
Panelists indicated that Belarusian independent media would remain hostage to the government's political games with the West. "Should we fall out with Europe, strangling them [the surviving independent media] is a technical issue," a panelist commented.



BELARUS

D

Despite a slight increase from last year, 0.84 against 0.73, Belarus remained a country where the government allowed little media freedom, although media advocacy efforts were still pushed by some groups and new media continued to develop as an alternative.

Two restrictive laws were adopted with a view to tightening the grip over the media and ensuring they had little chance of publishing information critical of the government. In a coordinated effort in March 2008, the KGB raided local offices of independent donor-funded broadcasters. Equipment was seized, and journalists were detained for questioning.

Conversely, in an end-of-year attempt to improve its strained relations with the EU, the government allowed two independent newspapers back into the state press distribution network and the postal service. Both newspapers were banned from those monopolized distribution channels in 2005, together with a dozen other publications critical of the government. Elsewhere, the government organized a roundtable with international and domestic press freedom watchdogs to discuss Internet regulation. The government has vowed to take the watchdogs' recommendations into account while drafting the soon-to-be-adopted cabinet decree on Internet media. Until now, the Internet has been the least-regulated of media in Belarus. Those latest developments left some of the panelists with hope that there would not be an immediate crackdown on the independent media.

Throughout 2008, Belarus attempted to offset an increasingly unfriendly relationship with Russia, its closest ally, by thawing ties with the West, primarily the EU. In August, the country's last political prisoners were released from jail, including former presidential candidate, Alyaksandar Kazulin. However, a parliamentary election a month later was deeply flawed, according to domestic and international observers. Candidates loyal to Belarus's president, Alyaksandar Lukashenka, won all of the 110 seats in parliament. Despite the release of the prisoners, this suggests Belarus is not planning even a token political liberalization that might eventually undermine Lukashenka's rule. Still, improved relations with the West would build the president's bargaining power in negotiating Russian subsidies—in the form of discounted gas and oil—for Belarus's unreformed economy. Any Western investment that might follow would allow Belarus to avoid being economically over-dependent on Russia.

Panelists indicated that Belarusian independent media would remain hostage to the government's political games with the West. "Should we fall out with Europe, strangling them [the surviving independent media] is a technical issue," a panelist commented.

BELARUS AT A GLANCE

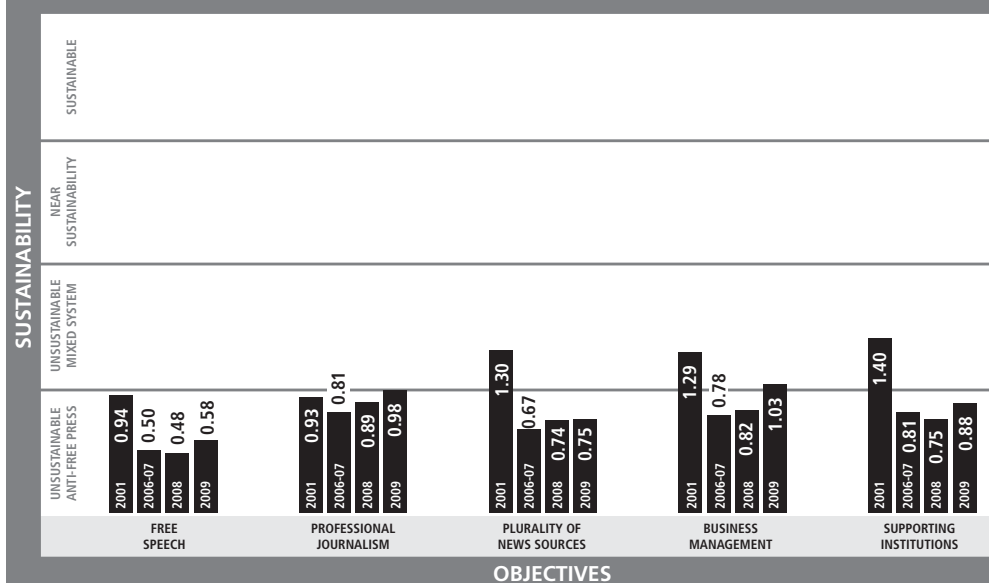
GENERAL

- > **Population:** 9,685,768 (July 2008 est., *CIA World Factbook*)
- > **Capital city:** Minsk
- > **Ethnic groups (% of population):** Belarusian 81.2%, Russian 11.4%, Polish 3.9%, Ukrainian 2.4%, other 1.1% (1999 census, *CIA World Factbook*)
- > **Religions (% of population):** Eastern Orthodox 80%, other (including Roman Catholic, Protestant, Jewish, and Muslim) 20% (1997 est., *CIA World Factbook*)
- > **Languages (% of population):** Belarusian, Russian, other
- > **GNI (2007-Atlas):** \$40.90 billion (World Bank Development Indicators, 2008)
- > **GNI per capita (2007-PPP):** \$10,740 (World Bank Development Indicators, 2008)
- > **Literacy rate:** 99.6% (male 99.8%, female 99.4%) (1999 census, *CIA World Factbook*)
- > **President or top authority:** President Aleksandr Lukashenko (since July 20, 1994)

MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, television stations:**
Print: 1,307 (673 newspapers (9 daily), 586 magazines and journals, 42 bulletins and 6 catalogues); Radio: 158 radio stations (2 nationwide); Television Stations: 69 (6 nationwide) (Belarus Ministry of Information, December 2008)
- > **Newspaper circulation statistics:** Top three by circulation: *Sovietskaya Byelorussia* (state-owned, 2,809,830 weekly circulation), *Komsomolskaya Pravda v Belorussii* (independent, 548,000 weekly circulation), *Respublika* (state-owned, 286,000 weekly circulation) (Belarus Ministry of Information, December 2008)
- > **Broadcast ratings:** Share of television audience: ONT (15.318%, state-owned) NTV Belarus (9.6%, Russian-owned, broadcasting state-controlled), Channel One TV (7.296%, state-owned) (Institute for Sociology at the National Academy of Sciences, July-November 2008)
- > **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, 2008)
- > **Annual advertising revenue in media sector:** \$114.1 million (\$70 million television, \$18 million press, \$6 million radio advertising, \$6.3 million Internet) (ZenithOptimedia advertising group, December 2008)
- > **Internet usage:** 6,000,000 (2007 est., *CIA World Factbook*)

MEDIA SUSTAINABILITY INDEX: BELARUS



Annual scores for 2002 through 2005 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

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.

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.

OBJECTIVE 1: FREEDOM OF SPEECH

Belarus Objective Score: 0.58

Freedom of speech scores saw minimal changes from the previous year, effectively keeping Belarus in the category of the most repressive countries. The government remained actively opposed to freedom of speech and access to public information. Indicator 8, media access to foreign news sources, showed modest improvement and, like last year, was the only indicator to exceed a score of 1.00. All other indicators showed no change and scored very close to the overall objective score.

One panelist commented, "[On the] Constitution level, everything is wonderful. Laws are 50-50. [There are laws, but some provisions are draconic—registration, accreditations, regulation of the Internet]. Enforcement is even more brutal than when these laws that are good-for-nothing are not enforced."

By amending the law on civil service, the government banned state officials from talking to the media except when they have a go-ahead from higher-level bureaucrats. The law on "information, informatization, and protection of information" adopted in November 2008 sets its sights on further restricting access to any public information, independent media experts claimed. Most notably, a new media law was adopted in August 2008 that orders online media to register with the Ministry of Information while also updating registrations of all existing media outlets. Separately, it introduces burdensome procedures for accreditation of journalists, especially those working for foreign media. A provision under the earlier media law, which ordered state bodies and officials to provide information within 10 days of a newsroom's request, was abolished altogether. A fuzzy requirement of "compliance with reality" for media materials was introduced. The law is poorly synchronized with other laws, notably employment legislation that is likely to cause confusion and expose independent media outlets to administrative sanctions and fines.

Licensing of broadcast media remains far from fair, competitive, and apolitical, according to panelists. They recalled Lukashenka speaking out in 2007 to say that broadcast licensing was politicized and that launching a radio station, for example, would not be made easier for non-state actors. Still, two more privately owned regional television channels launched FM music stations (in Homiel and Svetlahorsk, both in southeastern Belarus) and several more Minsk-based stations have gone farther into the regions. SKIF television, a privately owned network of regional television stations, is starting up in the city of Bobruisk. Local officials openly admitted there was no competition. The broadcaster simply received "positive recommendations" from other local governments. Separately, a license was granted for a cable television channel in the capital, Minsk, to target the hearing impaired.

Broadcast licensing is handled by the Ministry of Information. Yet even its officials openly admit that *de facto* decisions are being made by the Lukashenka administration, which considers licensing of great importance for the state, a media lawyer added. Another panelist estimated that Belarus had \$300 million to \$500 million a year in lost license fees because its full broadcast frequency was not being used.

Market entry for media outlets is more complicated than for other businesses, panelists agreed. Licensing comes from ministries of information (print and broadcast media) and telecommunications (broadcasters). Unlike other businesses, media operations can be suspended following a warning from the Information Ministry—without a court ruling. In one of the very few positive developments, the new media law abandoned the requirement that newsrooms register their locations with local governments. Unlike other industries, the same law restricted direct foreign ownership of media to 30 percent for a publisher or broadcaster, although this could be easily sidestepped with extra effort and at additional cost. Taxation of media outlets is no different from other businesses, and media have no tax breaks. In 2005, radio stations were ordered to air 75 percent Belarusian music. This affected business: The stations have been losing both audiences and advertising revenues ever since. The Internet remained the least regulated sector even though, with \$6.3 million in revenues in 2008, it has for the first time surpassed radio.

Crimes against journalists were rare. As in previous years, photographers and cameramen suffered most, and more often, possibly because they work closer to the scene, panelists noted. As in the past, the biggest threat to journalists' security came from law-and-order forces; these were also the first entities to obstruct journalists' work. On March 25, 2008, Andrej Liankevich, a photojournalist with *Nasha Niva*, was brutally beaten and arrested by riot police as he covered an opposition rally in Minsk. Siamen Pechanko,

One panelist commented, “[On the] Constitution level, everything is wonderful. Laws are 50-50. [There are laws, but some provisions are draconic—registration, accreditations, regulation of the Internet]. Enforcement is even more brutal than when these laws that are good-for-nothing are not enforced.”

another journalist from the same newspaper, was arrested and sentenced to 15 days in jail by a Minsk court for alleged participation in the same “unauthorized” rally. Separately, a Lithuanian television crew was detained as it tried to film the rally. The crew’s footage was confiscated by the police.

