
Divestment in East European media by West European conglomerates in need of cash resulted in transfer of ownership from investors interested in profit to groups interested in promoting personal political and/or business interests.



I am pleased to introduce the latest annual Media Sustainability Index (MSI) study for Europe and Eurasia. The MSI is one of the most reliable and trusted evaluations of media health globally and in the various regions and countries included. Coverage of the same 21 countries in the Europe and Eurasia region for more than a decade allows interested readers to discover emerging trends—both positive and negative—in media development in the region. In this edition, IREX looks at one emerging threat: increased political control of media outlets. Weak financial footing has caused the loss of independence at media outlets across the region, resulting in a loss of objectivity and plurality in the news. Our analysis is available in the Executive Summary that follows.

How does the MSI make a difference in the lives of citizens in each country? The MSI measures a number of contributing factors of a well-functioning media system and considers both traditional media types and new media platforms. This level of investigation allows policymakers and implementers to analyze the diverse aspects of media systems and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with this essential knowledge, citizens can help improve the quality of governance through participatory and democratic mechanisms, and help government and civil society actors devise solutions to pervasive issues such as poverty, healthcare, conflict, and education.

How does the MSI aid journalists and independent media supporters realize the improvements they seek? The MSI provides important—and useable—information for the media and media advocates in each country and region. By reflecting the expert opinions of media professionals in each country, its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector.

IREX would like to thank all those who contributed to the publication of the 2012 MSI. Participants, moderators, and authors for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse managed the MSI with the untiring editorial support of consultant Dayna Kerecman Myers. The United States Agency for International Development (USAID) has been a consistent supporter of the MSI, helping to develop the project from its inception, ensure its ongoing implementation, and foster its expansion into the Middle East and Africa.

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

Sincerely,



W. Robert Pearson
President, IREX

Foreign investors are naturally wary of losing their investment through legal actions taken by an angry government. However, in countries that joined and seek to join the European Union, such action likely would be either illegal under terms of their membership or detrimental to their application.



The 2012 MSI study for Europe & Eurasia revealed a mix of positive developments, regression, and stagnation (or resilience, depending on one's point of view). Nearly half of the 21 countries included in this study showed little change either way, their overall score moving by 0.10 or less. Six countries showed improvement and five slid backward.

Below is a brief summary of notable findings:

- The former Yugoslavia accounted for all but one of the countries with lower scores this year. Montenegro improved, Croatia remained roughly unchanged, but the rest of the former Yugoslavia—Serbia, Bosnia, Kosovo, and Macedonia—suffered losses (note that Slovenia is the only country of the former Yugoslavia not studied by the MSI).
- Croatia received the highest score of the E&E MSI. However, its overall score is only 0.08 higher than in 2001, although most individual objective scores have changed positively or negatively since that time.
- Moldova continued to improve and achieved the highest score among the four countries in “Russia and Western Eurasia.” All objectives except Objective 4, Business Management, received a score in the “near sustainability” range.
- Armenia maintained its leadership amongst the three countries in the Caucasus. Its overall score remained mostly unchanged, although the score did slip slightly.
- Georgia continued to slowly regain ground lost in 2008.
- Russia's score improved; despite serious lingering challenges, panelists expressed a cautious optimism that the situation will continue to improve in the coming years.
- Kyrgyzstan returned to the top spot in Central Asia as the political situation there stabilized. However, two objectives, those covering professional journalism and business management, remain well below the “near sustainability” range.
- Divestment in East European media by West European conglomerates in need of cash resulted in transfer of ownership from investors interested in profit to groups interested in promoting personal political and/or business interests.

Scoring charts providing all scores for 2012 can be found at the end of this section. Further, the entire history of MSI scores for all regions is available on IREX's website in Microsoft® Excel spreadsheets. See: www.irex.org/msi.

Each year for the executive summary, IREX selects one or two themes that appear in multiple chapters and highlights trends and comparative developments. This year IREX has chosen to focus on the impact that increased political control of media is having on media sustainability. While by no means a new phenomenon, panelists in a number of countries are pointing to an increase in politicized media ownership and the problems this poses for their media sector.

Political Control of Media

One of the core forces behind the international consensus that supports the rights to free speech and a free press is the protection of political speech. Vibrant political debate and politically sponsored messages make up a vital part of a strong democracy. Access to the mass media by all elements of the political spectrum is one pillar of sustainable plurality in the media. Transparent partisan media content is therefore a hallmark of a strong media sector.

