
None of the countries studied in this edition have achieved sustainability (measured by a score of 3–4) in their overall score. Of the sub-regions studied, Southeast Europe averaged the highest scores, with a 2.28 combined average. Central Asia continued to trail the other sub-regions in terms of media development.



I am pleased to introduce the Media Sustainability Index (MSI) 2010. The MSI provides an analysis of the media environment in 21 countries of Europe and Eurasia during 2009 and also shows trends in the media sector since 2001. The MSI was first conceived in 2000 and launched in 2001, in cooperation with the United States Agency for International Development (USAID). Since that time, it has become a universally recognized reference for benchmarking and assessing changes in media systems across Europe and Eurasia.

The MSI allows policymakers and implementers to analyze media systems—consisting of both traditional media types and new media platforms—and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with knowledge, citizens can help improve the quality of governance through participatory and democratic mechanisms, and help government and civil society actors devise solutions to pervasive issues such as poverty, healthcare, conflict, and education.

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

IREX would like to thank all those who contributed to the publication of the MSI 2010. Participants, moderators, authors, and observers for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse and Dayna Kerecman Myers managed the MSI. USAID has been a consistent supporter of the MSI, helping to develop the project and ensure its ongoing implementation.

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

Sincerely,



W. Robert Pearson

President, IREX

News websites and Internet news agencies are proliferating and often provide information that is otherwise impossible to find. In some of the most repressive regimes, such as Uzbekistan and Belarus, these sources are a much-needed addition to the limited range of perspectives available from domestic news sources.



While each sub-region of the 2010 Europe and Eurasia MSI saw a decline, they all made some notable improvements as well. Interestingly, new media platforms are emerging across the different sub-regions and promise to fill gaps in the media in many countries. However, the entire region felt the effects of the economic crisis, with the media deeply impacted. All sub-regions reported ongoing challenges with the lack of enforcement of media laws, widespread self-censorship, continued violence against journalists, and growing public apathy about the media.

None of the countries studied in this edition have achieved sustainability (measured by a score of 3–4) in their overall score. Of the sub-regions studied, Southeast Europe averaged the highest scores, with a 2.28 combined average. Central Asia continued to trail the other sub-regions in terms of media development; Uzbekistan, Turkmenistan, and Belarus were the three lowest performing countries across the Europe and Eurasia region. According to the MSI methodology, they all fall in the category of unsustainable, anti-free press—meaning that they do not meet, or only minimally meet, the objectives.

In addition to contributing to self-censorship, the sinking economy was tied closely to slipping journalism standards in many countries. Professional standards, followed by business management, were the worst performing objectives on average across the region. Already stretched thin and paid poorly, media professionals took further hits to their salaries. Some media owners resorted to layoffs or salary reductions for their employees. The financial difficulties also reduced options for training and journalism education.

By pulling in voices from a wide variety of journalists, consulting with other media members of the countries studied, and summarizing overall developments, the MSI aims to serve as a tool in research and advocacy efforts toward improving the media's ability to inform the public. To that end, IREX provides all previous editions of the MSI and spreadsheets with combined scoring data on its website, www.irex.org/msi.

The Increasing Use of New Media Platforms in Europe & Eurasia

Clearly, the growing emergence of new media platforms in the region offers an alternative to traditional media. Such options are highly valuable for the many countries that lack pluralistic views in the traditional media, and where self-censorship impinges on the availability of news and information that citizens need in order to hold politicians accountable and make important life decisions.

In Russia, for example, the score for Objective 3 (plurality of news) fell from 2.28 in 2001 to 1.54 in 2010. One panelist noted that people are looking for new sources of news, and recently, consumers have found another avenue for staying informed, as all important events are taken up in social networks and blogs. In one case, an accident with the Nevsky Express train in November 2009 provided fodder for online discussions—in particular, theories about the cause that differed from the official explanations. In Azerbaijan, where Objective 3 scores have also fallen in recent years, the coverage of a shooting by a student at the State Oil Academy that left 13 people dead and another 13 wounded illustrates the potential of new media in the region. This tragedy was a turning point of sorts, when the Internet and mobile phone footage scooped traditional media. An Azeri IT specialist noted that he has more confidence in Internet news, because at least it is not censored.

