
“The government may restrict the work of media both business-wise—via printing houses, distribution systems, advertising, and tax penalties—and as far as editorial policy is concerned—via censorship, false-information and libel suits, and restricting access to official information,” one panelist commented.



BELARUS

Once again, Belarus fell short of the requirements for at least partial sustainability of its media sector, reflecting the Belarusian media's stagnation in 2009. Prohibitive legal norms and restricted access to news sources were only partially offset by media advocacy efforts and the largely unregulated Internet.

The Belarus government prefers repressing free speech with subtle tools that have the same chilling effect as overt measures. "The government may restrict the work of media both business-wise—via printing houses, distribution systems, advertising, and tax penalties—and as far as editorial policy is concerned—via censorship, false-information and libel suits, and restricting access to official information," one panelist commented. Despite such circumstances, Belarusian citizens can still access alternative viewpoints via the Internet, international broadcasters, and a few surviving private newspapers.

As relations with Russia, Belarus's closest ally, continued to deteriorate, Belarus President Lukashenka tried to further thaw ties with the West, firstly with the European Union (EU). The EU is demanding more political freedoms in Belarus, including unrestricted media. The government mostly paid lip service to political liberalization, but its grip on the media did ease slightly. The authorities retreated, at least temporarily, from regulating online media. An advisory council on the media was set up and non-state actors were invited to discuss media-related issues. Three more embattled private newspapers were allowed back into state-controlled distribution networks, but a dozen more were left outside. The government granted permission to one foreign-donor-funded broadcaster to open a bureau inside Belarus, albeit only for one year.

Elsewhere, the under-reformed Belarusian economy was unable to generate enough revenue to sustain independent media. In fact, Belarus needed billions of dollars from the International Monetary Fund and Russia to uphold its economy.

Two disquieting developments, just several days after the MSI panel discussion was held, called into doubt whether the period of relatively relaxed controls will continue. First, the government appointed a new, more hawkish information minister, Colonel Aleh Praliaskouski. Praliaskouski is a former army officer and head of a department of the presidential security service. His brief connection with the media was serving as director of BelTA news agency, the mouthpiece of government, in 2002 and 2003. Most notable, however, was his tenure as chief of the Lukashenka administration's ideology department (2006-2008). The opposition weekly *Narodnaya Volya* found itself on the wrong side of a costly libel suit filed by Praliaskouski (detailed in the 2008 MSI report). In 2008, he stated the necessity of filtering web content, praising the experience of China.

BELARUS AT A GLANCE

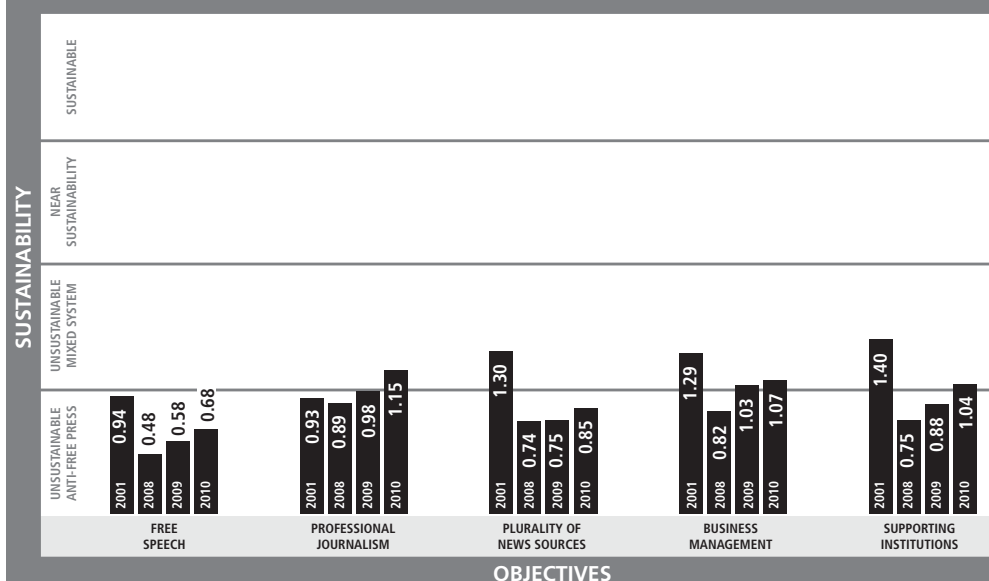
GENERAL

- > **Population:** 9,671,900 (January 2009, National Committee for Statistics)
- > **Capital city:** Minsk
- > **Ethnic groups (% of population):** Belarusian 81.2%, Russian 11.4%, Polish 3.9%, Ukrainian 2.4%, other 1.1% (1999 census)
- > **Religions (% of population):** Eastern Orthodox 80%, other (including Roman Catholic, Protestant, Jewish, and Muslim) 20% (1997 est., *CIA World Factbook*)
- > **Languages (% of population):** Belarusian, Russian, other
- > **GNI (2008-Atlas):** \$52.117 billion (World Bank Development Indicators, October 2009)
- > **GNI per capita (2008-PPP):** \$12,150 (World Bank Development Indicators, October 2009)
- > **Literacy rate:** 99.6% (male 99.8%, female 99.4%) (1999 census)
- > **President or top authority:** President Aliaksandr Lukashenka (since July 20, 1994)

MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, television stations:**
- > **Print:** 1,305 (663 newspapers (9 daily)), 594 magazines and journals, 42 bulletins and 6 catalogues; Radio: 158 radio stations (2 nationwide); Television stations: 71 (6 nationwide) Belarus Ministry of Information, February 2009)
- > **Newspaper circulation statistics:** top three: *Sovietskaya Byelorussia* (state-owned, 2,000,000 weekly circulation), *Komsomolskaya Pravda v Belorussii* (independent, 558,000 weekly circulation), *Respublika* (state-owned, 271,250 weekly circulation) (Medusa Advertising Agency December 2009)
- > **Broadcast ratings:** Share of television audience: ONT (18.0%, state-owned), NTV Belarus (15.7%, Russian-owned, broadcasting state-controlled), RTR-Belarus (8.4%, Russian-owned, broadcasting state-controlled) (GEVS, December 2009)
- > **News agencies:** BelTA (state-owned), BelaPAN (private), Interfax-Zapad (Russian-owned), Prime-TASS (Russian-owned), Ecopress (private), Agentstvo Grevtsova (private), Minsk-Novosti (state-owned), Registr Information and Legal Agency (private) (Belarus Ministry of Information, 2009)
- > **Annual advertising revenue in media sector:** \$ 92.4 million (\$56 million television, \$14 million press, \$6 million Internet, \$5.4 radio) (ZenithOptimedia advertising group, December 2009)
- > **Internet usage:** 3 million (November 2009 Gemius)

MEDIA SUSTAINABILITY INDEX: BELARUS



Annual scores for 2002 through 2006/2007 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

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.

Separately, a draft of a presidential decree on the Internet was leaked to independent media. Among other provisions, it calls for registration of online media and the possibility of summarily blocking any website. As of this writing, whether the government will move forward with implementing this decree is unclear. But the Internet community and free speech advocates fear the worst, looking ahead to local elections in 2010 and the presidential election early in 2011.

Note: MSI panelists in Belarus agreed to participate only if they were not named publicly. Amendments to the criminal code were introduced in December 2005 to add an article, "Discrediting the Republic of Belarus," that provides for criminal liability for giving international organizations "false information" about the situation in the country. Human-rights groups, both domestic and international, believe the article's vague wording makes it possible for the government to detain for up to six months anyone reporting negative information or to imprison them for up to two years.

OBJECTIVE 1: FREEDOM OF SPEECH

Belarus Objective Score: 0.68

Although the Belarus Constitution guarantees the freedom of speech, these provisions are largely not enforced. Despite severe criticism both in-country and abroad, a media law came into effect in February 2009. Comments from MSI panelists on the new law ranged from "tolerably restrictive" to "draconian."

In particular, press freedom watchdogs condemned the burdensome procedures for accreditation of journalists; the information ministry's increased authority to penalize the media and their managers; the sanctions for violating the vague requirement of "compliance with reality" for media materials; the restriction on foreign ownership of media to 30 percent; and most notably, the government's efforts to extend tough controls of online media.

The media law orders existing print and broadcast outlets to re-register with the Ministry of Information. Although the ministry manages registration rather unrestrictively, at least half a dozen small-circulation regional bulletins were unable to register as newspapers under the law. Their applications were repeatedly returned—neither denied nor approved. The ministry cited various dubious reasons for returns: a company being registered at a home address (most common), a paper's specialization being non-compliant with publishing standards, and would-be editors lacking journalism diplomas and experience. Panelists

noted that two or three companies with almost identical applications were able to register regional newspapers.

The Internet remains the least regulated of all media and largely unrestricted, although VOIP is banned other than for personal use. Users are not required to register for access to the Internet. And in an attempt to improve its relations with the EU, the government put an informal moratorium on the registration of Internet media.

One of the panelists mentioned other laws detrimental to freedom of speech: the law on civil service (effectively bans access to official information), the law on combating extremism (makes criticizing government policies dangerous), and the criminal code (with numerous defamation provisions).

Politicized courts with judges appointed by the president offer little if any protection—only when the international community applies pressure. Freedom of speech violations in 2009 were hardly causing public outcry, but independent journalists did display some solidarity.

The information and communications ministries issue broadcast licenses in a three-tier process. First, a broadcaster registers a media outlet (the so-called television or radio program) with the Ministry of Information. Then the Republican Commission on Television and Radio Broadcasting, the nine-member body of government officials headed by the Minister of Information, allocates a frequency via a tender. Finally, the Ministry of Communications and Informatization issues a license to use the frequency allocated.

Although a set licensing system is in place, panelists said that the actual allocation is highly problematic. "Broadcast licensing is neither fair nor competitive. And there are no exceptions here," one panelist said.

Broadcasters founded by the president and the Council of Ministers receive frequencies without a tender. This practice allows further government monopolization of media—despite the Constitution expressly banning such monopolies. Furthermore, the media behemoth National State Television and Radio Company pays a registration fee of just \$60 to run its three national television channels, one satellite television channel, five national radio stations, and five regional television and radio companies with their own regional FM radio and television production studios. Other applicants pay 40 to 200 times as much to register.

Between February and November 2009, the Ministry of Information registered four radio stations (one state-owned) and seven television channels (three state-owned). In February and August, the ministry announced two tenders to allocate three regional FM radio frequencies each, in the towns of Lida, Pinsk, Babrujsk, Salihorsk, Zhlobin, and Brest.

However, the ministry issued no official reports about bidders or any winners.

On the positive side, Belarus remains a global leader in regulatory reforms to ease conducting business, according to *Doing Business 2010*, the seventh report in an annual series published by the World Bank and International Finance Corporation. For the second consecutive year, Belarus ranked fourth among the top 10 regulatory reformers. Its overall rank climbed to 58 from 85 last year (up from 115 two years ago). On starting a business, Belarus was ranked seventh out of 183 countries—an impressive leap from 98th a year earlier. Starting a business in Belarus requires six days and five procedures, according to the same survey.

