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I am pleased to introduce the latest annual Media Sustainability Index (MSI) study for Europe and Eurasia. The MSI, now in its 14th year, is one of the world's most in-depth recurring studies of media health in the world. IREX developed the MSI to provide a complete picture of the development of sustainable, independent media. Looking beyond issues of free speech, the MSI aims to understand the degree to which the journalist corps is emerging as objective professionals, whether media firms can sustain robust news operations, and whether civil society supports the fourth estate.

The 2015 edition shows that the business side of media in the region is still weak, posing a threat to editorial independence. As online media blossom, it has attracted the attention of shadowy owners who push an agenda. On the other hand, audience measurement is taking hold more and more, promising to help level the playing field. And, in several countries media freedom seems to be more highly valued by citizens. An analysis of these developments is presented in the Executive Summary that follows.

How does the MSI make a difference in the lives of citizens in each country? The MSI measures a number of contributing factors of a well-functioning media system and considers both traditional media types and new media platforms. This level of investigation allows policymakers and implementers to analyze the diverse aspects of media systems and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with this essential knowledge, citizens can help improve the quality of governance through participatory and democratic mechanisms, and help government and civil society actors devise solutions to pervasive issues such as poverty, healthcare, conflict, and education.

The MSI also provides important—and useable—information for the media and media advocates in each country and region. By reflecting the expert opinions of media professionals in each country, its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector.

I would like to thank all those who contributed to the publication of the 2015 MSI. Panelists, discussion moderators, and authors from each country, listed after each chapter, provided the primary analysis for this project; their first-hand insights are invaluable and give immense depth to the study. Here at IREX, Neetha Tangirala and freelance editor Dayna Kerecman Myers went the extra mile to get text ready for publishing. The United States Agency for International Development (USAID) has been a consistent supporter of the MSI, funding the project from its inception and ensuring its ongoing implementation.

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



Leon Morse  
Managing Editor

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*“Sustaining independent media only from advertising in the condition of a deep economic and social crisis is practically impossible. The dubious mechanisms for distribution of public funds for the media are being used to influence their editorial independence,” one Bulgarian panelist concluded.*



**R**esults of the 2015 MSI study for Europe & Eurasia (E&E) at first glance show encouraging results: the average of 21 overall country scores increased by 0.04 compared with last year, representing the highest average of overall scores so far this decade. Out of 21 countries studied, seven increased by more than one-tenth of a point. Eleven country scores remained about the same and only three decreased by more than a tenth.

Indeed there are some encouraging developments, described in more detail below. However, in other cases what appear to be improvements in scores are likely to be only short-term blips on an otherwise downward or flat trend. Belarus (+0.16), Azerbaijan (+0.15), and Kazakhstan (+0.16) all showed small increases in overall score, but in all of these cases several factors indicate that this is not part of a new trend.

In Belarus all objective scores increased modestly except Objective 1, Freedom of Speech. Given the past year was not an election year, panelists gave better scores to indicators such as 2.3, self-censorship and 3.3, impartiality of state media content. With presidential elections scheduled for late 2015, it is likely that these indicators and others will receive less favorable scores next year. Likewise in Azerbaijan, Objective 1 did not increase and other objectives received only slight increases. Difficulties securing the participation of panelists from 2014, in part due to the ongoing crackdown on critical voices there, created some variation in score, but only marginally. Finally, in Kazakhstan Objective 1 did show modest improvement, mostly as a result of better scores for indicators 1.3, covering media licensing, and 1.5, which assesses legal protection of state media independence. Objective 3 also improved modestly. Indeed in Kazakhstan many new sources of media are available, both online and through digital broadcasting platforms. However, at this point it does not seem as though the ruling elite there are prepared to cede any time soon what amounts to overwhelming control of the most important media.

Below is a brief summary of notable findings:

- From an E&E regional average high of 2.08 in the 2006/2007 study, Objective 4, which assesses media management, has fallen more than half a point, steadily losing ground each year. Even countries now in the EU, such as Romania, Bulgaria, and Croatia, are not immune from this trend. Overall the issue seems to be that media have been weakened by a poor economy and been preyed upon by political money, or political pressure has weakened the economic environment in which media operate, thus making it easier for political money to distort the market and put independent media at a strong disadvantage.
- Market research and audience measurement, assessed by Objective 4's indicators 6 and 7, are keys to a well-functioning media marketplace. Across the region, there are more countries than ever before reporting that serious attempts to study media's audience are being undertaken. To date there are mixed results, with successes, failures, and a few who have never attempted it.

