Introduction

I am pleased to present the Media Sustainability Index (MSI) 2002, which analyzes and measures the current state of independent media systems in 20 countries throughout Europe and Eurasia. The MSI was designed in collaboration with the United States Agency for International Development (USAID) in 2000 as a tool to measure media development, as well as to assess changes in media systems over time.

Various organizations have periodically examined particular aspects of media systems, most notably the paramount indicator of a healthy media system: freedom of speech. The Committee to Protect Journalists, Freedom House, Reporters Sans Frontières, the International Press Institute, and others have prepared widely used and respected surveys of free speech or violence against journalists. These are important reports, and many media donors and implementers rely on them in formulating their programs. But we felt a new tool was needed that included questions of free speech, as well as other important areas that shape a modern independent media. In all, there are five core areas: (1) the state of media legislation that allows for the development of independent media and free speech; (2) the level of professional and ethical journalistic and editorial practices; (3) the plurality and quality of media outlets; (4) the business model that sustains independent media; and (5) the support media outlets and journalists receive from trade and professional associations. The MSI is, therefore, a comprehensive examination of different attributes that, taken together, provide a unique and detailed picture of independent media in a given country or region.

The latest MSI report shows incremental progress in many countries with backsliding in some, notably Russia and Moldova. The countries of Southeast Europe exhibited the most positive trends, as was the case in 2001. While Croatia, Bulgaria, and Romania still got high grades for sustainability, their rate of progress slowed considerably. This was due primarily to the difficulty of implementing generally accepted media laws. Meanwhile, Serbia[1], Montenegro, and Kosovo made strides in the development of independent media, primarily because of significant international donor support, greater focus on media legislation, the accepted trend toward European integration, and increasing political stability after the removal of Milosevic. Bosnia and Herzegovina remained stagnant, partly due to a seriously divided government and society that prevent meaningful reform.

[1]*Editor's Note: The data for Serbia were collected prior to the assassination of Prime Minister Djindjic and the subsequent state of emergency, which curtailed media freedoms.*

The state of independent media has changed little in the Caucasus. Given the dire economic conditions in Armenia, Azerbaijan, and Georgia, it is difficult, if not impossible, to talk about truly independent media. And yet, all three countries have shown an increasing plurality of news sources. Many different media outlets exist in the Caucasus, and the independent outlets are committed to producing their own news. But these positive developments are undercut by the continuing perception in the public that media outlets are simply crude tools used by the government or powerful business groups.

Data from Russia and the Western Eurasian states of Moldova, Belarus, and Ukraine are mixed. While Belarus experienced some marginal improvements, its media had to operate in a repressive political environment and a worsening economy. Meanwhile, in Russia and Moldova, journalists and media managers felt the heavy hand of government. The one bright spot on the media horizon was the emerging grassroots support for independent media. This was the result of the growth of nongovernmental organizations (NGOs) that work in the human rights and media sectors.

This year's report continues to show disappointing trends for the Central Asian region. Indeed, the MSI panel from Uzbekistan agreed that the term "independent media" does not even apply to that country. To a large extent, the same can be said for Kazakhstan, Kyrgyzstan, and Tajikistan. Media in these countries have not demonstrated their independence from overt political pressure, self-censorship, and nepotism. Overall, Kazakhstan and Kyrgyzstan have improved slightly when compared with 2001, while Tajikistan and Uzbekistan have made scant progress since last year, as journalists are forced to cover the least controversial issues. Although independent media will not come soon to Central Asia, there are pioneering media in each of these countries that should be nurtured and supported.

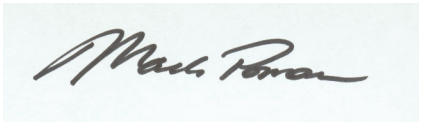
Many people contributed to this year's MSI. First and foremost, the participants, moderators, and observers on the individual country panels provided the basic analysis for this project. They are listed in each country chapter.

At USAID, Peter Graves (USAID/Washington), Azamat Junisbai(USAID/Central Asia), and David Hoffman (USAID/Central Asia) provided significant input into the design of the project. Numerous other field-based USAID staff provided valuable comments on the content of the various chapters. All have been strong supporters of independent media development and the value of the MSI as an analytical tool for media development professionals.

IREX field staff in the 20 countries provided crucial assistance in assembling the panels, providing logistical support and editorial comments. IREX/DC staff, including Tadd Eakin, Jill Jarvi, Maggie McDonough, Angela Roberts, Gerhard Saric, Cara Stern, and Mark Whitehouse provided editorial support. Mark Whitehouse and Theo Dolan managed the overall implementation of the project.

We hope you will find this report useful, and we welcome any comments.