Just two days later, the Belarusian KGB raided offices of several independent broadcasters, the apartments of their journalists, and other businesses they believed were working with those outlets. The searches started at almost exactly the same time in Minsk, Homiel, Hrodna, Viciebsk, and other cities. The KGB seemed to be targeting two independent outside radio stations, the Polish-funded Radio Racja and the EU-backed European Radio for Belarus (ERB), as well as the U.S.-funded RFE/RL. Satellite television channel Belsat, mostly Polish-funded, said its premises had also been raided. These broadcasters are primarily headquartered in neighboring Poland and their journalists have all been denied government accreditations.

Broadcast equipment and computers were seized during the raids and the KGB detained dozens of journalists for questioning over alleged connections with the creators of animated cartoons that were deemed insulting to President Lukashenka in 2005. According to a panelist, the targeted journalists had their phones tapped. The entire large-scale operation was supervised and carried out by the KGB’s counterintelligence department. Ironically, the actions may have helped sustain Belsat, since panelists believed its funding was about to be cut back. After the raids, the Polish Foreign Ministry—the major funder of Belsat—announced it would increase funding for the television channel to cover losses suffered by journalists. Other governments and international organizations also pledged support for the media outlets affected.

In a more positive development—obviously an attempt to improve relations with Europe—the Belarus Foreign Ministry accepted accreditation applications from several Belsat journalists who had previously been denied accreditation on dubious grounds.

Throughout the year, independent publications—ARCHE magazine and two unregistered newspapers, *Svaboda* and *Glos znad Niemna na uchodztwi*—were investigated for suspected dissemination of extremist information. This dangerous development implied criminal liability for the publications’ editors and writers. “There were no improvements as far as journalists’ security or even the feeling of security is concerned. It’s true journalists are not getting killed here, but there is no normal feeling in your profession either,” a panelist commented.

There are no truly public-service media in Belarus. The market is dominated by state-owned media with the exception of the Internet. State media are far from editorially independent, since their editors, whose contracts are usually renewed annually, are directly appointed by the Ministry of Information. By and large, media laws favor neither state-funded nor independent media. However, the law limits advertising in non-state general news publications to less than 30 percent of content compared with 25 percent for state-owned. That is hardly consolation for the former, since every year the budget law provides extra funding (\$75 million in 2008) for state-owned media. This comes in addition to state media’s subsidized salaries, rent, printing and distribution. Independent media also have a disadvantage when it comes to access to information since many events require accreditations, and officials withhold information and comment from non-state media. However, according to one panelist, even state media are not getting comments. Civil

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

FREE-SPEECH INDICATORS:

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

servants prefer to play it safe. They avoid comment and do not provide any information.

Belarusian law carries criminal penalties for libel and offers greater protection for top officials, particularly the president. Furthermore, Belarus libel laws do not allow for the public figure doctrine, under which public figures and officials may win libel lawsuits only if they can demonstrate that the publishers' knew the information was false or that it was published with reckless disregard for the truth. There were no reports of such cases in 2008.

More common are "honor and dignity" cases covered under civil law. In these cases, the prosecution does not have to prove malice, or even falsity. It is enough that the article in question caused "emotional distress" to the person described.

As noted above, access to public information is restricted, primarily for independent media. Under a presidential decree adopted several years ago, official bodies have the right to classify their activities and documents as top secret. Even statistical data is withheld. The national statistical committee is said to operate a department to protect secret information, according to a panelist. The committee is apparently the only state body that charges media for CDs or brochures containing very basic statistical data. The prices for this information are generally not affordable.

Restrictions on information combine with resource problems and harsh laws to further restrict investigative reporting. The only examples of investigative journalism panelists could name were stories occasionally published by the electronic newspaper *Ezhednevnik* and, even more rarely, by independent weekly *Narodnaya Volya*. With so many obstacles and safety concerns, journalists' investigative skills have almost fallen into disuse. "Access to information is the cornerstone of journalism, everything else is being built on top of that. The government is perfectly aware of that and will keep the media on a 'starvation diet,'" a panelist commented.

Access to international news and news sources, mostly via the Internet, remained largely unrestricted by the government. The affordability of Internet fees—to say nothing of international news subscriptions—and language barriers are still handicapping the broader use of international news sources. Although Internet access became somewhat cheaper in 2008, some smaller regional newsrooms still use the Internet on a limited basis; those journalists have to queue at the editor's desk, the only one connected to the Internet. Still, according to one panelist, very few Belarusian media are interested in or can make good use of international news sources.