- Ownership transparency, assessed by Objective 3, indicator 6, is important for the audience to evaluate the content of media and better recognize bias. Progress has been made in a number of countries over the years, notably in Georgia, to end offshore ownership and shed light on who owns the media. But new online media, often outside of stricter regulatory regimes covering traditional media, have the ability to operate with little ownership transparency. Further, social media give voice to personae who may or may not be who they claim to be. Panelists from several countries address how this has impacted the media landscape.
- Many high-profile cases of regression in media freedom and democratic values generally, including in a number of countries covered by the E&E MSI such as Azerbaijan, have caused a certain amount of gloom amongst the international development community and democracy activists. However, there is good news, even if tempered by continued challenges, coming out of countries such as Albania, Armenia, and Moldova.

Scoring charts providing all scores for 2015 can be found at the end of this section. Further, the entire history of MSI scores for all regions is available on IREX's website in Microsoft® Excel spreadsheets. See: [www.irex.org/msi](http://www.irex.org/msi).

## What is Behind Objective 4's Slide?

Media outlets and the media sector as a whole have a number of vulnerabilities. Direct censorship, pressure to self-censor, violence against journalists, and reporters coming up against information blockades all undermine the ability of media to serve as the "Fourth Estate." Over the past several years in Eastern Europe, it is the ability of media to sustain financially their operations that has most diminished their independence and reporting quality.

Objective 4 measures the business and management aspects of a media sector. It is designed to gauge practices employed by media managers to run their media outlets efficiently. It assesses the state of advertising, not only in terms of how robust the market is, but how fairly advertising is placed and if government subsidies or advertising skew the market. It also includes a measure of media market research and audience measurement (a separate analysis of how these are performing is included below).

Objective 4 scores have fallen since their highs in the 2006/2007 edition throughout Southeast Europe and much of the rest of the region. (However, in Moldova, Armenia, and Kazakhstan scores have actually risen as the overall economies have improved and, in Moldova's case, the political situation in the country stabilized and saw a

reform-minded government elected.) While each country's individual case is unique, there are underlying causes that have affected media worldwide. First, the global financial crisis of 2008 tightened credit markets. The impact on media was multifold. Multinational media conglomerates pulled back from new markets in Eastern Europe to focus on their core investments in Western Europe. As consumer demand withered, so too did advertising. At the same time, online advertising finally took hold but at prices that are a fraction of what print and broadcast once commanded. While at first media in much of Eastern Europe were insulated to some degree due to the lack of development and use of online media, this quickly changed with the rise of cheaper Internet access and improvements (and also lower prices) in mobile networks and smart phones.

Media worldwide have adjusted but the media landscape is forever changed, and at least in the short run there is a sense that this revolution has damaged journalism quality even if at the same time opening up the media space to more voices.

In Eastern Europe, the Media Sustainability Index has chronicled over the past nine years how media throughout the region are impacted by these global shifts, and how media vulnerability as a result is being used by forces wishing to control information.

Croatia is an excellent case in point, being one of the most successful transition countries in terms of both overall achievements (e.g., it is a EU member) and media development. A quote from this year's chapter summarizes how things have changed, even there:

"Recently, I've met representatives of a group of local media. They told me that they were operating on a basis of three-month financial plans. No more strategic planning; now, it is about mere survival," said Berković. Indeed, there isn't much left of the glory days of the late 1990s and early 2000s, when some of the 'home-grown' media companies, started in the late 1980s or early 1990s and based more on enthusiasm and vision than on financial investments, were rightfully considered as proud examples of the successful Croatian entrepreneurship, well beyond the media industry."

The chapter goes on to detail the woes in the business of media, including an estimate that newspaper circulation has dropped to one-third of the level seen in the late 1990s and that jobs in the print industry have been cut by 40 percent since 2007.

Another panelist from Croatia, Ante Gavranović, the founder and former president of the Croatian Associations of Publishers, pointed out during the panel discussion, "Such a persistent crisis in the media sector is a result of a combination of a contracted advertising market and

media management incapable of coping with a new market environment. In the initial phase of the crisis, some print media managers had tried to fight the downward circulation trend by trivializing the content, which resulted in the loss of trust in media and a further drop in circulation.”

And print is not the only media suffering: local radio and television stations report that they rely on funds from the government to support public interest programming, without which they would be forced to only show entertainment programming. Panelists also reported that, although not in the red, national broadcasters do not make as much as they once did.