Sincerely,



Mark G. Pomar
President, IREX

Executive Summary

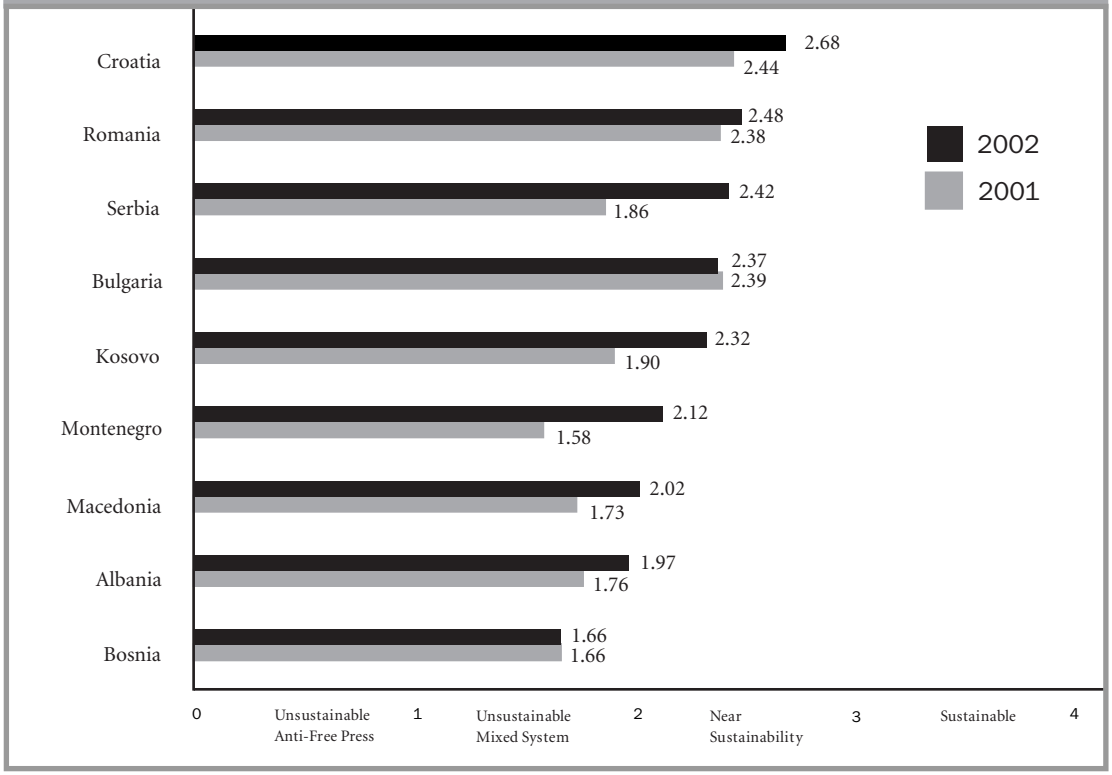
Last year, IREX issued the first Media Sustainability Index (MSI) for Europe and Eurasia. The MSI 2001 demonstrated that many countries in Europe and Eurasia had made important strides in developing independent media. Such progress is striking when one considers that little more than 10 years ago most of these countries were under Soviet rule or influence and had little or no recent culture of free speech. Other countries, such as the Central Asian republics, Belarus, and Moldova, continued to be bound by a more authoritarian rule and an adherence to a political culture derived from the Soviet era. Nevertheless, courageous journalists, media outlets, and nongovernmental organizations (NGOs) operate in these countries, even though with limited room for action.

Southeast Europe

The MSI 2002 offers few surprising deviations from the 2001 results. The most positive trends toward media sustainability continue in Southeast Europe, with Croatia, Bulgaria, and Romania still leading the way. This improvement parallels their progress in terms of inclusion into the European economic and North Atlantic military integration processes. These three countries have moved near sustainability on all objectives. However, events in these countries also show that their progress is not necessarily assured. Bulgaria continues to struggle with media law reform issues as the media community pushes for further liberalization of the media environment. Implementation of Romania's access to information law demonstrates the vast difference between passing a progressive law and ensuring its full implementation.

As with the other countries profiled in the MSI, Croatia, Bulgaria, and Romania have just recently emerged from decades of communist rule and are still in the process of solidifying their young democracies and establishing viable market economies. Therefore, the goal of a sustainable independent media is very much dependent on the success of such reforms. These states operate in an environment in which everything becomes political and society often becomes polarized. This atmosphere not only provides the state with arguments to curb the right to free speech in the name of stability, but can also impede the further development of professional journalism when media mirrors the political and societal polarization. Therefore, more time is needed to ensure that the positive steps in media reform become entrenched.

SOUTHEAST EUROPE: AVERAGE OBJECTIVE SCORES



Kosovo, Montenegro, and Serbia demonstrated significant progress from 2001 to 2002. Montenegro passed landmark media legislation, Kosovo continued to consolidate gains made since the 1999 North Atlantic Treaty Organization (NATO) intervention, and Serbian media, despite stalled legislative reform, made large strides forward. Albania, with a period of relative political stability, has also witnessed progress in its media system. Macedonia faced a real danger of backsliding due to the ethnic tensions between Macedonians and Albanians, but was able to emerge from conflict and display gains in media development. More specifically, supporting institutions for the media consolidated and improved their capacity to assist in the transformation of the media environment through training and advocacy. Meanwhile, Bosnia witnessed relative stagnation in its media environment with progress in some areas and minor backsliding in others. This lack of improvement can be attributed in part to the poor political and economic climate in Bosnia, which continues to hinder reform. Furthermore, the country remains ethnically divided, and contentious elections revealed a partisan reaction on the part of media outlets.

As a region, Southeast Europe has the most advanced media of those studied in the MSI, as such media are on the verge of approaching equality with more progressive and liberal media systems of Central Europe and the Baltics. However, progress is still too recent for donors and Western governments to withdraw their support. Economic downturns or ethnic conflict could bring back more authoritarian governments, cause the media to polarize along with society, and lead to societal backlashes against fundamental freedoms.

In fact, countries such as Albania, Bosnia, Kosovo, Macedonia, and Montenegro are precariously balanced despite recent reforms and positive media development. Kosovo's status remains uncertain, Montenegro will revisit its legal status in less than three years, and Bosnia remains a

divided country despite progress toward cooperation among the three indigenous groups. Bosnia, Kosovo, and Macedonia continue to rely on varying degrees of international military and political support to preserve their stability. Albania has experienced relative political calm, but political in-fighting could again erupt, further damaging the government's ability to implement progressive legislation. Overall, Western support is vital to the media in these countries, just as progressive media in each of these countries are a crucial component of their democratic and economic development. In many cases, media are leading the way, whether they are bridging ethnic divides, exposing corruption, or promoting democratic values.

