

As an illustration of how panelists' views of their media sector have changed, or not, over the space of 10 years, IREX selected a few indicators to compare how they were described in 2001 versus today.



I am pleased to introduce the tenth annual Media Sustainability Index (MSI) study for Europe and Eurasia. This body of work has helped establish the MSI as one of the most reliable and trusted evaluations of media health globally and in the various regions and countries included. Covering the same 20 countries since its inception in 2001 (with one addition made in 2008), the Europe and Eurasia MSI over the years has documented a mixed history of encouraging improvements, frustrating stagnation, and disappointing regression throughout the region. In an encouraging example, earlier studies reported a nascent Internet media; over time one can track the progress made by Internet media and other new media platforms, which have undeniably improved citizen access to news and undermined attempts by some authorities to control political dialogue. A fuller analysis is available 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.

How does the MSI aid journalists and independent media supporters realize the improvements they seek? The MSI 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.

IREX would like to thank all those who contributed to the publication of the 2011 MSI. Participants, moderators, and authors for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse and Dayna Kerecman Myers managed the MSI. The United States Agency for International Development (USAID) has been a consistent supporter of the MSI, helping to develop the project from its inception, ensure its ongoing implementation, and foster its expansion into the Middle East and Africa.

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

Sincerely,



W. Robert Pearson

President, IREX

Regardless of the underlying reasons, self-censorship robs citizens of news and information they need. However, it is a sign of progress in countries where this is a matter of business relationships as opposed to fear of arbitrary violence; the former is much easier to mitigate.



With three notable exceptions—Belarus, Russia, and Uzbekistan—the media sector in the countries included in the first edition of the MSI in 2001 have over time either improved overall or stayed more or less the same. But, a review of overall MSI scores is just one way to use the MSI to see how the media situation has changed. Another is to compare the qualitative characterizations made by panelists in 2001 to those they are making today; in some cases the same panelists that provided comments in 2001 made appearances on 2011 panels. IREX looks below at some issues that troubled panelists in 2001, how they were described then, and compares these to how they are described today.

In a similar vein, IREX includes a summary of how the Internet was viewed in 2001 and how it is described today as a way to look at the impact of new media on dissemination of information, public dialogue, and citizen access to timely news and information.

IREX this year employed an updated methodology to prepare the reports. More details are provided in the following Methodology section. Briefly, however, IREX added two new indicators. One assesses a media sector's ability to report on local, regional, national, and international news in a way that meets the needs of citizens in all corners of a country. This was not a new concept to the MSI, but IREX determined that this important concept did not receive enough consideration before. The other looks at the ability of a county's communications infrastructure to meet the needs of the media sector and media consumers, particularly as new technologies such as digital broadcasting or mobile broadband Internet access are becoming increasingly important. Other language in the methodology was modified to better capture the concepts we have always sought to assess.

Ten Years of Progress? Panelists' Perspectives

As an illustration of how panelists' views of their media sector have changed, or not, over the space of 10 years, IREX selected a few indicators to compare how they were described in 2001 versus today. Those selected cover media licensing, objective and ethical journalism, and self-censorship. IREX also selected two countries that have shown significant change: Kosovo, which has improved its overall score by 34 percent, and Russia, which this year received an overall score 25 percent lower than in 2001.

In Albania, for example, 2001 panelists said that the code of ethics was uniformly ignored and “Reportage is mostly based on innuendo, lies, and distortion.” Journalism was described as supremely polarized along political lines. This year’s report painted a much-improved situation, even if political differences linger.

Broadcast Licensing

As countries throughout the region gear up to make the transition to digital broadcasting, the regulatory bodies that oversee licensing processes come under increasing scrutiny by the media profession they are tasked to serve and regulate. However, problems predate digitalization. Since the inception of the MSI, these agencies have been the target of criticism from panelists because often they are politicized and their decisions non-transparent. In most cases, these issues have not been resolved to the satisfaction of the panelists.

For example, Bulgaria’s 2001 panelists described broadcast licensing as “partially fair” and one panelist said, “It is obvious that the Council of Ministers has complete control over the licensing body. Even some independent commercial outlets got their licenses on political grounds.” This year, panelists continued their criticism from recent years that the digital transition is being mismanaged and, as a result, well behind schedule. Recent changes to the law governing the regulator met with mixed reviews: one panelist felt that fewer council members in the agency would open it up to increased political and economic pressure; another panelist saw the changes as cathartic, allowing the competitive award of digital licenses.

