
The MSI reflects the expert opinions of media professionals in each country and its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector. IREX continues to encourage professionals in their vital efforts at developing independent and sustainable media in their own countries or, in many cases, preserving alternative voices in the face of repressive governments.



I am pleased to introduce the Media Sustainability Index (MSI) 2009. The MSI provides an analysis of the media environment in 21 countries of Europe and Eurasia during 2008 and also shows trends in the media sector since 2001. The MSI was first conceived in 2000 and launched in 2001, in cooperation with the United States Agency for International Development (USAID). Since that time, it has become a universally recognized reference for benchmarking and assessing changes in media systems across Europe and Eurasia.

The MSI allows policymakers and implementers to analyze media systems and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with 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 information for the media and media advocates in each country and region. The MSI reflects the expert opinions of media professionals in each country and its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector. IREX continues to encourage professionals in their vital efforts at developing independent and sustainable media in their own countries or, in many cases, preserving alternative voices in the face of repressive governments.

IREX would like to thank all those who contributed to the publication of the Media Sustainability Index 2009. Participants, moderators, authors, and observers for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse managed the MSI with editorial and administrative assistance from Blake Saville. IREX staff in the region provided important logistical support and guidance. USAID has been a consistent supporter of the MSI, helping to develop the project and ensure its ongoing implementation.

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

Sincerely,



W. Robert Pearson

President, IREX

This year's study also shows how growth is fragile in the media sector, particularly in Objective 1, freedom of speech. While a government's commitment to a free media should not hinge on the quality of journalism present, biased reporting and polarization in the media can often be used as a motivation or justification for government antipathy toward a free press.



The 2009 edition of the Europe and Eurasia Media Sustainability Index (MSI) reveals a mixture of progress and regression in the region. On the one hand, measures for business management were mostly up compared to last year; on the other, additional countries joined the ranks of those showing deteriorating scores since the baseline study in 2001. The Southeastern Europe and Caucasus sub-regions suffered losses overall, while Russia and Western Eurasia gained, as did Central Asia to a certain degree.

This year's study also shows how growth is fragile in the media sector, particularly in Objective 1, freedom of speech. While a government's commitment to a free media should not hinge on the quality of journalism present, biased reporting and polarization in the media can often be used as a motivation or justification for government antipathy toward a free press. Unfortunately, Objective 2, professional journalism, is the worst performing objective on average across the region. Objective 5, supporting institutions, the strongest objective in the region since 2002, fell overall this year. The change can be explained by reports from many countries of polarization and competition that preclude cooperation, coupled with difficulty achieving sustainability in the face of decreased international donor support.

IREX does not provide exhaustive analysis of regional, sub-regional, or individual country developments in the chapters that follow. The MSI is designed to serve as a summary of overall developments and a starting point for local media practitioners, international media development workers, academics, and others for further research. IREX intends for the results of the Media Sustainability Index to serve as one tool in the conversation about media development and to support advocacy efforts aimed at improving media ability to inform the public in the countries under study. To that end, IREX provides all previous editions of the Media Sustainability Index and spreadsheets with combined scoring data on its website, www.irex.org/msi.

Developments in the Sub-Regions

Observers should use a level of caution when assessing averages and trends of the sub-regions within Europe and Eurasia. Sometimes close neighbors, such as Ukraine and Belarus or Kyrgyzstan and Uzbekistan, are heading in opposite directions. Nonetheless, using sub-regional groupings can be a convenient way to focus attention on developments and trends, contrast performance to highlight opportunities or threats, and/or identify problems or successes.

Southeastern Europe as a whole suffered decreases in all objectives for the second year in a row. Particularly noteworthy were the setbacks in Objective 1, freedom of speech; Objective 2, professional journalism; and Objective 5, supporting institutions.