If in Croatia so far the media have not been weakened to the point that they have come under control of political forces, in Bulgaria, another EU member, the situation has deteriorated to the point that quality of reporting has suffered greatly in the eyes of MSI panelists. The problems there are summarized thusly by this year’s chapter: “The most problematic areas include the unfair distribution of government funds for the media, the manipulative and unreliable data on broadcast ratings and circulation figures, as well as the overall lack of transparency in the advertising market.”

One panelist, the sales manager for a big media conglomerate, said, “Most traditional media operate at a financial loss, which leads to compromises with editorial independence. With few exceptions, the big advertisers enjoy complete media support. As public institutions remain the biggest advertisers, any government regardless of its political affiliation receives media support.” Other panelists described how the advertising market in Bulgaria has fallen by 45 percent since 2008. Now, one of the most important advertisers is national and local government that handle not only advertising from the national budget but also advertising on behalf of the EU. Panelists complained that the advertising is not handled transparently, that many recipient media support the government of the day, and perhaps most importantly, local media are often shut out of the equation. Exacerbating the availability of advertising revenue was a price war between two important national broadcasters who engaged in a price war, lowering advertising rates throughout the country.

Further, many media there have become mouthpieces for their owners, who head business conglomerates. One panelist noted that such media are not as interested in being run as a business, but funded by their owners and used to attack their competition. Another panelist noted how the quality of news in such cases unavoidably suffers.

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impossible. The dubious mechanisms for distribution of public funds for the media are being used to influence their editorial independence,” one Bulgarian panelist concluded.

Ukraine in 2006/2007 scored an impressive 2.83 for Objective 4, its highest scoring individual objective in its MSI history and up from 1.51 in 2001’s initial study. In 2015, it scored a 1.39, remaining almost unchanged from 2014. While instability and conflict in the country have certainly depressed the advertising market, there is more underlying the problems facing media there: political pressure has forced the media into abandoning strong management in favor of simply acting as political cudgel.

Although often adding cautionary notes, the Ukraine 2006/2007 chapter nonetheless painted an optimistic picture: “More private media outlets are becoming more efficient and profitable due to the growth of advertising and other revenues, as well as professional competition.” “Independent media do not receive state subsidies. Panelists mentioned another form of cooperation with local governments in which newspapers sign agreements with them to provide, for example, a separate, appropriately marked page for official information from the local authorities.” And, “Revenue from various sources grows in both print and broadcast media, and professional managers are making more outlets able to diversify their revenues, panelists said.”

This year panelists shared a gloomy reality that persists despite the departure of Yanukovich from power. “The majority of media in Ukraine are not businesses at all. Even the largest channels require subsidies from their owners, as they are losing revenue,” said one panelist. “In the current market with up to 4,000 print editions and 300 television stations, many cannot survive. State-funded media distort the market,” noted another. The impact on independence was demonstrated by one example where a local newspaper silenced a car accident involving the son of large local advertiser.

The main underlying problem is government influence in the media market and politicized ownership. Panelists reported that government agencies at the national and local levels poured \$43 million into various media outlets they control, compared with a total media advertising

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market of \$345 million. State media in Ukraine are eligible to tap into that advertising market, competing with commercial outlets. Further, the previous government manipulated media licensing to replace more neutral ownership with political ownership at important broadcast outlets. Oligarchs now control the most important source of news for Ukrainians and are not as interested in the ability to make money from these assets (let alone provide quality journalism) as they are of making use of their messaging power for their own benefit.

Macedonia suffers from similar problems. One panelist remarked on the futility of good management practices: “Regardless of one’s managerial skills and the level of organization, it is not about the access to the market, but the access to the actual advertising budgets that decides the success. There are small television stations all over Macedonia that report huge earnings, in spite of having limited capacities, and there are well-organized national radio stations that report losses.”

Another paragraph sums up the situation well: “A large majority of the media, including almost all of the largest privately owned national broadcasters and print media, are actually part of larger entities and cannot be considered the core business for their owners. The owners use them instead to promote their core activities, as a tool to use against competition, and as a bargaining chip in negotiations with authorities when core businesses are under pressure. Last year, there were reports that two national broadcasters were targeted for takeover, but ultimately nothing materialized. In at least one of those cases, the proverbial grapevine has it that the national television station was offered by the owner after his main business venture was the target of a hostile takeover attempt.”

These four cases show how vulnerable media outlets are when secure sources of revenue dry up, and how political

pressure can result in a marketplace unfriendly to all media. In the case of the former, Bulgaria is one example where a successful media sector has been damaged dramatically to the point that it is likely to take years for it to recover the success it once had. Despite what appeared to be a strong legal environment, weakened media were easy targets for those wielding political money. In Ukraine and Macedonia, media had been achieving success in developing financial sustainability, but government changes resulted in animosity toward critical media. Bending laws and taking advantage of underdeveloped economies, media there, particularly in Macedonia, struggle to find a safe place in the market. The most important media are dominated by those with money and with political agendas.