In Bosnia, when the 2001 MSI panel convened the broadcast regulator was partly under control of the international community. Today it is in the hands of Bosnians and panelists respect its operations; however it has come under increasing political pressure that threatens to upset its professional operation. Georgians in 2001 complained of political favoritism in both licensing and enforcement of broadcast laws. Georgian panelists’ critical tones were no different this year.

Not all reviews of licensing lack positive notes. Croatian panelists in 2001 acknowledged promising changes that had not yielded practical changes. Today, they criticize the operations of the licensing agency, but concede that political

control is no longer a significant factor. Kosovo’s broadcast regulator had not even been established in 2001. This year, panelists described the licensing process as transparent.

Nonetheless, in most of the countries in the region, political authorities have not shown a willingness to cede control of the airwaves, and many of the issues raised in 2001 remain.

Objective Reporting and Ethics

The media professionals who serve as MSI panelists often level frank criticism at their colleagues for unfair and unethical reporting. Reporting that lacks balance, relies only on official sources, is not fact-checked, or is interspersed with the opinions of the reporter are common complaints. Paid-for stories and “advertorial” content is likewise pointed to as doing a disservice to the profession. But taken as an average, scores for objective 2 have improved in every sub-region; panelists in some countries are painting a better picture of journalism, although others feel little has changed.

In Albania, for example, 2001 panelists said that the code of ethics was uniformly ignored and “Reportage is mostly based on innuendo, lies, and distortion.” Journalism was described as supremely polarized along political lines. This year’s report painted a much-improved situation, even if political differences linger. Said one panelist, “Today, in the conditions we live in, journalists do an exceptional job; even when the government does not provide information, they try their best to verify their information with at least two sources.”

Panelists from Montenegro described journalism in 2001 as fractured by rival pro-Serbian and pro-Montenegrin camps that nearly precluded fair reporting. This year, one panelist pointed to stubborn deficiencies, but also to progress: “However, while now we do not have explicit hate speech—that simmered down alongside the political cycle—tabloidization is now a major problem.”

Kyrgyzstan’s 2011 panelists were not at all satisfied with the state of journalism, and cited several deficiencies. However, in contrast to 2001, the current state of affairs still seems like an improvement. At that time, panelists described many independent media as “cut and paste” outfits that, in some cases, did not even have professional journalists on staff.

Stagnation exists in several countries. The Armenia chapter from 2001 reads almost identically to the 2011 chapter: journalists producing good-quality work exist, but they are the exception. Likewise, in Macedonia, panelists 10 years ago complained about the prevalence of subjectivity and opinion in reporters’ work. The same complaints are heard this year.

Self-Censorship

Self-censorship lingers as an obstacle to improved scores for professional journalism. However, after 10 years, its nature has changed somewhat. As the political situation in many of the region's countries has stabilized, self-censorship is less a matter of life and limb and more a matter of avoiding inconvenient confrontations with the authorities and protecting relationships with advertisers.

In Bosnia, panelists listed a number of reasons why journalists in 2001 would practice self-censorship, including fear of offending politicians and conforming to business interests. In 2011, economic factors were given as the prevailing reason. Panelists in Kosovo cited lack of security as a reason that, in 2001, journalists did not cover organized crime. Nowadays, the political leanings of editors appear to be the primary problem: journalists themselves do not shy away from covering topics but may find their stories shelved.

A Tajik panelist in 2001 asserted that all journalists practice self-censorship out of fear that harm might come to them or their families. Although such fears do not seem to have disappeared, panelists this year pointed to relationships with key advertisers as one reason to self-censor. Another reason is to avoid visits by the tax authorities.

In Ukraine, panelists cited similar reasons in 2001 and 2011 for self-censorship. However, physical attack was not explicitly stated in 2011, whereas in 2001 it was. Presently, government harassment in the form of lawsuits is feared most. However, one 2011 panelist felt that if a story is expected to make a big splash that these fears take a backseat to the benefits of breaking the story.

In Macedonia, self-censorship is practiced for the same reasons now as in 2001: economic benefits and conforming to a stated editorial line. Armenian panelists in 2001 cited a past history of violence against media professionals as a reason for self-censorship, and even now panelists said that the practice persists out of fear of offending politicians. In Montenegro fear of reporting on criminal activity, reported in 2001, has not abated.

