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BELARUS

Significant recent changes in Belarus include the impact of Russia's annexation of Crimea and the conflict in Ukraine; the economic crisis and drop in value of the Belarusian ruble, which in August 2015 had fallen over 30 percent for the year; a presidential election in October 2015; and a thawing of relations with the West. Little, however, has changed with regards to civil and political life and freedom of speech: President Lukashenka maintains his autocratic political system. If anything, government control over civil society and independent media got easier, as foreign funding has significantly dipped due to tightened national budgets in donor countries, shifting priorities to the Middle East, and a form of appeasement to Lukashenka as he skillfully plays the role of mediator between Russia and Ukraine.

The government maintains its usual tools of constraint on traditional media and continues to tighten its controls over the internet. Cumbersome and loosely-worded registration and licensing requirements stonewall the print and broadcast media from presenting alternative points of view. Menacing legal requirements remain in place under the pretext of creating responsible media. As a result, the media are forced to continue practicing self-censorship. Barriers around accreditation prevent journalists from reporting on topics such as corruption or the financial crisis. Meanwhile, division along ideological lines damages standards of accuracy and fairness.

The government controls around 75 percent of the GDP, composed mostly of unreformed state-run businesses that do not see a need to advertise their products or services, and avoid the independent media. The advertising market shrank significantly in 2015 as the economic crisis hit; most local experts say it dropped by as much as 30 percent to some \$83 million, but dollar comparisons are distorted by the drop in the ruble. The national government's direct funding and other public support of state-run media was roughly stable. This means the impact of the drop in advertising has disproportionately hit the independent media. Thanks to state support some 600 state-controlled media outlets present one point of view largely aligned with the government.

The internet is increasingly the medium of choice for Belarusians, with more than 60 percent using it to receive news and analysis, increasingly via mobile devices after 4G was launched in December 2015 by one mobile operator. Internet media have suffered too, but most commentators suggest the drop in their share of advertising has been closer to 15 percent. Additionally, the authorities are beginning to pay heed to the importance of internet media; the blocking of one influential website might portend things to come.

The difficult operating environment in Belarus prevented the inclusion of input from an in-country panel discussion this year. This chapter represents desk research, interviews, and the results from questionnaires filled out by several people familiar with the state of media in the country.

BELARUS at a glance

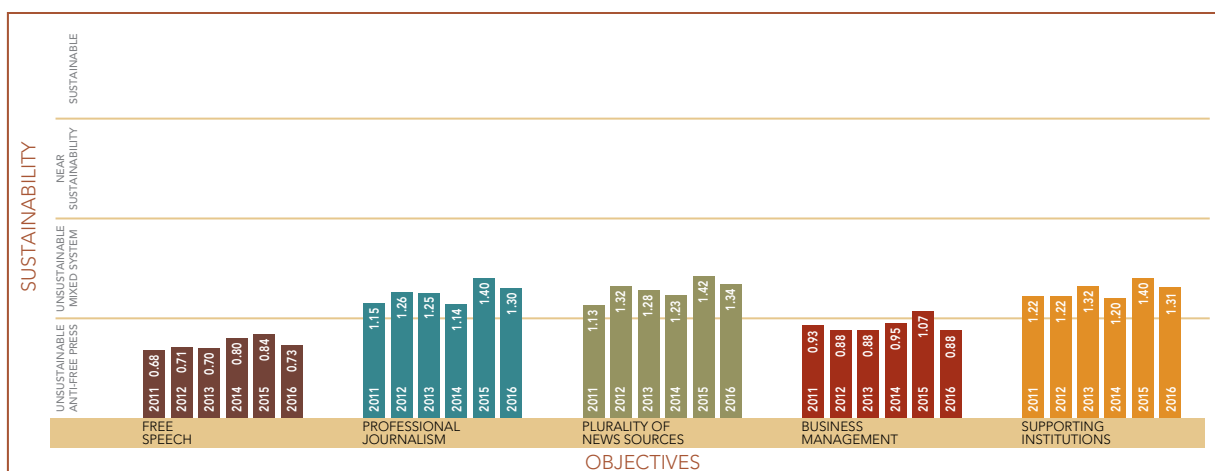
GENERAL

- > Population: 9,589,689 (July 2015 est., CIA World Factbook)
- > Capital city: Minsk
- > Ethnic groups (% of population): Belarusian 83.7%, Russian 8.3%, Polish 3.1%, Ukrainian 1.7%, other 2.4%, unspecified 0.9% (2009 est., 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 (official) 23.4%, Russian (official) 70.2%, other 3.1% (includes small Polish- and Ukrainian-speaking minorities, unspecified 3.3% (2009 est., CIA World Factbook)
- > GNI (2014-Atlas): \$69.53 billion (World Bank Development Indicators, 2016)
- > GNI per capita (2014-PPP): \$17,610 (World Bank Development Indicators, 2016)
- > Literacy rate: 99.7 %; male 99.8 %, female: 99.7% (2015 est., CIA World Factbook)
- > President or top authority: President Alexander Lukashenka (since July 20, 1994)

