the many crimes in the years before then, when police used clubs and tear gas and flat-out beat journalists. "We have to note… that it was nothing like 10 years ago, when reporters were severely injured and placed in hospitals," he said.

Baghdasaryan explained, "The 'order' [to the police from the government] was to take them away, remove them, and not beat them." Martirosyan agreed, saying that the authorities wanted to disperse the protesters away from the public eye, unwitnessed by the media. Baghdasaryan added that journalists' camera storage data was professionally erased and could not be recovered.

"This was a bad precedent, because if so far (in the last 4-5 years) we've dealt with incidents involving individuals—members of parliament, public officers, governors, etc.—this marked a centralized, organized government approach, which has had a backlash on the country's reputation," said Vahe Sargsyan, a moderator at Lratvakan Radio and a freelance journalist.

Interior Minister Vladimir Gasparyan issued a press statement on June 23, 2015, apologizing for police conduct and saying that the government would launch an investigation. The authorities followed through on the promise to reimburse journalists for their police-damaged equipment, but never had to answer to the public over the use of taxpayer funds for the replacements. Several media members involved in the events filed lawsuits, which have now merged into one case that is still in process. But the panelists said that they expect the case to be closed, and the offenders will go unpunished or with nominal fines or reprimands—the typical result in such scenarios.

The law does protect the editorial independence of public media. But as with the constitutional provisions for free speech, state press freedom is on paper only. In real life, no panelist suffers any illusion that these laws are actually ever enforced, nor that the public media actually serve the interests of the public. Instead, the public media have acted consistently as a quite obedient tool in the hands of authorities. "It is only for the cultural content and programming that one can consider the public television [truly] public," said Nelli Babayan, a reporter at *Aravot* daily newspaper. Martirosyan said that for the most part, the government does not need to interfere with the editorial content of public media, because editors know exactly what content is expected to please the government.

Still, the panelists pointed to some improvements in the balance of coverage. Outlets feature more impartial and nuanced reporting than just a few years ago, when public media openly mocked the opposition. The panelists noted, however, that some people (and not necessarily political leaders, but just regular public figures) are still shut out from public television appearances because of views that do not favor the current government.

In contrast, the majority of the panelists agreed that public radio represents what could be considered a model public media outlet, allowing for a wide spectrum of views and opinions and providing balanced, impartial, and neutral coverage.

The public radio audience is limited, however. The signal is broadcast only through FM frequencies, and since June 2014, listeners have been deprived of the Soviet-era cablecast known as "Wall Radio," which used to reach every single apartment. The official reasons for stopping the service were that the cable network was in the red, the infrastructure was very old and worn out, and upgrades would not be worth the significant investment required. While the percentage of the population with access to FM radio is unknown, the service is free of charge—anyone with FM receiver can access it through terrestrial broadcast.

The panelists also noted that the role of the public television station has diminished, and ratings have dropped over the past couple of years. The changes have followed some major shifts by advertisers: advertisements have been banned from public television, and some key programs have switched to the privately owned Armenia TV.

Libel has been a civil code issue since May 2010. Although it first triggered a series of lawsuits seeking fat payouts, the courts have settled down, with cases reduced to an insignificant number. In 2015 one such case emerged because of a story published in *Aravot*. The article implied that a nightclub in one of Yerevan's underground passages was, in essence, a strip club, and the adjoining bar a

motel frequented by prostitutes, to the annoyance of the residents. The club owners sued the newspaper for libel and demanded AMD 3 million (roughly $6,400)—AMD 1 million from the journalist and AMD 2 million from the newspaper. The first hearing took place December 5, and the court ruled that the burden of proof should lie with the plaintiff. The case is still winding through the courts, hearing after hearing. The panelists said that they are not aware of any other major cases.

The panelists said that public information has become considerably easier to access than in previous years. However, the situation is not yet perfect. Frequently, officials will bounce around queries, answer in written form, or demand that journalists submit the question in the written form, then give an unclear response in writing. This back-and-forth process is a real obstacle to prompt and accurate reporting, Deheryan said. "They have now become more sophisticated in avoiding giving straight answers. You give them a specific question and they give you vague, blurred answers that do not get to the point of the issue."