## **Taking the Audience’s Pulse**

Measuring audience size and learning who the audience is are powerful tools, the deft use of which can create successful media—successful not only in terms of their ability to make money but also in becoming a valuable resource for their audience. This year’s MSI revealed that in 15 countries there is broadcast audience measurement, with it being done in a limited way in another five. Only the Turkmenistan study reported no efforts whatsoever to measure broadcast audience or use market research to better understand the audience and its preferences. While in many cases there are flaws with either the implementation and/or access to and use of the data, overall the expansion of this activity is a step in the right direction.

Of the seven indicators that make up Objective 4, two cover market research and audience measurement. Assessing the existence and use of these tools, therefore, contributes nearly a third of the weight to the objective score. Of note is the fact that since 2006/2007, when Objective 4 scores peaked taken as a whole, the situation with market research and audience measurement seems to have improved—suggesting that the slide in Objective 4 is rather acutely related to the advertising market and ability of media to secure revenue, in line with the new reality facing media worldwide, and political considerations. Should the developments in market research and audience measurement continue, or at least remain, the advertising market could adjust over time to better reward media that draw the largest audiences. Of course, other aspects of the playing field will need to be leveled as well, such as ending the practice of state media selling advertising at artificially low prices.

In a few countries, there is agreement that the ratings in existence are relatively accurate and that media use research to better tailor their content. In Croatia, for example,

panelists judged that ratings are “reliable and precise” but also “hideously expensive,” meaning that media that are financially well-off can afford to make use of them. However, there is a culture of using research to tailor products to the needs of the audience. In Ukraine a similar situation exists, and again smaller players, typically local regional broadcasters, are either unable to afford to buy into the results or else are shut out of the research altogether due to the small markets in which they operate. In Serbia, measurement exists to the benefit of national radio and television broadcasters, but local stations are not included in the measurements.

In Albania, audience measurement seems to be getting established finally but has yet to take hold among broadcasters. This year’s chapter reports, “Market studies are still rarely used by the media to formulate strategy or recalibrate programming according to audience interests and demands. Abacus Research and Telematrix Albania have started to report data on electronic measurement of viewership through people meters, but it seems that the products of these companies are not yet widely used by advertising clients due to financial constraints.” Likewise in Kyrgyzstan efforts to introduce audience measurement are only now taking place; media are still skeptical and it is limited to larger markets.

In Bulgaria established audience measurement has taken a turn for the worse from days when it once served media as a valuable information resource. There, two companies provide audience measurement, but seem to each be currying favor with bitter rivals in the national broadcast television market. Wide gaps in the ratings for the same shows by each of these have undermined trust in the ratings, undercut the ability of media to develop adequate business plans, and hurt the ability of advertisers to place advertising spend wisely. One panelist decried this development, saying that the advertising market is “a boat sailing in stormy seas. When the research falls, this market will become a junk market and all advertisers will withdraw.”

In Moldova, “AGB’s data have little credibility,” according to one panelist who cited a 2010 AGB measurement giving a local network viewership during time slots when the network was not broadcasting. Panelists there reported that AGB Moldova has connections with media conglomerates. In Georgia, broadcast ratings cover national media; panelists remained critical of the company producing ratings, although not to the point of dismissing them entirely. Likewise in Tajikistan, research findings that showed a significant audience in a market unserved by one broadcaster called into question all efforts to measure audience.

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In several other countries, audience measurement remains spotty: it is either carried out infrequently or plays a minimal role in determining advertising rates and placement for one reason or another. In Kosovo there are companies that conduct market research, but most media cannot afford to pay for the results. In Montenegro, panelists said audience measurement efforts “are rare.” In Armenia television broadcasters find ratings to be expensive, lacking coverage of key platforms such as IP television, and restricted to Yerevan. Broadcasters therefore do not rely greatly on these figures in their work.

While overall the situation with audience measurement and its use in market research is far from established and reliable in most cases, it is encouraging that it exists in one form or another in nearly every country in the region. As these efforts continue, they will become important tools for media. Further, successes from one country are likely to inspire neighbors to adopt such approaches.

## Hiding Online

Through at least the middle of the last decade, online media in much of the developing world was the province of students and innovation-minded progressive elite with literacy and the money to access equipment and time on the Internet. While this gave rise to a blossoming of ideas and an opening of information online, this was also short-lived.

