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I am pleased to introduce the Media Sustainability Index (MSI) 2008. The MSI 2008 provides an analysis of the media environment in 21 countries of Europe and Eurasia during 2007 and together with previous versions shows trends in the media sector since 2001. Since the MSI was first conceived in 2000 and launched in 2001, in cooperation with the United States Agency for International Development (USAID), it has evolved into a key benchmark study to assess how media structures change over time and across borders.

Media plays a central role in the broader development agenda, not only in democracy and governance sectors, but also in fields such as poverty reduction, economic development, health, and conflict mitigation, among others. The MSI provides a tool that allows policymakers and implementers to analyze the elements of a media system and determine the most effective areas in which assistance can improve the free flow of news and information critical to development.

Of equal and perhaps greater importance, the MSI should be seen as an important tool for the media and media advocates themselves in each country and region. The MSI reflects the expert opinions of media professionals in each country. MSI results and analysis can inform the media community, civil society, and governments of the strengths and weaknesses of the sector. We encourage them to use the opportunity the MSI presents to continue their own vital efforts at developing independent and sustainable media. In some countries, their presence also serves notice to repressive governments that independent media has a continuing voice.

IREX would like to thank all those who contributed to the publication of the Media Sustainability Index 2008. Participants, moderators, authors, and observers for each country, listed after each chapter, provided the primary observations and analysis for this project. At IREX, Leon Morse managed the MSI with editorial and administrative assistance from Blake Saville. IREX staff in the region provided important logistical support and guidance. USAID has been a consistent supporter of the MSI, helping to develop the project and supporting its ongoing implementation. All are essential supporters of independent media and advocates for the MSI as an analytical tool for development professionals.

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

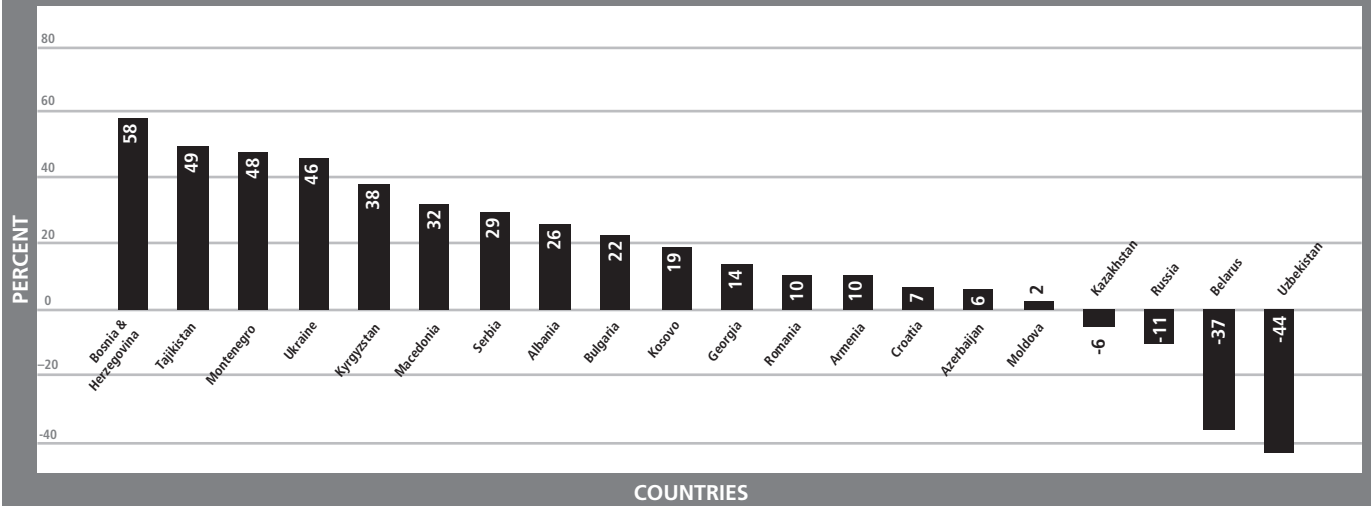
Sincerely,



Mark G. Pomar

President, IREX

PERCENT CHANGE IN MSI 2001–2008: EUROPE AND EURASIA



The 2008 Media Sustainability Index (MSI) represents the seventh iteration of this analytical report, first conducted in 2001. The analyses presented in this year's version show a largely stagnant media sector across the region as a whole and in subregions, with some specific exceptions.

A period of settling in seems to have occurred over the past two years. The period of "color" revolutions is a receding memory, elections proceed apace, and efforts continue in reform of media laws, developing sound management, and training the next generation of reporters. Some countries ensure that elections include little real competition, that civil society is weak, and that the media remain passive while under direct (and/or indirect) state control. Other countries are holding free elections and have witnessed a growing civil society, but in many cases, the issues have changed from democracy, human rights, and independence to relations with Europe, economic growth, corruption, and social welfare. Media reform and development remains on the agenda, but the agenda is crowded and the battle for attention more difficult.