Gayane Abrahamyan, a journalist at eurasianet.org and Yerkir Media TV, mentioned that officials still use a discriminatory approach based on perceived political ties of an outlet, implying that pro-government and public media still win easier access. The panelists again crowned the municipal government of the capital city, Yerevan, as one of most obstructionist bodies. Babayan noted that apparently the Ministry of Finance is softening its resistance, when it was previously among the most challenging. Pap Hayrapetyan, the editor-in-chief of *Sevan* newspaper, said that it is still very difficult to access information outside of the capital, in *marzes* (administrative divisions, provinces). "For a month and a half, we could not find out who had won the tender for road construction in Sevan," he said.

Since the collapse of the Soviet Union, Armenian laws have not restricted media outlet access to or use of local and international news and news sources. Intellectual rights, especially of international news sources, are often violated. However, more respected outlets are increasingly curbing this practice by at least crediting the original content source. Others will blur the original ownership of the content through translating it and making it "their own," never mentioning from where the original article came. Also lamentable is the situation with graphic content. Outlets will copy photos without any mention of the original source, and when they are confronted, they just say that they consider the source to be Google, according to the panelists.

Entry into the journalism profession is free and not restricted in any way.

Armenia Objective Score: 2.49

According to panelists, professional journalism has seen some improvement across the board, and the overall quality of journalism has risen slightly as compared to the previous year. The trashiest media outlets have decreased both in numbers and perceived validity. However, the panelists noted that outlets should be considered individually when assessing today's Armenian media field, because there is a wide spectrum of different quality media. "I am against generalizations, because the quality varies dramatically. It's like comparing a pear with a car," Martirosyan said.

The more respected outlets try to instill the culture of fact-checking, consulting a variety of relevant sources, avoiding subjectivity, and getting all sides to a story. All the reporters present on the panel asserted that when being faced with the choice of speed or accuracy, they choose accuracy, and they check at least two sources before posting an article. However, other outlets and reporters might actually choose speed. Often they have to come up with a certain number of articles per day, or they are compensated based on the number of articles or stories generated, or they have to compete in speed with other outlets. Abrahamyan commented, "At armenianow.com, for example, they never generate content for the sake of just filling the website. They publish fewer, but well-written, processed and thoughtful, meaningful stories."

Babayan said that such articles are not in high demand, however. "You work on a story for days, weeks, to make

---

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).

it thorough, quality content, but the outlets posting predominantly news on car accidents, casualties, murders inevitably garner more readers/viewers." She stressed that if society's interest in this type of news does not decline, poor-quality, sensational journalism will persist. Martirosyan argued that this need will never cease, so the important thing is to separate the "yellow" press from quality journalism. Those outlets that want to be considered quality journalism providers should resist the temptation post yellow content just to garner more views or reads, he said.

Producing legitimate content is even harder in radio format. "If in print you can find sources, information from here and there, patch it and make it a story, in radio you cannot do that. And you have to find/generate a 'speaking' source," said Sargsyan. In this respect, radio is cleaner of plagiarism and bad quality journalism, he added. Gayane Mkrtchyan, a reporter at armenianow.com and iwpr.net, pointed out that "it is a lot easier to convince [an interviewee] to speak for the print media than to make him speak before a camera or a microphone."

The panelists noted that press conferences turn into dialogues between one or two briefed reporters and the person giving the press conference, while the others (usually inexperienced, beginner reporters and interns) have little idea what is going on. "And it is after press conferences like these that unverified data/information goes straight to the public. I wish at least an editor looked at it before posting," said Mkrtchyan.

The Armenian media sector has no formal universally recognized ethical standards. Although the Yerevan Press Club has had a code for years, the vast majority of media outlets do not adhere to it. "Our public hasn't evolved to accept any standards," Martirosyan said. Deheryan specified that "those outlets that have been set up for the sole purpose of serving political interests of this or that group do not even bother with ethics."

On the other hand, many legitimate outlets have developed and adhere to their own sets of ethical standards, which are by far more harmonized with globally accepted practices. The especially progressive outlets have even developed ethical standards on journalist activities online, e.g. comments, statuses on Facebook, etc.

