

# MEDIA SUSTAINABILITY INDEX

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2016

**The Development  
of Sustainable  
Independent Media  
in Europe and Eurasia**



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## MEDIA SUSTAINABILITY INDEX 2016

The Development of Sustainable Independent Media in Europe and Eurasia

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## Implementing Partners

IREX wishes to thank the following organizations that coordinated the fieldwork for and authored a number of the studies herein:

**Mediacentar Sarajevo** <http://www.media.ba>

**BTC ProMedia** (Bulgaria) <http://www.btcpromedia.org>

**Institute for Advanced Studies GAP** (Kosovo) <http://www.gapinstitute.org/>

**Legal Media Center** (Kazakhstan)

**Media Development Center** (Macedonia) <http://mdc.org.mk>

**Independent Journalism Center** (Moldova) <http://ijc.md/eng/>

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EUROPE  
& EURASIA

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*This year IREX analyzes for what reasons citizens do and do not take a stand when media and those reporting on key issues in their country are under threat.*



I am pleased to introduce the latest Media Sustainability Index (MSI) for Europe and Eurasia. The 2016 edition highlights the impact of Kremlin-backed media blitzing the media sectors in neighboring countries and how business interests are a key driver of self-censorship. Last year we reported that in several countries media freedom seems to be more highly valued by citizens; this year we look at why in other countries citizens are not motivated to support threatened media independence. The Executive Summary that follows reports differences and similarities across the region regarding these issues; complete score charts and panelist recommendations to improve media sector performance can be found as well.

The MSI, now in its 15th year, is one of the world's most in-depth recurring studies of media health in the world. IREX developed the MSI to provide an international development approach to measuring media sector performance. Looking beyond issues of free speech, the MSI aims to understand the degree to which news and information from both traditional and non-traditional sources serve its audience reliably.

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 access to news and information that empowers citizens to help improve the quality of governance through participatory and democratic mechanisms.

Findings in the MSI also provide useable analysis 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.

The MSI is not possible without a large cast of players. Foremost, more than 200 media professionals from throughout Europe and Eurasia took time from their busy schedules to reflect on their own media sector and provide the thoughtful comments that make the MSI stand out as a media development assessment tool. Discussion moderators and authors from each country organize the MSI and contextualize the panelists' thoughts. Without Lee Ann Grim's dedicated editing and logistical support, this year's MSI would not be reaching you until much later in the year. 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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*One of the more surprising results is how anti-foreign-NGO sentiments, commonplace coming from Kremlin-controlled media within Russia, are spreading elsewhere.*





Results of the 2016 MSI study for Europe & Eurasia (E&E) show that across the board there was little change. Taken as a whole, the region improved in overall score by 0.01, from 1.85 to 1.86. However, there were offsetting changes underlying this seeming immobility: Objective 1, Freedom of Speech, scores for the region as a whole fell by 0.02 while Objective 2, Professional Journalism, increased by 0.02 and Objective 5, Supporting Institutions, increased by 0.04. Reflecting this, individually, the majority of countries showed little change in their overall score. Five of the 21 countries increased their overall score by more than 0.10, while three decreased by more than 0.10.

The three countries that this year experienced a decrease in overall score—Belarus, Azerbaijan, and Kazakhstan—were ones last year that had showed small but unexpected increases. Last year’s Executive Summary indicated that such increases were unlikely to be part of a larger upward trend; panelists’ scores this year for all three ended up placing the three more or less where they stood in 2014.

A similar phenomenon occurred this year with Tajikistan. Panelists there gave scores that increase the overall score in the country by 0.18 despite the fact that many serious threats to the media sector exist, including government pressure and harassment of critical voices, concentration of media control, poor quality reporting, and difficulty for independent media in raising revenue. Except for Objective 3, Plurality of News, all objectives received higher scores. Reading the chapter text, however, one does not get the impression that much positive is happening to improve the ability of Tajik media to serve as the Fourth Estate.

Why the increase, then? First, it is important to note that Tajikistan’s score still places it in the upper half of the “unsustainable, mixed system” category, which is 1.51 to 2.00. So that is unchanged from last year. Second, the source of the scores is individual media professionals in the country. Of the 12 participating in the Tajikistan study, nine also participated last year. Of the nine returning panelists, six provided higher scores while three provided lower scores in Objective 1. Analysis of other objectives shows a similar pattern.

IREX does not release individual panelists’ scores, as that could unfairly put a panelist under pressure. Further, individual experiences may color how a panelist scores from year-to-year. A traumatic event, such as brutal attack on a small journalist, might result in a short term decrease for the relevant indicator; in the next year the score might again return to where it was previously. Given events in Tajikistan, it is unlikely that increases in score will continue.