Online media are everywhere now. While the early adopters are still online and quality information abounds, it now can get lost in the noise of countless websites, many of which aggregate information without analysis or are online versions of tabloids. Paid political trolls make discussion forums an unpleasant place to spend time. One strength of online media, the ability to operate with little startup capital and without the red tape of government regulation, has also allowed websites to spring up with no information about who is behind them, robbing visitors of the ability to judge what bias may be present or to assess for themselves any agenda present in the nature of the reporting.



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In this year's MSI, panelists from several countries reported shrouded ownership as a concern. In Armenia media ownership across platforms remains a problem, "with many rumors but few facts." One panelist highlighted how the only thing he knows about one online outlet is that it criticizes the Prosperous Armenia Party; as to who controls it he has no idea. In Macedonia, on the other hand, existing laws—even if imperfect—shed some light on media ownership—except online media. That chapter cites a report that found that many news websites, typically pro-government in content, are registered in tax havens. That chapter's author cautions that this may be a way of hiding the fact that indeed the websites are controlled by people close to the ruling party or politicians. In Romania, panelists indicated that anonymity is the rule for online news and blogs.

In Serbia a new law created transparency of ownership for media, except online media. This year's study pointed out that a growing number of websites that publish news exist but provide no information about their ownership. In Kosovo, the panelists expressed serious concern about hate speech present in both the reporting by online news outlets or in the uncensored, un-moderated, anonymous comments by readers. Panelists there blame online outlets for a drop in overall quality of journalism.

While regulation of online media is a road that should be avoided, on the other hand some strong self-regulation by reputable, well-intentioned news websites on prominent, voluntary disclosure of ownership could encourage a clear delineation between those promoting transparency and those trying to stay in the shadows.

## It is not All Bad News

In the past two years regression in democratic development, including freedom of the media, has received a lot of attention. There is a valid fear that gains made since the end of the Cold War are slipping away. Within the E&E region, setbacks for democracy and the media in Hungary (not covered by this study), Russia, Azerbaijan, and Ukraine received the most attention. Stubborn authoritarianism persists—and in some cases seems to be getting more entrenched—in Turkmenistan, Belarus, and Uzbekistan. In Uzbekistan the

situation has taken so bizarre a turn that the president's own daughter, Gulnara Karimova, who was the regime's cheerleader and was believed to control substantial media holdings, now finds herself under house arrest and the media over which she held sway have been reassigned to others.

While certainly there seems to be developing a list of long-term losers when it comes to media development in the region, there are also those that are doing better after starting off in 2001's inaugural study under much more humble circumstances.

Chief among those showing significant improvement are Albania, Armenia, and Moldova. These countries have improved in overall score since 2001, in 2015 are scoring in the "near sustainability" range, and have improved consistently or remained relatively stable over the past few years. Bosnia, Montenegro, and Kosovo, for example, have all improved since 2001 but have, in recent years, been on a negative trend in scoring despite the fact that all three score in the "near sustainability" range. There is no reason to abandon hope for these latter three, but at the same time developments there have contributed to the sense of overall regression referred to above.

In Albania, Armenia, and Moldova, there seems to be a common thread that the public values media freedom. In Albania, for example, the chapter notes, "In general, there is a perception that the public is sensitive to violations of media freedom, coupled with careful international monitoring, which has helped prevent the political establishment from harassing the media." In Moldova, the public has increasing trust in the legal framework and in Armenia the chapter notes, "Society increasingly places a high value on freedom of speech and media freedom," although it continues, "but that has led to little change." Armenia, however, scores a 2.58 in Objective 1, making it one of the top scorers in that Objective.

In Albania the chapter notes that journalism quality has improved thanks to some recent training opportunities, while in Armenia one panelist said, "Now it is not respectable to just write 'according to our sources.' You have to mention other sources, too, to appear professional—which was not the case even a year ago." Moldovan panelists were more pessimistic on journalism quality but still awarded a score of 2.24.

However, in Moldova public broadcasting has become more balanced and independent, according a report by Deutsche Welle Akademie. Armenian panelists did not have the most glowing remarks about public broadcasting in their country, but the chapter did note progress: "Previously, in the extremely polarized climate, viewers never saw oppositional figures or events on public television (or any other

outlet)—or if they appeared, it was for the sole purpose of being ridiculed. Today, even public television features opposition news, although diluted and blurred among other non-important events.” Likewise, one Albanian panelist noted, “The only progress made by TVSH is that it no longer assails the opposition.”