Martirosyan also raised the issue of controversial events, and the fact that the media have not yet defined a set of ethical standards for covering them. The panelists recalled an instance of a newspaper publishing and posting online a photo of a murdered bank employee without blurring his face. His relatives and bank colleagues had to disseminate an announcement asking the outlet to cover his face. Martirosyan also gave the example of tert.am, which posted

a brutal ISIS execution video at 7 p.m., when children could be watching. The panelists also recalled the media's handling of a recent detainment of a supposedly armed group in one of the capital districts. Many outlets failed to abide by the presumption of innocence and used qualifiers that would be appropriate only after a court verdict. "You can actually assess a media outlet's degree of credibility and professional quality by running it through these kind of acid tests," Deheryan commented.

Few media make clear distinctions between news and advertorial reporting, quite often presenting advertorials as news. Only savvy viewers and readers can detect advertising footprints.

Accepting gifts also remains a debatable topic among some journalists. Some panelists recalled recent experiences of trying to arrange interviews with members of parliament, with the members of parliament asking how much they should pay for the interviews. "It's absurd to a point that they do not even imagine a situation when they should not pay for an interview," said one of the panelists, who asked to remain anonymous.

The situation with plagiarism has improved. Fewer outlets copy content today, and if they do, they basically adhere to the law on copyright and cite the original source. However, media outlets steal photos every now and then, most of the time without even the watermark of the source.

Self-censorship still thrives. The panelists agreed that very often, self-censorship is so ingrained that it has become somewhat subconscious. One of the panelists recounted facing censorship demands after switching from a media outlet based in the West to a local outlet. "I had to resist the demands and did the opposite, because I caught myself starting to censor myself. I was able to do this (resist the censorship, thanks to holding a different job, too), but many others can't because they'll lose their job," the panelist said. Another panelists shared the example of a young journalist who did not record a part of a press conference because she thought it would be censored. However, when the editor learned that, he was amazed, as they had aired even stronger content than that.

Journalists cover key events and issues, and hardly any topic is off limits—at least by all outlets. For example, television might not pick up a story, but a website might; if the issue is of public interest, it will eventually and surely be covered. "Even previously taboo or near-taboo topics such as sexual minorities, domestic violence, the church (controversial issues with the church) are no longer taboo, because the field is very open today," Abrahamyan said.

However, television outlets might delay coverage of some urgent issues. The panelists recalled the media handling

of the murders of an entire family by a deserter from the Russian military base in Gyumri, Armenia's second-largest city. Public unrest followed the murders, but television stations were late to cover the fierce protests. Online media, though, streamed live from the scene.

Pay levels for journalists and other media professionals vary greatly, based on factors such as the type of outlet (print vs. broadcast, television vs. radio), the location of the outlet (capital vs. regions), the position, and the experience of the individual. But on the whole, media salaries are not that much different from other industries or the private sector. Mkrtchyan said that "kids" like journalism interns or new graduates write press releases for as low as AMD 500 (around $1) each. In regions, salaries are much lower in all job sectors, including the media.

And as in years before, the most vivid indicator of the wage issue is the journalism field's gender composition. Women prevail dramatically over men, who switch to other jobs because they cannot support their families with such low pay rates. Most journalists have to combine work across several outlets. Babayan mentioned one journalist that has said that she will never lower herself to engage in corruption despite her low pay, while others might say "why not?"

Entertainment programming eclipses news and information programming—which, media outlets claim, does not garner high ratings. A telling example is Armnews TV, which had been a 24-hour news channel, much like CNN. In 2015 it transformed into a regular Armenian channel, with lots of entertainment programming and only the usual top-of-the-hour newscasts that other channels air. "The advertisers would rather place their ads in soap operas than in news programming," said Armine Gevorgyan, a journalist at Armenian Public Radio.

Facilities and equipment for gathering, producing, and distributing news are efficient enough to serve their ends. "Even if your outlet doesn't have a video camera, you can shoot it on your own phone and send it to your media outlet through Internet, which I have done many times before," said Varduhi Stepanyan, a freelance journalist.