MEDIA-SPECIFIC

- > Number of active media outlets: Print: 723 newspapers, 823 journals and magazines; Radio Stations: 173; TV stations: 100 (2015, Ministry of Information); Internet News Portals: 25 (2014, Gemius)
- > Newspaper circulation statistics: Top three by circulation SB. Belarus Segodnia (weekly circulation 2,000,000, state-owned), Komsomolskaya Pravda v Belorussii (weekly circulation 436,000, private, Russian-owned), Respublika, (circulation 160,000, state-owned) (December 2014, Medusa advertising agency)
- > Broadcast ratings. Top three by share: NTV-Belarus (14.8%), ONT (13.97%), RTR-Belarus (13.27%) (December 2014, GEVS)
- > 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, 2014)
- > Annual advertising revenue in media sector: \$116.3 million (\$62.4 million television, \$19.9 million Internet, \$10.5 million print, \$6 million radio) (Vondel Media advertising group, December 2014)
- > Internet usage: 5,595,608 (www.internetworldstats.com, November 2015)

MEDIA SUSTAINABILITY INDEX: BELARUS



MEDIA SUSTAINABILITY INDEX 2016: OVERALL AVERAGE SCORES



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

Belarus Objective Score: 0.73

As documented in previous reports, the Belarusian constitution and several laws, including the media law, as well as international treaties ratified by Belarus, guarantee freedom of speech. Yet what the law actually says is less important than the arbitrary way in which it is oftentimes applied. “In 2015 little legislative change was introduced, instead the authorities worked hard at implementing the law on media and other acts adopted in late 2014. The blocking of website Kyky.org in June 2015 was a chilling illustration of the power of the new law,” one interviewee commented. On the other hand, the former “black list” of banned websites, including www.charter97.org, www.belaruspartisan.org, spring96.org, has been cancelled.

The laws impacting freedom of expression are kept menacing but vague. For example a media outlet may be punished by the government regulator, the Ministry of Information, over a minor technical mistake or for publishing information that turned out to be incorrect, even if there is no harm done.

As noted in last year’s MSI, in December 2014 the Belarusian parliament adopted amendments to the already restrictive media law that impose stringent rules on online media similar to those traditional media have had to abide by for

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.

many years. According to the vaguely worded provisions, any website that distributes information—including blogs and social networks—is considered to be a media outlet. Although no formal registration is required for online media, they can be closed down after two warnings from Information Ministry just like “regular media.” In addition, online media and hosting providers can now be held accountable for all comments posted on their websites, and the state’s power to block Internet resources has been extended. While previously only propaganda inciting war, violence, cruelty, or extremism could be blocked, now any information that can harm Belarus’s “national interests” may trigger the shutting down of a website, and materials published as far back as three months are allowed to be blocked.

Foreign websites have to receive permission to be distributed in Belarus. Other provisions allow the ministry to block access to any website if it violates those or other requirements. The new law also bans the distribution of information deemed to be extremist or capable of harming national interests, defined in similarly vague language as in other laws.

Confidentiality of news sources is guaranteed by law, yet may be overridden by a court order or a request from an investigating authority as part of a court hearing or criminal investigation. However there have been no cases demanding a source be provided to a court in recent times.

The media law requires registration of traditional media (print, television and radio stations, and news agencies). Both registration and licensing procedures remain cumbersome and politicized. Applicants need to provide numerous details on the would-be outlet, including topics to be covered, frequency, distribution area, as well as information about the sources of funding and the editor-in-chief. The latter must have a journalism diploma and at least five years of work experience as an editor. There must also be a company or a non-profit organization to act as publisher or a broadcaster.

There is no equal access to the frequency spectrum. The National State Television and Radio Company—a conglomerate of four television and five radio channels and five regional television and radio companies—as well as broadcasters founded by the president or the Council of Ministers—receive frequencies without a bidding process.

Meanwhile, in accordance with the law, frequencies are allocated via a tender administered by the Republic Commission on Television and Radio Broadcasting—the nine-member body of government officials headed by the minister of information. Applicants need to provide detailed information, most notably on what kind of programming the station will be offering. Successful bidders

are then required to receive a license from the Ministry of Communications and Informatization to use that frequency.