The important takeaway is that the longer term score trends and the general score range are key considerations for the user of the MSI, as is contextualizing the scores with the information found in the text. The scores themselves are guideposts; the analysis provided in the text should serve as the foundation for any conclusions underpinning action by advocates or development professionals.

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## What's Inside the 2016 MSI

Below IREX reports on themes that emerge from many chapters. This year, the question of public support for independent media, the impact of Kremlin-backed messaging, commercial pressure on media content, and reporting on the migrant issue are compared across several countries.

New this year is a summary of panelist and chapter author recommendations organized into several themes: 1) Education Opportunities & Reform; 2) Media Content Development; 3) Legal Support Mechanism; 4) Financial Support Mechanism; 5) Solidarity and Civil Society & Association Support Mechanism. IREX hopes that these will be useful to MSI users and welcomes feedback on their inclusion.

Scoring charts providing all scores for 2016 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).

## Who's Got Their Backs?

Media professionals and human rights advocates, even with international backing, cannot themselves create space for the high-quality reporting that is the foundation of an information ecosystem that empowers citizens politically and as consumers. This is especially true when an entrenched government—or other forces—do not look favorably upon voices that do not align with their vested interests. A grassroots demand for such information must exist, and citizens must be motivated to defend their right to that information, and by extension defend the rights of those who produce it.

In last year's Executive Summary IREX noted that public stock in media freedom seemed to be on the rise in Albania, Armenia, and Moldova. But such is not the case in other countries. This year IREX analyzes for what reasons citizens do and do not take a stand when media and those reporting on key issues in their country are under threat.

In Croatia, one panelist stated "The public is ready to protect the right to be informed, as guaranteed by the highest international standards." Yet, this may be a reflection of either or both the past and when such rights face a clear threat from an identifiable source that can serve as a common oppositional rallying point. In the 1990s, some 100,000 citizens rallied on Zagreb's main square to protest the revocation of Radio 101's license. Today, without the clear and heavy-handed action of government, another panelist characterized protests in contemporary Croatia as "lack[ing]

a vigor it had before." Another panelist described the reaction to the low-level threats and hassles faced by media professionals today. The chapter notes: "But according to the panelists, the general public feels a certain fatigue regarding threats to journalists. 'In times of a crisis, people are just too preoccupied with their own problems to be actively involved in protesting against "minor" problems of some other professional or social group,' one panelist commented."

In Armenia, panelists also reported a public appreciation for media and information rights: "Still, Armenian citizens value the freedom of speech more and more, with soaring demand for uncensored speech and information." However, one of the panelists there noted that there is room for improvement that is likely to come as the public's media literacy improves.

Yet in several countries, the panelists felt that a number of considerations de-motivate the public when it comes to protecting these rights.

In some cases, it seems to be that the public places a low value on them. A Romanian panelist said, "Part of society is not convinced of the importance of this democratic principle. I cannot explain otherwise the electoral success of various local barons who attempted to control the media in their counties." In Tajikistan, panelists believe that the public is indifferent to violations of freedom of speech. "Citizens do not care that the websites of local media are blocked or what lawsuits are brought against journalists. The panelists felt that the authorities are helped because public opinion has been split for several years: part of the public believes that a free media is very important for society, while another part believes that the media complicate the situation and libel the government."

This sentiment was echoed in Macedonia: "The society, on the other hand, remains conservative, patriarchal and the prevalent nationalist ideology has little understanding for any minority or dissenting opinion. In Macedonian multiethnic and multicultural society, ethnic and social groups expect from the media to protect the interests of the nation or state, and those who support a more open, democratic and inclusive society and protest the abuses and violations of freedom of expression are in minority." The chapter does strike a hopeful note, however: "Panelists did comment that the situation has improved over previous years, especially in terms of growing numbers of people who are discontent and publicly express their dissatisfaction with the overall situation in the country, including in the area of freedom of expression and freedom of media."

Others view threats to media as an affair that is simply a product of political machinations. In Kazakhstan, for

example, one panelist said, “People do not view press as either official or independent press, but instead distinguish between government and opposition press. If media report that a journalist is attacked due to professional activities, the public reaction is, ‘well, it’s the opposition press.’”

However, another panelist from Kazakhstan said, “The public value freedom of speech, but fear makes people silent.” In Azerbaijan, whether fear or frustration is the cause, one panelist noted, “People are inclined to bow rulers rather than laws. The panelist referred to a popular saying: *‘Hökumətə hökumətlik elmək olmaz’* (literally: ‘you can’t behave with the government like a government’ i.e. you can’t argue with the government).”