However, there is a line where politicization of the predominant mass media in a country becomes counterproductive. An isolated media outlet that masquerades as a provider of news but is in reality a conduit for propaganda may have a limited impact if a number of objective media exist. A media sector dominated by partisan outlets, on the other hand, will undermine the effectiveness of a media sector as the "fourth estate."

Even in an ideal situation, it is unlikely that any single news outlet will ever serve perfectly as the only news source needed by any one individual, let alone an entire society. Media outlets cover different topics, and many cover the same topic differently. Complementary information, such as a recommendation by a friend on a social network, a radio news bulletin, an in-depth investigative story in text form, and the grass-roots perspective of a citizen reporter work to best inform citizens and allow them to make decisions that best suit their own priorities and interests.

However, the ability of humans to absorb information and the time each makes available for doing so is limited. In reality the optimal situation is one where many news outlets adopt an objective approach that presents many sides of an issue and exposes citizens to new and provocative ideas. When partisanship becomes the *raison d'être* of a critical mass of media outlets, access to objective information and plurality suffer as only the most avid media consumers have access to diverse ideas and points of view. Some media consumers will

make do with only the news they wish to receive. Unchecked, such a situation may lead to extreme divisiveness within a society.

Needless to say, a worse situation arises when partisan control of media overwhelmingly or even exclusively favors one political group. Media professionals, civil society, and even governments must therefore find a way to preserve space for political speech yet maintain a media sector that serves, first and foremost, the public's news and information needs.

In the context of the MSI studies, panelists have long complained about the damage politicization of media has on a media sector and the news received by citizens. For example, political control will negatively affect scores for professional journalism as balance in reporting and ethics are both compromised and self-censorship is more commonplace. Often partisanship will infiltrate publicly owned media and reduce scores for relevant indicators. In severe cases favored media outlets receive preferential treatment in access to information and media licensing. Partisan ownership may result in a distorted media market, as cronyism and not market principles affect sources of revenue.

How MSI Panelists are Reporting on Political Control

While such issues have plagued many of the countries studied by the MSI, this year's study revealed a trend toward increased politicization in a number of countries, threatening previous progress.

Panelists in Albania confirmed the difference in ethics and objectivity displayed by political party media. They lauded the performance of the media sector compared to institutions such as courts or parliament, but were mindful of the damage that politicization brings to the profession. One asserted that quality reporting stems from not only a journalists' professionalism, but also from their independence. Panelists in Bosnia point out that the media are fractured along both political and ethnic lines, and as one panelist explained, "only a few, truly independent media have the luxury of publishing objective and uncensored information."

Moldova panelists described a divide between media outlets: "Media outlets in Moldova can be divided into two categories: those that observe journalistic ethics and those whose editorial policies are unethical. Television channels, newspapers, news agencies, news portals—all media outlets in the country can be easily placed into one of these two categories as the politics of their editorial policies are clear." In Georgia the situation was described thusly: "The lack of objectivity is a major shortcoming in terms of professional standards. The largest television stations uncritically convey the government's

ideas and projects, while opposition-leaning stations do not do enough to balance their criticism of the government.”

In these examples, the balance between pro-government and opposition outlets is relatively balanced and there are at least some independent media. In other countries in the region, thanks in part to the efforts of political forces, that balance is squarely in favor of ruling political parties.

Ukraine and Russia are examples where formerly there was higher plurality and better parity between political media and now these have either diminished or are diminishing. In its initial study in 2001, Russia scored 2.28 for plurality, which is relatively respectable. It quickly lost ground, falling to 1.26 in 2005 and gaining back ground a few years later as online media became more prevalent. The change of scores over time reflects well the way that Russia’s ruling party has engineered changes in ownership of the most important media, primarily national television channels, into the hands of party faithful or even the state itself. Independent and opposition voices dwell mostly online and in print. Panelists there noted, “A relatively small group of independent media that adhere to principles of fair, objective, and well-sourced reporting, cover all key events and issues, do not practice self-censorship, and adhere to high ethical standards.” Most citizens in Russia do not benefit directly from the work of this small group, given the importance of television; however, their work is not without its impact.