With few exceptions, market entry for media outlets is the same as for businesses in other sectors. Most notably, the media law restricts foreign ownership of broadcasters and publishers to 20 percent. Separately, publishers and broadcasters cannot be registered as sole proprietors. Media receive no tax breaks, although state-owned television and radio networks have been exempt from VAT and profit taxes for years.

Physical crimes against journalists remain rare. There is however continual harassment of media professionals: police interference with working journalists, usually during demonstrations, arrests and detentions for hooliganism, and ad-hoc “questioning” by the security services. In a somewhat positive development, the Belarusian Association of Journalists (BAJ), a domestic press freedom watchdog, reported about 19 counts of short-term arbitrary detentions of journalists in 2015, down from 29 a year earlier and 45 in 2013. “The lack of repression against journalists and media after the presidential election” is mentioned by BAJ as another positive trend of the year. At the same time, the number of incidents with police interference into journalistic activities increased in 2015 in comparison with the previous year. A total of 47 incidents were registered in 2015 (19 cases of detention and 28 administrative cases for cooperation with foreign media) versus 39 incidents (29 cases of detention and 10 administrative cases) in 2014.¹

A commentator noted, “Another important trend is the escalating campaign against freelance journalists cooperating with Belarusian media broadcasting from abroad, most notably, Belsat and Radio Racyja. There were more than 25 cases since March 2015, with some journalists fined several times.”

The law guarantees editorial independence of all media outlets, either private or state-owned (Belarus has no public media). The state-run media organizations however depend heavily on government paychecks and subsidized tariffs. More importantly, their editors are appointed by the government, with editors of key national outlets appointed by the president himself. Quite common are “coordination meetings” with editors of state outlets where they receive guidance on how certain affairs should be covered in order to maintain a consistent official line.

Libel remains criminalized in Belarus, punishable by up to six months in prison. Yet there were no reports of libel cases lodged against journalists or media outlets in 2015.

¹ <http://baj.by/en/analytics/e-newsletter-mass-media-belarus-bulletin-646-brief-annual-review>

Meanwhile every year Belarusian media face dozens of civil defamation suits. In such cases, a plaintiff does not have to prove actual damage to reputation and the burden of proof rests on the defendant. Plaintiffs often seek around \$5,000 (the country’s average annual salary) in damages.

An interviewee claimed, “Belarus has started its liberalization and turned a bit toward the west: there are no more detentions for 15 days or so as was once a popular sentence for arrested demonstrators or journalists covering marches. At the same time, the quantity of fines increases exponentially: in 2015, there were at least twice as many fines (in quantity and in amount) issued for journalists for doing their work.” Another commentator stated, “In the past, the Ministry of Information was the main regulator for the media, but now with new Law on Media, Law on Advertising, and numerous regulations on the internet—as well as due to the crisis—internet-media are regulated and monitored by many other state agencies, including the Ministry of Trade and tax authorities. This has had a really negative impact not only on freedom of expression but also daily operations and sustainability. It’s a struggle for survival, in which it’s almost impossible to think about development.”

As noted above, the law does not hold government officials to a higher standard with regard to proving damages. According to Belarusian laws, “insult of a representative of the authorities” is punishable by up to six months in jail. The penalty for “insulting the president” is up to two years in prison and “calumny toward the president” is punishable by up to four years.

Online publishers and hosting providers are still liable for litigation even if they take material down following an initial complaint. Many news websites therefore implement some sort of pre- or post-moderation policy to avoid potential legal implications.

The Belarusian government has sustained a culture of secrecy and many government agencies keep as much information as possible behind closed doors. Although the 2009 Law on Information, Informatization and Protection of Information guarantees access to, and distribution of, public information, it also allows many exemptions. Almost 60 state agencies, regional governments, and state-run companies have the right to qualify their information as secret. Furthermore, government officials are only allowed to talk to the press after a go-ahead from their bosses. Government public affairs officers (in many cases still named ideology officers) have been imposing more barriers onto journalists’ reporting practices for years.

A journalist’s right to information is no different from any other citizen. Before 2009, media requests for information

required a response within 10 days. After the revision of the media law, the only way to seek disclosure of public information is via the 2011 law on requests by individuals and legal entities. It requires an organization (or a government agency) to reply within 15 working days (30 days when additional inquiry is required).

Privately-owned media outlets, especially those that criticize government policies, have the most trouble receiving public information. In many cases government agencies refuse to release certain information (usually statistical data) on the grounds that it takes too long to retrieve it. Sometimes fees are charged for fulfilling an information request. Requests from private media are often dismissed on the grounds that such information has already been given to state-owned outlets. A largely unregulated system of accreditation is another tool to keep critical reporters away: private outlets are sometimes denied accreditation on the grounds that a sufficient number of other outlets (in most cases state-run) have already received accreditations and can offer sufficient coverage.