Although would-be publishers and broadcasters—just like other businesses—will certainly benefit from those reforms, media outlets also have simplified administrative procedures. The new media law eased registration of media outlets and most notably abandoned the requirement that newsrooms register their locations with local governments. Theoretically, filling out an application form, paying a registration fee, and filing these with the Ministry of Information are enough to start up a media outlet. Within a month of receipt, the ministry is to decide on an application. However, the aforementioned non-registrations of regional newspapers “should be seen as an extra barrier to market entry,” said one of the panelists, a media lawyer. Broadcasters go through the cumbersome licensing procedures detailed above.

Belarusian law has other media-specific restrictions, most notably that media operations can be suspended for up to three months following a warning from the Ministry of Information and without a court ruling. Also under the new media law, direct foreign ownership of media is limited to 30 percent for a publisher or broadcaster, and radio stations must air 75 percent Belarusian music. This clause in particular causes stations to lose audiences, as listeners seek more variety and therefore turn less to radio as a source of music.

Taxation in the media sector is no different from other industries, and although the government has made some reforms, all businesses have to cope with one of the most tangled tax systems in the world. According to *Doing Business 2010*, a medium-sized company would spend 901 hours a year preparing, filing, and paying taxes that would total 99.7 percent of its profits. This led to Belarus being ranked 183rd of 183 economies on this indicator in the report.

Crimes against journalists remained rare. However, the panelists agreed that media professionals do not feel secure. The police practice of obstructing journalists engaged in covering opposition rallies continued to thrive, and new developments prompted fears that police were adopting

new practices. During peaceful civil actions in downtown Minsk on September 9, September 16, and October 16, 2009, plainclothes riot police obstructed the work of journalists photographing and filming the events and the subsequent dispersals by the police. Each reporter was tackled by two plainclothes commandos, who covered camera lenses and pushed journalists away from the scene and made filming and photographing nearly impossible. The Belarusian Association of Journalists took these concerns to the Ministry of Interior and the presidential administration. The authorities told them that the government investigated the incidents, but no reports were made public.

In addition, several journalists received anonymous threats. On February 6, 2009, Andrzej Poczobut, a correspondent in Belarus for Poland’s largest daily, *Gazeta Wyborcza*, found a note on his apartment door warning him to stop his critical reporting or else face retribution. Then his family, including his 8-year-old daughter, received repeated calls on their mobile phones from unknown callers asking for Poczobut’s whereabouts. A month later, the Ministry of Foreign Affairs denied his application to renew his press accreditation, on grounds that his reporting was biased and insulting to the president. Poczobut’s allegedly insulting articles included a recent police initiative to enforce the fingerprinting of male residents, the deportation of three Polish Catholic priests, new criminal lawsuits launched against recently released political prisoners, and talks between Lukashenka and EU officials.

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.

In another case, Natalya Radzina, editor of the opposition news website Charter97.org, received an e-mail on July 15, 2009 threatening her with sexual violence if she was not “careful” about what she posted on the site. This came a week after her website reported about the pardon of the leader of the pro-Russian neo-fascist group, Russian National Unity. The story reported details of the government’s failure to curb the organization’s xenophobic and racist activities, alleging ties with the Belarusian KGB. Back in 2006, the same group had sent threats to several independent regional newspapers.

Iryna Khalip, Belarus correspondent for the Moscow-based independent newspaper *Novaya Gazeta*, has been targeted also. On December 12, 2009 in a memo to her newspaper, she said that she had received anonymous threats by e-mail, phone, and telegram. She was warned not to publish the investigative report she wrote and submitted to her paper on November 22, 2009 about the disputed legacy of the late Georgian billionaire Badri Patarkatsishvili. One e-mail read, “Unless you remove your article, you will go to meet Anna Politkovskaya,” referring to the *Novaya Gazeta* reporter who was gunned down in Moscow in 2006. The telegram suggested that Khalip “think about her son when reporting.” An unidentified man told Khalip by phone that she should not leave her house if the article is published.

The article was published on December 9, 2009, but there was no follow through on the threats. Khalip said that she believes that the state security service KGB was involved, since details mentioned in the messages suggested that the perpetrators had intercepted her e-mails and bugged her cell phone.

Belarus has no truly public media in the Western sense. With the exception of the Internet, state-owned media outlets prevail. Editors of the biggest nationwide media are appointed by the president, so “they ‘by custom’ remain editorially dependent,” a panelist commented.

Media law does not on its face favor either state media or private media. However, private, independent media routinely face restricted access to official information, mainly via a largely unregulated system of accreditations. Non-state journalists still rarely win access to events attended by the president or other top officials.

Businesswise, state-owned media enjoy subsidized rent, salaries, distribution, and printing on top of \$67 million (down from \$75 million a year earlier) in direct funding from the state budget. Moreover, a presidential decree of September 25, 2009 exempts state-controlled television channels ONT and STV from VAT and income taxes for three years, on the condition that the outlets reinvest the money

to upgrade their technical facilities and buy and produce content. Just a month later, the National State Television and Radio Company secured similar tax breaks.

Belarus has harsh libel and insult laws, with government officials and especially the president having a higher level of protection against criticism. The president does not have to file a suit; the public prosecutor’s office “automatically” files. Libel is punishable by up to three years in prison, by two years in a labor camp, or by large fines. The courts have heard no such cases since 2002; however, every year local media assistance NGOs report 15 to 20 so-called “honor, dignity, and business reputation” suits dealt with through the civil law. Meanwhile, state-controlled media regularly involved in smear campaigns against opposition groups go unpunished. Independent media companies are in most cases penalized by fines for far less egregious violations.