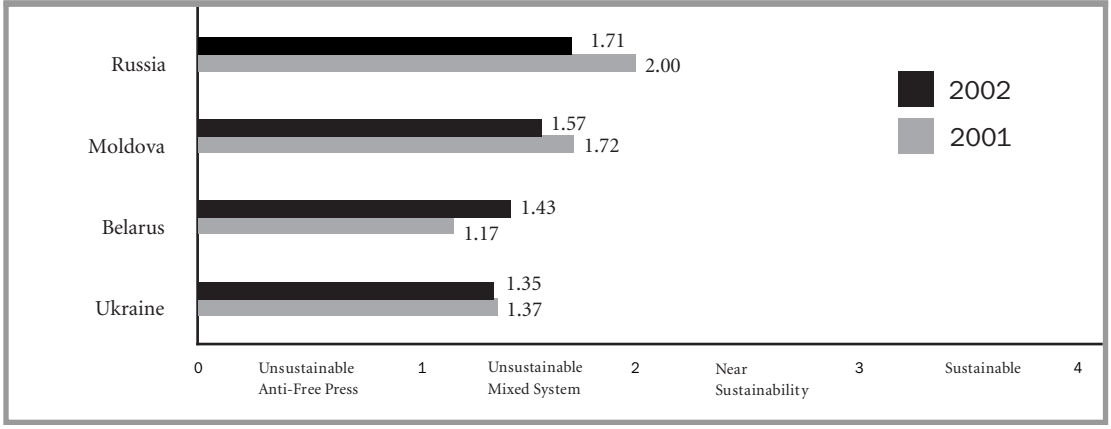
Russia & Western Eurasia

Russia, which had been the leader of this region, witnessed backsliding this year as political and business pressures on media mounted. Moldova also experienced backsliding as the new government sought greater control over the media. Ukraine remained relatively stable, albeit at a low level of development. Belarus displayed some progress following the presidential elections of 2001, as media made some tentative steps to test the limits of a relatively more open environment. However, this progress originated at a very low level, and Belarus remains one of the lower–ranked countries.

In general, the results indicate how constant interference by the central governments and the gloomy economic situation are the key causes for the slowly evolving media systems in the region. Despite the collective failure to approach sustainability on all five objectives, one can nonetheless observe a divergence in results among the four countries. While Russia, for example, has made some progress toward sustainability in the domains of free speech, plurality of news sources, and the creation of supporting institutions, Belarus and Ukraine have registered little positive development, particularly when it comes to free speech and the state of professional journalism.

Polarization between state and private media, the omnipresence of government interference in media affairs, and the exercise of open and indirect censorship clearly suggest that the media in Russia and the Western Eurasian states have a significant way to go before reaching sustainability. Although all four countries seemingly battle the same difficulties on their paths toward free and sustainable media, it has to be stressed that Russia is relatively the most advanced among them. The main question facing Russia may be whether the private media owned by the "media moguls"

Russia & Western Eurasia: Average Objective Scores



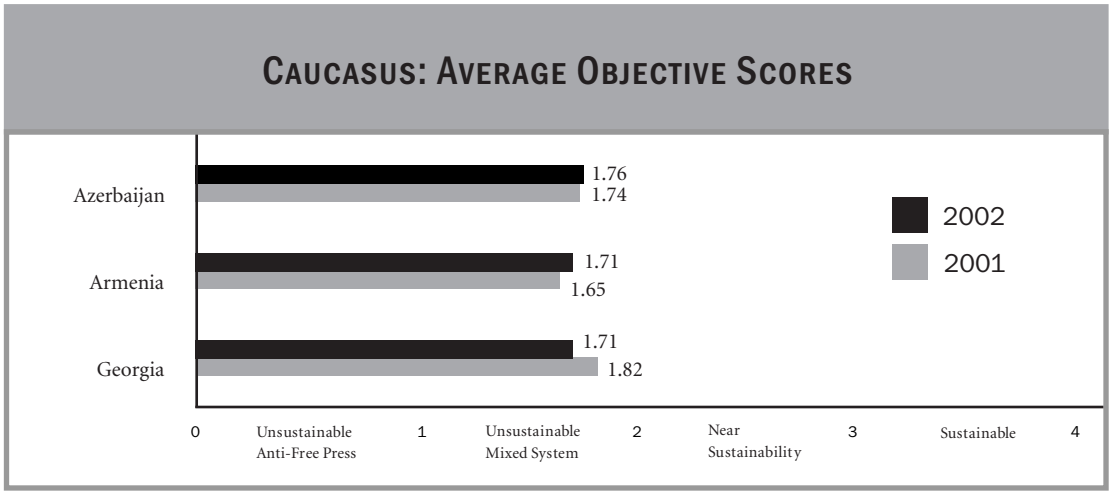
will pursue true independence from the government and their corporate owners. Moreover, since Moldova, Belarus, and Ukraine have century-old political and cultural ties to Russia, it seems unlikely that real change will take place in the former three countries unless Russia first succeeds in developing a sustainable independent media. Russia's media continue to be strongly represented in Belarus, Moldova, and Ukraine, either as local reprints of major Muscovite papers or through Russian television and radio broadcasts that offer coverage of neighboring countries.

CAUCASUS

The situation from 2001 to 2002 in the Caucasus has not significantly changed in the media sphere. Armenia, Azerbaijan, and Georgia have all exhibited relative stability in their media systems, albeit at a low level. MSI panelists in all three countries witnessed some backsliding in the quality of media management, compounded by continuing economic problems.

As with 2001, the primary barriers to the development of the media sector are the weak economy, continuing fallout from the conflicts within and between the countries, and poor development outside of capital cities. More specifically, key problems facing the media in the Caucasus include finding a profitable advertising base, purchasing newsprint, paying salaries, and the overall lack of capital.

As in 2001, none of the countries are nearing sustainability. These scores indicate that while they have begun to make progress, additional work remains to be done in the media reform process. Supporting institutions remain vulnerable and need additional development if they are to provide indigenous training and advocacy without substantial outside support. The overall quality of journalism remains low, despite some courageous media pointed out by the panelists. The legal and regulatory framework provides the basic protections in theory, but much work needs to be done to properly implement constitutional provisions and reform legislation.