Political turmoil caused Macedonia to return the largest loss in both Southeastern Europe and the whole region. Its overall drop of 0.57 reflects serious problems that will likely impact the development of its media for some time. For the past few years, Macedonia scored solidly in the “near sustainability” category, even though it had lost some ground recently. However, the fall to 1.71 sets it back into the “unsustainable, mixed system” category. Panelists described a situation in which both the government and the media abandoned commitments to a free press, objectivity, and professionalism as a political expedient. This situation highlights the difference between “sustainability” and “near sustainability.” The Southeastern European experience is showing how difficult it can be to achieve the kind of development necessary to resist regression in a very short period of time under political or other pressures.

While Macedonia may be the most striking example of media fragility in southeastern Europe, it is not alone. Croatia is in danger of falling below its baseline scores after a few years in a row of decreasing assessments by panelists there. From its high in 2005, when it was showing nearly 25 percent growth from 2001, it is now at only 1 percent. More troubling is that only Objective 3 (plurality of news) and Objective 5 (supporting institutions) contribute to net positive growth. Objective 1 (freedom of speech), Objective 2 (professional journalism), and Objective 4 (business management) all received lower scores this year than in 2001. Panelists expressed shock at the assassination of publisher Ivo Pukanić, and certainly that contributed to the lower score. But, as poor a sign that was, the Objective 2 score now stands at 2.00, down from 2.50 in 2001. Panelists blamed the small size of the Croatian market that squeezes out “serious” news sources in favor of sensational news outlets.

Bosnia also has demonstrated difficulties moving ahead in recent years. Bosnia is still the leader in improvement since

2001, with an overall increase in score of 68.9 percent. However, this is down from the 2006/2007 study, led by decreased scores for the professional journalism and freedom of speech objectives. Panelists noted that the small decrease in freedom of speech is mainly due to lingering ethnic divisions in society. The fall in professional journalism was summed up by one panelist, who said, “We have to admit that our journalism is preoccupied by subjectivism.”

Likewise, Montenegro still shows an improvement of 35.7 percent since 2001, but the 2006/2007 scores showed nearly 60 percent growth. Panelists there decried the poor implementation of recent legislative changes, high damages awarded in libel suits, poor adherence to journalism ethics, and lack of sophistication in reporting.

European Union member Romania also suffers from stagnation in the media sector and has only managed an increase in overall score of 8.2 percent since 2001. Politicization of the media and a kind of cynicism by politicians about the role of media in society culminated in July 2008, with a Senate measure designed to force broadcasters to air “good” and “bad” news equally. Fortunately, the law was not enacted in the end.

The Caucasus returned overall negative scores as well. Armenia remained more or less the same, and has scored in the upper half of an “unsustainable, mixed system” since IREX first studied its media in 2001. Developments in Georgia and Azerbaijan, however, brought down the regional score.

Azerbaijan was not much of a surprise, as development there had never been significant and the government has consistently made a concerted effort to control information and maintain its grip on power. Continued jailings—thought to be perpetrated by the government—of critical media professionals and harassment of journalists make journalism a very difficult profession. Also this past year, the government took further steps to decrease the plurality of news sources by banning the use of domestic FM frequencies by foreign broadcasters, such as Radio Free Europe, Voice of America, and the BBC.

Unfortunately, Georgia also took further steps backward again this year after peaking in 2006/2007. Especially troubling is the drop of 0.87 points in the freedom of speech objective since then, and the 0.71 loss in plurality of news sources is also telling of Georgia’s problems. The political crisis of early 2008 and the tensions with Russia over South Ossetia that erupted into war damaged press freedom and the media itself, as it increasingly became a means for political ends, following the trend reported last year. Complicated ownership structures of some of the most influential media seem to lead back to politicians and their close associates. During the war, the government blocked Russian media and websites. Panelists observed that media are not run for the purpose of making

a profit; rather, they often receive cash injections from their owners and must operate in an environment of politicization in advertisement placement.

Russia and Western Eurasia showed some improvement, due mainly to better performance of the business management objective and overall progress recorded in Ukraine. Ukraine's media continue to develop, but the pace of improvement in professional journalism is not keeping up with other areas. Panelists were critical of the ability of much of the Ukrainian media to provide the public with objective information, and pointed out in particular the adverse effect of "advertorial" content and other hidden advertisements.