The government does not restrict access to and use of both domestic and foreign news sources. Copyright definitions remain vague and many news organizations borrow stories from other outlets without even rewriting them, although in many cases credit is given to original sources. Use of pirated photos is widespread.

Entry into journalism remains unrestricted. Still, the media law defines a journalist as a staff member of an officially registered domestic news outlet. Citizen journalists, bloggers, and freelancers are considered non-journalists and lack those very few benefits their official status might have given them. One of those is fewer problems with law enforcement agencies during newsgathering. People using professional photo and video equipment in the streets might expect to have their press credentials checked by the police. Another is access to events that require accreditation, which one receives from an officially registered media outlet.

Reporting for a foreign news outlet requires accreditation with the Ministry of Foreign Affairs. So-called exiled Belarusian media (registered and broadcasting from outside of Belarus) struggle the most. Belsat has been refused repeated and annual requests for accreditation making the work of its journalists a constant stress and legal challenge. Euroradio has succeeded in maintaining a registered bureau since 2009, with between 10 and 12 accredited journalists but the accreditation is kept on an annual basis. All requests for a three-year accreditation have been refused.

State journalism schools apply ideological vetting as part of the student application process. Yet the process is more of a formality as there are almost no denials on the grounds

of political loyalty. Belarus still has a Soviet-style practice of obligatory job placement for university graduates. Graduates of tuition-free programs are required to work for two years wherever the commission of university and government officials sends them. Most of these positions are with small regional newspapers.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Belarus Objective Score: 1.30

As reported in previous MSI editions, the Belarusian media fail to meet high standards of professional journalism. The main obstacles preventing journalists from producing quality reporting and carrying out their work includes restricted access to public information, a lack of human resources, the dominance of state owned and state controlled media, and varying degrees of self-censorship.

State-run outlets have long been swayed into toeing the government line and are allowed very little space to criticize the government's policies or to hold officials accountable. Private outlets are more likely to follow standards of fairness and accuracy.

Attempts by private outlets to receive comments from government officials are largely stonewalled. Sometimes, when a story requires several opinions, objectivity is simulated by providing quotes from several people who share similar views, rather than giving a different perspective.

Belarus has two professional associations of journalists: the state controlled Belarusian Union of Journalists and the independent Belarusian Association of Journalists. Both organizations have codes of conduct that are quite similar and seek to promote standards of accuracy and fairness.

However most outlets are pressured into self-censorship, which remains entrenched across the industry.

In general, state-run media have to follow government-mandated editorial guidelines or at least be selective about the topics they choose to cover. Therefore there is no positive coverage of the opposition. At the same time, state-controlled outlets might address social issues, even criticize certain problems and provide critical coverage about a local official. Yet they would never directly discuss weak laws or dysfunctional government policies.

Despite the pressure, both political and economic, independent outlets report on most issues, including the financial crisis. There remain some 60 independent publications in Belarus, made up of 20 newspapers (6 national and 14 regional), and 15 national independent online media.

The remainder are niche media such as City Dog, 34Mag, Kyky.org, and periodicals such as Arche Magazine (covering culture) and Delo Magazine (business-oriented).²

Pay levels in the media remain low. There also remains a significant variation between national and regional media outlets, and in many cases between state-owned and private (the former sometimes pay twice as much). Those working for local private newspapers tend to be at the lower end of the pay scale. Reporters in regional outlets can expect around \$150 to \$200 a month and up to \$400 to \$500 in the capital, and editors earn 30 to 50 percent more. Meanwhile, the national monthly mean salary is \$300. In order to earn a livable amount of money, many journalists tend to work for multiple outlets or take part-time jobs in other sectors, most notably public relations and advertising. Some are leaving for other sectors, and very few outlets can afford to hire new staff as downsizing is not uncommon. The financial crisis and drop in advertising revenue is merely exacerbating an already bad situation.

The level of pay impacts the quality of journalism, as does the economic well-being of the media. Although there is significant training available many outlets do not have the resources to implement best practice and allocate sufficient time for journalists to produce quality reports. One interviewee, however, commented that there has been a “definite increase in and improvement in photo and data journalism capacity in Belarus due to donor supported capacity building (but no improvements in the state media). There’s also been a lot of strengthening of

² http://www.belpost.by/download_files/urpsmi/Kat_percent20RB_1-2016.pdf

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).

photojournalism with an increase in the use of Belarusian generated content (rather than Russian); a good example is ‘Memory photo’³ showing in striking visuals the losses on Ukraine’s eastern front.”

As noted elsewhere the terms of broadcast licenses seriously limit news and information content while allowing entertainment. Russian entertainment content is prevalent, as is almost any other form with the usual strong showing of American entertainment.