A. The Regions

Any downturn in a regional score should be taken in context. The decreases in regional averages and in individual countries are not large, and fluctuations can be expected from year to year while still observing a positive trajectory.

Southeastern Europe has remained the leader in scoring since the first the MSI was published. The "dangling carrot" of EU accession has helped pull along states such as Bulgaria, Croatia, and Romania. Meanwhile, Bosnia, Montenegro, Macedonia, and other states have been influenced by the potential of EU membership, even if it seems a distant possibility.

However, the MSI did witness a slight drop this past year in the combined regional average, from 2.65 to 2.45, driven by larger drops in states such as Kosovo, Bosnia, and Romania. In Kosovo, the panelists expressed frustration with a lack of progress in the media sector during a year in which it became apparent that Kosovo was heading for independence. However, little progress was made in the media sector during the year, perhaps in part because of the overwhelming attention paid to the status talks with Serbia on determining Kosovo's future.

Meanwhile, Bosnia demonstrated that media remain divided along ethnic lines. Debates over meeting the requirements of the Stabilization and Association Agreement with the EU reflected ethnic divisions and tensions, which spilled over into the media—including a boycott of the public broadcaster by the government of the Republika Srpska.

Romanian media experienced drops in scoring despite the country joining the EU. However, panelists pointed out that setbacks occurred in several other areas (including corruption, financial stability, and governance) after EU accession. As they noted, scholars have begun talking of a “Romanian post-accession syndrome.”

There is no clear evidence of a sustained decline in the region; the countries and the region itself fall into the range of near-sustainability. The transition to sustainability might be the hardest stage to reach.

The average for the **Caucasus region** would suggest few changes during the past year, but the number belies variations among the countries. While Armenia and Azerbaijan witnessed slight increases, the Georgia scores dropped more substantially following the political upheaval surrounding President Saakashvili, protests against his rule, a state of emergency, and subsequent elections in early 2008. The Georgia MSI showed that treatment of the media by the legal system and the state worsened considerably, and plurality of news declined due to the effects of the state of emergency. Whether this drop will reverse itself with stabilization of the situation or whether it reflects a new approach to the media remains to be seen. Regardless, the scores for the region reflect media sectors in a fragile state. A series of events late in the year damaged Georgia’s impressive progress, and media in both Armenia and Azerbaijan remain stuck in an “unsustainable, mixed system.”

The **Russia and Western Eurasia region** represents a mixed group of states with respect to their media sectors. Ukraine has demonstrated progress over the past seven years, while Moldova has remained stagnant and Russia and Belarus have seen backsliding over this timeframe. Compared to last year, the region demonstrated inertia at its current level, more than any movement in a positive or negative direction.

Belarus remains a repressive state where independent media struggle to survive and where many media and journalists have resorted to moving outside the country to work for external broadcasters and other media outlets.

Russia remained stagnant as it entered the election season and the government ensured that the media would not pose a threat to the ruling elites. Well-funded state media and private media close to the state demonstrated their sophistication, technical expertise, and, in many cases, business acumen, while independent media remained largely confined to newspapers and a few broadcast outlets.

Ukraine witnessed a drop in scores, declining from 2.37 to 2.00. The ongoing political confrontation between two opposing political camps, with one camp looking West and one East, did

not allow room for the media to operate and develop. As the panelists noted, “Previous achievements in free speech and media independence look now fragile and unprotected; strong legal and institutional protection mechanisms to make them irreversible have not been yet established.”

The **Central Asia region** remains the least developed of Europe and Eurasia with respect to media development. Turkmenistan (included in the MSI for the first time this year) and Uzbekistan are the two countries in the region that can be characterized as “unsustainable, anti-free press.” Turkmenistan is slowly emerging from the isolation imposed by its recently deceased leader, President Niyazov, but any steps towards more openness or freedom are being taken very slowly, including within the media sector. Uzbekistan remains mired in a repressive media environment following the 2005 government crackdown on civil society and media.

Kazakhstan, Kyrgyzstan, and Tajikistan continue to operate in the space between repression and tolerance. Independent media exist, critical coverage occurs, professionalism spreads slowly in journalism and management, and organizations do exist for advocacy and representation of the rights of journalists and media. Yet the limits are clear and the constraints, legal and extralegal, prevent substantial improvement. A market-based business model is difficult for media that are too critical, as the economy is tied closely to the state and the overall economic level of such countries as Tajikistan and Kyrgyzstan create an underlying obstacle to media development. Self-censorship is prevalent, and even when it is not practiced, legal mechanisms are used against journalists and media outlets. Judicial systems are not independent.