Russia still falls short of its 2001 scores in all objectives except Objective 4, business management. Efforts by the government to control news and information have negatively impacted both the freedom of speech and plurality of news sources objectives. Perhaps most troubling are reports from panelists that the lack of diversity in news sources and abbreviated freedom of the press is not of particular concern to the public at large.

Central Asia managed to show some improvements despite the inclusion of Turkmenistan and Uzbekistan in the regional average. Uzbekistan continued to worsen, if only slightly, and is the leader in negative change since 2001, losing 48 percent. Turkmenistan, new to the MSI last year, also suffered losses and achieved the worst score in the history of the Europe and Eurasia MSI and one of the worst in the roughly 80 countries studied worldwide by the MSI.

Kazakhstan moved from a position of net loss to net gain this year. Overall, many problems persist, as the score of 1.68 implies. In particular, the freedom of speech and plurality of news objectives languish below 1.50. However, panelists awarded higher scores for professional journalism this year, and stronger economic performance helped improve the business management score as well.

Kyrgyzstan leads Central Asia in improvement since 2001, with an increase of 49.5 percent. It advanced somewhat again this year as panelists upgraded their assessments of freedom of speech and professional journalism. However, despite being arguably the freest country in Central Asia, Kyrgyzstan's scores for professional journalism and business management prevent it from entering the "near sustainability" category. Lack of development in these two objectives can create mutually reinforcing challenges, as a lack of resources at media outlets precludes quality, which in turn hinders the value of media in the eye of the consumer.

The MSI is showing that overall, despite some improvements, media development throughout the Europe and Eurasia region is difficult, particularly in the face of political turmoil and government animus toward transparency, critical opinions,

and plurality in the media. Although Kazakhstan moved from a position of overall loss to overall gain, it was offset by two countries, Macedonia and Azerbaijan, plus Turkmenistan in the second iteration of the MSI there. What used to be the province of only the most repressive in the region, the list of overall backsliders has increased to include nearly one-third of the 21 countries studied by IREX in the region.

Developments in the Objectives

A few trends presented themselves within the objectives and deserve some attention. While not an exhaustive treatment of the developments throughout the region, these are common themes that were observed across different sub-regions.

Panelists from many countries complained of various pressures, such as lawsuits, threats against journalists, and uneven playing fields in the market. The result is often self-censorship, one-sided coverage, and abandonment of ethics, as described in discussions of **Objective 2, professional journalism**. The irreconcilable political polarization in many of these societies, from Albania to Azerbaijan to Kazakhstan, is reflected in the media. Many outlets become beholden to one faction or another, and the media as a whole—including the few that can claim to be independent—are seen as fair game in political machinations.

While governments must not be allowed to justify repressive measures under the guise of "media here are not yet responsible enough," media can protect themselves by adhering more closely to accepted journalism standards and ethics. In the end, the decision to follow ethical practices must be made at the local level. Panelists in Kosovo made a good point that could be one step in the right direction. In a discussion of Objective 1 and attacks on journalists, one panelist said, "When five or six newspapers write on a hot topic, the threat against the journalists is minimal." If more media cover controversial topics, and cover them fairly, they may well put the sector on firmer footing.