As of this writing, there were no reports of Internet service providers or web hosting companies being punished for the content that users store or transmit via their facilities. Still, almost all websites critical of the government are hosted outside Belarus.

Belarus has no access to information law, and access to public information remains restricted, panelists agreed. A provision under the earlier media law, which ordered state bodies and officials to provide information within 10 days of a newsroom’s request, was abolished altogether, “leaving independent media even without that insignificant safeguard,” a media lawyer commented.

One of the panelists recalled the government “significantly restricting and filtering” information about the swine flu. As the epidemic was gaining strength, the Ministry of Health stopped reporting on the availability of drugs and providing statistics regarding infections and deaths. The ministry started offering percentage data instead, and only to state-controlled media. Their non-state counterparts were largely ignored and had to rely on other, often unofficial sources.

Concurrent with those actions, the Ministry of Information warned that “it would stop any attempts to disinform the population,” adding that online versions of registered media were also monitored. Two weeks later, on November 18, 2009, the ministry handed out warnings over swine flu stories to two independent newspapers: the opposition weekly *Nasha Niva* and the Russian-owned popular daily *Komsomolskaya Pravda v Belorusii*. The stories at both newspapers cast doubt on the official version of how the government tackled the epidemic. Following such a warning, the Ministry of Information may suspend a media outlet’s operations for up to three months. With two warnings

during a year, the Ministry of Information may seek closure of a media outlet via a court ruling.

Access to international news and news sources—mostly via the Internet—remains unrestricted. Still, the affordability of fast Internet connections hampers the broader use of international sources, as do the cost of subscriptions to foreign news services and the poor foreign language skills among some readers.

In principle, the government allows reprints and rebroadcasts. But in practice, one panelist argued, the state keeps broadcast media under tight control and no news rebroadcasting is allowed. On September 30, 2009, the Ministry of Information issued a warning to Autoradio, a Minsk-based FM station, citing it as “falling short of its creative concept of broadcasting.” The Ministry suggested the radio station “take steps to keep to the creative concept of its broadcasting,” otherwise its license could be cancelled. Although the text of the warning contains no reference to any particular violation, it is believed to be prompted by the EuroZoom radio program that was produced by the independent European Radio for Belarus (ERB) and then broadcasted daily by Autoradio. ERB is a donor-funded radio headquartered in Poland. Surprisingly, on November 11, 2009, a Council of Ministers directive allowed ERB to open an official bureau in Belarus for a period of one year.

Panelists differed somewhat on whether entry into journalism is generally free. On the one hand, a journalism diploma is not a legal requirement to work as a journalist. In fact, state and independent newsrooms are staffed mostly by those who lack journalism diplomas, according to numerous reports. On the other hand, the government controls admissions to journalism schools. Applicants must provide recommendations from local authorities and then undergo interviews by a special commission that mostly checks on how politically loyal would-be journalists are. Moreover, graduates of journalism schools are subject to Soviet-style “distribution” and must work for two years wherever the government sends them—usually to small state-owned regional newspapers.

Belarusian law requires editors-in-chief to have a diploma or degree in journalism and at least five years of managerial experience. That condition has been in place for years and the labor inspectorate at the Ministry of Labor and Social Protection checks for compliance. In an alarming development this year, the Ministry of Information somewhat transcended its jurisdiction by introducing that requirement of editors as a prerequisite for entities applying to register a new media outlet.

Accreditation also proves to be a barrier for some media professionals. “The accreditation procedure is neither

transparent nor open, and is in fact an ideal mechanism to restrict access to information,” a panelist commented. Sometimes events are being covered on a pool basis and independent journalists may not be allowed. Online journalists, freelancers, and bloggers have even more difficulty gaining access to information or public events, given that they are not employed by a registered media outlet and have no journalist status.

Panelists could cite only one attempt to fight restricted access in any organized way. In 2007, the House of Representatives (the lower chamber of the Belarusian parliament) denied accreditation to Maryna Koktysh, deputy editor-in-chief of the opposition weekly *Narodnaya Nolya*. Since then, she has unsuccessfully tried to appeal the decision. On December 4, 2009, the Belarusian Supreme Court ruled that “issues related to accreditation of journalists fall outside of courts’ jurisdiction and denials cannot be taken to court.”

Foreign correspondents must be accredited with the Ministry of Foreign Affairs. The ministry has repeatedly denied accreditations to journalists working for independent donor-funded broadcasters—ERB, Radio Racyja, and satellite TV Belsat—that specifically target Belarus, on grounds that they had been reporting without accreditation.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Belarus Objective Score: 1.15

While commenting on Objective 2, panelists mentioned that giving overall scores on Belarusian media is not easy, given the huge differences between independent and state media. Scoring is especially difficult with regard to objectivity, in-depth reporting, ethics, censorship, and pay levels, one of them remarked.

State-controlled media present one-sided and biased coverage. Quite often, controversial events and issues are simply not covered. Opposition media also push propaganda. Still, Belarus has independent media outlets that try to be objective, despite the government or opposition pressure to “counteract lies.” According to one panelist, independent media “have become hostage to a closed society and—to a much lesser degree—lack of culture of professionalism.”

With understaffed newsrooms, most independent newspapers and online media find it next to impossible to conduct in-depth research, instead merely scratching the surface of an issue, which affects report quality. Journalists at state-controlled media simply accept as truth what government officials are saying and do no fact checking or background research.