Ukraine’s slide into increased politicization of the media and decrease in plurality is more recent and threatens to be just as detrimental to democracy as Russia’s. In Ukraine, panelists lamented the prevalence of paid-for media content. The going rate for favorable mentions of politicians may be upwards of \$1,000; some media outlets have even developed informal rate cards. National television is dominated by four holding companies that belong to supporters of President Yanukovich. That study also notes that the government appears to be using the switch to digital broadcasting as a means to further silence opposition voices: local and regional television stations who have been broadcasting for years are receiving far fewer digital licenses than requested or are being shut out entirely. Instead, the state-controlled regulator is handing the licenses to brand-new entrants. Some panelists in Ukraine felt that relatively good plurality exists, and one described a situation where citizens with sufficient wealth and time can get a full picture of events in the country by referring to news from multiple sources. Another panelist, however, was more pessimistic, and believed that the average person would not go to such lengths to get news.

Opposition media in such contexts are often little or no better than those controlled by their political rivals. Panelists in Azerbaijan and Kazakhstan, where control of key media

is sadly similar to Russia and, increasingly, Ukraine note that opposition media lack balance and often simply present a polar opposite version of stories reported in pro-government media. Panelists in Kazakhstan described opposition media as “one-dimensional.” By no means was this assessment unique to Kazakhstan.

Economic Vulnerability and Multinational Divestment

Political maneuvering is only one direct way to politicize media. Examples of unfair licensing procedures abound. Governments throughout the region use subsidies and directed advertising to support their friends and undercut critics. Perhaps the most striking example from the past year was the attempt by the Kyrgyz parliament to nationalize one pesky television station.

Politicians and their friends also take advantage of economic vulnerabilities to directly control media. The combination of imperfect markets, weak economies, and tight control of information conspire to hamstring the financial health of many would-be media entrepreneurs interested in building successful, independent media outlets. Essentially, it is very difficult to attract quality personnel, have them obtain timely information and report on events and issues thoroughly, and then be rewarded by the market for it. As a result, there is little incentive for investors to become involved in media other than as a public relations platform.

One of the most threatening developments in 2011 facing relatively well-performing media sectors, such as those in Romania and Bulgaria, is the divestment of ownership in respected media outlets by West European media conglomerates that have decided to pull back and focus on their core markets.

The downside of this divestment is that foreign ownership often means a certain amount of insulation from political pressure. Foreign investors are naturally wary of losing their investment through legal actions taken by an angry government. However, in countries that joined and seek to join the European Union, such action likely would be either illegal under terms of their membership or detrimental to their application. Therefore, foreign investors in much of Southeast Europe have leeway to run their media outlets there in much the same way they do in their home markets. And even if there might be hesitation to roil a host-country government, at least overt political bias is largely mitigated. This cannot be taken for granted with local ownership.

Indeed, most of the new owners—those wealthy enough to afford to purchase media outlets among those most respected in their countries—often have made their wealth through

political connections or are otherwise politically motivated, even if not in favor of the ruling party. Panelists from several countries reported such cases occurring in 2011.

Developments in Albania were instructive. Panelists reported a number of ownership changes during the year, but one in particular troubled them. An Italian media company financed a media group that started in the early days of the transition. The holdings of the group included the influential News 24 television, the prestigious daily newspaper *Gazeta Shqiptare*, and the successful RASH radio station. An investment group that panelists characterized as close to the government bought these outlets. For proof of that claim they noted how within months of the deal, the editorial bias changed from one favoring the opposition to one favoring the ruling party.

Panelists asserted that the wealth fueling these investors came from dealings with the government, such as procurement and privatization. One panelist warned, "These businessmen, who during the period of the socialist government were construction contractors, have become in some cases bank owners and are aggressively entering the media market with a bias that in the near future will create problems for media freedom." Likewise, panelists noted that broadcast licensing decisions have created more media favoring the government; in their estimation the media balance in the country has shifted in favor of the government.