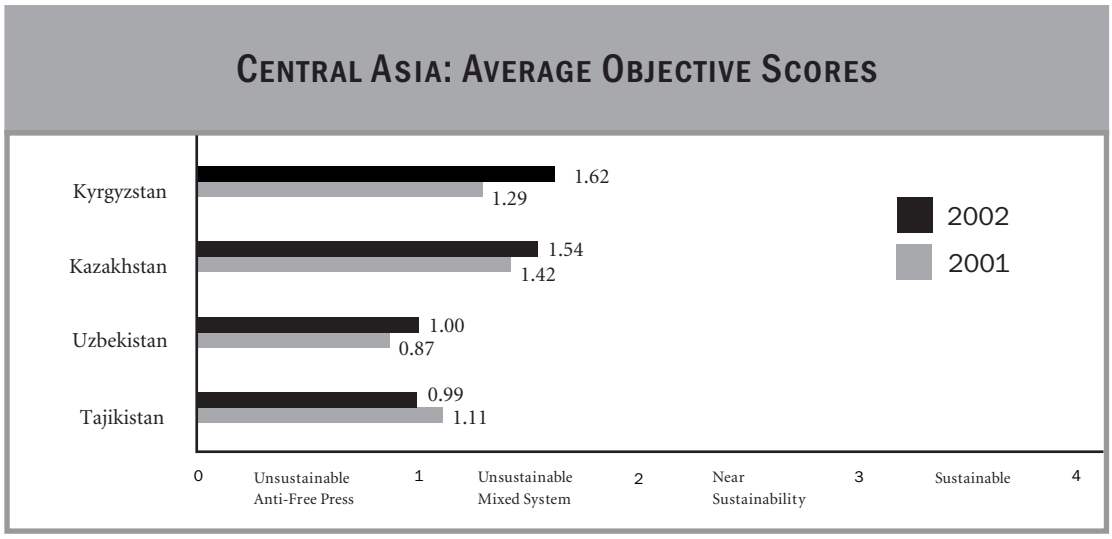
CENTRAL ASIA

As a region, Central Asia continues to lag behind many of the other countries featured in the MSI. The four Central Asian countries demonstrated they currently have unsustainable, mixed systems for every objective, illustrating a clear lack of progress in media development. Tajikistan and Uzbekistan were rated unsustainable and anti-free press on many objectives, suggesting the

near total absence of progress toward sustainability.[1] Professional journalism rated as the lowest of the five objectives overall in the region, suggesting that additional steps are necessary in improving the quality of journalism. Plurality of news sources ranked as the highest of the five objectives, but it still remained at an unsustainable level. But one could argue that increasing access to Russian or other foreign news may help push the media forward.

As with the MSI 2001, the overall analysis for Central Asia suggests that government control of the media—either through direct state ownership or through private state-affiliated media—is the root cause for many of the problems that lead to low levels of media sustainability. This government influence leads to self-censorship and editorial cautiousness. Therefore, advances for independent media in Central Asia will depend on deconstructing the continual attempts of governments to control information. There will be no easy or quick solutions.

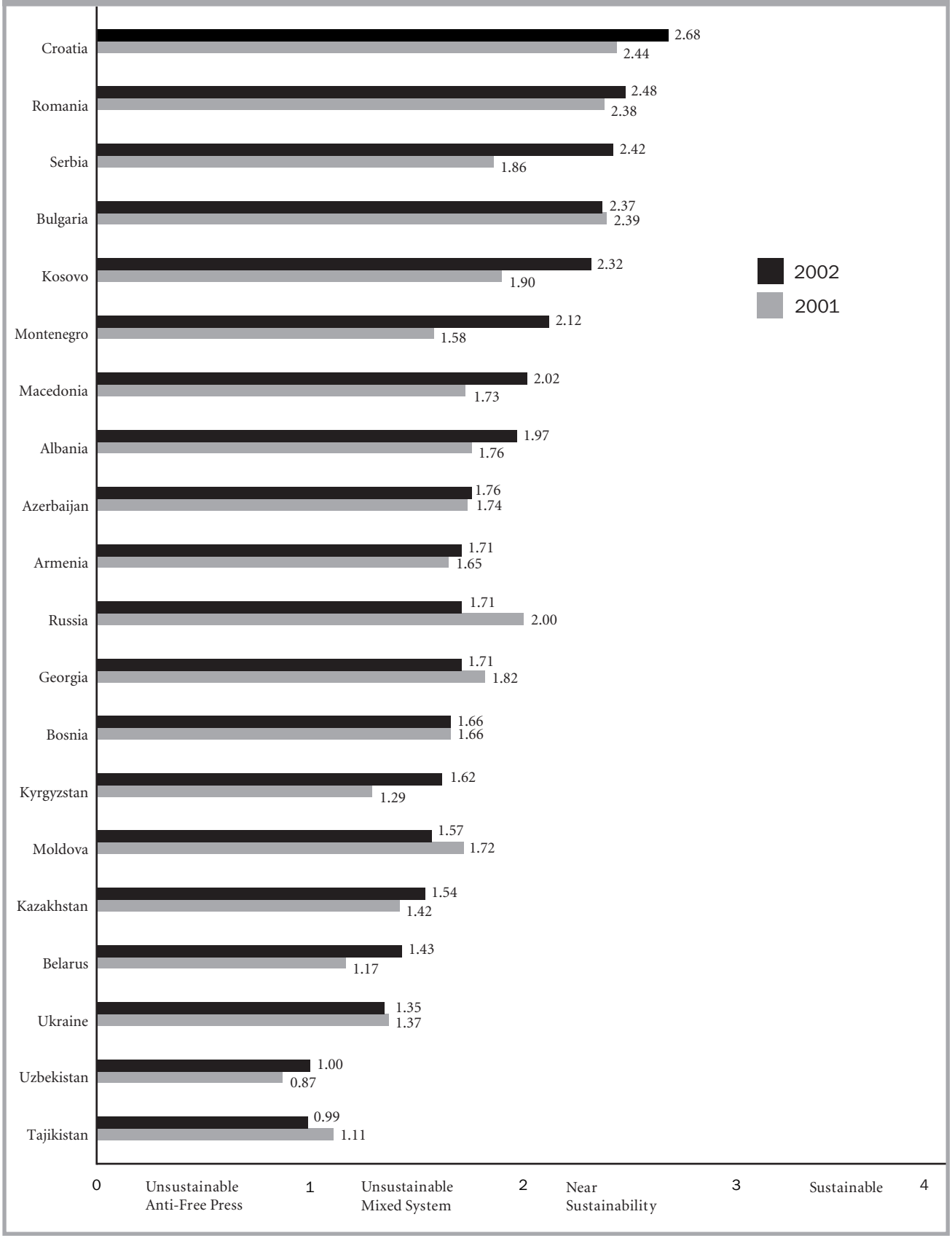
Traditional methods of media development such as training journalists and editors, improving business management of independent media, supporting legal reform, and developing supporting NGOs and associations will have a beneficial impact. However, true sustainability will require broad economic and political reform of these societies, a process independent media can and must help to encourage.