News websites and Internet news agencies are proliferating and often provide information that is otherwise impossible to find. In some of the most repressive regimes, such as Uzbekistan and Belarus, these sources are a much-needed addition to the limited range of perspectives available from domestic news sources. The website Ferghana.ru, which covers all of Central Asia, reports on issues and events that regimes in Uzbekistan or Turkmenistan would never allow to see the light of day. These include human rights developments, border issues between Kyrgyzstan and Uzbekistan, and publicity of abuses of journalists. In Belarus, the website Charter97.org offers articles critical of the regime and uncovers corruption by government officials.

However, high costs associated with Internet use continue to restrict access in many countries, such as Armenia—a problem that is especially evident in regions.

Another serious problem surrounding Internet access is that some countries in the region restrict and monitor Internet use or are flirting with stepping up regulations. In 2009, Belarus narrowly escaped government regulations that called for registration of online media and the possibility of summarily blocking any website. The Internet community and free speech advocates fear the worst in 2010, looking

ahead to local elections then and the presidential election early in 2011. Even in more open countries, such as Bulgaria, police have stepped up their interest in investigating Internet providers. The authorities pressure Internet providers to reveal information, including IP addresses and content. In countries such as Turkmenistan and Uzbekistan, the state filters many international news websites and limits Internet access to providers that ultimately rely on the state telecom companies. Internet cafés often require users to show identity documents.

While Turkmenistan and Uzbekistan continue to exert strong control over the Internet, some of their Central Asian neighbors, such as Tajikistan and Kazakhstan, are seeing more use of the Internet for news. In Tajikistan, newspapers are incorporating materials acquired from blogs. Kazakh panelists noted KazTag news agency's launch of SMS distribution as a positive development in 2009. The number of users of Twitter, Facebook, and other social networks is growing every year.

Some countries have been slower to recognize the possible news value in blogging. In Azerbaijan, for example, panelists reported that blogging has not gained credibility, to the point that the Azeri media community did not react as sharply as the international community did to the arrest of two bloggers, Adnan Hajizade and Emin Milli. These panelists did not view the arrests as a threat to media freedom, because they do not feel that bloggers represent credible media in Azerbaijan.

Throughout the region, blogging and citizen journalism have not yet supplanted traditional media as leaders in news and information. Panelists in Macedonia reported that the country has a few specialized blogs on new technology, archeology, and other very narrowly targeted topics. But in general, the panelists there said, bloggers do not produce news—they either state opinions or pull news from other sources. In the panelists' assessment, blogs lack serious content, and the blogging community seemingly still does not fully grasp the prospective value of blogs in this respect. In Montenegro also, panelists reported that blogging is still undeveloped and, according to the panelists, focuses on commentary about events. The above example from Russia points to the importance of blogs for discussion about events or political issues, but not as yet a significant source of journalistic reporting or investigation.

In Bulgaria, the panel had differing views about blogging. One panelist remarked that the growing reach and authority of Internet blogs is good news for Bulgaria's media scene, because it is setting an alternative agenda. But another panelist expressed concerns about ethics in blogging. Clearly, regardless of the author—a professional journalist contributing to an online news source, for example, or a

citizen journalist blogging about local topics—understanding journalism ethics and professional practices will be important if this medium is to reach its potential for increasing plurality and dialogue on important societal issues.

In Montenegro, several panelists brought up problems with standards for Internet journalism. More than one panelist noted the need for Internet media to comply with broader journalism standards. Another discussion point was regarding accountability for those behind some websites.

New media tools also proved efficient in organizing student protests in 2008 and 2009 in Croatia, where Twitter, Facebook, blogs, and other new media platforms are gaining popularity rapidly. These tools were also used heavily during the first round of the presidential election in late 2009. The power of Facebook gained wide international coverage after students in Moldova used it to organize mass protests in early 2009, following controversial elections.