B. The Issues and Objectives

The regional variations discussed above have stayed remarkably consistent since the MSI started in 2001. Undoubtedly, this reflects larger political and external forces at work. Whether it is the lure of EU membership for Southeast European states that have witnessed progression, or the lack of real transitions in Central Asia as authoritarian regimes remain in power, the results show that development in the media sector has been dependent on internal political and economic changes as well as external events, such as EU expansion or reassertion of Russian influence in Central Asia.

Interventions by donors and implementers can have a significant impact in some cases, particularly when they coincide with external incentives and internal motivation to reform. However, circumstances in the Central Asia region show that such interventions cannot overcome entrenched political obstacles to change. This is not to diminish the worth of such interventions, but rather to show that the

process is longer and donors must realize that they are laying groundwork for long-term change, not immediate movement from mixed to sustainable systems.

Evaluating the scores in relation to the five objectives of the MSI shows interesting changes since 2001, and can offer insights to donors and policymakers on which elements of a media system are most amenable—or resistant—to change.

Professionalism is the weakest of the indicators, scoring a 1.75. Since 2001, the score for this indicator has risen from 1.52—a 15 percent increase. If one accepts the belief that quality journalism lies at the heart of a professional media sector, these results point to the difficulty faced in improving media sectors throughout the region. Yet a 15 percent average increase across the entire region indicates that progress can be made. If the difficulties involved in changing a professional culture—creating a new generation of professional journalists—are considered, then it is not overly surprising that this remains a challenge.

However, a group of countries is showing real progress according to the MSI. Eight countries—seven within the Southeast Europe region—scored higher than 2 this year, indicating that they are “nearing sustainability.” Three countries (Belarus, Turkmenistan, and Uzbekistan) scored below 1, indicating “unsustainable, anti-free press.”

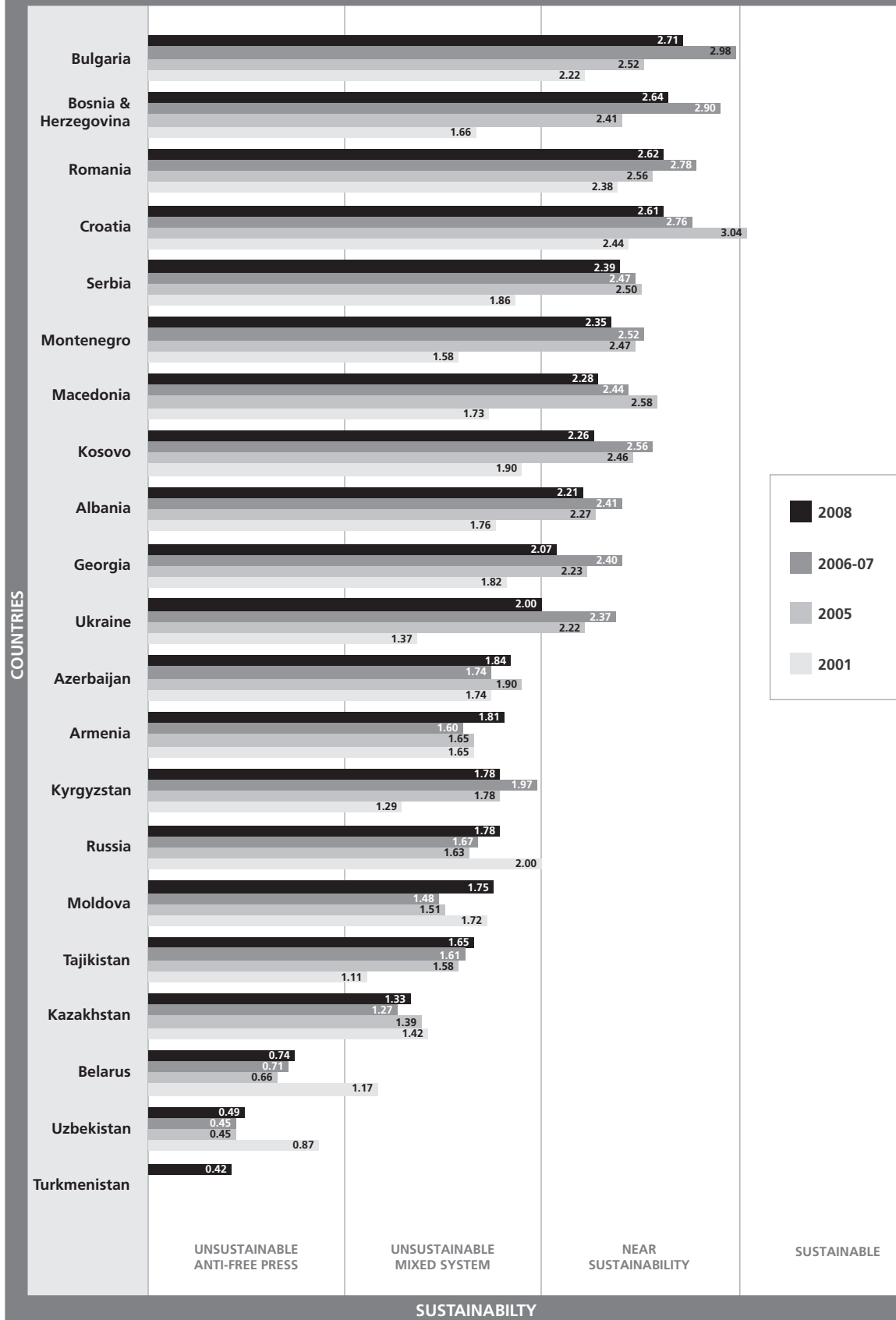
The objective for free speech, encompassing the legal and enabling environment for media, has improved only 6 percent since 2001, with the average of all countries in the region moving from 1.78 to 1.89. When the changes in media law across the region during that time frame are examined, the reason becomes clear. The development and implementation of media laws is a long-term process and one that requires the active support or acquiescence of the governments. While journalism training and witness improvements can be provided in a repressive environment, media laws cannot be passed or media law implementation improved without some form of cooperation from the government. Stable and repressive governments have not allowed this to happen in many instances, and such conditions bring down the average.