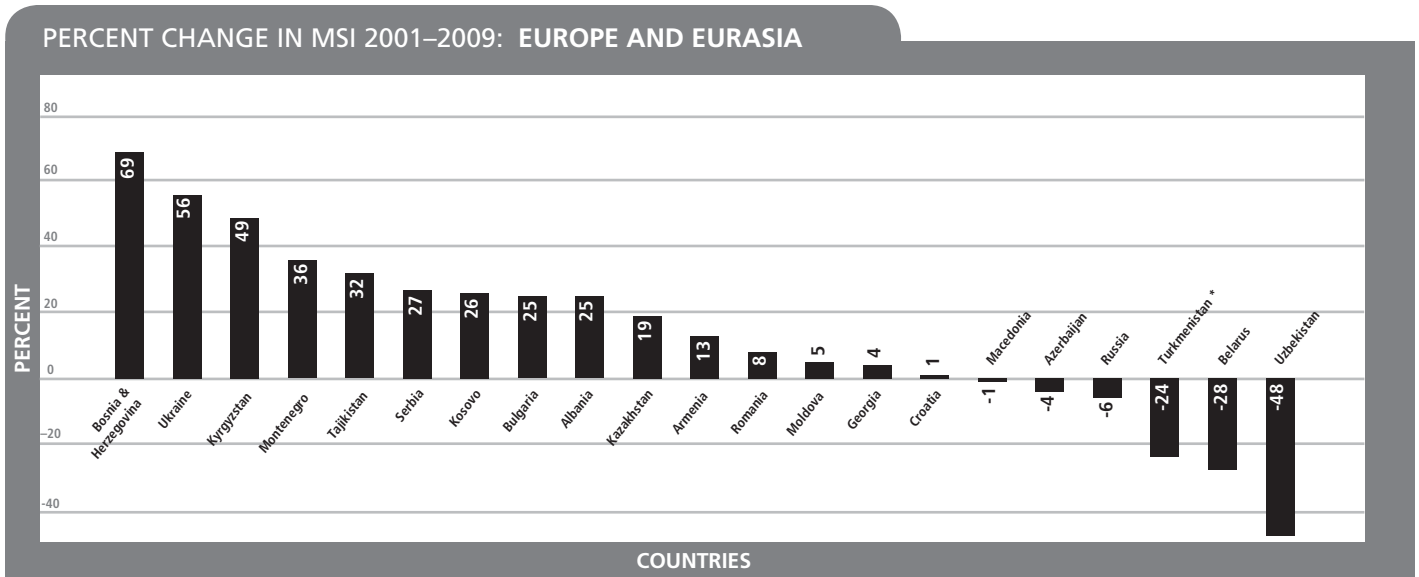
Despite lingering poverty in many of the countries in the region, panelists reported that overall, 2008 was good for business. Scores for **Objective 4, business management**, increased noticeably in 11 countries, while decreasing in only six. A number of elections resulted in more cash outlays for advertising and public relations, and many panelists also described increases in the advertising market. Further, media businesses are adopting increasingly better management practices, including wider use of market research and reliance on audience measurements—absent in most of the countries that IREX studies in other regions. Online media are beginning to make money. Finally, print media are better balancing advertising revenues and not relying on subscriptions as they once did.

On the down side, many of the countries—particularly those with small populations and a unique language—suffer from too much competition in the market. Montenegro, with about 670,000 people, is an extreme example. But Kosovo, Croatia, Macedonia, Albania, and Moldova all have fewer than 5 million people. The relatively large media markets in these countries may hurt the overall sustainability of the media and its ability to inform the public. For example, panelists in Croatia complained about the print media’s reliance on kiosks for sales and the therefore requisite “screaming headlines” that entice consumers away from more news-oriented media. Sustainability issues might become more acute as countries open up digital frequencies.

Objective 5, supporting institutions, has been a historic leader among the five objectives in the Europe and Eurasia region. In last year’s discussion of developments in Objective 5, the MSI reported, “The relative strength of this sector in 2008 and the growth since 2001 is cause for optimism for the development of the sector...” However, this year Objective 5 suffered the largest decrease of any objective. It was down noticeably in seven countries, while increasing in five and remaining more or less the same in nine. Its overall regional average fell below 2.00 for the first time since 2002.

Some panelists point to diminished involvement of international donors as a reason for Objective 5’s overall decrease. However, more is going on: in many cases, donors left seemingly strong, sustainable organizations. Polarization in the media and increasing competition have undermined cooperative spirit. In many countries, panelists report a lack of commitment by local media professionals to sustain such organizations. Further, efforts to date to improve journalism education have not paid dividends, although in many countries, panelists are hopeful that recent developments will change this trend.

Some positive examples can be found, such as the Croatian Journalists’ Association. Nonetheless, local communities of media professionals must take ownership of their supporting institutions, and recognize the need for solidarity in order to resist pressures from the government and business and improve professionalism.