All the panelists agreed that niche reporting exists but is critically minimal. Journalists did not conduct any truly significant, thorough, traditional investigations in 2015. Such reporting is too expensive, as are other niches. Television channels air a couple of programs on sports, economics, business, and health. But few, if any, journalists specialize in only one area; they are required to be versatile creatures. "Needless to say that as a regional media outlet, all sorts of niche reporting is done by our limited staff—we're both the economists and the investigative reporters," summarized Arevhat Amiryan, editor-in-chief of *Vorotan*.

OBJECTIVE 3: PLURALITY OF NEWS

Armenia Objective Score: 2.76

Many news sources abound, allowing consumers to check one story against another, but the increasing number of media outlets has not brought about qualitative changes. "The quantitative multitude (but not diversity) of the media outlets has devalued their significance. It's just like when you lecture your child to an excessive extent. Your 'mentoring' loses its weight, effectiveness, and significance," said Abrahamyan.

A few media outlets allow for multiple points of view in their editorial policies. During recent years, this MSI indicator has seen slight improvement—but because the overall number of more professional outlets is growing, not because the singular-viewpoint outlets have decreased.

Overall, Armenian media cover the various political viewpoints, although across different outlets instead of all within one. This broader coverage occurs more in online and print media than broadcast. "Those senior citizens that still watch the traditional television channels for news, and the Armenian expats living in other countries and watching primarily online media, have dramatically differing pictures of events and issues," Mkrtchyan commented.

Pre-elections campaigns are a different matter, though. Broadcast outlets strive to look balanced in presenting various political viewpoints because they are being

> **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.

monitored. Typically, the Yerevan Press Club is the monitoring authority. The club is given grants for this purpose by international donors, including the Open Society Institute. The monitoring often prompts changes in the media landscape, sometimes dramatically, panelists said. They gave the example of the outlets set up at election time for the sole purpose of touting a particular party, political force, figure, or government officer. "[Outside of these monitored periods,] the outlets that present plurality of news are few," Abrahamyan confirmed.

Facebook is another source of information for citizens. However, Facebook feeds blend stories from various outlets. Most ordinary users do not differentiate between the stories, especially when they are shared by friends and not posted by the outlet itself.

Emigration has had a positive effect on Internet growth. Now, even the more aged population has started using the Internet to communicate with relatives abroad, and at the same time, they have started reading and watching news online. Some senior citizens have even come to trust Internet news more than traditional sources. "Years ago, when I used to work for an online outlet, when I was telling people that our periodical was online, they used to say 'who cares about your Internet?' But now, things are quite different," Abrahamyan shared. Compared to last year's picture, online feeds of protests have almost doubled, from 15,000-20,000 to about 40,000 simultaneous viewers.

Since the collapse of the Soviet Union, citizen access to domestic and international media has not been restricted by law. The only technical restriction could pertain to the upcoming digitalization of broadcast media. However, as the result of a recent decree, the government will be providing approximately 48,000 socially vulnerable citizens with DVB converters (set-top boxes). The converters will allow for digital broadcast reception through their regular analog television sets. It is a mystery how they identified these 48,000; media experts have questioned the number. However, the prices for the converters are going down. Currently they can be bought for as low as AMD 10,000 (around $20).

Internet speed and quality can still be an issue outside the capital. Rural audiences have the choice of a few national broadcasters, satellite dishes, and local/regional stations. Digitalization promises a wider variety.

Public media are *de jure* independent of the state or ruling party, but *de facto* they are under full control of the government and are far from truly serving the public interest. Public television has seen a dramatic change in terms of reflecting the views of the political spectrum, presenting balanced and non-biased news programming.

But as mentioned in the indicators above, and according to some panelists, there still are black lists of people informally banned from appearing on public television. The public radio station, in contrast, is allowed significantly more freedom, and is much closer to following a public-service model, but its audience is considerably smaller.

In terms of educational and cultural programming, public television has experienced a dramatic improvement by introducing more and more of these kinds of shows. For example, many new social, cultural, educational, and analytical programs of public interest have emerged: *Public Auditorium, Art Studio, Artcanon, Taste of Armenia, Planet of Whys, Mothers' Club,* and *Mysteries of Armenia.*

On the other hand, according to the panelists, stations have seen a major shift since advertising was banned from public television last year. Their personnel and "advertiser-friendly" programming have migrated to other channels, taking their respective audiences along with them.