New technologies have become an integral part of the media landscape throughout most of Europe and Eurasia, and likely the new platforms for sharing news and information will continue to grow in importance. As with any type of media, issues of sustainability (legal and regulatory environment, professional standards, business management environment) are important considerations when evaluating how well the media are performing their role as the fourth estate. The MSI methodology is designed to capture the performance of a country's media sector regardless of the specific nature of its prevailing platforms. The MSI will include the impact of current and yet-to-be-invented forms of media in future editions.

Developments in the Sub-Regions

Southeast Europe is the only region studied to score soundly within MSI's "near sustainability" category (between 2 and 3), meaning that a country has progressed in meeting multiple objectives regarding legal norms, professionalism, and the business environment supportive of independent media. However, the overall average slipped slightly from last year, reversing the region's prior progress and revealing the inherent lack of sustainability in many areas.

Although Croatia, Montenegro, and Kosovo had modest gains, most of the other countries in this sub-region fell at least slightly. Bulgaria's score dropped most significantly—more than a third of a point—with Romania and Serbia coming close to that percentage as well.

One explanation for the lack of growth in the region may be related to these countries' progress toward EU accession. International donors shift their attention to countries with needs perceived to be greater, and politicians and others

wishing to control news and information increasingly expose and exploit weaknesses in the media sector.

Panelists from Croatia, one of the countries that did climb slightly, noted the lack of NGO activity in rural parts of the country and discrepancies in progress. "NGO is almost an unknown term just kilometers from the city limits of the five or six largest cities in Croatia. Expansion of IT communications helps, but this is still a problem for Croatia," one panelist concluded. But where NGOs are present in Croatia, they are vocal in their support. A high point for this region is Croatia's rebirth of investigative journalism. Following the unexpected resignation of Croatia's prime minister, reports flowed on corruption and misuse of public funds. Croatian journalists are increasingly reporting on corruption, bribery, and lack of transparency in the use of public funds.

Kosovo showed higher scores for the 2010 MSI, reflecting advancement in the media sector in 2009. The overall score jumped nearly a quarter of a point, with four out of the five objectives showing improvement. While political forces still attempt to influence the media, most of the media have resisted—though the same cannot be said of Radio Television of Kosovo (RTK). One of the important stories of the year revolved around RTK. Its general director resigned, saying that he found it "impossible to run RTK in a responsible manner" and questioning its ability to maintain editorial independence from the government.

Macedonia proved unable to gain any ground after its dramatic fall of more than a half a point in last year's study, following serious political turmoil. This year, it continued to decline, though not by a large margin. Among the reasons for Macedonia's decrease, the panelists pointed to the escalation of hate speech, a general clampdown on freedom of expression in the media and also among citizens, and the consequences of the global financial crisis. One interesting outcome of the sharp decreases in governmental advertising, however, was that the media produced coverage more critical of governmental policies. The panelists also lamented the media's underestimation of new technologies and their usage: The industry was surprised by the sudden shift of audiences away from print and towards Internet use.

The government of Serbia made changes to laws that protect the "presumption of innocence," increasing penalties for media that report on criminal investigations and court cases in a way that could prejudice public opinion before a verdict is handed down. Panelists and international observers fear that these amendments will exacerbate self-censorship to the point that journalists will stop reporting on corruption cases and rob citizens of information on how such cases are proceeding. Furthermore, panelists complained that the government made little movement in privatizing public broadcasters. Most local

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public broadcasters are beholden to local authorities and receive outlays from local budgets, thus unfairly competing with private commercial media.

Panelists across the Southeast Europe sub-region lamented the growing public apathy about the fate of journalists and the waning respect for the journalism profession. In Albania, for example, panelists noted that while violence against journalists is not widespread, neither is defense of media freedom, except by organizations of journalists and human-rights defenders. However, in Bosnia & Herzegovina, panelists noted that two separate assaults on journalists generated strong public condemnation and reaction from the judiciary and the police.

Overall scores for the **Caucasus** as a whole did not change dramatically from last year; while trailing Southeast Europe, it still edges out Russia & Western Eurasia and is solidly above Central Asia. However, its overall average score, 1.79, still reflects an “unsustainable mixed system” in the MSI methodology.