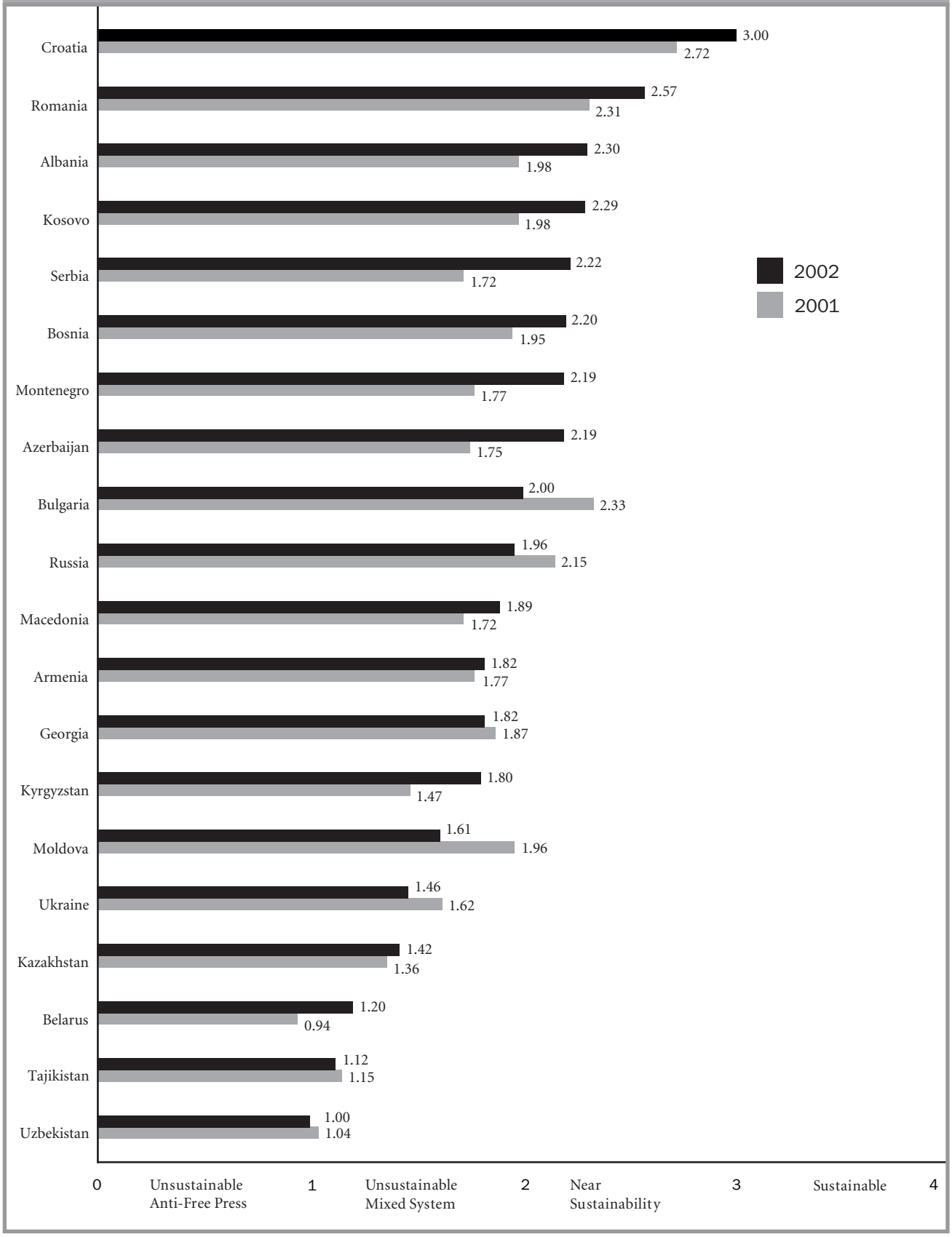
The MSI 2002 again demonstrates the connection between political, economic, and social reform and the development of independent media. Independent media can help the reform process move forward, but media also need the support of that reform process in order to fulfill their role in society. This relationship has been demonstrated in Montenegro, where political reform and media reform coincided with the passage of three new liberal media laws. At the same time, active attempts at media reform in Moldova have been hindered by a government that appears to be uninterested in broader reform. In this case, we have seen the devastating impact of economic hardship on the media and their freedoms. Overall, nascent independent media are dependent on broader political and economic forces—media alone cannot change societies. However, media development efforts strengthen these media and help societies address their problems by bringing information to the public. And when combined with a broader democratic development mandate, media can make a lasting difference in democratizing societies.