Plurality of news sources has also improved little since 2001, scoring 1.99 in 2008 as compared to 1.86 in 2001 (a 7 percent increase). Plurality encompasses many aspects of citizen and media accessibility to local, national, and international news. Many obstacles can hamper plurality; for example, poverty restricts the ability of citizens to buy newspapers, access cable or satellite television, or use the Internet—a frequent comment over the years by MSI panelists from Central Asia. Governments can restrict content of cable networks and terrestrial broadcasts as well as newspapers and magazines, as happens in states such as Belarus, Uzbekistan, and Turkmenistan. Poor business and technical infrastructure can restrict the distribution of news. Distribution of newspapers remains weak in most countries, according to the MSI panelists.

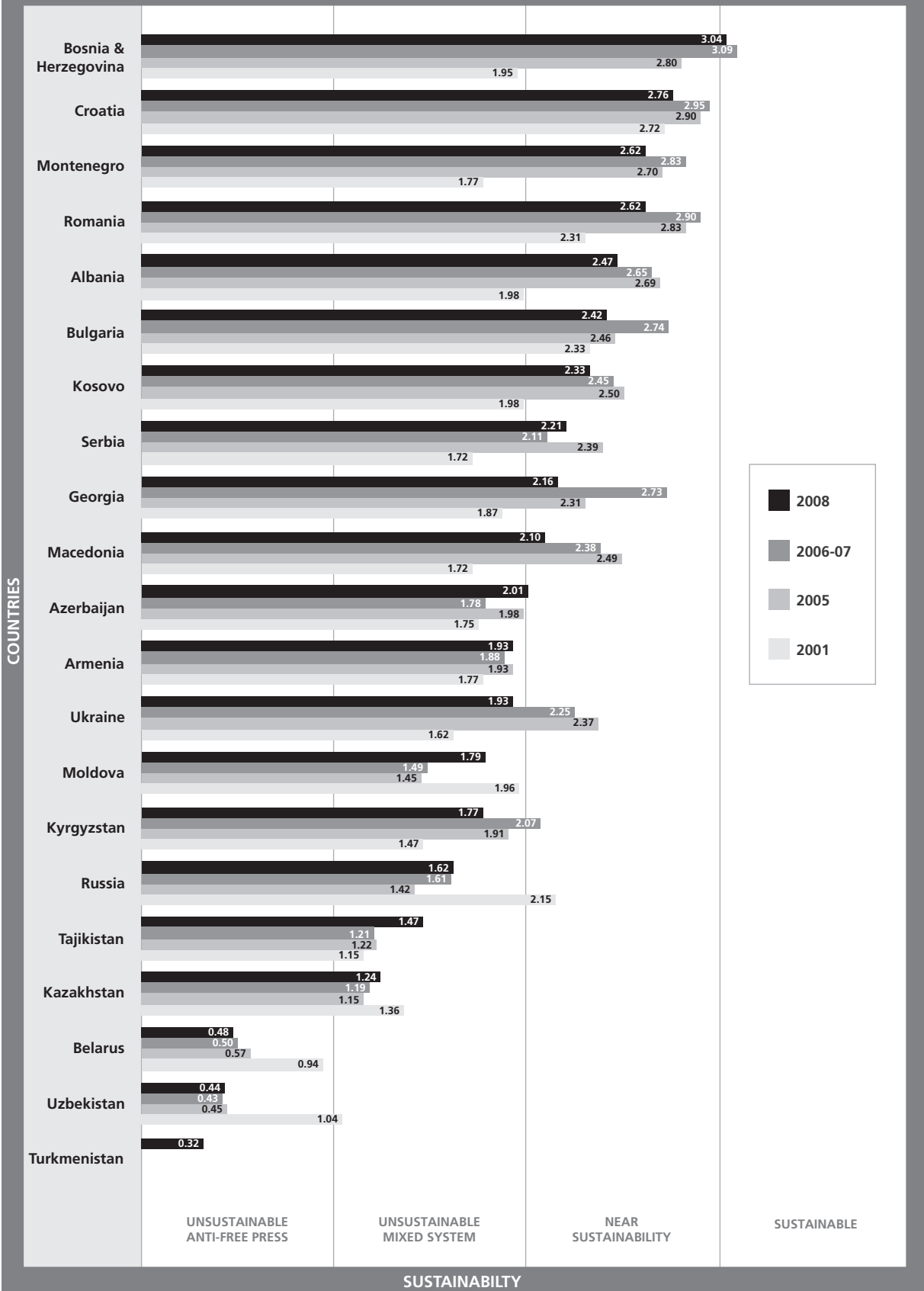
For media to become professional and independent, they must also be managed as viable and sustainable businesses, whether they are state, public, private, or community outlets. The soundness of journalism makes no difference if the outlet goes out of business. Sound journalism faces the danger of censorship, overt or covert, if outlets must resort to accepting money from political parties or relying inordinately on any one business to remain viable. The MSI has witnessed strong development of media management, with an increase of 16 percent since 2001 to an average score of 1.81. In addition, in 2008, 13 countries score above a 2.0 in business management, meaning that these countries are moving toward sustainability.