* Data for Turkmenistan is since 2008

MEDIA SUSTAINABILITY INDEX 2009: OVERALL AVERAGE SCORES

<ul style="list-style-type: none"> ☐ Turkmenistan (0.32) ☐ Uzbekistan (0.45) 	<ul style="list-style-type: none"> ▲ Belarus (0.84) 	<ul style="list-style-type: none"> ▼ Tajikistan (1.46) 	<ul style="list-style-type: none"> ▼ Azerbaijan (1.67) ▲ Kazakhstan (1.68) ▼ Macedonia (1.71) ☐ Moldova (1.81) ☐ Armenia (1.86) ☐ Russia (1.88) ▼ Georgia (1.89) ▲ Kyrgyzstan (1.93) 	<ul style="list-style-type: none"> ▲ Ukraine (2.14) ▼ Montenegro (2.15) ☐ Albania (2.20) ☐ Serbia (2.35) ▲ Kosovo (2.38) ▼ Croatia (2.46) 	<ul style="list-style-type: none"> ☐ Romania (2.57) ☐ Bulgaria (2.78) ▲ Bosnia & Herzegovina (2.81) 		
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	

MEDIA SUSTAINABILITY INDEX 2009: FREE SPEECH

<ul style="list-style-type: none"> ☐ Turkmenistan (0.30) ☐ Uzbekistan (0.44) 	<ul style="list-style-type: none"> ☐ Belarus (0.58) 	<ul style="list-style-type: none"> ▲ Kazakhstan (1.47) 	<ul style="list-style-type: none"> ▲ Tajikistan (1.64) ▼ Macedonia (1.65) ☐ Moldova (1.78) ▼ Armenia (1.82) ▲ Russia (1.84) ▼ Georgia (1.86) ☐ Azerbaijan (1.94) 	<ul style="list-style-type: none"> ▲ Kyrgyzstan (2.02) ☐ Ukraine (2.02) ▼ Montenegro (2.17) ☐ Serbia (2.21) ☐ Kosovo (2.37) ☐ Albania (2.38) ▼ Croatia (2.50) 	<ul style="list-style-type: none"> ☐ Romania (2.61) ▲ Bulgaria (2.69) ☐ Bosnia & Herzegovina (2.94) 		
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 2008

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

Annual scores for 2001 through 2008 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

MEDIA SUSTAINABILITY INDEX 2009: PROFESSIONAL JOURNALISM

<ul style="list-style-type: none"> ▼ Uzbekistan (0.64) □ Turkmenistan (0.74) □ Belarus (0.98) 	<ul style="list-style-type: none"> ▼ Azerbaijan (1.60) ▼ Macedonia (1.66) ▲ Russia (1.72) ▲ Kazakhstan (1.74) ▼ Georgia (1.77) ▲ Ukraine (1.77) ▲ Kyrgyzstan (1.81) ▲ Moldova (1.82) □ Serbia (1.89) ▲ Armenia (1.90) □ Montenegro (1.91) ▼ Croatia (2.00) □ Tajikistan (1.46) 	<ul style="list-style-type: none"> □ Albania (2.22) □ Kosovo (2.23) □ Romania (2.26) □ Bosnia & Herzegovina (2.30) □ Bulgaria (2.50) 					
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	

MEDIA SUSTAINABILITY INDEX 2009: PLURALITY OF NEWS SOURCES

<ul style="list-style-type: none"> ▼ Turkmenistan (0.21) ▲ Uzbekistan (0.39) □ Belarus (0.75) 	<ul style="list-style-type: none"> ▼ Tajikistan (1.70) □ Moldova (1.71) ▼ Azerbaijan (1.78) □ Russia (1.84) ▼ Georgia (1.91) ▼ Macedonia (1.93) ▲ Kazakhstan (1.43) □ Armenia (1.96) 	<ul style="list-style-type: none"> □ Ukraine (2.18) □ Kyrgyzstan (2.25) □ Albania (2.26) □ Montenegro (2.41) ▼ Croatia (2.45) ▲ Kosovo (2.59) ▲ Serbia (2.64) ▼ Romania (2.77) 	<ul style="list-style-type: none"> ▲ Bosnia & Herzegovina (3.02) □ Bulgaria (3.03) 				
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 2008