[1] *Editor's Note: Turkmenistan was not included in the MSI.*

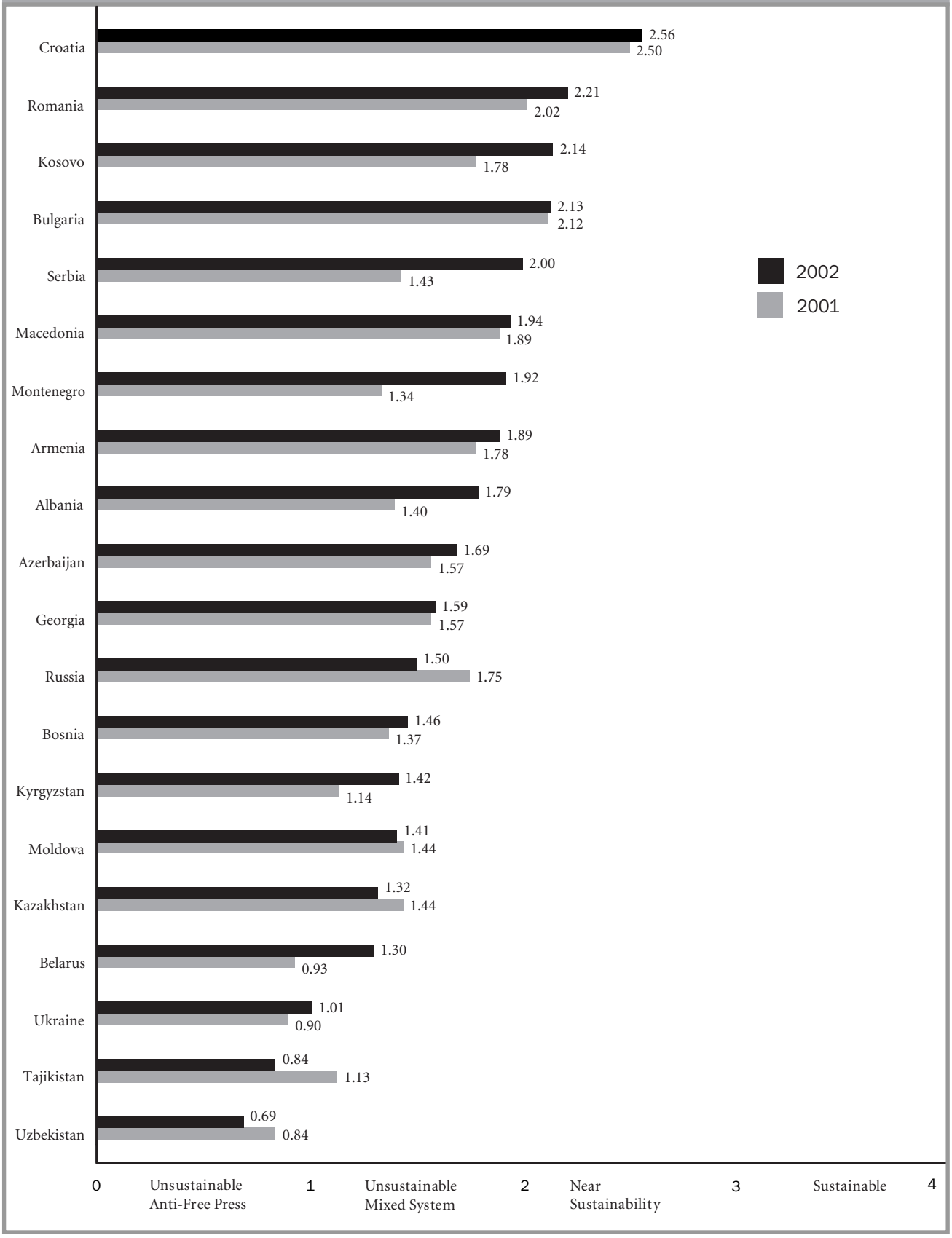
AVERAGE SCORING FOR ALL OBJECTIVES