The supporting institutions objective demonstrates both the highest score in 2008 (2.01) and the highest percentage increase since 2001 (19 percent). The supporting institutions objective evaluates those institutions that support the professional development of the media sector in journalism, business, and management. It rates the viability and strength of advocacy organizations, training institutions, and distribution systems for print and broadcast outlets, among others. The relative strength of this sector in 2008 and the growth since 2001 is cause for optimism for the development of the sector, given that these local supporting institutions—not donors or international media support organizations—will be working over the long term to develop their sectors.

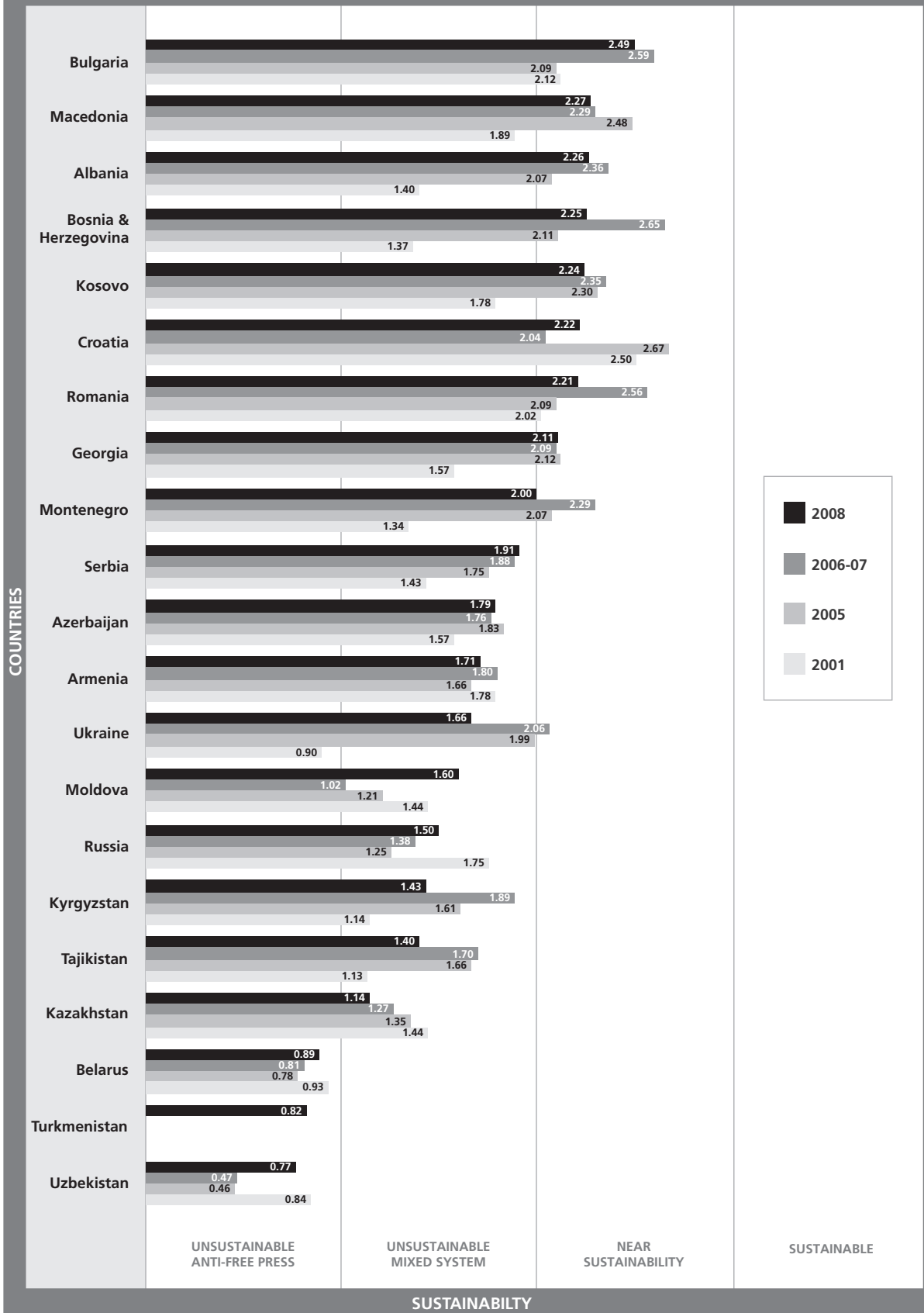
MEDIA SUSTAINABILITY INDEX 2008: AVERAGE SCORES