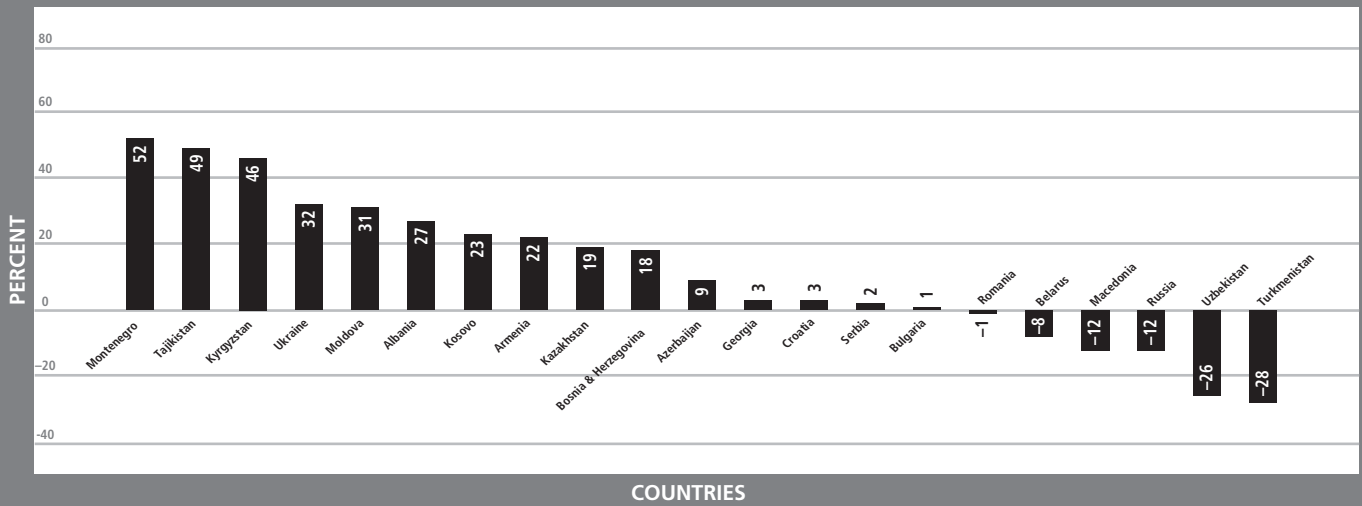
Bulgarian newspapers *24 Chasa (24 Hours)* and *Trud (Labor)*, owned by German media conglomerate Westdeutsche Allgemeine Zeitung (WAZ) for many years, were sold to an Austria-based investment company, BG Privateinvest GmbH in December 2010. The investment company was established expressly for this purchase, and is divided almost evenly between three investors, one Austrian, one German, and one Bulgarian. Despite initial reassurances that little would change, the new owners moved the longtime editors at each paper into less direct oversight roles and instituted editorial changes. The new owners are now locked in a disagreement; many staff that were unhappy with the editorial changes have left and plan to form a new daily in 2012.

In Macedonia, at the end of 2011 WAZ sold its subsidiary, Media Print Macedonia (MPM), encompassing three daily newspapers, a printing plant, and the leading print media distribution company. The buyer was a holding company owned by controversial local businessman Jordan "Orce" Kamcev. Panelists allege that Kamcev has close ties with the government. Repercussions from this sale come up throughout the Macedonia study. Panelists believe that the dominant position of MPM serves as a barrier to market entry. One panelist who is a newspaper owner said, "I would say that MPM is clearly a monopoly. Whether we want to do business with them or not, we do not have a choice," referring to print media distribution. Finally, given the government's closure of MPM's largest rival, the pro-opposition A1 group, plurality in Macedonia has suffered to the benefit of the ruling party.

Evenimentul Zilei, the one-time quality leader among Romanian newspapers, was sold in 2008 by its Swiss owner, Ringier. Ownership of the paper has bounced around for a few years, but at the end of 2011 it was in the hands of Dan Andronic. According to the author of this year's study, Andronic is a specialist in "negative public relations and blackmailing, close to the former government of Adrian Năstase but currently working for the current government of Năstase's adversaries." What is clear is that *Evenimentul Zilei* has been transformed from an example of quality journalism into an unabashedly pro-government outlet replete with personal attacks against opposition leaders.

The positive and negative implications of foreign ownership for editorial independence are by no means definitively proved with the above examples. Indeed, this topic would make for a worthy content analysis research project. Further, within the E&E region, it is only the countries of Southeast Europe, some of whom have joined the European Union and several who actively seek to, where there has been noteworthy Western European investment in the media. Beyond the protection of the European Union, foreign investment in regions farther afield might be managed in a different way.