In Russia, patriotism plays a role: “At the same time, the society and even the journalism community do not place a high value on freedom of speech and media freedom. Many journalists believe that they should protect the interests of the state (that is, of the authorities rather than the country), and engage in propaganda rather than news, commented one of the panelists.”

Another point that has been made in past years is that the media content itself is generally of poor quality. The public therefore does not place value on the fruits of a free media, either from the standpoint of protesting for it or paying for it. Most authoritarian rulers have become much more nuanced in their approach to controlling the media, information, and public discussion—and opinion. It might be hard to rally people around a media outlet like 1990s Croatia’s Radio 101—when they were also protesting against a government that many felt going in the wrong direction. Clearly, however, demonstrating through quality content and tangible results of good quality reporting, particularly investigative reporting, would go a long way toward enhancing the value of that reporting, both economic and from a rights perspective.

## Moscow Calling

Politicians in the Kremlin make no secret that they are spending millions of dollars on messaging that supports the worldview, and their larger strategic goals. They do not always, however, promote the fact that other media in neighboring countries are also financed or controlled by pro-Kremlin sources. The combination of transparently pro-Kremlin and opaquely financed, yet bearing compellingly anti-EU and –U.S. messages, work to confuse the information space in many countries and upend both the position of respected domestic journalism and the meaning of quality journalism itself. This leads to a number of issues in several of the countries included in the Europe & Eurasia MSI.

For one, the result is media—both locally controlled and affiliates of Kremlin-backed outlets—spread what panelists describe as propaganda, but perhaps might be better called misinformation. In Ukraine, much of the pro-Kremlin media is plainly labeled as such, and it has created an internal information war. As reported in that chapter, “Based on the monitoring efforts of NGO Telekritika, the professional level of journalists as well their compliance with professional and ethical standards has fallen catastrophically. ‘The information war being carried out by Russia against Ukraine is a powerful factor influencing the current quality of reporting. Journalists are being drawn into this conflict and have started performing a counter-propaganda role, which consequently makes media discourse biased, engaged, and emotional,’ says Diana Dutsyk, executive director of NGO Telekritika.”

In Moldova, media licensing has been compromised to some degree because of expansion of Kremlin media there. In 2015, a member of the broadcast licensing commission was expelled from the Communist Party after he voted with his colleagues to suspend rebroadcasts by television station Rosiia 24. That decision was the result of monitoring coverage of events in Ukraine. However, this was not a signal of a unified policy. One panelist noted, “The [licensing commission] only pretended to fight propaganda because the Russian media group Sputnik broadcasts in Chişinău on the frequency of the radio station Univers FM without a license. We notified the [licensing commission] of this, and their answer was that no station in the country has a contract for rebroadcasting radio station Sputnik from the Russian Federation. Nevertheless, Sputnik radio station broadcasts with no impediments, and the [licensing commission] keeps silent.”

In Bulgaria, some of this media is not so directly linked to the Kremlin. There, one of the panelists pointed out that “2015 marked a deluge of new online media replicating and peddling the disinformation originating from the Peevski media [conglomerate]. The blogger Krassimir Gadjokov has created and is expanding a list of over 75 online sites used to disseminate propaganda for Peevski media and the Russian interests in Bulgaria; these sites frequently quote each other. The sites do not indicate their owner nor their editor, and do not provide contacts.”

The Kremlin’s media also take advantage of the fact that in rural border areas of its neighbors, media coverage is poor and residents have few choices for media. In Kyrgyzstan, panelists said that overall “News from Russian channels continues playing a significant role in forming the public opinion and agenda.” One panelist specified, “In rural areas and small towns, due to the absence of local media and

It might be hard to rally people around a media outlet like 1990s Croatia's Radio 101—when they were also protesting against a government that many felt going in the wrong direction.

limited access to national media, local residents primarily have access to rebroadcasted Russian TV channels.”

One panelist told how Georgian media never travel to certain areas to cover key issues, such as the issuance of Russian passports to local Georgians residing on the border. She also added, “If we consider Javakheti region, I wonder how these people receive any news about this country [Georgia], where they live. Nothing to say about the content diversity... And then they are surprised that people have pro-Russian sentiments.”