A rather small “pool of experts” is approached for comments, and as a result, the different media outlets present hardly any variety of approaches or opinions, one panelist argued. The experts themselves are in the dark and offering mostly guesswork, given the restricted access to information. Independent think tanks have almost gone extinct or at best become “one-man-bands.”

Each of the country’s two journalistic organizations, the governmental Belarusian Union of Journalists and the independent Belarusian Association of Journalists, has its own code of conduct. The codes are quite universal: “It all boils down to the Ten Commandments,” a panelist said. Another panelist added, “Media operate in such a narrow corridor that there is hardly any possibility to violate ethical standards.”

In a surprise move, the government tried to enter the discussion of ethics. Natallya Piatkevich, first deputy head of the presidential administration, accused the media of sensationalizing stories and said it would be advisable to work out a unified journalism ethics code.

Self-censorship is thriving across the media sector, in varying degrees. Some independent media are ready to report on sensitive issues, but journalists know that they are better off not addressing some subjects—for example, President Lukashenka’s family as well as the business interests of his family and allies. A business survival imperative leads to newsrooms compromising their ethical standards—at times by not criticizing prominent advertisers, and even by succumbing to requests that certain advertisements not be placed next to political stories or any critical reporting at all.

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).

In most cases, journalists—especially those at state-controlled newsrooms—are already aware of the corridor within which their reporting should stay. The editors of independent journalists sometimes advise soft-pedaling stories, especially when a publisher or broadcaster is seeking a license or is updating registration with the government. “State-owned media *ex officio* have to conceal public information,” a panelist commented. “If that is impossible, they indulge in a mass production of factoids. Independent media tend to cover key events; however, often they are themselves in the dark about important matters.”

Panelists said that the media cover almost all key events, but the quality remains a sore point. “You can’t say people understood what was going on with the economy or the swine flu,” a panelist argued. Blogs and social networks like YouTube, Facebook, and Twitter are hardly contributing anything except for personalized comments.

“Pay levels for journalists are sufficiently low to encourage all manifestations of corruption,” a panelist said, but added rather ironically, “The thing is, there is no need to buy journalists that often.” A journalist at a regional newspaper earns at least \$300 a month in the regions and around \$700 in the capital, according to one panelist. Note that in local currency equivalents, salaries remained the same at best as a year earlier. Throughout 2009, the Belarusian ruble slumped 33 percent against the U.S. dollar, including a one-off devaluation of 20 percent to seek a \$2.5 billion loan from the International Monetary Fund. In 2009, the median salary in Belarus was around \$350 a month.

Overall, journalists working for the state media remained better off compared to their independent counterparts. One of the panelists equated working for the state media to corruption, since “these journalists kept on generous retainers are just spinning the government’s line.” Apart from higher salaries, state-owned media are still capable of securing subsidized housing loans for their employees.

“With salaries being low and temptations high,” said one panelist, journalists and editors do sell stories and provide favorable coverage, mostly in the form of veiled advertising. Sometimes these choices are made to sidestep the legal limitation on the amount of advertising. Occasionally, journalists and editors are offered gifts or trips; for example, a car dealer that organizes a “how-good-our-cars-are contest” and gives cash prizes to authors of the best stories.

By Western standards, Belarusian television maintains a rather high information-to-entertainment ratio. Newspapers contain hardly any entertainment features. Nonetheless, the panelists argued that the media sphere does not include enough news,

and the quality of both information and entertainment programming remains low.

The government also is dissatisfied with the amount and quality of news. On December 14, 2009, President Lukashenka lambasted the state media: "Media are not working today at all. There is nothing to watch on the television both at home, and, luckily for us, abroad. No one listens to radio in Belarus any more. And they watch only music videos on television. This is all entertainment stuff, not interesting at all. I have an impression that managers [of state television channels] have forgotten that they are executors of ideological work."

The basic technical capacities for newsgathering and reporting are available everywhere across the industry, the panelists agreed. However, independent newsrooms are increasingly unable to afford to stay on the cutting edge of the technology or offer good multimedia or multi-platform journalism. They are desperate for faster computers and broadband Internet, as well as photo and video equipment. The software used is almost 100 percent pirated.

At the same time, several panelists cited journalists' reluctance and lack of skills in using the equipment and technology already at their disposal. With government subsidies and centralized procurement of equipment, state-controlled newsrooms are getting more competitive with regard to technology.

With restricted access to information and the lack of resources available to the media, investigative journalism has gone extinct. There is some quality niche reporting, mainly on economics and sports. "There is a need for specialized journalism, yet with media just fighting for survival as businesses and no one willing to invest, there is hardly any market for that," a panelist argued.

Private blogs and on-line media have not offered much of an alternative. Blogs are largely opinion, often based on news in "traditional" media. And online media suffer for the same reasons broadcasters and print media do, including lack of resources.

OBJECTIVE 3: PLURALITY OF NEWS

Belarus Objective Score: 0.85

According to the panelists, news is restricted in Belarus and independent news sources are not readily available. There is some relief thanks to the Internet, small private newspapers, satellite dishes, and foreign radio stations. "There are a lot of state-owned, and very few private, sources of information. Quantitatively, there are more

non-state media registered [900 versus 414, according to the Ministry of Information], yet audience-wise, they are largely overshadowed," a panelist said.