Both state and non-state media have sufficient newsgathering equipment. State media are generally better equipped as professional photo and video equipment is too expensive for most media, especially regional media. However, cheap modern alternatives including smartphones and pirated software are common.

An interviewee commented that given the growing financial constraints “in-depth and investigative journalism remain rare, as does well researched quality reporting and following an issue over time. Euroradio [based in Warsaw but accredited with a bureau in Minsk] is one of the leading producers of original content along with TUT. by [a leading portal with an increasing focus on news], *Nasha Niva* [a national newspaper] and Naviny.by and Belsat [Warsaw-based satellite television], a small number in the national context.”

OBJECTIVE 3: PLURALITY OF NEWS

Belarus Objective Score: 1.34

Belarus has a large number of media of many different kinds. However the quality and content vary significantly and many outlets do not produce their own news or unique content. For this reason the quantity of outlets does not translate into a variety of viewpoints offered within the Belarusian media landscape. In addition, the quality and depth of reporting are limited due to the worsening financial constraints of the media and by political and social constraints.

According to official data, Belarusians are exposed to a multitude of media voices. A country of 9.5 million people has almost 1,900 “traditional” media outlets. There are 723 domestic newspapers, 823 magazines and journals, 42 bulletins, 12 catalogues, 100 television stations, 173 radio stations, and nine news agencies, according to the Ministry of Information. Together, there are around 4,000 foreign and domestic newspapers and magazines available

³ <http://vasukovich.com/foto-na-pamyat>

as well as 200 foreign television channels are distributed throughout the country. There are hundreds of online media organizations that are exempt from official registration with the government, therefore there is little data on the number of these organizations.⁴

An interviewee explained: “In the past year nothing has changed significantly; no external broadcaster got a license to broadcast inside Belarus, no internal broadcaster shut down. The leading online sources of news stayed generally the same. Maybe governmental sources such as BELTA state news agency or *SB - Belarus Today* newspaper of the administration of the president increased their ratings a bit, but otherwise there’s been no real change. Russian pro-Kremlin media continue to play a significant role, with their news and entertainment shows available on TV channels that are free of charge.”

There has been no new media consumption data since the 2014 MSI, which states that an average Belarusian is watching seven television channels, accessing five websites, reading three newspapers and listening to three radio stations. Television remains the most popular source of news, with 84.9 percent of those polled saying they are using it to receive news and information. That is, however, 7.7 percent less than in 2013. Online media yielded 64.5 percent (2.4 percent more than in 2013). Newspapers and radio are less popular as sources of news, with 32.6 and 29.4 percent respectively. Furthermore, both demonstrated a huge decline (41 and 34.3 percent respectively) compared with 2013.

Approximately 70 percent of all registered outlets are privately-owned—yet state-run media organizations dominate the market in terms of audience. However the terms of registration for many private outlets require them to offer little or no news and analysis, and to focus almost exclusively on entertainment.

Most media that do touch on news and information do not vary from the official content of the state dominated media. A few outlets do try to offer alternative viewpoints, most notably Euroradio, Belsat, *Nasha Niva*, and TUT.by; although the latter also aggregates news from a multitude of sources it is increasingly generating its own content. A commentator noted, “...despite the tremendous pressures, independent media have impact on public opinion in Belarus and their popularity, especially of online media, is growing. The majority of Top 50 news and information websites in Belarus are either independent or opposition run [according to Akavita ratings; note three of the top 10 are state-run media]. Independent media are successful in using social networks as additional channels of disseminating news

⁴ <http://www.belarus.by/en/about-belarus/mass-media-in-belarus>

and information. They have many followers, their posts are clicked, shared and discussed. State media websites have few readers and their communities in social media (when they have them) are dead.”

An interviewee noted, “A positive trend is the development of online niche media, like CityDog.by, Kyky.org, or 34mag.net with clearly targeted audiences, a good sense of building communities, and understanding the nature of internet communication. They create original content, innovate with technologies, and show some success with monetization through native advertising and additional services.”

Access to both domestic and foreign media is not restricted by law. However, in order to be distributed in Belarus, foreign outlets or their distributors require permission from the Ministry of Information. Installing a satellite dish requires a permit from local housing authorities, yet that is a mere formality. Besides, as internet access is getting faster and cheaper, more people are choosing IPTV over satellite television. Improvements of online access and other telecommunications mean that access to foreign and alternative sources of information continues to increase. However, the economic crisis is bringing affordability into increasing question. Subscriptions to printed material is increasingly difficult to afford, pushing many people to online alternatives. A 2015 poll showed 93 percent of 18 to 29 year olds got their news online, but for 61 and older that drops to just 22.8 percent.⁵ Foreign media too are

⁵ <http://mediakritika.by/article/3451/kto-chitaet-novosti-v-internete> (research published in November 2015)

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.

increasingly turning to pay per view options, limiting their availability.