In line with the analysis above concerning Objective 4, none of these three chapters had much positive to report in terms of business management and the financial health of media. Objective 5, covering supporting institutions, also revealed some weaknesses, particularly in the lack of strong professional and trade associations. Indeed, panelists pointed out weaknesses throughout. However, there has been encouraging progress that seems as though it may have some resilience. One panelist from Armenia commented on the chances of reversing media freedom, saying, “I would not say the probability is high, because of several factors. People’s culture, mindset, behavior, and civic awareness have changed, and you can’t just strike it out at once—that is very hard to do.”

Further, short-term stabilization in Ukraine gives hope that the situation there could improve to the point that in a short amount of time the achievements witnessed in the middle of the last decade can be reclaimed. All objective scores improved (except Objective 4) thanks to the opening of the political space after the exit of the Yanukovich regime. It is too soon to celebrate the media’s comeback there, especially since there is an active military conflict in the country’s east that threatens both stability and independent voices. However, the capacity that was built in the past 20-odd years seems to have not faded and panelists did seem hopeful for the future.

One panelist decried this development, saying that the advertising market is “a boat sailing in stormy seas. When the research falls, this market will become a junk market and all advertisers will withdraw.”

For example, media professionals felt confident after the important role media played in the EuroMaydan movement. The so-called “Dictatorship Laws” in 2014 that would have severely curtailed freedom of speech were a prime spark in keeping that movement going and pushing its final success. The media licensing issues of the past (referred to above) are being addressed, and although challenges remain surrounding local media being shut out of digital broadcasting, there are efforts being made by the government to redress the poor choices made by the Yanukovich government. Panelists were cautious, but still appreciative, of steps made to reform state broadcasting into a public model.

Further, Ukrainians have improved access to viewpoints. The Ukraine chapter notes, “The level of pluralism has increased; despite the fact that one media outlet may present information in a one-sided manner, the public has opportunities to tap alternative information from many sources.”

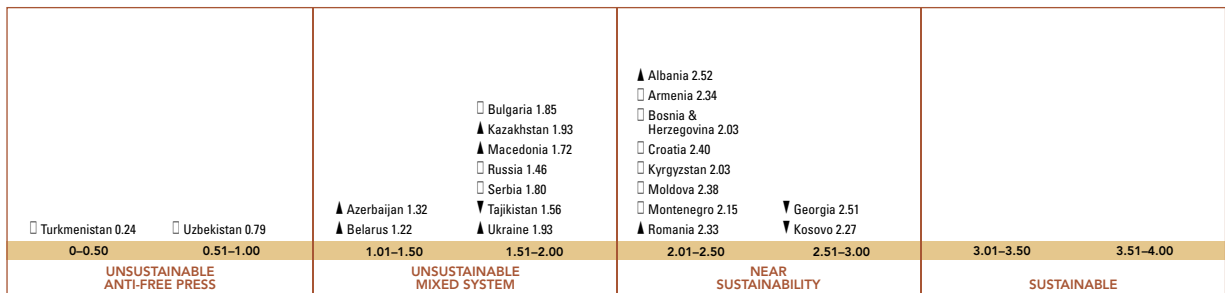
Ukraine still has a long way to go, but so far one can be cautiously optimistic that the media there is rebounding.

## PERCENT CHANGE IN MSI 2001–2015: EUROPE AND EURASIA



\* Data for Turkmenistan is since 2008

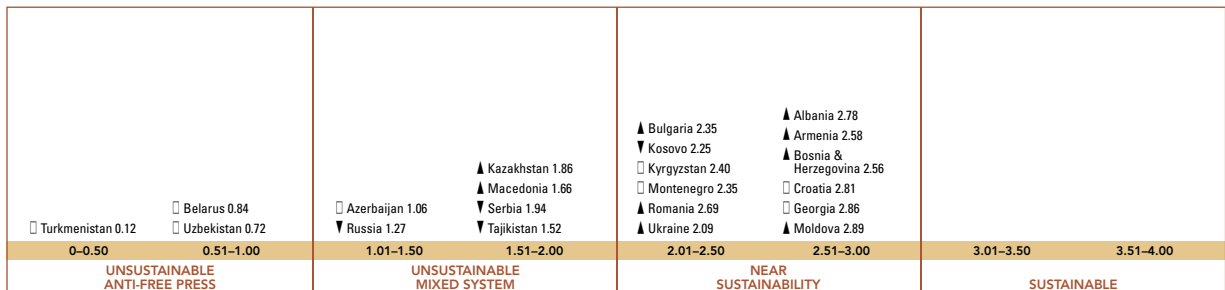
## MEDIA SUSTAINABILITY INDEX 2015: OVERALL AVERAGE SCORES



### CHANGE SINCE 2014

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

## MEDIA SUSTAINABILITY INDEX 2015: FREE SPEECH



### CHANGE SINCE 2014

▲ (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\\_msiscorers.xls](http://www.irex.org/system/files/EE_msiscorers.xls)