State television continued to dominate in 2009. In a September independent opinion poll, 89.8 percent of Belarusians aged 18 and older said that they watch state-owned national television channels; 85.0 mentioned Russian television; 47.2 cited local television stations; 40.9 said cable television; and 22.2 named satellite television. In a March 2009 survey by the same pollster, only 5 percent said they were watching independent donor-funded satellite television Belsat. Novak, a television audience research company, reported the following weekly audiences for state television channels: ONT, 2.42 million; NTV-Belarus, 875,000; Channel One, 620,000.

According to the same March 2009 survey, 50.9 percent listened to state radio and 50.8 percent to private FM stations offering mostly entertainment content. Independent broadcasters based outside Belarus reached far smaller audiences: European Radio for Belarus, 3.6 percent; Radio Racyja, 2.4 percent; and Radio Liberty (Belarusian service), 2.1 percent. (The margin of error for the survey was 3 percent.) These broadcasters also employed the Internet as a key tool in distributing their content.

Meanwhile, the Internet is evolving as an increasingly important source of news: 7.3 percent said in the aforementioned March 2009 survey that they are reading news on the Internet. In October 2009 the weekly audience of Belarusian news websites totaled around 250,000 visitors, according to Gemius, an Internet research company. Blogs

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.

and social networks have hardly become a source of news on their own, and some “traditional” media have representation online. Internet access remains faster and cheaper in more urbanized areas. New media technology is available—Internet via mobile phones, for instance—but their adoption remains relatively low.

Subsidized, state-controlled publications dominate the print market. Private newspapers are discriminated against in distribution, severely limiting their reach. Most notably, since 2005 the state has banned 10 out of 25 non-state publications from government-owned distribution and subscription networks. Those publications have to rely on their own in-house distribution services.

Several years ago, the government effectively banned foreign news channels from cable networks. In April 2009, five more Russian television channels were taken off cable networks. The Telecommunications Industry Union (TIU), a trade association of cable network operators, elected to remove RTR-Planeta, NTV Mir, Ren TV, Channel One, and TVCi. TIU and its members cited various reasons, such as increased broadcasting fees requested by the proprietors of the disconnected channels and/or their failure to obtain a permit from the Ministry of Information to distribute in Belarus. However, industry sources believe the ban was brought about by criticism of President Lukashenka on some of the Russian channels.

To broadcast or distribute in Belarus, foreign media outlets need express permission from the Ministry of Information. The ministry has rubber-stamped distribution of 378 foreign publications (38 newspapers, 2 bulletins, and 338 magazines and journals). The Russian press is subject to a simplified procedure, but almost all foreign press is restrictively unaffordable for Belarusians. Foreign television channels are available either via cable or satellite. Belarusian cable operators offer 119 television channels, including 60 Russian channels, and several ISPs started offering entertainment programming via Internet protocol television.

Belarus has no truly public media; state-owned outlets are nothing more than mouthpieces of the government, the panelists agreed. State media spend a predominant amount of time reporting on the government and its leaders, while ignoring the opposition, independent trade unions, and NGOs. Usually, state media cover opposition groups only when they are being attacked by state propagandists or the KGB. Sometimes, however, some opposition groups or leaders might get coverage just to sow more discord among the already fractured opposition. They serve the public interest only via educational and cultural programming. “What is more, they do carry weather forecasts,” a panelist added sarcastically.

Belarus has four traditional news agencies, and only one of them is state-owned, according to the Ministry of Information. The independent news company BelaPAN has traditionally won accolades for its high-quality reporting and its broad spectrum of services: news subscriptions, the e-paper Naviny.By, photos, infographics, audio, video, and multimedia content.

State-owned BelTA is the mouthpiece of the government. It offers news, photo services, and infographics and publishes the weekly *7 Dnei* and several journals. Separately, BelTA is building websites for local governments and state-owned newspapers and is supplying them with national news. Two more prominent market players—Interfax-Zapad and Prime-TASS—are Russian-owned. A monthly news subscription would cost around \$300, according to one panelist. Most media can afford to buy news from one company only, and a handful of big state-owned media covering international news can afford and make use of subscriptions to international news (AFP, Associated Press, and Reuters).

Of the 71 television broadcasters in Belarus, 41 are privately owned. The only television with national reach outside of governmental control is the First Music Channel. The others are small local stations offering a small amount of their own programming, which consists mostly of personal messages (like birthday greetings) and some daily local news in which the government is never criticized. In fact, local governments frown on any critical reporting at all.

Domestic radio broadcasters are hardly producing any news of their own. Instead, they rely on BelTA, Interfax-Zapad, and the Internet. International radio companies targeting Belarus, including the ERB, Radio Racyja, and Radio Liberty, do produce their news, yet their reach is very limited. Some, such as ERB and Radio Liberty, are more important as Internet news agencies, with other Internet portals using their news.

Although the law orders disclosure of the direct owners of media, the real proprietors are not always apparent to an average reader or viewer. This is even more an issue in case of online media or blogs that remain largely unregulated. Media ownership is hardly concentrated other than by the state. The only foreign investment in the media industry is from Russia. In addition to the two aforementioned news agencies, Russian businesses own popular daily *Komsomolskaya Pravda v Byelorussii* and the weeklies *BelGazeta* and *Argumenty i Fakty*.

The panelists agreed that many social and minority issues remained underrepresented. The government places obvious pressure on the media to avoid “sensationalizing” the stories so as not to damage the “social cohesion” of the country. Minority issues are at most discussed on the web

by those affected and within communities themselves. Some ethnic minorities, most notably Polish and Jewish, publish their own small-circulation newspapers and bulletins. Gender, ethnicity, and religions other than Russian Orthodox are among the issues that receive little coverage in the mainstream media.