One of the more surprising results is how anti-foreign-NGO sentiments, commonplace coming from Kremlin-controlled media within Russia, are spreading elsewhere. In Bulgaria the panelists discussed increasing propaganda attacks against the international NGOs involved in media development. “Some panelists reported that the Peevski media are tracking organizations that receive funds from the America for Bulgaria Foundation, the Norway Fund, and other donor programs supporting the media and are publishing accusations that the NGOs serve external political interests. For example, several print and online media published a list of ‘Sorosoids,’ including the names, pictures, and positions of members of NGOs supported by the Open Society Foundations founded by George Soros.” One panelist said, “The media monopolies are creating an air of suspicion against NGOs, which is hard to disperse.” Another commented, “There is a systematic effort to compromise the public image of the NGOs, which hampers our ability to support high-quality journalism. It’s very unpleasant to know that your actions will be interpreted as a threat to national security or something like that. The media participate in this campaign as well; they selectively extract from [local NGO] reports, take things out of context, and use them for defamatory purposes.”

## Business Interests Call the Shots

Panelists from countries throughout Europe & Eurasia have for at least a few years noted the shift from direct censorship to self-censorship. As well, they have noted that this is beginning to reflect not so much an avoidance of angering

the government, but rather annoying important advertisers. Indeed, the Albanian branch of the Balkan Investigative Reporting Network undertook a survey of 120 journalists and media managers there, asking about the main causes of censorship and self-censorship. More than 70 percent of respondents said that journalists avoid covering certain stories and ranked large commercial companies and important advertisers as key sources of pressure.

One panelist there illustrated such pressure with the example of Vodafone, which has refused to buy advertisements in *Shqip* newspaper, he said, in protest over some of the paper’s coverage of that company. In neighboring Macedonia, panelists also pointed at telecoms as a culprit: “It is now more difficult to publish anything against the Telecom or the power supply company EVN than against the government,” one panelist said.

Panelists in Croatia “posed the rhetorical question of when the last time an article critical about the top 10 advertisers had been published.” One panelist said, in reference to coverage of key events, “There are no issues, *aside from the larger advertisers* [emphasis by editor], and no events that editors would actively prevent their reporters from covering.” In addition, Croatian panelists report that “Product placement pieces and advertorials are standard practice. Newly introduced elements in advertising contracts ever more often oblige the media to report positively on the advertiser, or at least to refrain from negative publicity.”

In Bulgaria, the situation has reached a point where untangling business interests and advertising may be impossible in the near-term. “After decades of domination over the advertising market, the companies controlled by Krassimir Gergov have shifted toward the Peevski media group.” One panelist said, “This makes Peevski the man who distributes the advertising money in Bulgaria. This is very visible by the content we can see on the four national channels and by looking at the advertisers and the advertised products.”

Sadly, this situation is an exacerbation of a previous attempt at media capture by business interests. The advertising agencies now controlled by Peevski had once belonged to advertising mogul Krassimir Gergov, who had amassed debt extended by the now-bankrupt KTB bank. That bank had also been extending questionable loans to media outlets as a way to control them.

“The suspicions that the bank had been used to buy media content proved true. Media outlets and publishing houses have been supplied with unguaranteed loans, and it’s shocking that the judiciary is not investigating how that money was siphoned off to corrupt the media. This hasn’t

been limited to KTB; recent publications exposed that *Trud* owes a huge debt to First Investment Bank, and it's not hard to see that the newspaper has been really active in supporting the projects funded by the bank, including a negative campaign against environmentalists who objected to its plans to expand the winter resorts at the expense of wilderness," one panelist added.

However, in places where business and government are difficult to separate for the casual observer, the source of self-censorship is often from the government through businesses. In Macedonia, panelists noted that "The citizens learned from the wiretapping scandal that the media that are part of large corporations are expected to adopt pro-government editorial policies to ensure that the mother companies will win lucrative public tenders, and that a share of the contract should go to the media, for their services in support of government's policies."

## Migrant Messaging

Throughout 2015, the plight of refugees leaving conflict and/or poverty in parts of Africa, the Middle East, or Afghanistan made worldwide news. Many of the countries included in the Europe & Eurasia MSI are on the paths many refugees choose between their homes and Western Europe. This issue not only proved to be a test for how governments responded to this flow of people, but also how the media in these countries covered it.

Reflecting the divided media—in terms of both skills and motivation—the issue was often covered in different ways within each country. In Croatia, one panelist used this example to exemplify the lack of balance and depth in reporting. "Let's take the migration crisis as an example. There were two opposite approaches to the issue, but the complexity of the crisis has rarely been reflected." Romanian panelists said an important segment of the media covered the issue mostly negatively, "full of stereotypes, hate speech, and nationalism." However, some alternative media "covered the immigrants' camps, talked to the immigrants, and produced ample, well-documented, and balanced materials."

In Bulgaria, according to one panelist, "The fact that the Patriotic Front signed the agreement against hate speech did not prevent its TV SKAT from using it. Throughout the year, maybe because of the refugee influx as well, there were more hate-speech voices, coming from beyond the usual suspects." However, another panelist noted, "The bloggers and social media activists were very active on issues like the referendum and the refugees, while the mainstream media stayed away from those topics."