News agencies are now more of an anachronism than functioning institutions. Media outlets no longer need their services, since information is openly available with the rise of online media. The exceptions are photo agencies, agencies providing some in-depth specialized reporting and analytics, or international agencies offering original video footage. Baghdasaryan noted that his agency Photolur does sell its photos to media outlets, both local and international. "During the past year we supplied the international media outlets with our photos, and they were very satisfied with them," he said. Photolur provides photos free of charge to regional outlets, yet, copyright violations, whereby their photos are simply stolen without any attribution, are also frequent.

Private media produce their own news and information programming. Most media, especially television outlets, produce their own news content. Other outlets simply base their news on a print or online outlet's story. "Many radio stations that are primarily engaged in music broadcast just read the news from a website, cite the title of the online periodical or print media—I don't know, can we consider this as their own programming?" Deheryan asked. Some panelists also noted a tendency for television outlets to develop a story based on their articles in print or online media, and call them to ask for their contacts for the story.

Panelists agreed that the people in the media field know or at least have an idea of true media owners (not the nominal owners or directors). The average person, on the other hand, does not.

"When regular citizens read or watch this or that media outlet, they normally don't know who it belongs to, and

they take it as true information. They don't usually know what ends this or that article/coverage served," said Babayan.

Media outlet formal ownership is more or less transparent, but the real people or political forces behind it are left to be guessed, sometimes even by the media professionals themselves. "If amongst the television channels it [ownership] is more or less obvious, in [the] case of online media, it is very clandestine and vague," Abrahamyan said. "I've always wanted to know who is the owner of Hraparak, who finances it, who finances Zhoghovurd … So the online media field is less controlled, less clear, and therefore more dangerous. Because when you know the ownership of a particular television outlet, you judge the news through that prism; but in online media you don't know the ownership. Even I don't."

According to the panelists, one online outlet managed to get grants from an international fund, but when the funder learned that the outlet belongs to a person closely tied to Armenian authorities, it terminated the grant project.

Minority-language information sources are available to all those who need them. Armenian media always freely cover ethnic minority topics. Public radio airs programs in 14 minority languages, including Kurdish, Assyrian, Greek, Ukrainian, and Russian. Russian, Kurdish, Yezidi, and Ukrainian minorities also have their newspapers. Many online newspapers have their Russian (and English) sections as well. Media now cover issues concerning gender and sexual orientation, but conventional public interest is quite low towards these issues.

Normally, the media provide news coverage and information on local, national, and international issues. Citizens are able to get news and information about their hometowns, other regions of the country, and national and international developments. Media with a nationwide reach report on significant news from regions outside the capital.

But the panelists noted that this coverage is just not enough. This has been the case for several consecutive years, albeit with slight improvements and increases in reporting from regions. The news flow has improved mostly from just the larger towns of Gyumri and Vanadzor (Armenia's second-biggest and third-biggest towns). Local media outlets and journalists cooperate with the Yerevan or national media outlets and periodically supply news from their regions. Other than that, the news from regions is still underdeveloped.

The media outlets in smaller cities or regions produce news and information mostly about their local developments, as national and international news are covered to a sufficient extent by their respective media. As for the coverage of international news in state media, Abrahamyan said that "it is a matter of resources and putting in some efforts, which many fail to. And the recent developments in Ukraine clearly demonstrated this, when they were mostly presented by Armenian television outlets through the prism of Russian channels. The major part of the international news by television outlets are based on Russian channels."

Abrahamyan added that most of the staff at international news departments in television outlets are translators and not journalists. They lack the analytical skills needed to process the international news from English, French, and German sources and prepare it for the Armenian public.

OBJECTIVE 4: BUSINESS MANAGEMENT

Armenia Objective Score: 2.15

The overall economic state in the country has stagnated and declined slightly during the past couple of years. Naturally, these conditions have impacted the media sphere and other sectors. However, according to the panelists, the overall picture looks somewhat better than previous years. This year did not see breakthrough developments in sustainability or business management with the majority of media. "I don't know, do we have one single outlet in Armenia that is self-sustainable?" Babayan asked. But Amiryan and Baghdasaryan reported that their businesses have become self-sustainable, showing that there are exceptions.