Regardless of the underlying reasons, self-censorship robs citizens of news and information they need. However, it is a sign of progress in countries where this is a matter of business relationships as opposed to fear of arbitrary violence; the former is much easier to mitigate.

Kosovo

In 2001, much of Kosovo's media sector was brand-new or still being established. Having nominally won independence only two years before, infrastructure had been destroyed

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and institutions had been started from scratch with the help of international advisors. Ten years later, Kosovo has recognition of their independence, established institutions, and robust infrastructure. Kosovo's overall score in 2001 was 1.90, reflecting the beginnings of a sustainable media sector but also uncertainty about the future. Scoring 2.54 this year, Kosovo is squarely in the "near sustainability" bracket.

The international community oversaw the legal framework in Kosovo in 2001; as such the text for Objective 1 (freedom of speech) was unusually short that year. Panelists addressed most of the indicators from the standpoint that much of the legal system was out of their direct control: being in the hands of internationals they therefore needed to wait and see.

Today, however, panelists describe a sophisticated legal framework that is in the hands of Kosovars. Legal guarantees of press freedom have been established and panelists feel that the public and the government mostly respect these. As mentioned above, broadcast licensing operates relatively well. While some confusion remains about libel laws, moves have been made to decriminalize them. Likewise, the government has fine-tuned access to information laws, even if some deficiencies remain.

The state of professional journalism was low in 2001. There was little tradition of media serving as the fourth estate. Available training opportunities before independence were rare and no university-level program for journalism existed; training sponsored by international groups was just taking hold. Particularly outside Prishtina, media used outdated equipment. Nowadays, the situation is markedly different. Reflecting this, Kosovo's score for professional journalism has improved 43 percent since 2001 to fall in the middle of the "near sustainability" range. Panelists agree that equipment is adequate to the task, despite broadcasters' concerns of the expense of upgrading to digital. Journalists often consult with more than two sources, including experts (even if they concede the pool of local experts on many topics is limited).

In Ukraine, five percent of the population in 2001 was thought to be online. Today, more than twice as many Ukrainians have an account with just one Russian social networking site, VKontakte.

And, despite measured criticism, panelists took note of multiple academic journalism programs; short-term training, however, is still wanting in their opinion.

Finally, were it not for recent setbacks due to the world financial crisis, business management would demonstrate the most dramatic turnaround. However, even despite the recent setbacks, the change is striking. In 2001, panelists characterized media outlets as “not well-managed businesses” and “donor-dependent.” At the time, most independent media had been in existence for no more than two years. Now, panelists speak of the importance of business plans for media outlets, even if not all use them. Audience ratings exist, even if panelists say not all media trust them. Advertising has become the key source of revenue for most media, and, importantly, panelists say that existing television stations are self-sustainable.

Russia

With an overall MSI score of 2.00, in 2001 Russia achieved its highest score in the ten years of this study. The score of 2.00 that year, while not exceptional in the absolute, was enough that Russia placed fourth among the 20 countries studied. After 2001, it slid about a third of a point and remained stuck in that range for several years, until the past two years when it scored even lower—in the middle of the “unsustainable, mixed system” range.

Of course, a score of 2.00 out of a possible 4.00 implies that many challenges remain for developing a sustainable media. Further, while Russia’s slide in human rights measurements, media freedom in particular, is often linked to the election of Vladimir Putin, he is not to blame entirely. The initial study notes:

This is not to say media were solidly independent under Yeltsin: almost all media were primarily representing their owners’ political and financial interests, essentially becoming mouthpieces for political and business oligarchs. One achievement in Yeltsin’s time was relaxed political control over media by the state. The Law on Mass Media (1991) and the Russian Federation Constitution (1993) remain the regulatory documents that guarantee free speech and ban censorship,

but the reality hardly corresponds to the principles proclaimed on paper. Putin’s coming to power has simply aggravated the contradictions that existed before.

The chapter goes on to detail some of the challenges facing the development of a sustainable media. Panelists complained that Kremlin-backed conglomerates exercised undue control on the media sector, thus limiting plurality. One panelist commented: “scandals reveal who owns media: otherwise everything is covered by five blankets here.” The study noted that few journalists follow ethical guidelines, calling the Moscow Journalist Charter “a paper exercise.” Journalists involved in trying to accomplish credible reporting, the report said, “are protected neither by law nor by labor unions.” Journalism schools were staffed by the “old guard,” teaching theory instead of practice.