**In Bulgaria, the situation has reached a point where untangling business interests and advertising may be impossible in the near-term.**

Overall, part of the problem of coverage is a result of the lack of a corps of reporters to cover international beats in what are small and poorly funded media markets. In Croatia one panelist said, "Even now, with hundreds of thousands of migrants crossing our borders, a more demanding reader can hardly find any article on international affairs that is not a pure copy/paste of an article published in foreign media. I am not questioning the quality of these 'originals,' but they logically lack the local aspect of the crisis."

## Recommendations

This year we asked panelists and chapter authors to provide specific recommendations on ways to improve the performance of their media sectors. In the past, although some recommendations were included in the text, since there was not a logical space in each chapter, these were not included when they came up naturally in panelist discussions.

Below are some of those recommendations based on a few of the recurring themes, with a designation of the country each came from. Many of these have more universal application, however.

### 1. Education Opportunities & Reform

- Armenia: Many journalism instructors and professors are not acting journalists. If professors were acting journalists they can prepare journalists with up-to-date education.
- Bosnia: Editors should encourage development of skills and expertise of their journalists in particular areas by financing their in-service training programs or at least enabling participation in training programs and independent work during working hours. Also, the international community should support quality trainings for journalists to fill the gap between the university curricula and the contemporary skills required by the media.
- Georgia: Journalism professors and practitioners should form a group of media professionals to support a variety of initiatives. The professionals could work towards producing better research, policy papers, and provide trainings on a number of problematic media issues. Among these are the gaps in journalism education and how to better prepare students for the professional career, professional

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unions, and their role in supporting media, public opinion and public attitudes, Internet freedom, and the country's communication policy.

- Kyrgyzstan: There is a lack of media management skills and low professional quality among journalism departments' alumni. New curriculum should be developed and then piloted with the use of a monitoring and evaluation tool.
- Montenegro: Global improvement of unfettered journalism and free media primarily depend on journalists' education and personal capacities. The education of new generations should be more practical and in close cooperation with existing media.
- Moldova: University committees should be created to assess the following opportunities: re-configuration of journalism training formats; training for media managers; launching an ongoing training center for media professionals; and introducing a course on "media sciences" for those interested in learning more about media impact for research purposes. High schools and universities should develop and implement a mandatory course on media literacy as a measure of protection against disinformation, manipulation, and propaganda through media.
- Russia: As media revenue is declining, independent media outlets cannot afford to pay for services, especially training, provided by NGOs. There is the need for more financial support from NGOs to provide free services and trainings to independent media.
- Tajikistan: Further work is needed to conduct training, seminars, and better schooling for young journalists, as they are not learning practical skills. Also, teachers should be trained in the standards for international journalism. Especially concerning is the specialization of journalists. For example, there is only one organization that provides training for journalists who want to work in the sphere of business reporting. It would be better to expose trainers in economic journalism to foreign economic mass media.
- Turkmenistan: The international community (including OSCE) should form a working group to discuss ways to improve professionalism of Turkmen journalists, given the context that Turkmen universities teach journalism students to become loyal only. Specifically, OSCE should consider opening up its professional trainings not only to government-approved journalists but also citizen

journalists as well. OSCE should also consider removing restrictions that it imposes on foreign journalism trainers in terms of what to teach and how to teach. In other words, foreign trainers should not be asked to avoid discussing certain politically sensitive issues during the lectures and trainings.

- Ukraine: Expand available training on media management, economy, and business issues. In terms of economic decline, financial sustainability is crucial for the quality of products and survival of independent media. Regarding more traditional training, journalism education may benefit from new laws on higher education, making universities freer from the central authorities as it relates to developing curriculum. An increase in media literacy among citizens may contribute to counteracting propaganda and increase the demand for high quality journalism.

## 2. *Media Content Development*

- Bosnia: Promote investigative journalism. Award schemes would provide gratification for journalists engaging in quality, investigative journalism. Print and online journalists and editors should respect intellectual property and attribute republished work of other media in a correct manner.
- Serbia: The focus of media association efforts should be shifted from less important but popular investigation of media ownership concentration to much more serious problem of media content concentration.
- Turkmenistan: Increasing visibility of citizen journalism presence in the country might offer alternative information (while teaching a lesson or two about safety as well).
- Ukraine: In particular, the challenge of creating a public broadcaster is not only to keep it independent from political and administrative influence but re-build the archaic structure of the former state television and create high quality media product attractive for wider audience and covering niches neglected by commercial broadcasters.
- Uzbekistan: The government must abolish censorship and lift taboos, allowing journalists to report on critical human rights issues. Also, the authorities should lift the ban on foreign media outlets operating in the country and unblock their websites, thus creating competitive environment in media market.