Setbacks for journalists in Azerbaijan, in particular, troubled the media community. Azerbaijan continues to top the list for the number of journalists imprisoned, with more added in 2009. Furthermore, a referendum was passed on 29 articles of the constitution, amid charges of significant voting irregularities. In addition to other articles roundly condemned as contrary to a path of democracy, some amendments contained provisions regarding protection of privacy and right of reply—without regard to whether or not the citizen in question is a government official. Observers in the media and civil society charge that the amendments will hamper the role of the press as watchdog.

Armenian panelists noted that while their media laws reflect international norms, the country has a lot of work to do in regard to enforcement. Serious questions about judicial independence and ongoing violence and harassment of the media led journalists to decry the prevailing air of impunity. Self-censorship is now widespread in Armenia, especially on television. Journalists, especially the profession’s youngest members, often do not follow professional standards of journalism.

Georgia’s media climate showed the stress of pressures stemming from the previous year’s Russian invasion and domestic instability, stunting development of the news business. Additionally, national airwaves rarely carry investigative stories, the mainstream television newscasts have become increasingly homogenous, and newspapers tend to be significantly opinionated. Yet, news traffic is increasing on social networking sites, blogs, and forums. YouTube and Facebook postings, in particular, inform the national discourse. These developments make Georgia a regional leader in advancing new media platforms. Georgia is further set apart from its neighbors by a media community showing signs of protest: Four members of Georgian Public Broadcasting’s board of trustees resigned during anti-government protests in April 2009, on the grounds that they could not ensure balanced and full coverage of the events.

The overall score for the **Russia and Western Eurasia** sub-region slipped slightly from last year, and the individual country scores all fell at least a little. Russia’s score plunged almost a half a point, falling even below the MSI’s 2001 baseline score. The overall score for the sub-region, 1.52, still places it firmly in the MSI’s unsustainable, mixed system category, and Belarus has still not managed to reach even the 1.00 mark.

To repress free speech, Belarus’s government continued to demonstrate its preference for subtle tools that have the same chilling effect as overt measures. These include business penalties and restrictions for media owners, as well as measures to control editorial policy via censorship, false-information and libel suits, and restricting access to official information. Despite such circumstances, Belarusian citizens can still access alternative viewpoints via the Internet, international broadcasters, and a few surviving private newspapers.

Russia’s media sector was hit badly by the economic crisis, which factored into Russia’s dramatic drop in score. Crimes against journalists have increased, and according to the Glasnost Defense Foundation, eight media professionals were murdered in Russia in 2009. Russian panelists remarked that the profession has long lost its prestigious reputation, compared to how journalism was viewed in the 1990s. Print media outlets cut their staff training budgets for staff training sharply in 2009; short-staffed by the crisis, these outlets felt that they could not afford to let any employees miss even one or two days for training. In small cities, independent local media offer the only possible source of objective information about local activities, and not all communities have independent options.

However, the expansion of blogs and social networks proved to be one positive trend visible in Russia in 2009; they have become a valued communication tool for

Russians, who have even begun using the Internet to address top Russian authorities.

Moldova's stormy political scene bled into media affairs, as protests following its disputed parliamentary elections turned violent. The government led its affiliated media outlets, such as the public broadcaster Teleradio Moldova, into a campaign to discredit the political opposition as well as some civil society representatives. The government accused NGOs and members of the Civic Coalition for Free and Fair Elections Coalition 2009 of involvement in the protests.

Ukraine faced its presidential election in early 2010 with an expectation of further suppression of press freedom and continuing erosion of the principles of journalism. Leading candidates of the older generation and their younger counterparts were united in their abuse of the media and disrespect for journalists. Panelists declared free speech the last myth of the Orange Revolution to be shattered. It was a hard year for Ukraine in business terms, as well. Panelists noted that many media managers were unprepared for the challenges of the economic crisis, and that losses could have been smaller with more professional management.