Nine media companies are registered with the government as information agencies, yet only four of those companies—BelaPAN, BelTA, Interfax-Zapad, and Prime-TASS—sell newswire services to other media. BelTA and BelaPAN are domestic media organizations, while Interfax-Zapad and Prime-TASS are Russian-owned.

There is no discrimination on the part of news agencies in supplying news to media organizations, yet state-controlled outlets rely on services provided by BelTA, the official agency of the Belarusian government, and sometimes Interfax-Zapad. Private outlets are more likely to choose BelaPAN, a privately owned agency, since it offers more balanced coverage with alternative opinions. Only a handful of large media can afford the services of international news agencies like the Associated Press, Reuters, and AFP. At the same time, pirating of their material including photos is common.

On average, domestic news agencies charge approximately \$300 per month for daily news updates and twice as much for real time/hourly news alerts. Apart from newswire services and news websites, BelaPAN and BelTA offer photos, multimedia stories, and infographics. BelaPAN sells specialist analytical reviews on a variety of topics. BelTA, publishes a weekly newspaper and an economic journal, as well as building and maintaining websites for local media outlets and government agencies.

Although the Ministry of Information has over 1,200 private outlets in its registry, few of them produce their own news or information content. Most magazines and newspapers offer entertainment or practical advice on things like cooking or gardening. Private broadcasters also supply entertainment content with current affairs constituting a very small proportion of their overall output, in most cases restricted to local non-political news, sports, accidents, and weather. Radio stations are music-based and television stations rely on entertainment and other programming provided by Russian television networks. There are no independent radio or television stations broadcasting from within Belarus and with a Belarusian broadcasting license.

Still, there are several dozen private newspapers, both local and national, that cover current affairs and offer independent outlooks on current affairs. They are more likely to offer unbiased coverage and alternative viewpoints. Reliance on stories syndicated from other sources is widespread, especially amongst online media; and not infrequently with disregard to copyright issues.

Private media ownership is not concentrated, however media as a whole are largely in the hands of the government, which controls more than 600 outlets. Foreign ownership remains insignificant, with Russian companies owning two popular newspapers, Komsomolskaya Pravda v Byelorussii and Argumenty i Fakty, two news agencies, Interfax-Zapad and Prime-TASS, and VTV, an entertainment television channel. The media law forbids foreign citizens and companies from holding more than a 20 percent stake in Belarusian media businesses. The media law requires disclosing the owners of founding companies behind traditional media organizations.

Belarusian media mostly focus on domestic issues. Many outlets cover local and international affairs, yet to varying degrees. Local media organizations tend to concentrate on local and regional news, and also report extensively on national ones. Their international perspective is rather limited and in many cases neglected. National outlets mostly offer a mix of national and international news and analysis and their coverage of regional and local news remains scant. At the same time aggregation of news from other outlets is quite common across the sector.

OBJECTIVE 4: BUSINESS MANAGEMENT

Belarus Objective Score: 0.88

The media business environment, mimicking other business environments in Belarus, is not a normal market environment. Media, neither state nor independent, can be described as efficient enterprises. State media and private media under state influence are subsidized directly with funding and indirectly with political support. Independent media are subsidized by international support. The advertising market is small and shrinking and is—as described above—not free of political influence.

Media outlets do not disclose financial statistics that would allow one to gauge performance. Even the government, the biggest media owner, is reluctant to report on how it manages public assets. Over the past 12 months in particular, but also in previous years, most independent media have received significant professional support in order to produce business plans, consolidate newsrooms (combine online, print, and broadcast production). Marketing and sales management support and training have also been provided. However during the same period the advertising market has shrunk and international support has dropped, and the Belarusian market and currency have been very unstable. The result is a turbulent economic environment, where even short- and mid-term budgeting is problematic.

Having certified accountants is a legal requirement. Large companies hire dedicated specialists to supervise advertising sales but often issues like finance, marketing, and personnel management are dealt with by the director of a media company, who is also oftentimes the editor-in-chief. That is especially common for smaller outlets. Few media can afford even part-time lawyers to take care of compliance with the many regulatory requirements imposed by the authorities, and many hesitate to pay for even ad-hoc advice.

Most outlets have several sources of revenue. The government directly supports state owned and run media organizations and also provides indirect support in the form of tax breaks and subsidized rent. State-imposed press subscriptions underpin the circulation of many state newspapers. At the same time many government-owned outlets also depend on advertising revenue; their subsidized status allows for them to undersell their privately owned competitors.