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### 3. Legal Support Mechanism

- Armenia: From international donors there is very little legal assistance for journalists/media outlets. It would greatly help the community if they could access legal assistance on a constant basis, and not only when there are legal components in this or that grant.
- Tajikistan: Independent media and individual journalists in Tajikistan should have access to lawyers that are trained to operate on media protection issues. Because most of the media do not have funds for such legal support, it would be nice for donor projects to provide for such units and to support the media in this way. In addition, in-depth training of journalist legislation concerning their rights and the observance of ethical and journalistic standards should be available and current. The low level of legal literacy of some journalists frequently leads to lawsuits against publications and individual journalists.
- Croatia: When it comes to the EU accession and aspirant countries, the legal framework component will soon be a non-issue, due to the formal alignment of their media legislation with the EU standards. But, most of these countries are doing that simply because they are required to in order to start/continue the accession process. But they are not so keen to implement the legal framework once it is formally adopted. For this reason, the implementation and watchdog function is so important.

### 4. Financial Support Mechanism

- Albania: The Union of Albanian Journalists should create a financial fund to help journalists in the case of strikes or protest against illegal employment with the intention to force media owners to sign individual and collective contracts with journalists.
- Bosnia: Funding for research and investigative journalism should be provided by media managers and through independent funds (mainly granting by international organizations). Also, media owners and editors should motivate journalists to conduct high quality work by offering competitive salaries and adequate employment regulations.
- Croatia: Media outlets in small markets will not be able to survive in the current format (and equally important, keep the quality of the content) on their restricted markets without active government support, be it VAT exemptions,

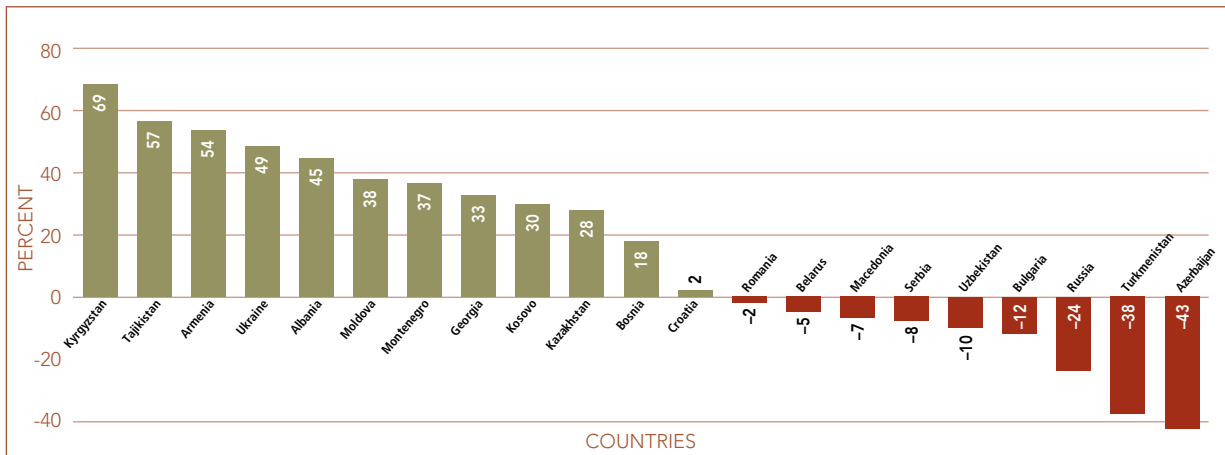
or other tax breaks (lower taxes on journalists' salaries, for example, as in France).

- Tajikistan: There has been an increase in grant programs and tender proposals in which media organizations can take part, such opportunities should continue and even expand.