Uzbekistan and Turkmenistan continue to pull down **Central Asia's** scores to an overall average of 1.14. Turkmenistan, in its third year of inclusion in the MSI, continues to be the lowest performing country studied in the entire Europe and Eurasia region, not even registering a 0.50, and with Uzbekistan not far behind. Turkmenistan and Uzbekistan are so repressive that it is impossible for the MSI to even conduct panels with journalists. Kyrgyzstan continues to lead the region in its score, but this year, enthusiasm over Kyrgyzstan's relative progress in some areas was dampened by serious crimes against journalists.

In 2009, the Organization for Security and Cooperation in Europe (OSCE) selected Kazakhstan to assume the rotating chair for 2010. As the first former successor state of the USSR to have this honor, Kazakhstan had potential momentum for a new democratization. Citizens anticipating the enhancement of democratic reforms and legislative amendments in the sphere of civil society and media development were swiftly disappointed, as reflected in Kazakhstan's drop in score of more than 0.20 this year. Just before taking the OSCE chairmanship, Kazakhstan adopted laws on Internet regulation and on recognition of private life immunity that contravene the principles of free speech.

However, despite the dangers of being a journalist in Kazakhstan and Kyrgyzstan, the media communities there are making sincere efforts to increase professionalism. In Kazakhstan, media leaders are paying serious attention to training and improving university journalism programs.

Governments are seeking a way to silence critics but get away with such actions despite the watchful eye of the international community. Increasingly, some governments charge critical journalists for crimes other than violations of media or libel laws.

Widespread corruption and intimidation of journalists continues to hold back Tajikistan's media sector. Tajikistan's panelists registered more cases of violence and harassment of journalists, as well as an uptick in lawsuits against the media. Additionally, journalists exhibit little solidarity when their colleagues are targeted. Tajik bloggers still feel relatively safe, though they are few in number.

Looking across the entire Europe and Eurasia region, it is apparent that many countries that had been creeping up the sustainability scale have fallen back a little, in no small part because of the economy. The weakened economy in most countries has opened the door even wider to the influence of money as a means to control news and information. However, political authorities appear to have been making a more systematic attempt to force the media in line behind them or face the consequences. The economy has simply given them one more tool to accomplish their goal. The Internet and new media are opening up interest in journalism and giving the media additional tools, but panelists from many countries sensed that as new media tools gain popularity, governments will take more notice and respond with more restrictions.

Developments in the Objectives

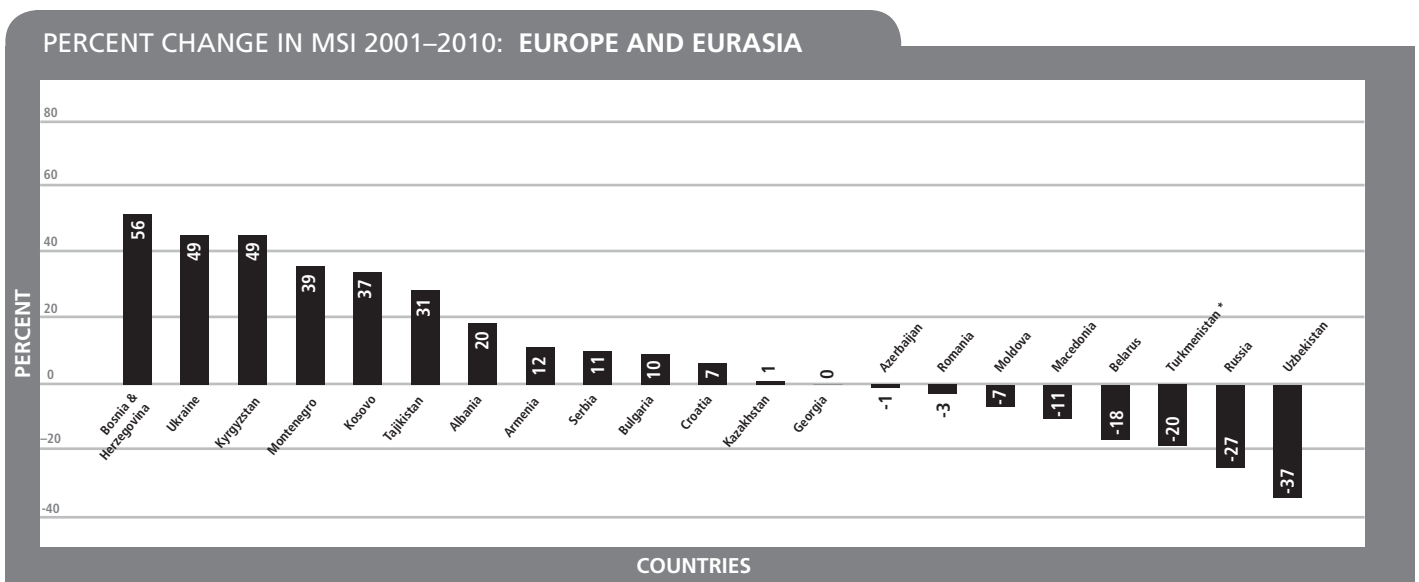
Some common themes were observed in the objectives studied across the different sub-regions. Many countries continue to suffer the effects of government repression, and panelists complain that legal frameworks mirror international standards on paper but are not enforced in practice.