Advertising sales are essential for private outlets and newspapers also depend on copy sales. Many local media organizations also rely heavily on publishing personal messages like birthday greetings. In some cases, outlets depend on the owners' revenues from other businesses or are sustained by grants from foreign donors.

One interviewee said, "The advertising market dropped some 20 percent over the year, but within the online advertising market there was moderate growth of 10 percent as this is the most active sector in the industry and it has been boosted by increased internet penetration, increased use of and accessibility to computers, tablets, and smartphones and the advent of 4G. The relative and steady reduction in the cost of connections is also boosting online consumption and the online market."

Most of the lucrative advertising accounts are managed by a handful of international advertising agencies. It is not uncommon for smaller media organizations, especially regional ones, to rely on their own advertising sales teams and revenues from small private businesses. In some cases, the media are reluctant to offer discounts on their headline prices to advertising agencies, although that is a common practice.

Although many owners feel pressure to sell more advertising, the law restricts the amount of advertising to 30 percent in newspapers and magazines (25 percent in state-owned titles) and 20 percent on radio and television (including 30 percent during primetime). To accommodate more advertising, some newspaper owners also publish freestanding non-news titles that are not subject to an advertising cap. Those titles are usually distributed as inserts in the newspaper.

Only large web portals like TUT.by or Onliner.by have successfully monetized their existing online traffic. One interviewee said, "More independent media are trying to experiment with monetization models as international support drops, but these are mostly informal youth, travel, and culture outlets such as citidog.by, 34travel.by, etc. who develop and sell info projects. Horki.info and some other outlets with a significant readership base are trying monetizing through context advertising. But otherwise there've been no significant changes."

Government subsidies continue to distort the media sector by propping up hundreds of state-owned outlets as noted above. State-controlled media enjoy indirect subsidies in the form of discounted newsprint, printing, and postage fees, lower rent, etc. The three biggest state-owned media companies, television networks ONT and STV and the National State Television and Radio Company, have been exempt from value-added and income taxes for several years.

The government and state-controlled companies buy very little advertising, yet both state and private businesses have been under pressure for many years to not place advertisements in outlets critical of government policies. The law also requires businesses and non-profit organizations to publish their legal notices in certain state-owned newspapers.

Market research is limited in Belarus and what exists is underused. State-run media, for example, do not feel the need to adjust their editorial policies or strategic goals to audience needs. Some professional research is being contracted though, usually commissioned either by advertising agencies or large media companies, and at times

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.

international donors. In most cases, media organizations do not have access to their results. And even if they did, the media would be unlikely to utilize the results. Surveys usually research the national market leaving smaller outlets, especially regional outlets, with little information to inform editorial policies or pass on to potential advertisers.

Some media companies occasionally run their own in-house surveys, usually via online or paper questionnaires. In order to tailor their content and lure advertisers, many outlets rely on the likes of Google Analytics to track traffic on their websites.

Several private companies produce broadcast ratings, press readership data, and Internet statistics. GEVS offers television ratings (obtained via Peoplemeters) and also measures radio and press audiences via phone interviews.

The internet research company Gemius provides good Internet statistics. It uses a combination of website counters, online panels, and offline research and offers both usage statistics and demographic profiles. Many outlets with an online presence rely on basic data provided by the online counter Akavita, in most cases to keep track of competing outlets. Meanwhile, advertisers rely on stated print-runs from newspapers and magazines, as there is no audit of circulation.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Belarus Objective Score: 1.31

Two new initiatives, though small, have potential to have an impact on the ability of supporting institutions to serve the media sector. Mediakritika.by is a promising online initiative that fills the gap where the traditional players like the Belarusian Association of Journalists (BAJ) are slow to react. An interviewee said they “raise questions on quality of journalism, promote ethics, and pay attention to media coverage of underrepresented groups. Mediakritika works with journalists from state and non-state media and is a popular resource among media professionals.” The other is the Press Club Belarus in Minsk, which aims primarily to promote exchanges between Belarusian and international journalists and act as a source of information and networking for Belarusian journalists. The Press Club Belarus is an associate member of the International Association of Press Clubs and supported by Press Club Polska in Warsaw. Press Club Belarus was founded by 18 journalists, editors, and publishers from independent Belarusian media.

Trade associations of newspaper publishers, television broadcasters, and cable operators as well as print distributors exist in Belarus. United Mass Media represents 13 regional newspaper publishers in central and western

Belarus. The Telecommunications Industry Union has almost 100 members, mostly local television stations and cable operators (as stated above none are independent). The Union of Publishers and Press Distributors serves the press distribution industry. It has eight full members (state-owned press distribution companies) and 17 more affiliated members (mostly printing houses, yet also several newspaper publishers). All of those organizations have hardly had any role in shaping the way their industry works. They mostly provide networking and learning opportunities for their members, attempt to sell advertising in bulk, and purchase newsprint and programming rights.