### 5. Solidarity and Civil Society & Association Support Mechanism

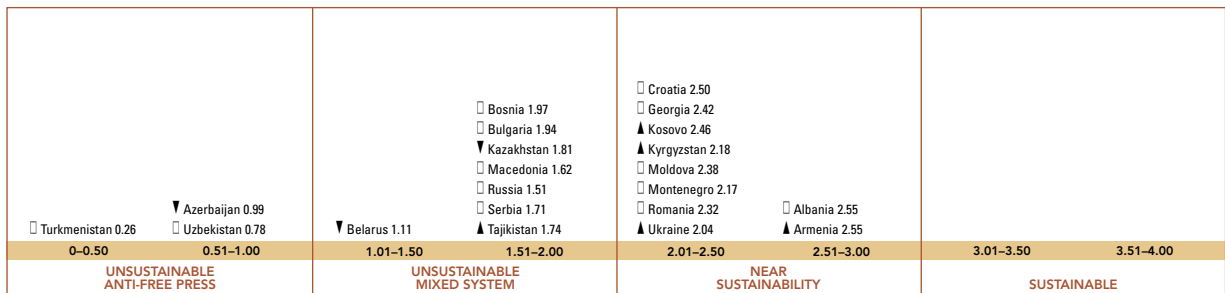
- Bosnia: Civil society, including journalist associations, should closely monitor any proposed changes related to media law, and strongly oppose provisions that are limiting freedom of speech; similarly, implementation of laws protecting freedom of expression should also be closely monitored. Furthermore, governmental bodies should treat all journalists equally and allow access to public events without exceptions. When contrary practices occur, the professional community, civil society, and other relevant actors should express stronger disagreement and support to affected journalists. Moreover, trade unions and professional associations should work more actively to protect journalists' rights and advocate for more efficient implementation of existing laws.
- Kyrgyzstan: One recommendation is to offer long-term programs and projects for media organizations conducting M&E of journalist's rights, freedom of speech etc.
- Montenegro: Create additional funds for support of media associations, which should strongly protect professional reputation and promote idea of free press.
- Serbia: The extraordinary government pressures on media not favoring the ruling coalition needs attention from media associations to improve communications and coordination of action with civil society. Stronger communication with international media organizations is needed too.
- Tajikistan: To ensure the safety of journalists persecuted by the authorities, the creation of a special fund or closer relations with the international human rights organizations that can provide support to journalists and their families is needed. Additionally, international donors should pay special attention to the seriousness of the situation within Tajikistan's media and provide help so that they can maintain their integrity and security.
- Ukraine: The influence of the existing professional journalists' associations, which are partly responsible for self-regulation and protection of journalists' rights, does not sufficiently cover the entire profession.

## PERCENT CHANGE IN MSI 2001–2016: EUROPE AND EURASIA



\* Data for Turkmenistan is since 2008

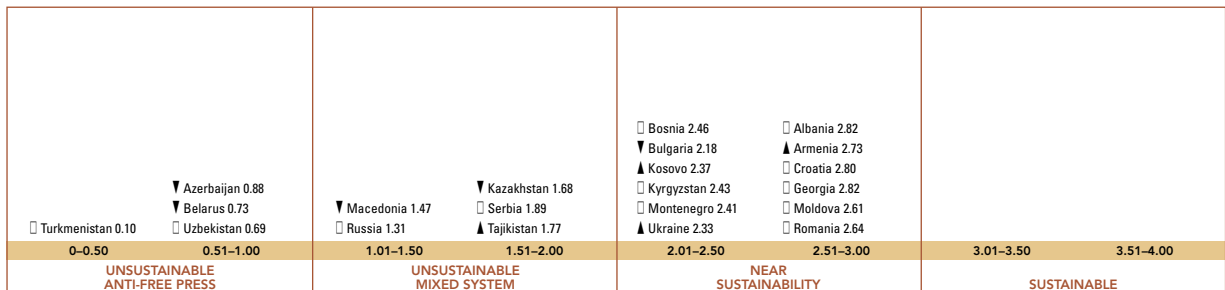
## MEDIA SUSTAINABILITY INDEX 2016: OVERALL AVERAGE SCORES



### CHANGE SINCE 2015

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

## MEDIA SUSTAINABILITY INDEX 2016: FREE SPEECH



### CHANGE SINCE 2015

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

**Unsustainable, Anti-Free Press (0–1):** Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

**Unsustainable Mixed System (1–2):** Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

**Near Sustainability (2–3):** Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

**Sustainable (3–4):** Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

Scores for all years may be found online at [http://www.irex.org/system/files/EE\\_msiscorers.xls](http://www.irex.org/system/files/EE_msiscorers.xls)



## MEDIA SUSTAINABILITY INDEX 2016: PROFESSIONAL JOURNALISM

<ul style="list-style-type: none"> <li>☐ Turkmenistan 0.49</li> <li>☐ Uzbekistan 0.94</li> </ul>	<ul style="list-style-type: none"> <li>☐ Azerbaijan 1.35</li> <li>☐ Belarus 1.30</li> <li>▼ Macedonia 1.49</li> <li>☐ Russia 1.43</li> <li>▼ Serbia 1.30</li> </ul>	<ul style="list-style-type: none"> <li>☐ Bosnia 1.67</li> <li>▲ Bulgaria 1.76</li> <li>▼ Kazakhstan 1.72</li> <li>▼ Montenegro 1.85</li> <li>☐ Romania 1.93</li> <li>▲ Tajikistan 1.84</li> <li>☐ Ukraine 1.86</li> </ul>	<ul style="list-style-type: none"> <li>☐ Albania 2.49</li> <li>▲ Armenia 2.49</li> <li>☐ Croatia 2.03</li> <li>▼ Georgia 2.34</li> <li>▲ Kosovo 2.46</li> <li>▲ Kyrgyzstan 2.12</li> <li>☐ Moldova 2.31</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 2015