Entry into the journalism profession was made more complicated in 2008, at least as far as getting professional education at state journalism schools. The government

There are no truly public-service media in Belarus. The market is dominated by state-owned media with the exception of the Internet. State media are far from editorially independent, since their editors, whose contracts are usually renewed annually, are directly appointed by the Ministry of Information.

introduced new requirements in 2008: applicants must provide recommendations from local authorities and then undergo interviews by a special commission. The commission mostly checks on how politically loyal would-be journalists are, officials admitted openly. Moreover, graduates of journalism schools are subject to Soviet-style "distribution" and must work for two years wherever the government sends them. At the same time, a journalism diploma is not a legal requirement to work as a journalist.

Other restrictions affect Internet media workers and freelancers. They do not enjoy the status of journalist since they are not employed by a registered media outlet. As a result, they are even less protected. Those working for foreign media should be accredited with the Foreign Affairs Ministry. Accreditations are also needed for an increasing number of events. These accreditations are often denied for independent media outlets.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Belarus Objective Score: 0.98

There has been no improvement of note in professional journalism. Most indicators showed little change from last year, except Indicator 1, reporting is fair, objective, and well sourced, which dropped modestly, and Indicator 7, technical facilities, which saw a modest improvement in scores. All indicators scored within a half point of the overall objective except for Indicator 7, which scored slightly better than the other indicators.

Both state and non-state media fell short of complying with professional and ethical standards, the panelists agreed. Political polarization cultivates propagandistic approaches on both sides. Even independent broadcasters based outside Belarus and funded by foreign donors with a view to offer an alternative to state propaganda are following this pattern, according to panelists. "There is no will and no skills," one

“There is no will and no skills,” one panel participant commented. “Across the spectrum, facts and comments are being slanted so as to fit certain concepts. That is Soviet-style journalism.”

panel participant commented. “Across the spectrum, facts and comments are being slanted so as to fit certain concepts. That is Soviet-style journalism.”

Technical experts remained a sore point. There is a small pool of them contacted by numerous media outlets on every pertinent occasion. There have been attempts to broaden that list but to no avail. The quality of experts’ comments is another problem “They have polished their presentation skills and style, but as to their economic analyses and forecasts, there is a feeling they are coming from the heart, rather than from the head,” a panelist commented. On the other hand, “no expert can be smarter than the author of the story. If questions the latter asks or the topic itself are silly, there is very little an expert can help with,” another panel participant added. Meanwhile, interviewing and research skills are poor, especially among younger journalists. Understaffed independent newsrooms find it very hard to produce high-quality in-depth reporting, to say nothing of more involved investigations. That is why science, technology, and industry are hardly covered at all.

There are two journalistic associations in the country: the Belarusian Association of Journalists (BAJ), which brings together independent media professionals, and the Belarusian

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).

Union of Journalists (BUJ), the “official” journalists’ association. Each has an ethical code of conduct. Unfortunately, the codes are not always followed, although independent journalists are more likely to adhere to them. “Getting on top of a barricade [i.e., taking an impassioned stand on an issue] is the easiest, as a result ethical standards suffer. Thus, the profession is eroded, the respect for journalism is eroded, so no wonder there is no public outcry when media are being harassed,” said one of the panel participants.

The selling of stories or the selling of positive coverage is not widespread since Belarus is a small market, both politically and economically, and dominated by the state. Sometimes, however, hidden advertisements are sold to sidestep legal limitations on the amount of advertising, a matter affecting both ethics and survival, a panelist added.

The panel agreed that self-censorship is widespread, and panelists noted that journalists are becoming accepting of the need to self-censor. “Once in a while, looking through the clippings of my past stories or electronic archives, I get surprised that I dared to write it that way. Right now, I would have chosen a euphemism. This is an illustration of the creeping erosion of journalism. Nobody wants to get into trouble through a single phrase—better to use Aesopian language. As a result, we see verbosity, ambiguity, lots of metaphors, and allusions, which put us on the brink of deprofessionalization,” a panelist commented.

“There was a taboo—either internal or imposed from outside—or intimidation or a habit not to write about the private life of the president, his family, and his allies. [That is] until he showed up at a public event with a 4-year-old son, previously concealed. Then there was sort of a go-ahead and both non-state and state media started writing about the child,” a panelist said. Independent media are more willing to discard self-censorship, although sometimes they have to be more cautious not to endanger their sources.

Almost all key events are being covered. The question is quality and reach. “You can bring up topics of paramount importance in a newspaper with a circulation of 299 [any publication circulating more than 300 copies must be registered with the government] or a blog, but who’s to read that?” a panel participant asked. Another panelist added that minor topics and events are not covered at all, and there is a big question of whether journalists are actually aware of all key topics given the degree of secrecy and the restricted access to information. “This is mere guesswork, yet some issues are either entirely missing or there are only allusions,” according to the panel.

There is no strong correlation between pay levels and corruption, panelists argued. Journalists, especially

independent ones, are not earning much, yet there is no one to buy them off. Still, there is some selling of stories or brokering positive coverage, mostly to businesses and sometimes to politicians. Journalists working for state media are better off than a year before. Their earnings depend on the official salary grids and, with state-mandated wage hikes throughout the year, they are now paid at least twice as much as those in non-state media. A journalist at a state newspaper earns around \$700 a month in the regions and up to \$1,000 a month in the capital. Journalists at Belarus' biggest daily, *Sovietskaya Byelorussia*, the key organ of the Lukashenka administration, and Channel One TV, are paid at least \$1,500 a month.