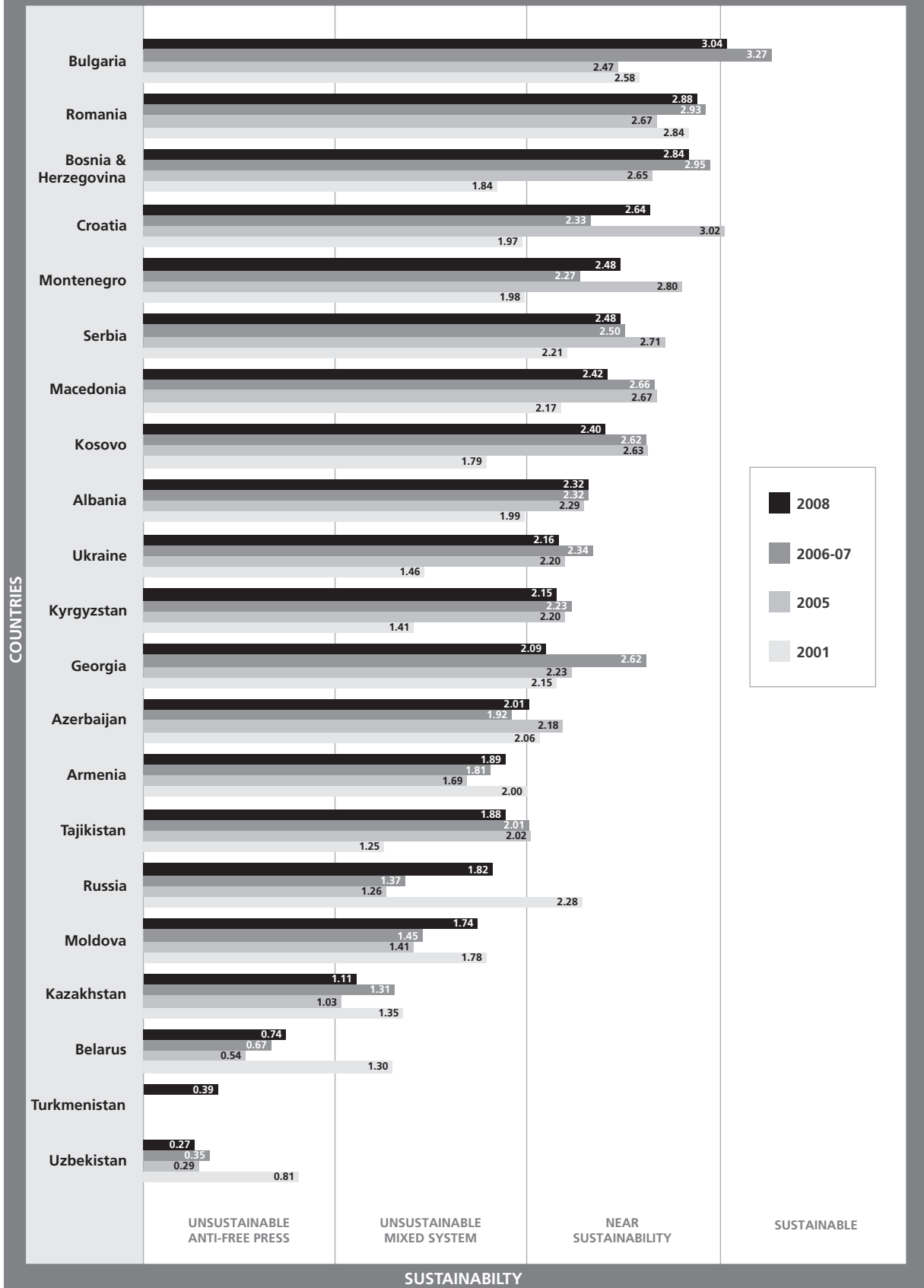
MEDIA SUSTAINABILITY INDEX 2008: FREE SPEECH