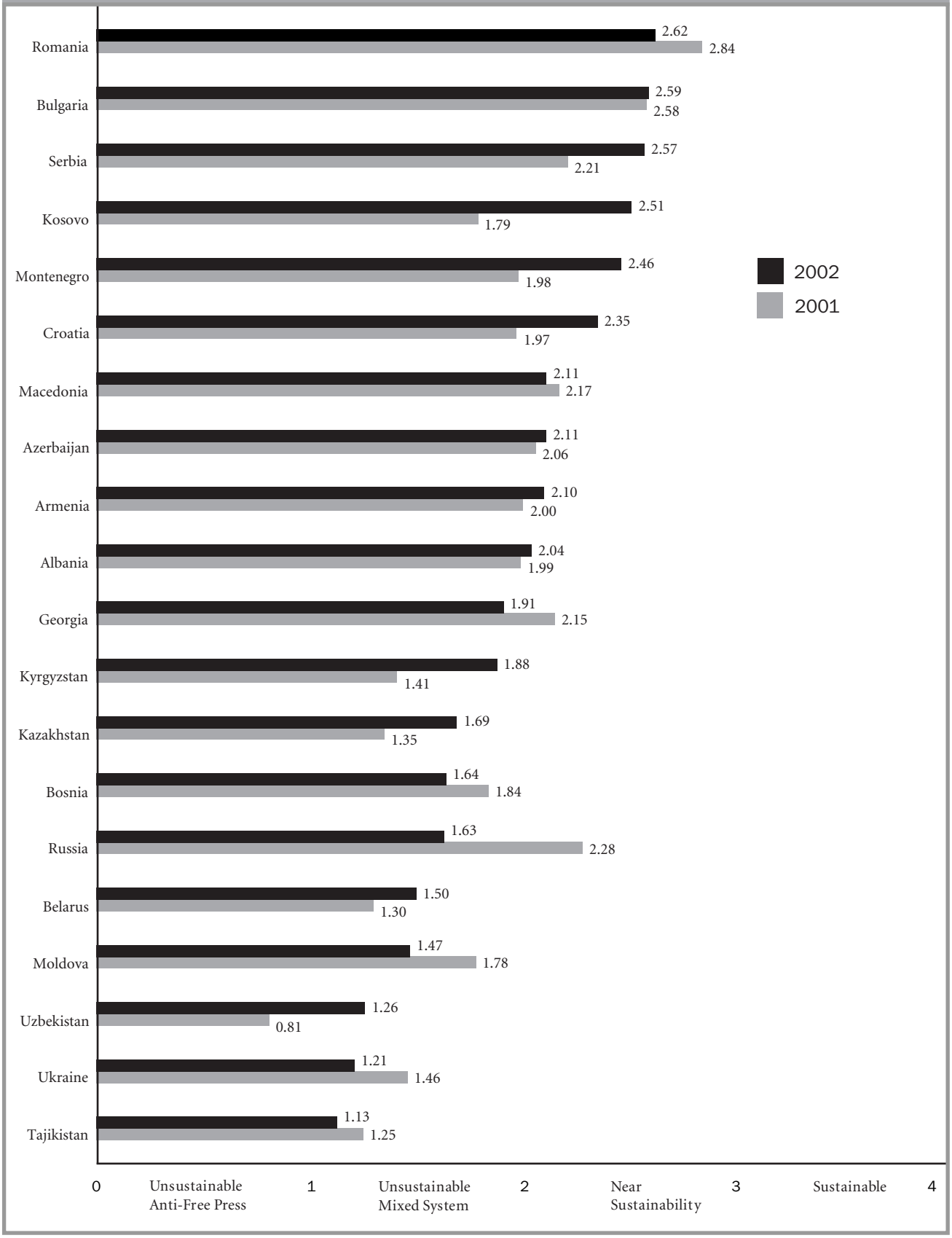
OBJECTIVE 1: FREE SPEECH SCORING



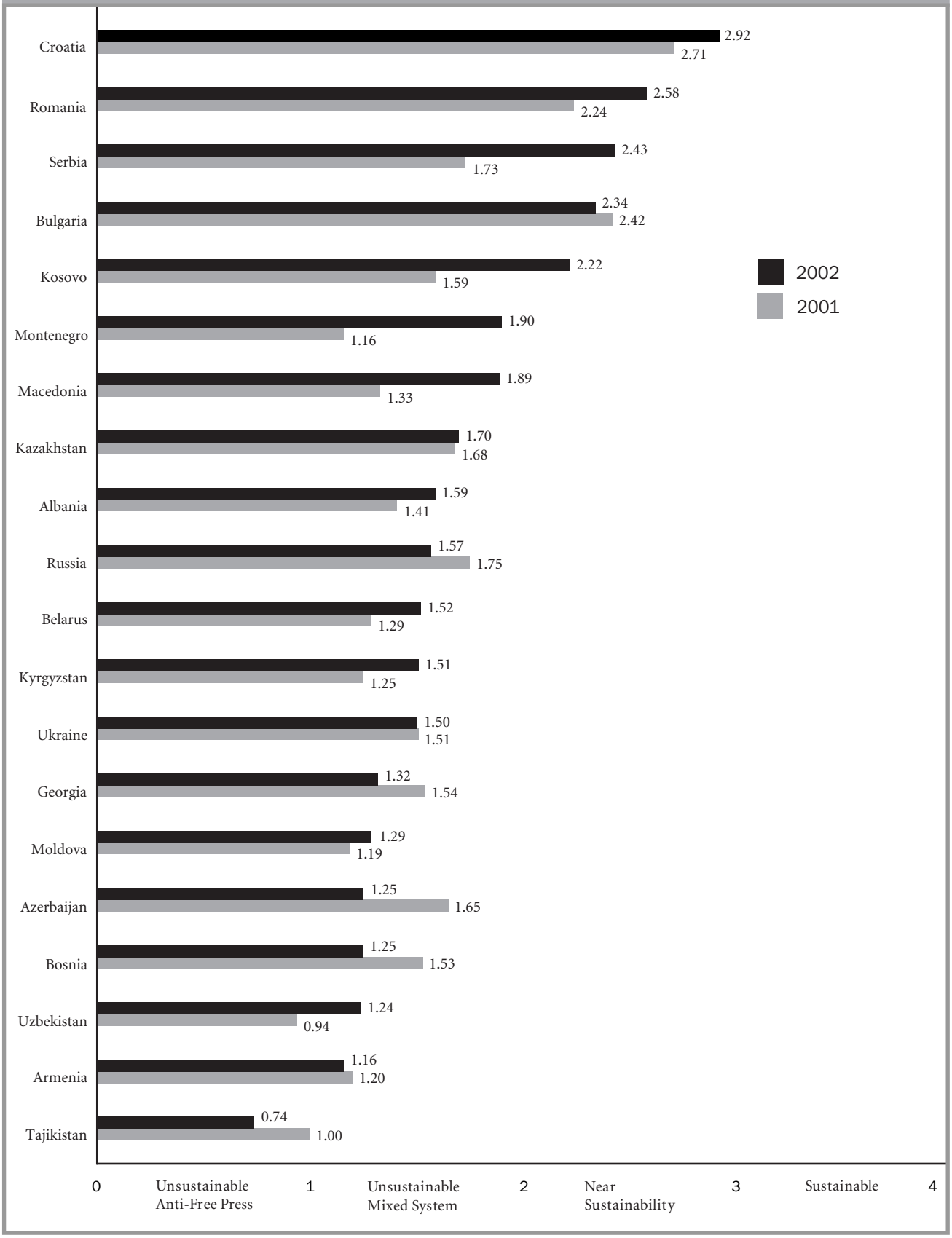
OBJECTIVE 2: PROFESSIONAL JOURNALISM SCORING