Still, very few media companies could be described as efficient and well-managed enterprises. Only some media

> **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.

> The print media, meanwhile, are close to extinction. "I've talked to the editors and they claim that you have to maintain a circulation of around 40,000 to 50,000 copies to be able to be self-sustainable," Martirosyan said. The average newspaper circulation in Armenia is 2,000 to 3,000 copies.

outlets and supporting firms prepare and follow business plans that help them secure financing. Accounting and finance practices are normally brought in line by the requirements of local tax agencies. Media companies seldom hire trained professionals separately from editors and journalists to manage marketing and human resource functions. Such staffing is a privilege of probably only some broadcast outlets.

Many outlets are originally set up for purposes other than commercial gain. They are seldom viewed as a business opportunity, but rather as an important tool in shaping or following political agendas. These outlets put little effort into reaching self-sustainability—they serve a different end.

Online outlets also can hardly sustain themselves, given that the market and the economy have not yet evolved to that stage. "There is also one unfortunate phenomenon: the advertisers look not at the quality of the (online) media, but the hits and visits, irrespective of the quality of the content," Babayan explained.

The print media, meanwhile, are close to extinction. "I've talked to the editors and they claim that you have to maintain a circulation of around 40,000 to 50,000 copies to be able to be self-sustainable," Martirosyan said. The average newspaper circulation in Armenia is 2,000 to 3,000 copies.

As noted above, media do not receive revenue from a multitude of sources, risking giving one client undue influence over editorial policy. As mentioned above, many outlets are set up for the primary purpose of serving a particular political interest, party, or public official. This type of outlet has basically one source of revenue: its benefactor. Some of these outlets manage to take their chunk of advertising from the market, either through ties with those in power or through real market-driven forces. But these outlets are very few, and do not care much about advertising; they are dependent almost solely on financing from a few backers.

Many companies buy advertising in the media, and the key ones have not changed. They include banks, telecommunications providers, automobile dealerships, wine manufacturers, and home improvement hypermarkets. Large advertisers sometimes proactively silence the mainstream and influential media by placing advertisements in those outlets.

With last year's amendment to the law on television and radio, the public media are now banned from running advertisements. The exceptions are social or commercial advertisements during educational, cultural, scientific, or sports programming. At regional outlets, classified advertisements, holiday greetings, and congratulatory messages are common additions to commercial advertising.

Advertising agencies work with broadcast media for the most part, as their higher rates provide more return to the agencies. The Media International Service, which panelists labeled an informal monopoly in the field, now includes one more channel, Yerkir Media TV, in its exclusive distribution list. It already advertises on Armenia TV, ArmNews, A TV, and Shant TV. According to the panelists, the outlets using this sales house are barred from working with other agencies or directly with advertisers.

Most media advertising is focused on outlets in the capital, and generally advertising revenue as a percentage of total revenue is not in line with accepted standards. Media managers feel pressed to use more advertisements as the only substantial source of revenue. However, the previously excessive amount of television advertisements has been reduced to a reasonable volume.

Alternatively, some media (especially regional print) have to rely solely on subscriptions. Amiryan's newspaper, *Vorotan*, has discontinued retail copies and just kept subscriptions.

Armenia provides state subsidies, which are governed by law. Independent regional and/or minority-language print media are entitled to government subsidies. The amounts are minimal and panelists said that they do not view the funding a threat to editorial independence or the media market. Annually, AMD 500,000 ($1,025) is distributed to each of the subsidized outlets.

Armenia has two television audience measurement organizations: Telemediacontrol (working under the license of GFK), and AGB Nielsen Media Research. They provide ratings for outlets that subscribe to their services and are

not readily accessible to all interested parties. The ratings are produced for the national market and the capital market, not for individual cities.

For the majority of outlets, market research, if at all conducted, is done in-house. For example, most broadcasters survey informally through call-in shows. Third-party, high-quality professional research is very expensive, and Armenia has only a few respected and credible research organizations that media outlets can trust. "Who should you choose for conducting this research?" asked Abrahamyan.