The 2001 study in many ways summed up where Russia’s media sector was heading when it noted that “Putin’s coming to power has simply aggravated the contradictions that existed before.” Those “contradictions,” loopholes and caveats that allowed government to exert control over the press, have been used continually over 10 years to steadily absorb the most important media into the ruling-party fold. Indeed, few, if any, new ways to control the press have been invented. Rather, the degree to which the old ways have been used has increased and with rather devastating effectiveness for stifling political and social discourse in the country.

The introductory paragraph to this year’s Russia chapter sums up the situation succinctly:

Although 2010 did not bring any serious changes to the Russian media sector, it left journalists with a feeling of despair. Authorities retained direct or indirect control over many news media outlets, and stepped up their Internet presence. Panelists believe that the quality of journalism is declining, self-censorship flourishes, and investigative reporting has all but died. Still, a small but stable group of media outlets adhere to principles of fair, independent journalism and manage to function in a market distorted by subsidies and preferences for state-affiliated media.

The “small but stable group” is hamstrung by its effective reach. In the section of the 2011 study on plurality of news, the author notes: “Panelists were concerned that with television channels as the major source of information, citizens only hear the government’s views. Alternative news and opinions are available only through a few independent media outlets and online, but most people do not use these sources of information.” However, such news sources may serve as a nucleus of an improved state of journalism and public discourse should the political situation open up. In an example of how politics play a direct role in controlling plurality,

further in the same section, the author notes: “Governors of the Kirov, Saratov, and Perm regions are liberal, so state media in these regions have very pluralistic tendencies.”

There are no signs that the government is willing to ease its control of the most important traditional media. Therefore, whether a wider audience will embrace objective and pluralistic media via new technologies—and whether these new technologies can retain their unfettered distribution—seems to be the key to rediscovered pluralism in the Russian media.

Ten Years of New Media Growth

The use of the Internet, social networking tools, and mobile platforms in Europe and Eurasia today may, in some cases, still have some catching up to do to approach that in neighboring Western Europe. Nonetheless, contrasting the current situation now to 2001 is stunning in how fast these technologies have become entrenched.

In 2001, simple access to the Internet was reported to be quite problematic, particularly outside of capital cities. In both Armenia and Bulgaria, panelists reported that in smaller towns and rural areas, people could not afford print media, let alone Internet access. Bosnian panelists noted that computers were not readily available in rural areas, and even in Sarajevo connections were expensive and unreliable. In Serbia at the time, three percent of the population was estimated to be online; only one percent were estimated to be online in Moldova and Georgia—where 92 percent had never even used a computer. Few Uzbeks had even heard of the Internet. In Belarus, fewer than 10 percent were online, and one panelist noted, “for the next few years, however, the Internet will not be a major factor in Belarus.”

In Ukraine, five percent of the population in 2001 was thought to be online. Today, more than twice as many Ukrainians have an account with just one Russian social networking site, VKontakte. One million Belarusians have VKontakte accounts. Throughout most of the region—with parts of Central Asia as a notable exception—people are using the Internet and related new communications technologies in similar numbers.

The content available in 2001 was also strikingly sparse compared to today. Panelists from a few countries relayed what sorts of news and information sites were available: Bulgaria had an online newspaper; in Russia, news sites mostly relayed information from news agencies, although a few were considered independent-minded; in Ukraine the panel described online media as being as polarized and unprofessional as the mainstream media.

In contrast, the 2011 study includes reports from each country on the many sources of news and information available

online, and the ways they are being used. Ukraine counts more than 100,000 active blogs. Armenian Prime Minister Tigran Sargsyan hosts a blog. Opposition activist and now president of Kyrgyzstan Roza Otunbayeva used Twitter to help rally supporters and others to oust the Bakiyev government (although one estimate shows that there are only about 1,000 Twitter accounts in Kyrgyzstan). Mobile telephone networks in Kyrgyzstan offer voice news services to subscribers, and 3G phone service is being rolled out with 4G in the near future. Traditional media across the region have online presences and are embracing multimedia content, for example a Bosnian radio station providing reporters with video cameras for producing content for its website.