There is hardly any pronounced move of independent journalists to other professions (mostly advertising) or state-controlled media. Very rarely do they leave for other countries, typically Ukraine and Russia. Media workers' salaries are quite competitive when compared with those of teachers or doctors, a panelist noted.

The balance between news content and entertainment has remained consistent for several years, with the latter—by Western standards—somewhat surpassed by information programming, a legacy of the Soviet Union, where the media's main role was to inform. Channel One TV, for example, allots 20-25 percent of its airtime to information programming, according to a panelist. Nonetheless, the quality of both news and entertainment remained low. Independent newspapers provide very little relief as far as entertainment content is concerned. Their coverage is one-sided and the topics uninteresting. Surprisingly, weekend issues of *Sovietskaya Byelorussia* were complimented for their high-quality infotainment, notably historical publications. On the Internet, a panelist added, there has been a buildup of audiences everywhere and entertainment Web sites outperformed online news sources.

As far as technical facilities, "the situation is not catastrophic yet leaves much to be desired." State media are better equipped than independent news outlets, and Minsk-based media fare better than regional outlets. Although some basic level is sustained most everywhere, media professionals lack the skills to make a good use of the facilities at their disposal. For many journalists, computers are nothing more than digital printing machines. They do not have the practical skills needed to use up-to-date software and online services, some of which are free of charge. Although Internet fees dropped further in 2008, not all newsrooms can provide high-speed connections without a traffic cap for their staff. Meanwhile, the independent press cannot afford their own distribution facilities (vehicles, points-of-sale, etc.). For non-state

"The politics are distorted, so is political journalism. There is no normal business, so its coverage is also warped, with no specialized media products," a panel participant said.

broadcasters, where technology is center stage, keeping up-to-date is even more difficult.

Some niche reporting exists, mostly in business, politics, and sports, but panelists rated its quality as somewhat unsatisfactory. This is despite the fact that many independent journalists, and especially editors, received specialized training from international and domestic media-development organizations. On the other hand, the environment itself trammels quality reporting. "The politics are distorted, so is political journalism. There is no normal business, so its coverage is also warped, with no specialized media products," a panel participant said.

OBJECTIVE 3: PLURALITY OF NEWS

Belarus Objective Score: 0.75

This objective remained unchanged from last year. Only Indicator 1, plurality of news sources, showed minor improvement. All other indicators remained unchanged, and all indicators scored relatively close to the overall score of 0.75. There is some theoretical plurality of news sources, panelists agreed, yet not all of them are readily available (independent press and broadcasters) or easily affordable (the Internet and satellite television and radio). What is more, an average citizen is hardly willing to take the effort to acquire alternative sources of news.

Urban areas offer a wider selection of news sources. Villages and smaller towns are often reached by two national state-owned channels, two or three state newspapers (usually *Sovietskaya Byelorussia* and local ones), and state radio channels. Overall, state television dominated an October 2008 independent opinion poll: 90.1 percent of Belarusians aged 18 and older said they were watching Belarusian TV; 84 percent named Russian channels; 46 percent said local television; and 18.3 percent cited satellite television. For radio, 53.6 percent listened to state radio and 51.8 percent listened to private FM stations offering mostly entertainment content. Independent broadcasters based outside Belarus reached far smaller audiences according to this survey: European Radio for Belarus, 1.9 percent; Radio Liberty (Belarusian service),

State newspapers retained a dominant position in the market. The government subsidizes their rent, subscription, printing, postage, and distribution. Back in 2005, the government banned 13 independent newspapers from state-owned distribution and 16 independent newspapers from subscription networks.

1.2 percent; and Radio Racyja, 1.4 percent. International broadcasters like Voice of America (2.0 percent) and the BBC (1.4 percent) were not in demand, either. Earlier surveys, however, showed audiences for the international broadcasters that were two or three times larger than this survey, and the external radio stations are increasingly operating as *de facto* news agencies with their stories posted at popular Web sites (portals and news sites).

Internet usage has increased slightly: 10.9 percent of those polled said they were using it daily with an additional 12.4 percent using it several times a week.

Regarding newspapers, 35.9 percent of those polled in another survey by the same company said they read local newspapers: 28.4 percent read *Sovietskaya Byelorussia* and 28.3 percent read the popular Russian tabloid *Komsomolskaya Pravda v Byelorussii* with a Belarusian insert. The leading

opposition weekly *Narodnaya Volya* and the more moderate independent weekly *Svobodnye Novosti* were read by 5.4 percent and 3.0 percent of respondents, respectively.

One of the panelists argued that poor marketing was to blame for media startups' failure to achieve success. For example, this panelist argued, a year after independent satellite television Belsat was launched, only 4.1 percent of those surveyed said they were watching it.

"There is neither total jamming [of foreign broadcasters] nor Internet filtering. Rather, the state is engaged in throwing sand into the gears, a shameful practice for a European country. On election days or during opposition rallies, independent news sites are cordoned off via shaping [bandwidth prioritizing and limiting]. Or another example: Cable operators used to say 'You are watching 48 TV channels,' yet when one of them, NST, Russian humor TV, had satirized President Lukashenka, it was replaced by another channel the following day. That new television channel could be just as good, but their meddling into my menu and deciding what should be on my plate is displeasing," a panelist argued.