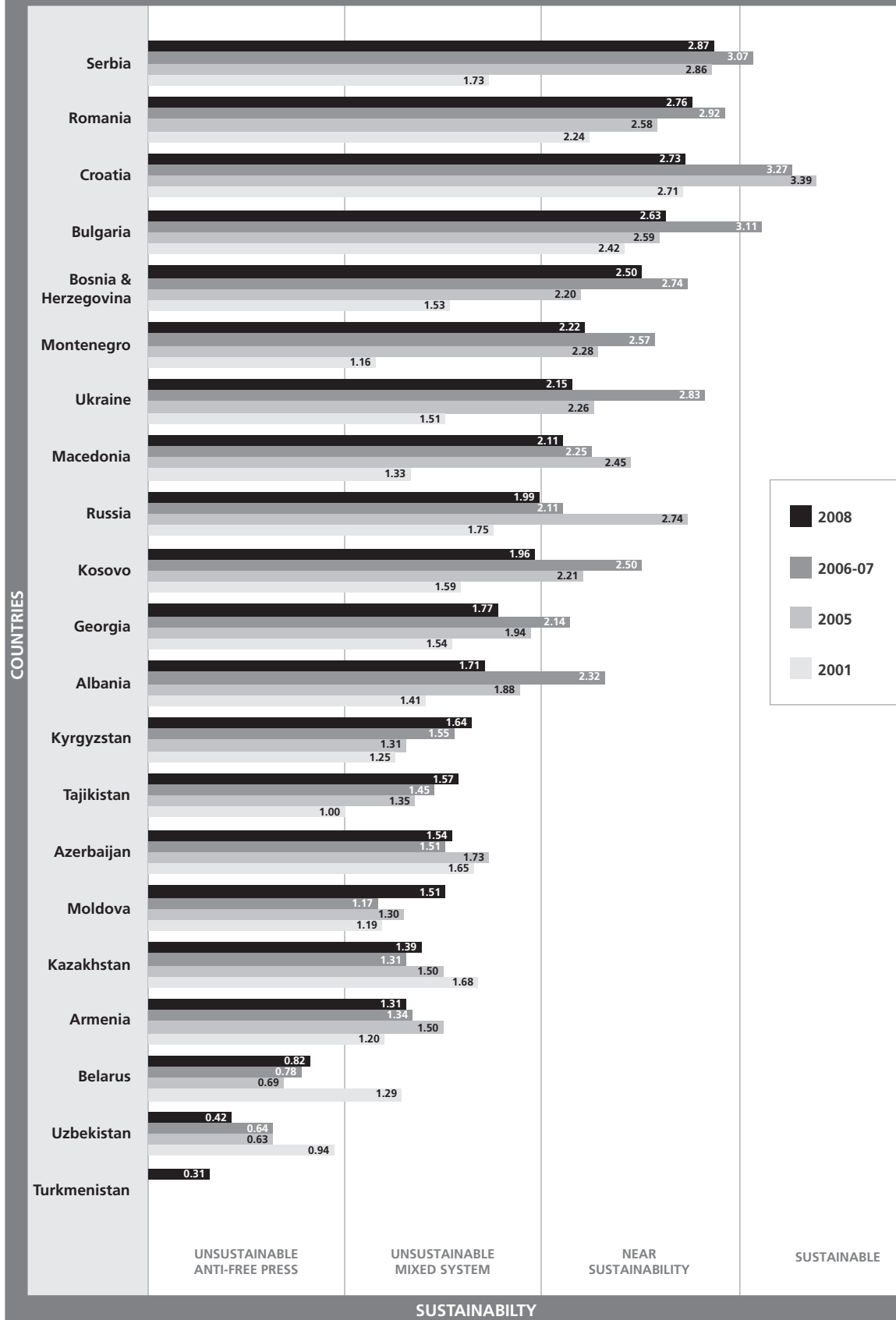
MEDIA SUSTAINABILITY INDEX 2008: PROFESSIONALISM