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

Annual scores for 2001 through 2008 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

MEDIA SUSTAINABILITY INDEX 2009: BUSINESS MANAGEMENT

<p>▼ Turkmenistan (0.11)</p> <p>□ Uzbekistan (0.41)</p>		<p>▲ Belarus (1.03)</p> <p>▼ Tajikistan (1.22)</p> <p>□ Azerbaijan (1.44)</p> <p>▼ Kyrgyzstan (1.48)</p>	<p>▼ Macedonia (1.61)</p> <p>▲ Moldova (1.65)</p> <p>▲ Armenia (1.74)</p> <p>▲ Albania (1.87)</p> <p>▲ Kazakhstan (1.90)</p> <p>▲ Georgia (1.94)</p>	<p>▲ Russia (2.12)</p> <p>□ Montenegro (2.22)</p> <p>▲ Kosovo (2.40)</p> <p>▲ Ukraine (2.43)</p> <p>▼ Serbia (2.45)</p>	<p>▼ Croatia (2.51)</p> <p>□ Romania (2.70)</p> <p>▲ Bulgaria (2.78)</p> <p>▲ Bosnia & Herzegovina (2.82)</p>		
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	

MEDIA SUSTAINABILITY INDEX 2009: SUPPORTING INSTITUTIONS

<p>□ Turkmenistan (0.23)</p> <p>▼ Uzbekistan (0.38)</p> <p>▲ Belarus (0.88)</p>		<p>▼ Tajikistan (1.30)</p>	<p>▼ Azerbaijan (1.60)</p> <p>▼ Macedonia (1.71)</p> <p>□ Kazakhstan (1.85)</p> <p>▼ Armenia (1.88)</p> <p>□ Russia (1.88)</p> <p>▼ Georgia (1.99)</p>	<p>▼ Montenegro (2.04)</p> <p>▲ Kyrgyzstan (2.08)</p> <p>□ Moldova (2.11)</p> <p>□ Albania (2.28)</p> <p>□ Kosovo (2.32)</p> <p>▲ Ukraine (2.32)</p>	<p>□ Romania (2.52)</p> <p>□ Serbia (2.58)</p> <p>▲ Croatia (2.86)</p> <p>□ Bulgaria (2.88)</p> <p>▲ Bosnia & Herzegovina (2.97)</p>		
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 2008

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

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The 2009 edition of the Europe and Eurasia Media Sustainability Index reveals a mixture of progress and regression in the region. On the one hand, measures for business management were mostly up compared to last year; on the other, additional countries joined the ranks of those showing deteriorating scores since the baseline study in 2001.



IREX prepared the Media Sustainability Index (MSI) in cooperation with the United States Agency for International Development (USAID) as a tool to assess the development of 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. Independent media are well-managed businesses, allowing editorial independence.
5. Supporting institutions function in the professional interests of independent media.

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

The scoring is done in two parts. First, a panel of local experts is assembled in each country, drawn from the country’s media outlets, nongovernmental organizations (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.

Panel participants are provided with a questionnaire that explains the objectives, indicators, and scoring system. Each panelist individually reviews the questionnaire and scores each indicator. Descriptions of each indicator explain their meaning 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.

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 is subsequently edited by IREX editorial staff. Names of the individual panelists and the partner organization or individual appear at the end of each country chapter.

IREX editorial staff reviews the panelists' scores, and then score the country independently of the MSI panel. This score carries the same weight as an individual panelist. The average

of individual indicator scores within each objective determines the objective score, and the average of the five objectives determines the overall country score.

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

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

FREE-SPEECH INDICATORS:

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

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

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

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

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

INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

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

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

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

II. Scoring System

A. Indicator Scoring

Each indicator is scored using the following system:

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

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

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

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

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

B. Objective and Overall Scoring

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

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.