In **Objective 1, Freedom of Speech**, reports from several countries show the lengths to which governments will go to pay lip service to democratic reform, but not loosen their grip on repressive political tools. Governments are seeking a way to silence critics but get away with such actions despite the watchful eye of the international community. Increasingly, some governments charge critical journalists for crimes other than violations of media or libel laws. Noted Kazakh human rights observer Yevgeny Zhovtis received an inordinately long jail sentence for vehicular manslaughter after he struck and killed a pedestrian that was walking at night on a street.

Reports of the trial suggest that Zhovtis was denied the ability to present an adequate defense. Azerbaijan, which has shown little restraint in jailing journalists, has charged journalists with a range of crimes from terrorism to drug possession to hooliganism in cases seen largely as politically motivated. Critical journalist Eynulla Fatullayev, already serving jail time for charges including terrorism and inspiring national hatred, found himself in more trouble after a search of his cell found trace amounts of heroin.

Another subtle tool to control the media, as seen across several sub-regions and described in **Objective 3, Plurality of News**, is the use of cable as a distribution pressure point. Foreign channels face being cut from cable packages and local channels get extorted to be included. Georgian panelists noted that cable networks have not carried Russia's state television channels since Tbilisi and Moscow waged war over the separatist South Ossetia region in 2008. Some panelists were convinced that the authorities have unofficially instructed cable operators to cut off the channels. Similar examples were reported in Belarus, Serbia, and Kazakhstan.

Under **Objective 5, Supporting Institutions**, which covers training opportunities, some patterns emerged as well. Several countries reported on the importance of how trainings are structured relates to their impact and effectiveness. A Serbian panelist praised short-term training courses organized by international media organizations, commenting, "Quality education within a journalist's own media outlet gives the best results." In Kazakhstan, some media companies, which are seriously concerned by the shortage of qualified personnel, also run practical "journalism schools" to quickly train young professionals. Panelists praised the concept of training a whole team of journalists alongside management, since management holds decision-making power. In addition, panelists across the region frequently reported that the need for hands-on practical training trumps all other training needs.



* Data for Turkmenistan is since 2008

MEDIA SUSTAINABILITY INDEX 2010: OVERALL AVERAGE SCORES

			<ul style="list-style-type: none"> □ Armenia (1.85) □ Azerbaijan (1.71) □ Georgia (1.82) ▼ Kazakhstan (1.44) ▼ Russia (1.45) □ Tajikistan (1.45) 	<ul style="list-style-type: none"> □ Albania (2.11) ▼ Bulgaria (2.43) □ Montenegro (2.21) ▼ Romania (2.30) ▼ Serbia (2.07) □ Ukraine (2.05) 	<ul style="list-style-type: none"> ▼ Bosnia & Herzegovina (2.60) ▲ Croatia (2.61) ▲ Kosovo (2.60) 		
□ Turkmenistan (0.33)	▲ Belarus (0.96)	□ Uzbekistan (0.55)					
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