State newspapers retained a dominant position in the market. The government subsidizes their rent, subscription, printing, postage, and distribution. Back in 2005, the government banned 13 independent newspapers from state-owned distribution and 16 independent newspapers from subscription networks. Some of those banned newspapers closed down altogether. Others had to rely on their own small-scale distribution incentives, and it "will take years for them to recuperate," a panelist said.

In an attempt to improve its relations with the European Union, the government in November 2008 allowed two of those banned newspapers, *Narodnaya Volya* and *Nasha Niva*, back into distribution systems. "The question is for how long and whether it will be worth their while," a panelist said, adding that applications of almost a dozen other independent newspapers to distribute via state-owned networks were rejected just a week later. Furthermore, Belsayuzdruk (a nationwide network operating around 1,400 newspaper kiosks) charged *Nasha Niva* a 55 percent markup and introduced a cap on how many copies it could sell. These networks often delay for up to 90 days their payments to publishers for the copies sold, further undermining newspapers' efficiency.

To be distributed or broadcast in Belarus, foreign print and electronic media need express permission from the Ministry of Information. On top of that, 136 cable operators now offering 90 television channels (including 50 Russian ones) must have their subscription packages approved by

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.

local governments. Cable television is available in urban areas only and is more or less affordable. According to the aforementioned survey, 39 percent of respondents watch cable television. Most Western, Polish, and Ukrainian news channels were banned from cable networks several years ago. However, they are available via satellites, quite often for free, or are just pirated. As for foreign press, only Russian publications—usually unaffordably priced—are available.

State media are hardly serving the public interest, other than through educational and cultural programming, panelists said. For years, they have been reporting mostly on the government and speaking with a single voice, quite often that of President Lukashenka. Marginalized opposition, independent trade unions and non-governmental organizations are mostly—and at best—ignored; they are sometimes smeared. Despite their efforts, independent broadcasters based outside Belarus were unable to fill the non-partisan public media gap. Meanwhile, panelists felt the pressure was mounting to make independent Belarusian media more servile toward the opposition.

There are nine news agencies in Belarus, according to the Ministry of Information. However, only BelaPAN can be considered independent. Panelists not only praised its objective and professional reporting but also noted the variety of services it offers: news subscriptions, e-paper, and photos, as well as some infographics, audio, video, and multimedia content.

BelTA, the mouthpiece of the government, offers news, photo service, infographics, and publishes the weekly *7 Dnei* and several journals. Two more prominent market players—Interfax-Zapad and Prime-TASS—are Russian owned. At around \$300 a month, subscriptions for most independent newspapers are only just affordable, to say nothing of news Web sites. Privately owned radio stations were banned from using BelaPAN news back in 2003 and since have relied on other sources, mostly the Internet.

There are 41 privately owned television broadcasters out of 69 broadcasters in total, yet they are mostly local stations offering little of their own programming. Most are limited to daily local news, personal messages (like birthday greetings), and weekly news programs. These broadcasters steer away from criticism of the government.

Panelists differed on the level of transparency of media ownership. The law orders disclosure of direct owners (publishers and broadcasters). But the state remained the only media tycoon, since “nobody views media as a business, that is more of a toy,” a panelist explained. There are some Russian-owned media, notably popular daily *Komsomolskaya*

Panelists differed on the level of transparency of media ownership. The law orders disclosure of direct owners (publishers and broadcasters). But the state remained the only media tycoon, since “nobody views media as a business, that is more of a toy,” a panelist explained.

Pravda v Byelorussii and weeklies *BelGazeta* and *Argumenty i Fakty*.

Like the broader political spectrum, social issues are underrepresented. The government prefers to ignore minority issues; they remained marginalized in the mainstream media and covered to very little extent by special media. Most notable were ethnic minorities' newspapers and bulletins, led by Polish and Hebrew publications, circulated within those communities.

OBJECTIVE 4: BUSINESS MANAGEMENT

Belarus Objective Score: 1.03

For the first time since 2003, Objective 4 received a score exceeding 1.00. Most of the indicators saw slight improvement, but panelists' observations of the growing advertising market (covered by Indicator 3) accounted for most of the improvement. Otherwise, all indicators received scores close to the overall objective score, except for Indicator 5, government subsidy of independent media, which scored more than a point higher. Despite the improvement, Belarusian media still face serious problems in terms of their management and financial performance.

“All in all, the industry is just surviving,” a panelist said while commenting on how efficient the media have been as businesses. An under-reformed and illiberal economy with no significant private sector is unable to generate enough earnings to sustain the media. Compounding the situation, the government either directly owns or controls both production (like printing presses) and distribution facilities (postal service, press distribution network, telecom infrastructure). Unreformed and largely inefficient, these supporting institutions have been hampering the development of the media sector.

“All in all, the industry is just surviving,” a panelist said while commenting on how efficient the media have been as businesses.