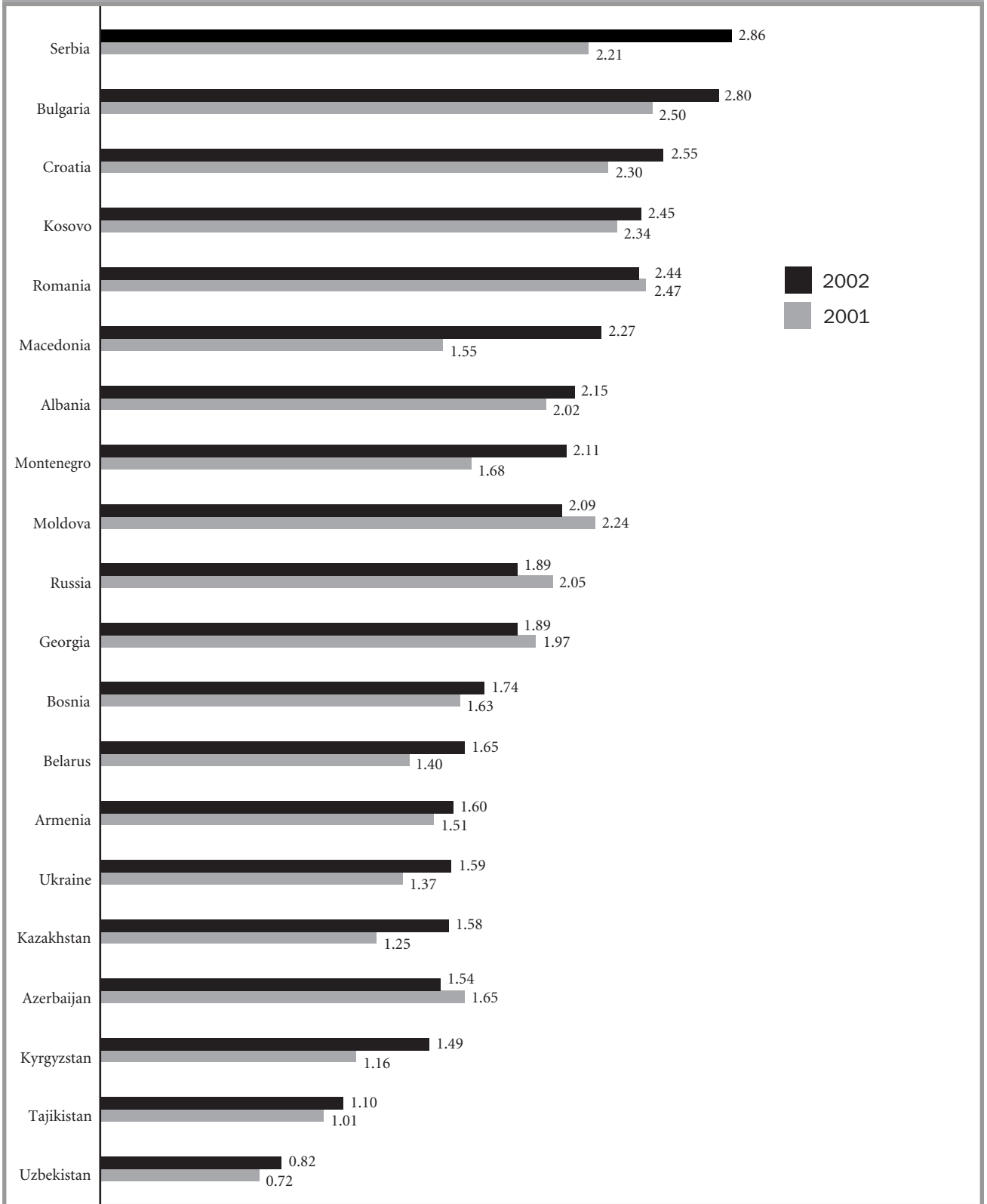
OBJECTIVE 3: PLURALITY OF NEWS SOURCES SCORING



OBJECTIVE 4: BUSINESS MANAGEMENT SCORING



Objective 5: Supporting Institutions Scoring



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METHODOLOGY

IREX prepared the Media Sustainability Index (MSI) in cooperation with the United States Agency for International Development (USAID) as a tool to assess the development of independent media systems over time and across countries. IREX staff, USAID, and other media development professionals contributed to the development of this assessment tool.

The MSI assesses five "objectives" in shaping a successful media system:

1–Legal and social norms protect and promote free speech and access to public information.
2–Journalism meets professional standards of quality.
3–Multiple news sources provide citizens with reliable and objective news.
4–Independent media are well-managed businesses, allowing editorial independence.
5–Supporting institutions function in the professional interests of independent media.

These objectives were judged to be the most important aspects of a sustainable and professional independent media system and served as the criteria against which countries were rated. A score was attained for each objective by rating seven to nine indicators, which determine how well a country meets that objective. The objectives, indicators, and scoring system are presented below.

The scoring was done in two parts. First, a panel of experts was assembled in each country, drawn from representatives of local media, nongovernmental organizations (NGOs), professional associations, international donors, and media development implementers. Each country's panel had a slightly different composition, but in most cases, the same panelists from last year's MSI were invited to return for the 2002 study in order to maintain consistency.

Each panel was provided with the objectives and indicators and an explanation of the scoring system. Panelists were asked to review the information individually. The panelists then assembled to discuss the objectives and indicators, and to devise combined scores and analyses. The panel moderator, in most cases a host country media or NGO representative, prepared a written analysis of the discussion, which was subsequently edited by IREX representatives.

IREX in-country staff and Washington, DC, media staff also reviewed the objectives and indicators, and scored the countries independently of the MSI panel. The panel scores and IREX scores were then averaged to obtain the final score presented in this publication. This method allowed the MSI scores to reflect both local media insiders' views and the views of international media-development professionals.

SCORING SYSTEM: INDICATORS & OBJECTIVES

INDICATOR SCORING

Each indicator is scored using the following system:

0 = Country does not meet indicator; government or social forces may actively oppose its implementation

1 = Country minimally meets aspects of the indicator; forces may not actively oppose its implementation, but business environment may not support it and government or profession do not fully and actively support change

2 = Country has begun to meet many aspects of the indicator, but progress may be too recent to judge or still dependent on current government or political forces

3 = Country meets most aspects of the indicator; implementation of the indicator has occurred over several years and/or through changes in government, indicating likely sustainability

4 = Country meets the aspects of the indicator; implementation has remained intact over multiple changes in government, economic fluctuations, changes in public opinion, and/or changing social conventions

OBJECTIVE SCORING

The averages of all the indicators are then averaged to obtain a single, overall score for each objective. Objective scores are averaged to provide an overall score for the country. IREX interprets the overall scores as follows:

3 and above: Sustainable and free independent media

2–3: Independent media approaching sustainability

1–2: Significant progress remains to be made; society or government is not fully supportive

0–1: Country meets few indicators; government and society actively oppose change

Note: The 2001 scores for the four Central Asian countries in this MSI have been modified from last year's report to more accurately reflect benchmark data compiled by IREX and USAID in 2001.

OBJECTIVE 1: FREE SPEECH

Legal and social norms protect and promote free speech and access to public information.

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

Objective 2: Professional Journalism

Journalism meets professional standards of quality.	
Professional Journalism Indicators	Reporting is fair, objective, and well sourced.
	Journalists follow recognized and accepted ethical standards.
	Journalists and editors do not practice self-censorship.
	Journalists cover key events and issues.
	Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
	Entertainment programming does not eclipse news and information programming.
	Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
	Quality niche reporting and programming exists (investigative, economics/business, local, political).

Objective 3: Plurality of News Sources

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

Objective 4: Business Management

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

Objective 5: Supporting Institutions

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