Panelists in 2001 were not oblivious to the potential new media could have and did have at the time. Panelists in Azerbaijan, despite the low penetration there, were using the Internet to gather information for their reporting and called for training on how to better use the Internet. Belarusian panelists, in discussing access to news, noted that with the Internet, barriers to news sources were no longer a problem. Indeed, when in 2010 Russia launched a media offensive against Belarusian president Alexander Lukashenko, Belarusian citizens got around censorship of Russian television channels by watching these reports via the Internet.

Other examples of using the Internet as an alternative news source were reported in 2001. Bulgarian panelists noted how the Internet was beginning to undermine the monopoly position held by the state-run news service. Kazakh panelists spoke of a return to *Samizdat*, or the passing of dissenting leaflets during Soviet times: materials from websites such as Eurasia.ru were printed twice a month and distributed in hard copy.

Similar examples from the 2011 study can be found. In Belarus, many independent news websites were blocked on Election Day 2010. Social networking sites become handy tools to share information. Armenian panelists this year felt that some important stories are not covered by the mainstream media; “Bloggers and citizen reporters, on the other hand, cover all events without hindrance,” they reported. In Kyrgyzstan, the study author wrote, “The first and only 24 hour-a-day service that reported what was happening on the eve of the revolution in Talas was the Diesel website.” The Macedonia study discusses how social media are used by the establishment, but also how news about corruption scandals involving the establishment can originate on social networking sites.

In 2001 as today, intolerant governments are savvy to the threat posed by these alternate news sources and seek to co-opt them or shut them down. In 2001, panelists from Russia and Kazakhstan reported that the government was already

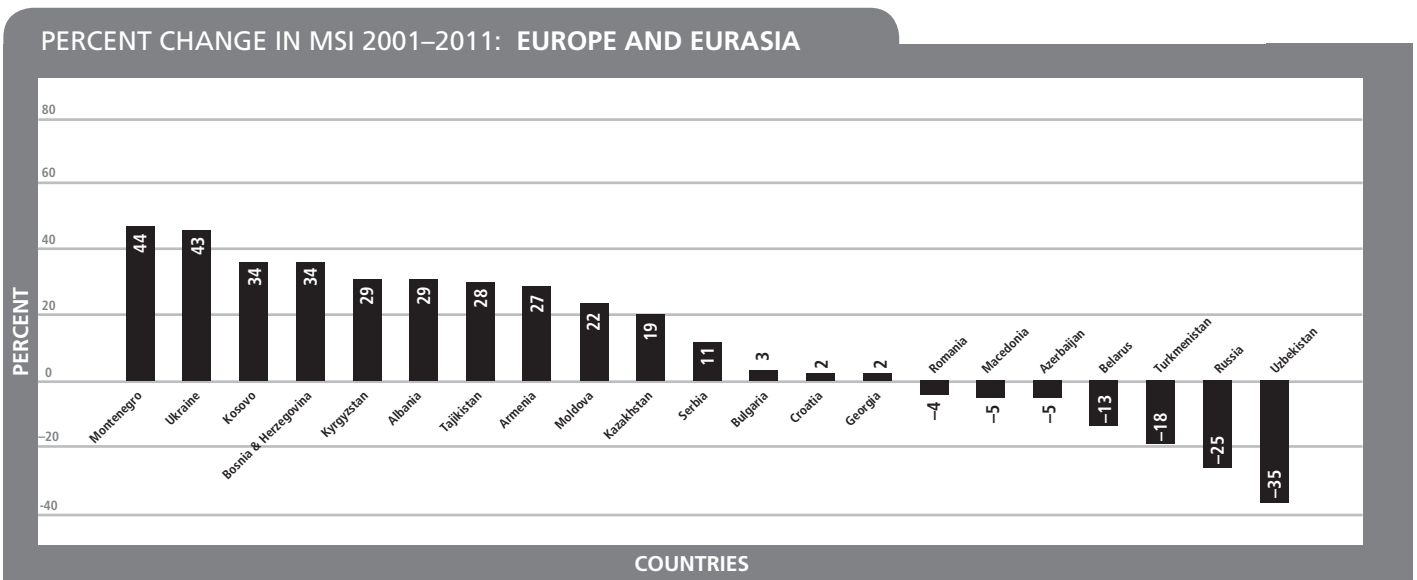
filtering the Internet (although Russia's 2011 panelists think this is no longer the case there). Today, with the notable exception of Belarus, this drastic measure is primarily a Central Asian phenomenon: Turkmenistan and Uzbekistan aggressively control Internet access and content that is available to its citizens, while Kazakhstan and Tajikistan are more selective.