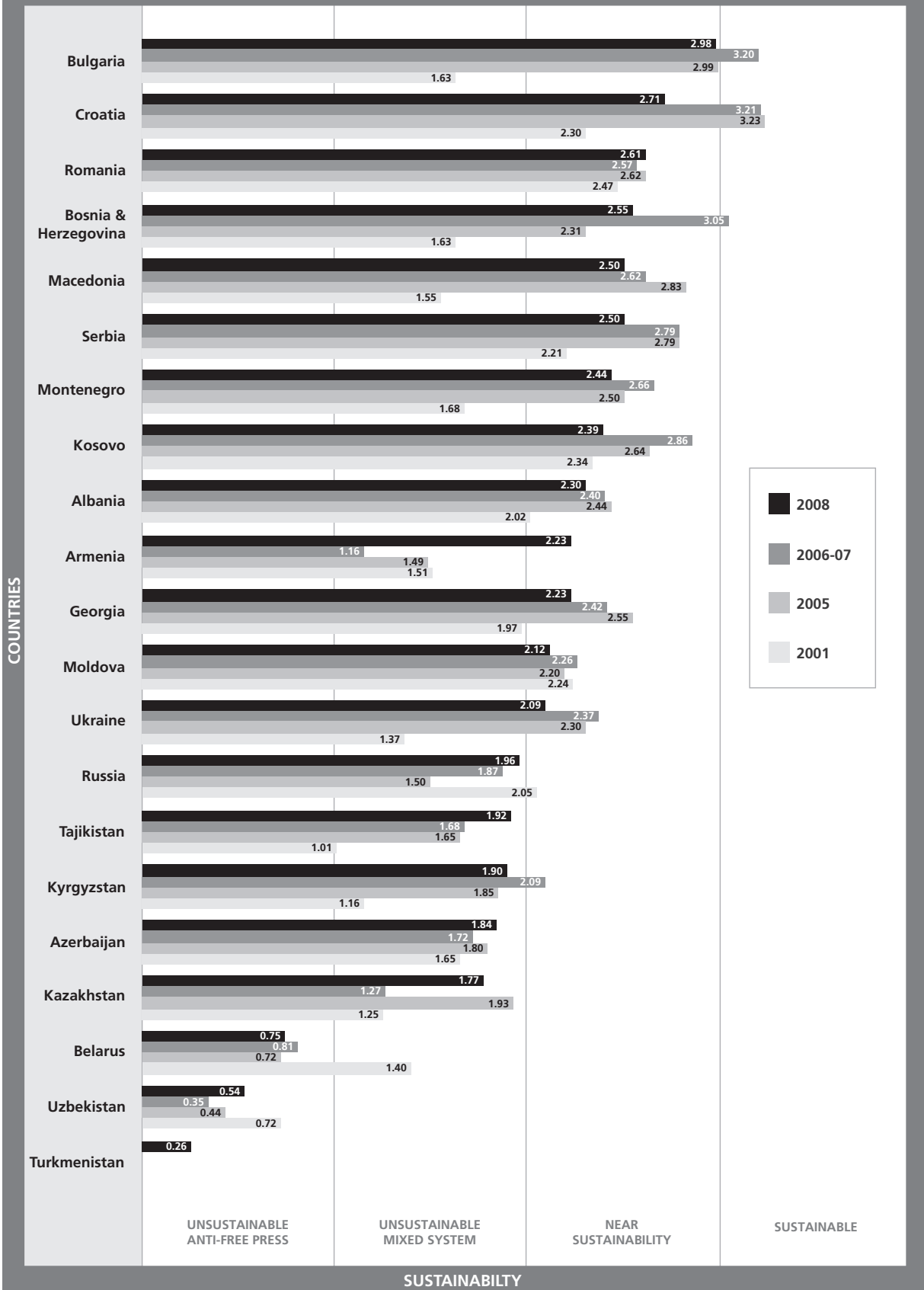
MEDIA SUSTAINABILITY INDEX 2008: PLURALITY OF NEWS SOURCES



MEDIA SUSTAINABILITY INDEX 2008: BUSINESS MANAGEMENT



MEDIA SUSTAINABILITY INDEX 2008: SUPPORTING INSTITUTIONS



A period of settling in seems to have occurred over the past two years. The period of “color” revolutions is a receding memory, elections proceed apace, and efforts continue in reform of media laws, developing sound management, and training the next generation of reporters.



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

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

The scoring is done in two parts. First, a panel of experts is assembled in each country, drawn from representatives of local media, nongovernmental organizations (NGOs), professional associations, and media-development implementers. Panel participants are provided with the objectives and indicators and an explanation of the scoring system. Each panelist individually reviewed the information and scored each objective. The panelists then assembled to discuss the objectives and indicators, and to devise combined scores and analyses. The panel moderator, in most cases a host-country media or NGO representative, prepares a written analysis of the discussion, which is subsequently edited by IREX representatives.

The panelists’ scores are reviewed by IREX, in-country staff and/or Washington, DC, media staff, which then score the countries independently of the MSI panel. Using the combination of scores, the final scores are determined. This method allows the MSI scores to reflect both local media insiders’ views and the views of international media-development professionals.

I. Objectives and Indicators

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

FREE-SPEECH INDICATORS:

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

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

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

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

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

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

BUSINESS MANAGEMENT INDICATORS:

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

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

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

II. Scoring System

A. Indicator Scoring

Each indicator is scored using the following system:

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

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

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

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

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

B. Objective and Overall Scoring

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

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

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

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

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