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

## MEDIA SUSTAINABILITY INDEX 2016: PLURALITY OF NEWS SOURCES

<ul style="list-style-type: none"> <li>☐ Turkmenistan 0.22</li> <li>☐ Uzbekistan 0.80</li> </ul>	<ul style="list-style-type: none"> <li>▼ Azerbaijan 1.06</li> <li>☐ Belarus 1.34</li> <li>☐ Kazakhstan 1.91</li> <li>☐ Macedonia 1.70</li> <li>▲ Russia 1.56</li> <li>☐ Serbia 1.84</li> <li>☐ Tajikistan 1.85</li> </ul>	<ul style="list-style-type: none"> <li>☐ Bosnia 2.20</li> <li>☐ Bulgaria 2.16</li> <li>☐ Kyrgyzstan 2.28</li> <li>☐ Montenegro 2.44</li> <li>☐ Ukraine 2.11</li> </ul>	<ul style="list-style-type: none"> <li>☐ Albania 2.62</li> <li>▲ Armenia 2.76</li> <li>☐ Croatia 2.64</li> <li>☐ Georgia 2.61</li> <li>▲ Kosovo 2.73</li> <li>☐ Moldova 2.60</li> <li>☐ Romania 2.56</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 2015

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

## MEDIA SUSTAINABILITY INDEX 2016: BUSINESS MANAGEMENT

<ul style="list-style-type: none"> <li>☐ Turkmenistan 0.23</li> <li>☐ Uzbekistan 0.80</li> <li>▼ Azerbaijan 0.68</li> <li>▼ Belarus 0.88</li> </ul>	<ul style="list-style-type: none"> <li>▼ Bosnia 1.39</li> <li>▲ Bulgaria 1.48</li> <li>☐ Macedonia 1.29</li> <li>☐ Russia 1.38</li> <li>▼ Serbia 1.39</li> <li>☐ Georgia 1.83</li> <li>☐ Kazakhstan 1.69</li> <li>▲ Kyrgyzstan 1.85</li> <li>☐ Moldova 1.85</li> <li>▲ Montenegro 1.96</li> <li>▼ Romania 1.96</li> <li>▲ Tajikistan 1.52</li> <li>▲ Ukraine 1.57</li> </ul>	<ul style="list-style-type: none"> <li>☐ Albania 2.11</li> <li>▲ Armenia 2.15</li> <li>▲ Croatia 2.27</li> <li>▲ Kosovo 2.16</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 2015

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

## MEDIA SUSTAINABILITY INDEX 2016: SUPPORTING INSTITUTIONS

<ul style="list-style-type: none"> <li>☐ Turkmenistan 0.24</li> <li>☐ Uzbekistan 0.66</li> <li>▼ Azerbaijan 0.98</li> </ul>	<ul style="list-style-type: none"> <li>☐ Belarus 1.31</li> <li>☐ Russia 1.86</li> <li>▲ Tajikistan 1.75</li> </ul>	<ul style="list-style-type: none"> <li>▲ Bosnia 2.15</li> <li>▲ Bulgaria 2.11</li> <li>☐ Georgia 2.48</li> <li>☐ Kazakhstan 2.05</li> <li>▲ Kyrgyzstan 2.20</li> <li>☐ Macedonia 2.18</li> <li>☐ Montenegro 2.17</li> <li>☐ Romania 2.50</li> <li>☐ Serbia 2.12</li> <li>☐ Ukraine 2.32</li> <li>▲ Albania 2.72</li> <li>▲ Armenia 2.60</li> <li>☐ Croatia 2.75</li> <li>▲ Kosovo 2.56</li> <li>▲ Moldova 2.55</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 2015

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

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*The important takeaway is that the longer term score trends and the general score range are key considerations for the user of the MSI, as is contextualizing the scores with the information found in the text.*



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.

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## II. Scoring System

### A. Indicator Scoring

Panelists are directed to score each indicator from 0 to 4, using whole or half points. Guidance on how to score each indicator is as follows:

- 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 average scores of all the indicators are 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.