Impeding the work of online media need not be so heavy-handed: in Ukraine and other countries, panelists reported that citizen journalists or bloggers are not considered journalists and therefore have a difficult time getting accreditation to cover official events. Having such a status was also reported to be problematic in terms of accessing public information.

Finally, panelists in 2011 did not discuss the potential that new media had to revolutionize public debate and discourse. This year's MSI has several examples. The author of the Russia

study wrote, "Ordinary citizens now communicate with senior officials on blogs. Traditional media are increasing their online presence and picking up stories that first emerged on blogs." In Armenia, panelists reported several cases where citizens used social networking tools to get their voices heard, such as forcing the abandonment of a plan to amend maternity-leave laws and compelling the resignation of teachers caught on video beating schoolchildren. In Kosovo, political candidates used Facebook to, for the first time, reach out and interact with voters on a large scale.

New developments in technology will continue to impact communications, and journalism, as they have throughout history. Those wishing to control information will continue to seek ways to curtail access to these technologies, and possibly seek to abuse them. The MSI will continue to document the successes and setbacks in years to come.



* Data for Turkmenistan is since 2008

MEDIA SUSTAINABILITY INDEX 2011: OVERALL AVERAGE SCORES

| | | | | | | | |
|--|--|---|---|------------------------|-------------|-------------|-------------|
| <ul style="list-style-type: none"> ▣ Turkmenistan (0.35) ▣ Uzbekistan (0.56) | <ul style="list-style-type: none"> ▣ Belarus (1.02) ▣ Russia (1.50) ▣ Tajikistan (1.42) | <ul style="list-style-type: none"> ▣ Azerbaijan (1.65) ▣ Georgia (1.85) ▲ Kazakhstan (1.68) ▼ Kyrgyzstan (1.66) ▣ Macedonia (1.65) ▣ Ukraine (1.96) | <ul style="list-style-type: none"> ▲ Albania (2.27) ▲ Armenia (2.09) ▼ Bosnia & Herzegovina (2.22) ▼ Bulgaria (2.29) ▼ Croatia (2.48) ▲ Moldova (2.10) ▣ Montenegro (2.28) ▣ Romania (2.29) ▣ Serbia (2.06) ▣ Kosovo (2.54) | | | | |
| 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 2011: FREE SPEECH

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|--|---|--|---|------------------------|-------------|-------------|-------------|
| <ul style="list-style-type: none"> ▣ Turkmenistan (0.28) ▣ Uzbekistan (0.43) ▣ Belarus (0.68) | <ul style="list-style-type: none"> ▣ Azerbaijan (1.66) ▲ Kazakhstan (1.73) ▼ Kyrgyzstan (1.94) ▲ Macedonia (1.66) ▣ Russia (1.52) ▣ Tajikistan (1.57) ▼ Ukraine (1.84) | <ul style="list-style-type: none"> ▲ Albania (2.39) ▲ Armenia (2.32) ▣ Georgia (2.07) ▲ Moldova (2.15) ▲ Montenegro (2.43) ▲ Serbia (2.14) | <ul style="list-style-type: none"> ▼ Bosnia & Herzegovina (2.54) ▣ Bulgaria (2.56) ▼ Croatia (2.54) ▲ Kosovo (2.70) ▣ Romania (2.55) | | | | |
| 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 2010

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

Scores for all years may be found online at http://www.irex.org/system/files/EE_msiscores.xls

MEDIA SUSTAINABILITY INDEX 2011: PROFESSIONAL JOURNALISM

| | | | | | | | |
|----------------------------------|--|--|--|--|-------------|-------------|-------------|
| | <ul style="list-style-type: none"> ▣ Turkmenistan (0.75) ▣ Uzbekistan (0.66) | <ul style="list-style-type: none"> ▣ Belarus (1.15) ▼ Russia (1.24) ▣ Tajikistan (1.43) | <ul style="list-style-type: none"> ▲ Armenia (1.93) ▣ Azerbaijan (1.67) ▼ Bosnia & Herzegovina (1.87) ▼ Bulgaria (1.88) ▲ Georgia (1.80) ▲ Kazakhstan (1.68) ▣ Kyrgyzstan (1.61) ▲ Macedonia (1.69) ▼ Romania (1.95) ▣ Serbia (1.74) ▼ Ukraine (1.75) | <ul style="list-style-type: none"> ▣ Albania (2.23) ▼ Croatia (2.08) ▲ Moldova (2.11) ▣ Montenegro (2.07) ▣ Kosovo (2.54) | | | |
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| UNSUSTAINABLE ANTI-FREE PRESS | | UNSUSTAINABLE MIXED SYSTEM | | NEAR SUSTAINABILITY | | SUSTAINABLE | |