Media outlets seem to be more interested in simple quantitative research than rigorous qualitative information, panelists said. Most strategic decisions are made based on the personal feelings of the outlet managers and owners, and not usually by information on audience demographics or preferences. As Babayan explained, "We measure the success/failure of our content by the activity/popularity generated by this or that story. When we see that a particular story garners more attention than the other, we try to cover more of that topic in the future."

In terms of circulation figures, there are no solid data to provide reliable information. Print circulation figures are so low that they are of little to no interest to advertisers or advertising agencies. More sophisticated online media track Internet statistics, but for the most part use Google Analytics. Even fewer outlets can process this data on a more in-depth level, limiting their need for statistics to just visits and hits. Or perhaps, panelists speculated, website owners do not want advertisers to have the more specific data, which would allow manipulation of the statistics by just showing a high number of visits. (Numbers can be inflated by using robots or by inexpensively bought non-target, irrelevant traffic.) But without tracking information such as traffic origin, bounce rate, average session duration of a page or specific article, pages read per session, average page depth, or new versus returning visitors, media outlets are not offering the data that could truly prove useful, for fear of losing their advertisers.

Martirosyan also mentioned similarweb.com, which provides website analytics and has the option of linking a personal account to a Google Analytics account. The link would make the information publicly available, provided, of course, that the owner wants to share it and has nothing to hide and nothing is being manipulated.

Armenia Objective Score: 2.60

Armenia has no acknowledged media trade associations. However, journalists have organized professional associations that work to protect rights and promote quality through training workshops, legal advice, etc. Some of the associations are the Gyumri-based Asparez Journalists' Club, the Yerevan Press Club, the Association of Investigative Journalists, and the Vanadzor Press Club.

Their effectiveness depends on funding, which usually is inconsistent and centered on grants. Normally they do not charge dues or membership fees, and if they do, the revenue is insufficient to cover the expensive services offered. Martirosyan said that he sees this approach as a shortcoming. "The problem is that we are dependent on [international] donor funding. We expect international funds to give us the money, instead of trying to fund this type of organization ourselves, through membership fees, fundraisers, et cetera. When local people don't contribute to the associations, they later don't demand that they protect them. If journalists paid membership fees, even small ones, they would later be able to claim the protection," he said.

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.

> Deheryan agreed, saying, "You cannot organize training for active journalists even in Yerevan, because half an hour later, their editor will call and summon them."

Martirosyan also noted that during the last two years, international donor funding has dropped dramatically, and in turn, the support programs have fallen off in influence. Deheryan concurred, saying, "Previously, there were on-staff legal experts [in professional associations and NGOs] that could provide legal assistance to journalists in need. But today these funds have been restricted, and these organizations don't have legal experts to assist journalists."

Asparez Journalists' Club will continue working with Open Society Foundations (OSF) to implement the joint project "Media for Civic Activism-2." In essence, this project will be the extension of the previous "Media Hub for Civic Activism" program, which has several goals. They include building citizen participation in youth centers and civic activities; expanding the distribution of *Asparez*; publishing supplemental inserts that cover social issues such as human rights, ecology, domestic violence, and corruption; and continuing the online radio station that airs news, analytics, and other content of public interest.

The government does not impose any legal restrictions that would prevent the registration or functioning of trade unions, professional associations, or NGOs. NGOs work in cooperation with the media sector to support freedom of speech and media independence. They include OSF, Eurasia Partnership Foundation Armenia (EPFA), Media Initiatives Center (MIC), Journalists for the Future (JFF), and others.

EPFA, MIC, and Internews will jointly implement USAID's new major five-year media project, Media for Informed Civic Engagement, which was launched in March of 2015. The project aims to increase citizen access to independent and reliable sources of information on the government's policies and planned reforms. The project will also be expected to create a demand for public awareness as a necessary mechanism for participation and involvement through improved quality of journalism.

As in previous years, the panelists were greatly dissatisfied with the quality of journalism degree programs at universities. The standards are still lamentable, whether at private or state institutions. Study programs still do not include sufficient practice-oriented training (vs. theoretical) to prepare young people to enter the profession after graduation. Few schools teach modern techniques such as the use of the Internet, multimedia, or social networks. "The university has given me nothing as compared to my practical work in outlets or participation in trainings/seminars," Stepanyan said.