## MEDIA SUSTAINABILITY INDEX 2015: PROFESSIONAL JOURNALISM

	<ul style="list-style-type: none"> <li>□ Bosnia &amp; Herzegovina 1.77</li> <li>▼ Bulgaria 1.58</li> <li>□ Croatia 1.94</li> <li>▲ Kazakhstan 1.93</li> <li>▼ Kyrgyzstan 1.83</li> <li>▲ Macedonia 1.62</li> <li>▲ Montenegro 1.99</li> <li>▲ Azerbaijan 1.45</li> <li>▲ Belarus 1.40</li> <li>□ Romania 1.86</li> <li>▼ Serbia 1.50</li> <li>□ Russia 1.35</li> <li>▼ Tajikistan 1.57</li> <li>▲ Ukraine 1.91</li> </ul>	<ul style="list-style-type: none"> <li>▲ Albania 2.47</li> <li>□ Armenia 2.26</li> <li>□ Georgia 2.49</li> <li>▼ Kosovo 2.13</li> <li>□ Moldova 2.24</li> </ul>					
<ul style="list-style-type: none"> <li>□ Turkmenistan 0.49</li> <li>□ Uzbekistan 0.94</li> </ul>							
0-0.50	0.51-1.00	1.01-1.50	1.51-2.00	2.01-2.50	2.51-3.00	3.01-3.50	3.51-4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

### CHANGE SINCE 2014

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

## MEDIA SUSTAINABILITY INDEX 2015: PLURALITY OF NEWS SOURCES

	<ul style="list-style-type: none"> <li>▲ Kazakhstan 1.99</li> <li>▲ Macedonia 1.77</li> <li>▼ Russia 1.43</li> <li>▼ Serbia 1.79</li> <li>□ Tajikistan 1.88</li> <li>▲ Azerbaijan 1.50</li> <li>▲ Belarus 1.42</li> </ul>	<ul style="list-style-type: none"> <li>□ Bosnia &amp; Herzegovina 2.23</li> <li>□ Bulgaria 2.07</li> <li>▼ Kyrgyzstan 2.19</li> <li>□ Montenegro 2.46</li> <li>▲ Romania 2.56</li> <li>▲ Ukraine 2.01</li> <li>▲ Albania 2.72</li> <li>□ Armenia 2.55</li> <li>□ Croatia 2.56</li> <li>▼ Georgia 2.64</li> <li>▼ Kosovo 2.57</li> <li>□ Moldova 2.58</li> </ul>					
▼ Turkmenistan 0.23	□ Uzbekistan 0.70						
0-0.50	0.51-1.00	1.01-1.50	1.51-2.00	2.01-2.50	2.51-3.00	3.01-3.50	3.51-4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

### CHANGE SINCE 2014

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

## MEDIA SUSTAINABILITY INDEX 2015: BUSINESS MANAGEMENT

	<ul style="list-style-type: none"> <li>□ Armenia 1.96</li> <li>□ Bosnia &amp; Herzegovina 1.58</li> <li>▲ Azerbaijan 1.06</li> <li>▲ Belarus 1.07</li> <li>▼ Bulgaria 1.35</li> <li>▲ Macedonia 1.38</li> <li>▲ Russia 1.44</li> <li>▲ Tajikistan 1.36</li> <li>□ Ukraine 1.39</li> <li>□ Croatia 2.00</li> <li>▼ Georgia 2.00</li> <li>▲ Kazakhstan 1.70</li> <li>□ Kyrgyzstan 1.65</li> <li>□ Moldova 1.75</li> <li>▲ Montenegro 1.80</li> <li>□ Serbia 1.60</li> </ul>	<ul style="list-style-type: none"> <li>▲ Albania 2.10</li> <li>▼ Kosovo 2.02</li> <li>□ Romania 2.08</li> </ul>					
□ Turkmenistan 0.14	▲ Uzbekistan 0.87						
0-0.50	0.51-1.00	1.01-1.50	1.51-2.00	2.01-2.50	2.51-3.00	3.01-3.50	3.51-4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