MEDIA SUSTAINABILITY INDEX 2011: PLURALITY OF NEWS SOURCES

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| | <ul style="list-style-type: none"> ▣ Turkmenistan (0.25) ▣ Uzbekistan (0.53) | <ul style="list-style-type: none"> ▲ Belarus (1.13) ▣ Tajikistan (1.59) | <ul style="list-style-type: none"> ▣ Azerbaijan (1.71) ▲ Georgia (1.85) ▲ Kazakhstan (1.79) ▣ Kyrgyzstan (1.88) ▣ Macedonia (1.70) ▲ Russia (1.76) | <ul style="list-style-type: none"> ▣ Armenia (2.30) ▲ Moldova (2.36) ▣ Serbia (2.27) ▲ Ukraine (2.04) | <ul style="list-style-type: none"> ▲ Albania (2.51) ▼ Bosnia & Herzegovina (2.59) ▣ Bulgaria (2.66) ▲ Croatia (2.83) ▣ Kosovo (2.78) ▲ Montenegro (2.64) ▣ Romania (2.61) | | |
| 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 2010

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

Scores for all years may be found online at http://www.irex.org/system/files/EE_msiscorers.xls

MEDIA SUSTAINABILITY INDEX 2011: BUSINESS MANAGEMENT

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| | | <ul style="list-style-type: none"> ▼ Azerbaijan (1.31) ▼ Georgia (1.47) □ Kazakhstan (1.48) ▼ Kyrgyzstan (1.27) □ Macedonia (1.39) □ Russia (1.35) □ Tajikistan (1.16) ▼ Belarus (0.93) □ Turkmenistan (0.14) □ Uzbekistan (0.73) | <ul style="list-style-type: none"> □ Albania (1.77) □ Armenia (1.85) ▼ Bosnia & Herzegovina (1.84) ▲ Moldova (1.60) ▼ Romania (1.92) ▼ Serbia (1.72) ▼ Ukraine (1.97) | <ul style="list-style-type: none"> ▼ Bulgaria (2.13) ▼ Croatia (2.24) ▼ Kosovo (2.15) □ Montenegro (2.01) | | | |
| 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 2011: SUPPORTING INSTITUTIONS

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|----------------------------------|-------------|---|---|--|-------------|-------------|-------------|
| | | <ul style="list-style-type: none"> ▲ Azerbaijan (1.90) ▲ Kazakhstan (1.71) ▼ Kyrgyzstan (1.61) ▲ Belarus (1.22) □ Tajikistan (1.33) ▲ Macedonia (1.79) ▲ Russia (1.64) | <ul style="list-style-type: none"> ▲ Albania (2.43) ▲ Armenia (2.05) ▼ Bosnia & Herzegovina (2.27) ▼ Bulgaria (2.22) □ Georgia (2.07) ▼ Kosovo (2.50) ▲ Moldova (2.27) □ Montenegro (2.24) □ Romania (2.43) □ Serbia (2.40) □ Ukraine (2.20) | <ul style="list-style-type: none"> ▼ Croatia (2.68) | | | |
| 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 2010

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

Scores for all years may be found online at http://www.irex.org/system/files/EE_msiscores.xls

But taken as an average, scores for objective 2 have improved in every sub-region; panelists in some countries are painting a better picture of journalism, although others feel little has changed.



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 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 review 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.

Changes and Additions in 2011

Between 2001 and 2010 IREX used the same objectives and indicators without any changes. In the MSI's tenth year, IREX drew on our experience using this methodology in three regions, Africa, Europe and Eurasia, and the Middle East, to refine the methodology. Based upon the comments from our panelists during panel discussions, IREX felt that certain concepts required clarification and amplification. Changes in technology over time required more direct language to show that our studies have captured its impact on the media sector and ensure that panelists continue to consider this in their deliberations. Finally, IREX intended from the beginning that the MSI not discriminate in favor of a country with a preponderance of public media or private media; regardless of ownership, the underpinnings of an effective media system are the same. Therefore, IREX clarified some language to ensure our intentions are clear in that regard.