There are no trade unions for journalists in Belarus, yet media workers have two professional organizations to choose from. The Belarusian Union of Journalists (BUJ), the “official” organization for journalists, brings together around 2,000 media professionals employed by state-controlled outlets. The independent BAJ has more than 1,000 members, mostly from private outlets. Both organizations vow to promote quality journalism and have developed ethical codes that members are obliged to follow.

BAJ is much more active in protecting the rights of journalists and freedom of speech in general. In addition to providing legal assistance to its members, BAJ monitors and publicizes information about violations of free speech. The BUJ is largely subservient to the government and a hangover from the Soviet era union. BAJ runs several professional development programs and also provides legal support and advice to journalists.

Domestic NGOs remain weak. There are no organizations—other than BAJ—dealing specifically with issues related to free speech. Under its mandate, however, BAJ is only allowed to protect its members. Elsewhere, human rights groups and think tanks sometimes deal with such issues. Most notably, Viasna and the Belarusian Helsinki Committee react to violations of freedom of expression by providing legal defense and publicity.

Several universities offer journalism degrees; most notable is the Journalism Institute at the Belarusian State University in Minsk. The institute offers courses in print, broadcast, and online journalism, as well as editing, media management, and international journalism. It has 1,500 students. Independent media criticize the curricula and the quality of training as “overly theoretical.” As a result many graduates are not job-ready. Similar training is offered by state universities in Brest, Homiel, Hrodna, and Viciebsk, as well as several private institutes in Minsk.

The European Humanities University (EHU) operates as an exile Belarusian university in Vilnius, Lithuania. EHU has several hundred students divided among four relevant

majors; mass communication and journalism, visual culture (cinema, television and Internet), design and visual media, and new media. The education they offer is definitely more liberal, and modeled on Western rather than Soviet standards and the university offers practical training in a modern multi-media journalism facility for students established with the support of the European Union.

Employment prospects for graduates in the media industry are bleak. Many graduates choose other sectors, most notably public relations and advertising. As noted above, graduates of state journalism schools who receive their diplomas for free are subject to mandatory job placements. They have a choice of working either wherever the government would send them or reimbursing the cost of their tuition. Usually, most of these job placements are with small newspapers run by local governments, with salaries of up to \$200 per month.

Short-term training opportunities are plentiful. Numerous training courses are offered for free by both domestic and foreign media development organizations as well as professional and trade associations. Formats vary from one-day webinars and master classes to workshops, long-term distance learning, and mentoring. Most training opportunities still target newsroom staff. There has been a recent increase in needed capacity building in finance, marketing, and advertising.

There has also been a welcome increase in training for web editors, website managers, and those responsible for social

media marketing as international donors have increasingly recognized the importance of online media.

Access to printing plants and sources of newsprint remain politicized and strictly controlled by the government. Most printing houses are state-owned and only three private companies are licensed to print newspapers. The law holds owners of printing facilities responsible for the content of printed materials they produce. Most newspapers are printed domestically and at state-run printing plants. Panelists said that price discrimination against privately-owned newspapers is a common practice. At the same time some glossy magazines are printed abroad, in Ukraine, Lithuania, or Latvia.

Similar to printing facilities, press and broadcast distribution channels are controlled by the government. Most news is sold via Belsajzdruk, a state-owned network of around 1,500 newspaper kiosks. Press subscriptions are mostly handled by state postal monopoly Belposhta. Around a dozen private regional newspapers have been denied access to either one or both of those distribution systems since 2006. They have relied on their own distribution systems ever since, as well as sales at private shops. Digital subscriptions remain insignificant. Most television and radio broadcasting equipment is state-owned; few independent transmitters are controlled due to strict licensing and compliance procedures. Many cable networks are owned by private companies, yet local governments approve the list of channels that are included in the packages.

Internet and telecommunications infrastructure continues to improve in Belarus, most notably with regards internet penetration which exceeds 71 percent (among those aged 15 to 74) and 61 percent of internet users surf the web every day. Internet subscriptions are increasingly affordable, and with the exception of less populous rural areas, the country is well served by both mobile operators and internet service providers.

Although Belarus has several points of entry for international internet connectivity, almost all of the traffic in and out of the country flows through systems owned by the state monopoly Beltelecom. All internet service providers are required by law to filter websites.

List of Panel Participants

Note: The difficult operating environment in Belarus prevented the inclusion of input from an in-country panel discussion this year. This chapter represents desk research, interviews, and the results from questionnaires filled out by several people familiar with the state of media in the country.

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.