### CHANGE SINCE 2014

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

## MEDIA SUSTAINABILITY INDEX 2015: SUPPORTING INSTITUTIONS

	<ul style="list-style-type: none"> <li>▲ Azerbaijan 1.51</li> <li>□ Bulgaria 1.90</li> <li>□ Russia 1.79</li> <li>▼ Tajikistan 1.64</li> <li>▲ Belarus 1.40</li> </ul>	<ul style="list-style-type: none"> <li>□ Albania 2.55</li> <li>□ Armenia 2.36</li> <li>□ Bosnia &amp; Herzegovina 2.02</li> <li>□ Kazakhstan 2.14</li> <li>▼ Kosovo 2.36</li> <li>□ Kyrgyzstan 2.08</li> <li>▲ Macedonia 2.19</li> <li>□ Montenegro 2.12</li> <li>□ Romania 2.46</li> <li>□ Serbia 2.17</li> <li>▲ Ukraine 2.24</li> <li>□ Croatia 2.69</li> <li>▼ Georgia 2.53</li> <li>□ Moldova 2.58</li> </ul>					
□ Turkmenistan 0.20	□ Uzbekistan 0.73						
0-0.50	0.51-1.00	1.01-1.50	1.51-2.00	2.01-2.50	2.51-3.00	3.01-3.50	3.51-4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

### CHANGE SINCE 2014

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

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*Likewise in Azerbaijan, Objective 1 did not increase and other objectives received only slight increases. Difficulties securing the participation of panelists from 2014, in part due to the ongoing crackdown on critical voices there, created some variation in score, but only marginally.*



IREX prepared the MSI in cooperation with USAID as a tool to assess the development of media systems over time and across countries. IREX staff, USAID, and other media-development professionals contributed to the development of this assessment tool.

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

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

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

### Scoring: A Local Perspective

The primary source of information is a panel of local experts that IREX assembles in each country to serve as panelists. These experts are drawn from the country’s media outlets, NGOs, professional associations, and academic institutions. Panelists may be editors, reporters, media managers or owners, advertising and marketing specialists, lawyers, professors or teachers, or human rights observers. Additionally, panels comprise the various types of media represented in a country. The panels also include representatives from the capital city and other geographic regions, and they reflect gender, ethnic, and religious diversity as appropriate. For consistency from year to year, at least half of the previous year’s participants are included on the following year’s panel. IREX identifies and works with a local or regional organization or individual to oversee the process.

The scoring is completed in two parts. First, panel participants are provided with a questionnaire and explanations of the indicators and scoring system. Descriptions of each indicator clarify their meanings and help organize the panelist’s thoughts. For example, the questionnaire asks the panelist to consider not only the letter of the legal framework, but its practical implementation, too. A country without a formal freedom-of-information law that enjoys customary government openness may well outperform a country that has a strong law on the books that is frequently ignored. Furthermore, the questionnaire does not single out any one type of media as more

important than another; rather it directs the panelist to consider the salient types of media and to determine if an underrepresentation, if applicable, of one media type impacts the sustainability of the media sector as a whole. In this way, we capture the influence of public, private, national, local, community, and new media. Each panelist reviews the questionnaire individually and scores each indicator.

The panelists then assemble to analyze and discuss the objectives and indicators. While panelists may choose to change their scores based upon discussions, IREX does not promote consensus on scores among panelists. The panel moderator (in most cases a representative of the host-country institutional partner or a local individual) prepares a written analysis of the discussion, which IREX staff members edit subsequently. Names of the individual panelists and the partner organization or individual appear at the end of each country chapter.

IREX editorial staff members review the panelists' scores, and then provide a set of scores for the country, independently of the panel. This score carries the same weight as an individual panelist. The average of all individual indicator scores within the objective determines the objective score. The overall country score is an average of all five objectives.

In some cases where conditions on the ground are such that panelists might suffer legal retribution or physical threats as a result of their participation, IREX will opt to allow some or all of the panelists and the moderator/author to remain anonymous. In severe situations, IREX does not engage panelists as such; rather the study is conducted through research and interviews with those knowledgeable of the media situation in that country. Such cases are appropriately noted in relevant chapters.

## I. Objectives and Indicators

### Objective #1: Legal and social norms protect and promote free speech and access to public information.

#### 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.

### Objective #2: Journalism meets professional standards of quality.

#### 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).

**Objective #3: Multiple news sources provide citizens with reliable, objective news.**

**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.

**Objective #4: Media are well-managed enterprises, allowing editorial independence.**

**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.

**Objective #5: Supporting institutions function in the professional interests of independent media.**

**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.