MEDIA SUSTAINABILITY INDEX 2010: FREE SPEECH

			<ul style="list-style-type: none"> □ Armenia (1.72) ▼ Azerbaijan (1.74) □ Moldova (1.69) ▼ Russia (1.60) ▼ Serbia (1.87) □ Kazakhstan (1.49) □ Tajikistan (1.66) ▼ Macedonia (1.47) 	<ul style="list-style-type: none"> ▼ Albania (2.16) ▲ Georgia (2.05) □ Kyrgyzstan (2.09) □ Montenegro (2.22) ▼ Romania (2.47) 	<ul style="list-style-type: none"> □ Bosnia & Herzegovina (2.96) ▼ Bulgaria (2.53) ▲ Croatia (2.71) ▲ Kosovo (2.53) 		
□ Turkmenistan (0.24)	□ Uzbekistan (0.46)	□ Belarus (0.68)					
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2009

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

Annual scores for 2001 through 2009 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

MEDIA SUSTAINABILITY INDEX 2010: PROFESSIONAL JOURNALISM

		<ul style="list-style-type: none"> ▼ Armenia (1.65) □ Azerbaijan (1.68) ▼ Georgia (1.62) ▼ Kyrgyzstan (1.68) 					
		<ul style="list-style-type: none"> ▲ Belarus (1.15) ▼ Kazakhstan (1.40) ▼ Moldova (1.36) ▼ Russia (1.37) 	<ul style="list-style-type: none"> □ Macedonia (1.57) ▼ Serbia (1.74) □ Tajikistan (1.53) ▲ Ukraine (1.96) 	<ul style="list-style-type: none"> □ Albania (2.18) ▼ Bosnia & Herzegovina (2.12) ▼ Bulgaria (2.08) ▲ Croatia (2.36) ▲ Montenegro (2.11) ▼ Romania (2.08) 		<ul style="list-style-type: none"> ▲ Kosovo (2.63) 	
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

MEDIA SUSTAINABILITY INDEX 2010: PLURALITY OF NEWS SOURCES

			<ul style="list-style-type: none"> □ Azerbaijan (1.72) ▼ Georgia (1.68) ▼ Kyrgyzstan (1.88) ▼ Macedonia (1.65) □ Moldova (1.73) ▼ Russia (1.54) □ Tajikistan (1.61) ▼ Ukraine (1.89) 				
	<ul style="list-style-type: none"> □ Belarus (0.85) □ Turkmenistan (0.26) ▲ Uzbekistan (0.55) 	<ul style="list-style-type: none"> □ Kazakhstan (1.34) 	<ul style="list-style-type: none"> ▼ Bosnia & Herzegovina (2.77) ▼ Bulgaria (2.62) ▲ Croatia (2.60) ▲ Kosovo (2.77) ▼ Romania (2.51) 	<ul style="list-style-type: none"> □ Albania (2.19) ▲ Armenia (2.21) □ Montenegro (2.41) ▼ Serbia (2.28) 			
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 2009

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

Annual scores for 2001 through 2009 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

MEDIA SUSTAINABILITY INDEX 2010: BUSINESS MANAGEMENT

		<ul style="list-style-type: none"> □ Belarus (1.07) ▼ Kazakhstan (1.44) ▼ Macedonia (1.39) ▼ Moldova (1.22) ▼ Russia (1.44) □ Turkmenistan (0.14) 	<ul style="list-style-type: none"> ▼ Albania (1.73) ▲ Armenia (1.95) ▲ Azerbaijan (1.62) ▼ Georgia (1.61) ▲ Kyrgyzstan (1.87) ▼ Serbia (1.96) □ Tajikistan (1.13) 	<ul style="list-style-type: none"> ▼ Bosnia & Herzegovina (2.43) ▼ Bulgaria (2.40) □ Kosovo (2.32) ▼ Montenegro (2.05) ▼ Romania (2.12) ▼ Ukraine (2.11) □ Croatia (2.59) 			
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