OBJECTIVE 4: BUSINESS MANAGEMENT

Belarus Objective Score: 1.07

At best, media as an industry is balancing books, the panelists agreed. Independent media outlets are trying to break even mostly, or generating very little profit. State media companies rely heavily on government subsidies and are far from being responsible or well-managed businesses.

The government retains ownership over supporting firms like printing presses, distribution networks, the postal service, and the telecommunications infrastructure. As businesses, these are neither professional nor efficient but might be profit-making given the exorbitant fees they charge. They make money in areas other than providing services to the media. Belsajuzdruk, a press distribution monopoly that operates more than 1,500 newspaper kiosks nationwide, sells everything from cigarettes to toothpaste and stationery, a panelist said. The postal service, Belposhta, retains a monopoly over press subscriptions and has turned its offices into mini-banks.

Media companies do some basic business planning, but in most cases project for only 12 months. Media outlets have

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.

personnel policies in place, yet very few—only the large and lucrative—could afford to hire dedicated professionals to manage marketing, finance, and human resource management. Having certified accountants is a legal requirement, so most media retain these services. Many do have advertising sales managers and some have lawyers to help media tackle tangled Belarusian legislation so as not to expose themselves to fines and sanctions.

Revenue comes from a variety of sources. State media rely heavily on government funding and, where allowed, on subsidized advertising fees. For years, businesses have been under pressure not to advertise in independent newspapers critical of the government. Government-controlled print media also capitalize on inflated state-imposed subscriptions. Private businesses, state companies, and even government officials themselves have to subscribe to two newspapers and then send receipts to ideology bosses at local governments. Typically, these are the *Sovietskaya Bielorusija*, the organ of Lukashenka administration, and a local state-owned newspaper.

Privately owned media depend mostly on advertising. Personal messages, such as birthday greetings and SMS chats, remain important sources of revenue for local television stations. To some extent, newspaper sales supplement the income of independent publishers. Foreign donors fund independent broadcasters based outside the country, as well as some non-state publications and online media. Private media do not receive state subsidies.

Speaking of the advertising market, a panelist said, “Many companies do not advertise at all, either because they don’t need that, can’t afford that, or think they can’t afford that.” In such an environment, the advertising market is hardly able to sustain the existing media—to say nothing of fostering development of specialized media products.

In 2009, the Belarusian advertising market dropped 20 percent to a total of \$92.4 million, according to advertising group ZenithOptimedia. To certain degree, the loss was offset by the aforementioned devaluation of the local currency against the U.S. dollar. Still, television remained the dominant advertising medium, with 60 percent (\$56 million) of total advertising spent. Print generated \$14 million, the Internet \$6 million, and radio \$5.4 million. The advertising market is rather underdeveloped, especially outside the capital, the panel agreed. There are a lot of creative agencies, very few media agencies, and not a single digital agency. Even at the biggest of agencies, only one person might be tackling media planning and media placement, a panelist added.

Budget-wise, multi-national giants like Procter & Gamble and Colgate-Palmolive and domestic mobile telephone operators continued to dominate the market. Their marketing accounts are still managed by big international advertising agencies and the money is by custom channeled to the national television networks offering the broadest reach. Still, they do sustain other media. Despite the huge discounts they demand, these agencies buy newspaper space or air time well in advance, thus helping the media to close cash flow gaps. Traditionally, regional media companies have relied on classified advertising from local small business and medium-sized businesses, but 2009 saw a more pronounced influx of national advertisers, according to one panelist.

The law limits advertising to 20 percent of total daily broadcast time and 30 percent of prime time (6 p.m. to 10 p.m.). For the press, advertising is restricted to 30 percent of content in non-state, general news publications and 25 percent in state-owned.

Big state-owned media, primarily television channels, are reportedly hiring research companies. But according to the panel, those outlets have made no apparent changes to editorial or programming policies. "Media hardly commission any market research, and when they do get results, these are hardly used," one panelist commented.

For other media companies, media-commissioned market research is restrictively unaffordable. Some regional media companies do make use of their own research, obtained mostly via questionnaires and phone surveys. The government oversees the validity of circulation data, yet actual press sales remain suspect, since Belarus has no independent circulation audit authority.

Broadcast media has seen no improvements in audience data. NOVAK sells ratings on television, radio, and print media via subscriptions to its diary panel, and does quarterly face-to-face polls. GEVS measures television ratings with PeopleMeters. The Independent Institute of Socio-Economic and Political Studies conducts mostly political polls, but sometimes includes television, radio, and newspaper questions in its surveys.

Internet statistics are available from Akavita (via online counters and questionnaires), NOVAK (Internet usage panel), and Gemius (via online counters, online questionnaires, and face-to-face interviews). At best, only generalized information is available to media outlets for free. Detailed data are offered by subscription and affordable only to major advertising agencies and lucrative media companies.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Belarus Objective Score: 1.04

Supporting institutions remain weak in Belarus, with few independent associations or unions, weak journalism faculties, and state-controlled infrastructure.

For trade associations, panelists cited United Media, an association of private regional newspaper publishers. The association has 14 members and is a forum for regional editors and media managers to exchange ideas and experience. It runs its own training program for association members, which include journalists, accountants, advertising sales managers, and other media sector workers. The association also fosters some business cooperation, such as exchanging advertising and buying newsprint in bulk at reduced rates.

Panelists also mentioned the Telecommunications Industry Union, which brings together 95 cable operators and television broadcasters. The union gained some publicity after it was used to oust five Russian television channels from cable networks, as detailed under Objective 3. The panelist said that they doubt that any independent trade association would have a chance to effectively lobby the government.