By and large, Belarus’ media have been hit by the economic crisis of late 2008. Some media faced decreasing advertising revenues by the end of the year, although others have seen unexpected jumps in ad sales as advertisers set out to spend ahead of the recession expected in 2009. Banks and car dealers have already announced they would be cutting their ad spending by 70 percent in 2009, according to a panelist.

Even the state television channels have seen their spending capped by the government and have had to cancel some expensive entertainment shows, according to a panelist. He quoted one of the television bosses at Channel One as saying: “As you know there is no crisis in Belarus [President Lukashenka vowed to retain control over the economy and ‘banned panicking’], yet there is no money either.” The government has even been contemplating selling stakes in its propaganda pillars, state-owned national television channels, according to the same panelist.

Elsewhere, the privately owned weekly *Express-Novosti* announced in December 2008 that it would suspend operations for six months because of its owner’s difficulties with other businesses.

There is some basic business-planning, a panelist argued. Still, following those plans is difficult in such a turbulent environment. Accounting practices and laws are not fully

compatible with recognized international standards. The government, however, has vowed it would simplify the overly complicated accounting and taxation systems, lower taxes, and curb red tape. Human resources management remained a weak point. Certified specialists are hired to manage accounting, which is a legal requirement. Sales managers are common. But only bigger media companies can afford lawyers, marketing, finance, and personnel managers.

Revenues come from a variety of sources that have remained largely unchanged for many years. State media relied heavily on government funding and on subsidized advertising fees. The latter are often used to lure advertisers away from privately owned media. Businesses may come under pressure not to advertise in independent newspapers critical of the government. Private radio stations rely mostly on advertising, as do non-state television companies where revenues also come from personal messages, like birthday greetings, sms-chats, etc.

The independent press generally depends on advertising. The sale of copies is important for a couple of popular tabloids and the opposition weeklies, which advertisers shun. Regional non-state newspapers rely mostly on classified ads from local small and medium-sized businesses, as well as, to some degree, on newspaper sales. Some of these publishers also run side businesses, mostly small advertising agencies that have developed out of their in-house ad sales departments. Foreign donors funded independent broadcasters based outside the country, as well as some non-state publications and online media. Private media do not receive direct subsidies from the government.

Commenting on how those revenue sources affected editorial policy, a panelist said the media absolutely would not criticize advertisers.

Throughout 2008, the Belarusian advertising market grew 30.4 percent, to total \$114.1 million annually, according to advertising group ZenithOptimedia. The Internet has more than doubled its earnings, to \$6.3 million from \$3 million. Other sectors were less successful. Television spending totaled \$70 million, print media \$18 million, and radio \$6 million.

Big international agencies continued to dominate the advertising market. So did their clients, multinational giants like Procter & Gamble, Colgate-Palmolive, and domestic mobile telephone operators which, seeking wider audiences, traditionally channel their budgets to national television networks. The law limits advertising to 20 percent of total daily broadcast time and 30 percent of prime time (6 p.m. to 10 p.m.). Smaller media outlets are missing opportunities to build up their ad sales, a panelist argued, possibly because of stereotypes or lack of pertinent experience.

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.

Little market research is being done, panelists agreed. Only a handful of bigger media outlets, like national state television channels, some national newspapers, and radio networks, can afford commissioned research, mostly in the form of opinion polls and, sometimes, focus groups. The research results are principally used to impress advertisers and, sometimes, to customize content. Donor-funded broadcasters like satellite television Belsat and European Radio for Belarus are also using commissioned research. Other media, at best, do their own research, mainly via questionnaires and phone surveys.

Panelists noted some improvements as far as broadcast ratings and, especially, Internet statistics are concerned. One more company, GEVS, started offering television broadcast ratings based on PeopleMeters. It joins the institute for sociology at the National Academy of Sciences. The Independent Institute of Socio-Economic and Political Studies (IIEPS) conducts mostly political polls but sometimes has television, radio, and newspaper questions in its surveys. MASMI is offering ratings of radio stations and statistics on the use of the Internet. NOVAK is still selling subscriptions to its diary panel and does quarterly face-to-face interviews on media consumption. In 2008, it launched an Internet usage panel. Gemius, a new actor on the Belarusian market, started offering Internet usage statistics gathered through online counters, online questionnaires, and offline face-to-face interviews. At best, only generalized information is available to media outlets. Detailed data are offered on subscriptions, affordable to major advertising agencies and rich media companies. Actual press sales remained suspect since there is no independent audit authority.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Belarus Objective Score: 0.88

The average score for Objective 5 edged up slightly from 0.74 a year earlier thanks to modest improvements in Indicators 1, trade associations, and 5, short-term training opportunities. All other indicators showed little to no change. A few indicators received scores that differed noticeably from the overall score. Indicator 2, professional associations, scored nearly a point higher than the overall score, just as it did last year. Also similar to last year, Indicators 6 and 7, access to printing facilities and apolitical distribution, both scored more than half a point lower. All other indicators scored close to the overall score.