Media outlets also are mostly displeased with the quality of the new graduates. "The journalism that is instructed in universities has nothing to do with the real journalism that we deal with," Gevorgyan said. "Quite often, the 'journalistic skills' discipline is taught by instructors who have never worked as practicing journalists… I first started to work [as a journalist] and only then studied journalism [academically]. If it were the other way around, I wouldn't be able to become a journalist."

Deheryan, who used to teach journalism in one of the universities, maintained that the editorial policies and journalistic standards of media outlets, too, can often be detrimental to beginning journalists. "We were sending tens of students into the market, and depending on where they would appear, they'd either grow, develop, or spoil [lose their professionalism]. One of my students who was performing poorly in terms of professional journalistic standards by generating manipulative content has now become a leading journalist in one of the outlets. I would ask her 'why?' She'd answer that that's what her readers wanted," he said.

Short-term training programs exist and they allow journalists to upgrade skills or acquire new skills, as long as editors allow staff to participate, Stepanyan said. Remarking on the reluctance of editors to let the journalists participate in training, Martirosyan said, "The outlets do not set a task of upgrading or developing a journalist, because the turnover rate is so high, [the editor] just needs someone to do the current work and he doesn't care about investing into their future." Deheryan agreed, saying, "You cannot organize training for active journalists even in Yerevan, because half an hour later, their editor will call and summon them."

Abrahamyan, on the contrary, recounted the time when she worked at armenianow.com and she went to the United States for a one-month training program. She was kept on staff all that time because her editor could see the importance and impact of the training and her future development.

Most of these international training programs are organized by international NGOs or local NGOs with international

donor funding. They are not necessarily media-specific NGOs; frequently, they are organizations implementing projects in other sectors that conduct training programs within a media component. The programs are free of charge to participants.

These international programs present a particular issue: active journalists do not apply to participate in them, whereas the not-so-active journalists are always ready and available to participate. The administering organizations are then forced to send them. "You see that these journalists have been to [various] countries, but you just can't find their stories/articles," Deheryan said.

The panelists could not name any undue restrictions on purchasing the materials that media or journalists need to produce their work, such as newsprint, software, etc. Armenia has many printing firms, which enables unobstructed and competitive printing.

The experimental digital broadcasting is already underway. However, analog broadcasting will not be shut down until the aforementioned decoders are distributed. Moreover, the regional television stations that have not received a license for digital broadcasting will continue broadcasting in analog mode for the time being and not be effectively shut down.

The existing ICT infrastructure mostly meets the needs of today's media industry. Media are able to offer citizens Internet streaming of audio and video. However, rural areas and towns outside of the capital still need reliable fiber optics solutions for better quality Internet. Rural area residents still depend on wireless USB card Internet provided by all three telecommunications providers. Their connections can often be unreliable and their high-speed traffic is limited; upon consumption of a certain amount of data, Internet service automatically switches to low speed.

List of Panel Participants

Gayane Abrahamyan, reporter and moderator, eurasianet.org and Yerkir Media TV, Yerevan

Suren Deheryan, chairman, Journalists for the Future, Yerevan

Varduhi Stepanyan, freelance journalist, Yerevan

Nelli Babayan, reporter, *Aravot*, Yerevan

Armine Gevorgyan, journalist, Armenian Public Radio, Yerevan

Samvel Martirosyan, blogger, IT security expert, Yerevan

Vahe Sargsyan, moderator, freelance journalist, Lratvakan Radio, Yerevan

Pap Hayrapetyan, editor-in-chief, *Sevan*, Sevan

Gayane Mkrtchyan, reporter, armenianow.com and iwpr.net, Yerevan

Arevhat Amiryan, editor-in-chief, *Vorotan*, Sisian

Melik Baghdasaryan, owner, Photolur photo news agency, Yerevan

Anahit Nahapetyan, owner and editor-in-chief, *Tufashkharhi Arorya,* Artik

Moderator & Author

Artashes Parsadanyan, independent media consultant, Yerevan

The panel discussion was convened on December 3, 2015.