Belarus has two working associations of media professionals. The Belarusian Union of Journalists (BUJ) is a "governmental" association uniting around 2,000 professionals who work for state-controlled media. BUJ has been functioning so for more than 50 years. Among other government officials, the deputy information minister is on the BUJ board. Although some

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.

reports suggest that the union is offering some networking possibilities and limited training incentives, one panelist said that BUJ is mostly giving out prizes.

The 1,200-member-strong Belarusian Association of Journalists (BAJ), meanwhile, works to protect independents journalists' rights via legal advice and defense, professional development, and public advocacy. BAJ has won plaudits each year from the panelists for its efforts to promote free, independent, and pluralistic media. However, its resources remained stretched.

Very few "state" journalists are members of BAJ and very few non-state journalists have joined BUJ. Furthermore, both BUJ and BAJ bring together management and rank-and-file employees. No journalist trade union in the country can promote journalist interests independent of management interests.

For almost 15 years, BAJ has been (or rather had to be, as one of the panelists noted) the only press freedom watchdog working in Belarus. Very rarely, assistance might come from the few surviving humanitarian groups, but "they are hardly efficient at all as far as protecting journalists or media is concerned," a panelist commented. "In fact, they are an endangered species themselves." In many cases, these organizations provide mostly publicity for cases and occasional legal assistance. Foreign press freedom groups do monitor and publicize violations, but they have little effect on the government.

State universities in Homiel, Hrodna, and Viciebsk offer diplomas and degrees in journalism, as do several smaller private institutes based in the capital. The most notable, however, is the journalism institute at Belarusian State University in Minsk, which has more than 1,500 students. Panelists indicated that controversy exists over the qualifications of graduates, as their education focuses on "academic programs" and not "substantial practical experience." As one panelist said, "Every time [one of] their graduates comes to our newsroom, he or she needs to be thoroughly retrained or thoroughly trained-up."

The main external educational alternative is European Humanities University (EHU), once a Belarusian university now in exile in Vilnius, just 110 miles away from Minsk. EHU offers two majors: media and communications and visual design and media. Every year the university admits around 30 students. Similarly to domestic institutions, EHU has difficulty providing "training grounds" for students to gain practical experience. Given that the Belarusian government views EHU as a political project, its graduates might face problems finding jobs back in Belarus, as local education authorities might not recognize their diplomas. Moreover, very few are willing to come back, at least at the moment, according to one panelist.

Other minor opportunities include government and foreign donor-funded scholarship programs in Poland, Ukraine, the United Kingdom, and the United States. As in previous years, panelists doubted that graduates will find it easy to locally apply the knowledge and experience that they gain abroad.

Short-term training opportunities—in most cases, offered for free by domestic and foreign media development organizations—remained plentiful, if not always efficient. Many training programs concentrate on general issues while more specific skills (e.g., investigative reporting, online and multiplatform reporting, editing, infographics, etc.) need to be developed, according to a panelist. Furthermore, most training programs and seminars are rather one-off activities and newsrooms and journalists have difficulty planning and making arrangements well in advance. As a result, quite often media outlets are not sending those who might benefit most from such educational programs.

Training offerings for advertising, sales, and finance departments are few. One of the panelists mentioned that webinars are not popular at all, although the technology has been around for several years. Another panelist cited lack of motivation among media professionals to learn on their own or seek out the training possibilities available to them. Foreign organizations offer longer-term hands-on training programs, yet Belarusian journalists' poor knowledge of second languages greatly restricts the number of possible applicants. Meanwhile, regional journalists that have participated in trainings and seminars held abroad sometimes come under pressure from local KGB officers.

Although sources of newsprint are not yet monopolized, the government has grown even stricter about imposing locally produced newsprint requirements onto printing presses and publishers alike. That newsprint is more expensive and of somewhat inferior quality. A technical standards authority has been pressuring several independent newspapers over the quality of imported newsprint they use, although the printing presses made no complaints.

Printworks are tightly controlled by the government via the Ministry of Information, the regulator of both publishing and media industries. Belarus has some private printing houses, yet even they act as meddling censors—under the law, a printing house director is responsible for the content of the printed materials produced. Printing houses also have quality issues; for example, they are notorious for being unable to maintain color consistency.

Similarly, the government retains full control over all media distribution channels. The press in Belarus is sold almost exclusively in a limited number of kiosks, owned by state monopoly Belsajuzdruk. Press subscriptions are monopolized

by Belposhta, the postal service. A handful of independent newspapers operate their own very small distribution systems.

The government owns most television and radio transmitters, with the remaining transmitters controlled via frequency licensing. Cable networks are usually privately owned, although the state significantly influences which channels can be part of cable packages. Private Internet service providers own some last-mile infrastructure, but interconnections are only possible via the state telecom monopoly Beltelecom.

Most importantly, the state controls all international Internet traffic. However, costs are decreasing and bandwidth is increasing. Belarus's direct Internet connection with other countries (Russia and Poland) reached a total bandwidth of 22 Gbps as of the end of 2009, up from 5 Gbps a year earlier. At the same time, Internet fees have lowered considerably: a 1 MB ADSL connection without a traffic cap costs around \$35 a month, down from \$500 a year earlier.

List of Panel Participants

Note: MSI panelists in Belarus agreed to participate only if they were not named publicly. Amendments to the criminal code were introduced in December 2005 to add an article, "Discrediting the Republic of Belarus," that provides for criminal liability for giving international organizations "false information" about the situation in the country. Human-rights groups, both domestic and international, believe the article's vague wording makes it possible for the government to detain for up to six months anyone reporting negative information or to imprison them for up to two years.