Panelists were not aware of the existence of active trade associations representing publishers or broadcasters. "Not out of my own experience, but rather from an Information Ministry official I have learned such organizations do exist," one panelist said rather ironically. Still media owners

The independent press generally depends on advertising. The sale of copies is important for a couple of popular tabloids and the opposition weeklies, which advertisers shun. Regional non-state newspapers rely mostly on classified ads from local small and medium-sized businesses, as well as, to some degree, on newspaper sales.

and managers—especially regional ones that are not competitors—communicate and share their experiences with each other, added another panelist.

Two professional associations benefit media professionals in Belarus. The Belarusian Union of Journalists is an "official" organization uniting around 2,000 professionals who work for state-controlled media. Its activities, according to a panelist, are restricted to mostly giving out prizes, although it also offers limited training incentives.

The 1,200-strong Belarusian Association of Journalists (BAJ), meanwhile, works to protect journalists' rights via legal advice and defense, professional development, and public advocacy. Panelists traditionally paid tribute to what the BAJ was doing to protect both journalists and freedom of speech in the country. However, its resources and reach are limited. "BAJ is doing a great job, but that is not enough. Despite all the heroic efforts, there is little they can do. They have got excellent lawyers, but you can actually count cases when they

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

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

Panelists were not aware of the existence of active trade associations representing publishers or broadcasters. "Not out of my own experience, but rather from an Information Ministry official I have learned such organizations do exist," one panelist said rather ironically.

have really succeeded, since you cannot chop wood with a penknife," one panelist said.

In principle, there are non-governmental organizations involved to some degree in free speech and media advocacy work, but they are mostly human-rights groups, assisting journalists to the same degree as other citizens. At best, they provide limited publicity and—occasionally—legal assistance when journalists' rights are violated. As a rule, such organizations operate in urban areas only. "The situation is that journalists have got BAJ and do not need anything else. In critical situations such NGOs do help, but these are one-off cases rather than systematic work," a panel participant said.

Panelists criticized universities for their curricula, faculties, and the quality of journalism training offered. "There is no institute in Belarus you could send a person to and at least hope a more or less qualified specialist would graduate," an independent editor explained. His counterparts from state-owned media are similarly dissatisfied. The director of the state news agency BelTA was quoted as saying he would rather hire a person with a degree in economics or political studies. Still, journalism degrees are offered by state universities, most notably the journalism institute at Belarusian State University (BSU) in Minsk, and state schools in Homiel, Hrodna, and Viciebsk. There are also three privately owned institutions, all based in Minsk, that train journalists. BSU's journalism institute vowed to stay up to date with journalism trends and, correspondingly, offer more practical training. As a result, a major in Web journalism was introduced in 2008. Although the institute spent around \$3.5 million on a new television studio, students were not allowed in, according to a panelist. Instead, a lottery show was produced there for one of the national television channels.

External alternatives include, first and foremost, the European Humanities University (EHU), once a Belarusian university now in exile in Vilnius, just 110 miles away from Minsk. Panelists said they had not come across an EHU journalism student or a media product from the university and could not generalize

as to the quality of the training. There have been no graduates from the university yet, so it is too soon to judge.

Other minor opportunities include government and foreign donor-funded scholarship programs in Ukraine, Poland, the United Kingdom, and the United States. As in previous years, panelists doubted that graduates would find it easy to locally apply the knowledge and experience they gained abroad.

Short-term training opportunities are abundant and there is a wide selection, addressing all levels and all departments. Most trainings are offered for free by both domestic and foreign media-development organizations. However, the effect is sometimes minimal, a panelist argued, saying skills are often lost as soon as trainees get back to their routine work. Another panel participant said the quality of such trainings was deteriorating, especially those offered by foreign trainers and he was less willing to send his staff. Such courses often concentrate on general issues such as ethics—possibly because donors are more willing to fund them—than on professional development. Longer-term in-service trainings, especially those held abroad, are less readily tapped by key staff since understaffed newsrooms depend heavily on these employees. According to panelists, trainings should concentrate more on improving journalists' interviewing and investigative skills, business reporting, and everything related to the presentation of information (visual design, infographics, multimedia).

Sources of newsprint are not yet monopolized, yet the government was reportedly ordering some state regional printing presses to switch to domestically produced newsprint that is more expensive and of somewhat inferior quality. Printing facilities are mostly owned by the state. The few remaining ones are directly controlled by the government via the Ministry of Information, the regulator of both publishing and media industries. "There is no problem buying newsprint, yet what will you do with that given the situation with printing houses? Private ones are even more likely to say no," an independent editor commented. Under the law, a director of a printing house is responsible for the content of the printed materials produced. Furthermore, there is an issue of quality and non-standard orders. In the latter case, it is both easier and cheaper to print abroad.

The government retained tight control over all media distribution channels. Broadcasters and newspaper kiosks are owned by the state. Postal services, too. There are some sales of mostly non-political publications through newsstands in shops and supermarkets. Some independent papers operate their own very small distribution systems. These allowed them to keep afloat after they were banned from state distribution networks.

Most of the telecom infrastructure is also owned by the government via the state telecom monopoly Beltelecom. It controls all international Internet traffic and charges exorbitant rates for that and for interconnection of private last-mile Internet service providers. As a result, Internet-access remains unaffordable to many Belarusians. Most have to choose between slow connections and traffic caps. A one megabit ADSL without a traffic cap is offered for around \$500 a month.

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.