Highlights of the Changes

Close inspection of the new objectives and indicators will reveal some subtle changes, and we invite users of the MSI to review these at their convenience. However, below is a summary of the key amendments and additions, with a short explanation.

- Objective 1, indicator 2: Although international norms of media freedom frown upon licensing and/or registration of print media or online media, this nonetheless occurs in many countries. The original wording of this indicator singled out broadcast media to reflect IREX's belief that only media making use of a public good—the broadcast frequency spectrum—should be subject to licensing. The changed wording broadens the scope, yet the guiding questions in the questionnaire ask panelists to consider if any licensing or registration serves to protect a compelling public interest.
- Objective 3, indicators 1 and 2: Changes made to these two indicators are intended to clarify the meaning of each and make each more distinctive. Indicator 1 covers the availability of different sources of news on different platforms and the diversity of viewpoints represented therein. Indicator 2 assesses any obstacles faced by citizens when trying to access domestic and foreign media, be those obstacles legal, socioeconomic, and/or infrastructural (e.g., inconsistent electrical supplies) in nature.
- Objective 3, indicator 8: Ideally, citizens have access to news about their immediate area, neighboring communities, national developments, and international events. Further, such reporting should be contextualized: the media should analyze the impact of such developments for their audience in a way, for example, that an international satellite news channel cannot do. IREX felt that this concept was not receiving adequate consideration in panel discussions and added an indicator dedicated to it.
- Objective 4: By changing the wording of this indicator, IREX intended to remove a perception of bias against public or non-profit media. IREX's intention from the beginning was to focus on good management and solid financial sustainability that encourages editorial independence of media outlets.
- Objective 4, indicator 5: By broadening the language of this indicator to specifically include government advertising, which in some countries is the largest source of advertising revenue, IREX aims to more fully assess the government's impact on the media marketplace and how fairly it spreads public funds amongst the media. Previously, guiding language in the questionnaire asked panelists to consider government advertising, but this change makes IREX's intention more explicit.

- Objective 5, indicator 8: Information and communications infrastructure is increasingly important to allow media to reach citizens and for citizens to serve as reporters or otherwise interact with the media. Citizens whose countries have poor resources in this area face disadvantages in this regard. IREX added an indicator to assess how well this infrastructure serves both the media and citizens. Indicator 7 under this objective, which previously also tried to cover this concept, is now solely dedicated to the control of these resources and the ability of media to access them without undue restrictions.

Impact on Scores of the Methodology Changes

In considering changes, IREX wanted to be sure that historic scores would maintain comparability to future scores. IREX did not see the need for radical additions; rather the intention of the changes was to ensure that MSI panelists properly assess the concepts already incorporated. However, adding indicators or changing language has had some minor impact on scores.

For example, adding an additional indicator in Objective 5 (previously seven indicators, now eight) to cover the information and communications infrastructure does allow for a relatively wealthy country with an advanced infrastructure but otherwise lackluster supporting institutions to perform better than in the past without any apparent change. However, the ability of one additional indicator to significantly change the average of seven other indicators is limited. Where the new indicators noticeably impact scores from previous years is noted in the introductory paragraph of the relevant objective in each country chapter.

Further, changes to the wording of the indicators had modest impact. For example, in years past panelists sometimes provided better scores than expected for Objective 4, indicator 5, which covered government subsidies for private media, if the government provided no such subsidies. Guiding text also asked panelists to consider government advertising, but experience showed that they probably did not do so to the extent IREX desired. Changing the wording of the indicator to also specify advertising has had a noticeable impact on the scores for this indicator, although it has not been enough to drastically impact Objective 4 scores.

The changes made to the methodology will result in more accurate reflections of the sustainability of a country's media sector and its ability to function as the "fourth estate." While IREX recognizes that scores are affected by these changes, the magnitude of the impact has been minimal in this first year of using the revised methodology and does not discredit comparisons to scores from past years.

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 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 or public media.
- > Libel is a civil law issue, public officials are held to higher standards, offended party 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.

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.
- > Facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exist (investigative, economics/business, local, political).

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) exists 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 non-partisan, 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.

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.

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 (e.g., 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.

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.