MEDIA SUSTAINABILITY INDEX 2010: SUPPORTING INSTITUTIONS

				<ul style="list-style-type: none"> □ Albania (2.29) ▲ Georgia (2.14) □ Kyrgyzstan (2.07) □ Moldova (2.05) ▼ Armenia (1.72) ▲ Belarus (1.04) ▼ Russia (1.31) □ Tajikistan (1.33) 	<ul style="list-style-type: none"> ▼ Kazakhstan (1.51) □ Macedonia (1.67) ▲ Azerbaijan (1.79) ▼ Armenia (1.72) ▼ Kazakhstan (1.51) ▼ Romania (2.33) ▼ Serbia (2.50) ▼ Ukraine (2.28) 	<ul style="list-style-type: none"> ▼ Bosnia & Herzegovina (2.71) ▼ Bulgaria (2.55) □ Croatia (2.80) ▲ Kosovo (2.76) ▼ Bosnia & Herzegovina (2.71) ▼ Bulgaria (2.55) □ Croatia (2.80) ▲ Kosovo (2.76) 	
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 2009

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

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IREX prepared the Media Sustainability Index (MSI) in cooperation with the United States Agency for International Development (USAID) as a tool to assess the development of media systems over time and across countries. IREX staff, USAID, and other media-development professionals contributed to the development of this assessment tool.

The MSI assesses five “objectives” in shaping a successful media system:

1. Legal and social norms protect and promote free speech and access to public information.
2. Journalism meets professional standards of quality.
3. Multiple news sources provide citizens with reliable, objective news.
4. Independent media are well-managed businesses, allowing editorial independence.
5. Supporting institutions function in the professional interests of independent media.

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

The scoring is done in two parts. First, a panel of local experts is assembled in each country, drawn from the country’s media outlets, nongovernmental organizations (NGOs), professional associations, and academic institutions. Panelists may be editors, reporters, media managers or owners, advertising and marketing specialists, lawyers, professors or teachers, or human rights observers. Additionally, panels comprise the various types of media represented in a country. The panels also include representatives from the capital city and other geographic regions, and they reflect gender, ethnic, and religious diversity as appropriate. For consistency from year to year, at least half of the previous year’s participants are included on the following year’s panel. IREX identifies and works with a local or regional organization or individual to oversee the process.

Panel participants are provided with a questionnaire that explains the objectives, indicators, and scoring system. Each panelist individually reviews the questionnaire and scores each indicator. Descriptions of each indicator explain their meaning and help organize the panelist’s thoughts. For example, the questionnaire asks the panelist to consider not only the letter of the legal framework, but its practical implementation, too. A country without a formal freedom-of-information law that enjoys customary government openness may well outperform a country that has a strong law on the books that is frequently ignored. Furthermore, the questionnaire does not single out any one type of media as more important than another; rather it directs the panelist to consider the salient types of media and to determine if an underrepresentation, if applicable, of one media type impacts the sustainability of the media sector as a whole. In this way, we capture the influence of public, private, national, local, community, and new media.

The panelists then assemble to analyze and discuss the objectives and indicators. While panelists may choose to change their scores based upon discussions, IREX does not promote consensus on scores among panelists. The panel moderator, in most cases a representative of the host-country institutional partner or a local individual, prepares a written analysis of the discussion, which is subsequently edited by IREX editorial staff. Names of the individual panelists and the partner organization or individual appear at the end of each country chapter.

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

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

In some cases where conditions on the ground are such that panelists might suffer legal retribution or physical threats as a result of their participation, IREX will opt to allow some or all of the panelists and the moderator/author to remain anonymous. In severe situations, IREX does not engage panelists as such; rather the study is conducted through research and interviews with those knowledgeable of the media situation in that country. Such cases are appropriately noted in relevant chapters.

I. Objectives and Indicators

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

FREE-SPEECH INDICATORS:

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

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

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

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

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

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

BUSINESS MANAGEMENT INDICATORS:

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

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

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

II. Scoring System

A. Indicator Scoring

Each indicator is scored using the following system:

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

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

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

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

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

B. Objective and Overall Scoring

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

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

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

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

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