PERCENT CHANGE IN MSI 2001–2011: EUROPE AND EURASIA



* Data for Turkmenistan is since 2008

MEDIA SUSTAINABILITY INDEX 2012: OVERALL AVERAGE SCORES

▲ Azerbaijan (1.89)	▼ Bosnia & Herzegovina (1.97)	□ Albania (2.23)	
□ Georgia (1.88)	□ Kazakhstan (1.68)	□ Armenia (2.01)	
▲ Kyrgyzstan (1.89)	▼ Macedonia (1.52)	□ Bulgaria (2.23)	
▼ Serbia (1.90)	▲ Russia (1.75)	▼ Kosovo (2.34)	
▲ Tajikistan (1.65)	▼ Tajikistan (1.65)	▲ Moldova (2.26)	
▼ Ukraine (1.81)	▲ Turkmenistan (0.30)	▲ Montenegro (2.40)	
□ Uzbekistan (0.64)	▼ Ukraine (1.81)	▲ Romania (2.35)	
□ Belarus (1.08)		□ Croatia (2.52)	
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 2011

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

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

MEDIA SUSTAINABILITY INDEX 2012: FREE SPEECH

<ul style="list-style-type: none"> ▣ Belarus (0.71) ▣ Turkmenistan (0.24) ▲ Uzbekistan (0.58) 	<ul style="list-style-type: none"> ▼ Azerbaijan (1.92) ▼ Kazakhstan (1.57) ▲ Russia (1.77) ▼ Serbia (2.00) ▲ Tajikistan (1.69) ▼ Macedonia (1.49) ▣ Ukraine (1.79) 	<ul style="list-style-type: none"> ▣ Albania (2.32) ▣ Armenia (2.23) ▣ Bosnia & Herzegovina (2.45) ▣ Bulgaria (2.46) ▣ Georgia (2.11) ▼ Kosovo (2.46) ▣ Kyrgyzstan (2.02) ▲ Moldova (2.37) ▲ Croatia (2.68) ▲ Montenegro (2.65) ▲ Romania (2.75) 					
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 2012: PROFESSIONAL JOURNALISM

<ul style="list-style-type: none"> ▼ Turkmenistan (0.56) ▣ Uzbekistan (0.68) 	<ul style="list-style-type: none"> ▼ Armenia (1.81) ▲ Azerbaijan (1.94) ▼ Bosnia & Herzegovina (1.68) ▣ Bulgaria (1.94) ▣ Georgia (1.76) ▣ Kazakhstan (1.64) ▲ Kyrgyzstan (1.77) ▲ Russia (1.56) ▣ Serbia (1.72) ▲ Tajikistan (1.73) ▼ Ukraine (1.63) ▲ Belarus (1.26) ▼ Macedonia (1.47) 	<ul style="list-style-type: none"> ▲ Albania (2.35) ▣ Croatia (2.15) ▼ Kosovo (2.20) ▲ Moldova (2.32) ▲ Montenegro (2.26) ▣ Romania (2.01) 					
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2011

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

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

MEDIA SUSTAINABILITY INDEX 2012: PLURALITY OF NEWS SOURCES

				<ul style="list-style-type: none"> ▼ Albania (2.40) ▼ Armenia (2.08) ▲ Azerbaijan (2.15) ▼ Bosnia & Herzegovina (2.16) ▼ Bulgaria (2.50) ▲ Georgia (2.05) ▲ Kyrgyzstan (2.19) □ Moldova (2.43) 	<ul style="list-style-type: none"> □ Croatia (2.90) ▼ Kosovo (2.51) □ Montenegro (2.68) □ Romania (2.68) 			
□ Turkmenistan (0.20)	▲ Uzbekistan (0.70)	▲ Belarus (1.32)	▼ Ukraine (1.86)	□ Kazakhstan (1.76)	▼ Macedonia (1.52)	□ Russia (1.78)	▼ Serbia (1.93)	▲ Tajikistan (1.99)
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 2012: BUSINESS MANAGEMENT

				<ul style="list-style-type: none"> ▼ Albania (1.61) ▼ Armenia (1.73) ▲ Azerbaijan (1.51) ▼ Bosnia & Herzegovina (1.61) ▼ Bulgaria (2.00) ▼ Georgia (1.48) ▲ Kyrgyzstan (1.43) ▼ Macedonia (1.20) □ Tajikistan (1.17) 	<ul style="list-style-type: none"> □ Kazakhstan (1.56) ▼ Kosovo (1.88) ▲ Moldova (1.81) ▲ Russia (1.64) □ Serbia (1.71) ▼ Ukraine (1.71) 	<ul style="list-style-type: none"> □ Croatia (2.17) □ Montenegro (2.06) ▲ Romania (2.03) 	
□ Turkmenistan (0.19)	□ Uzbekistan (0.71)	□ Belarus (0.88)					
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 2012: SUPPORTING INSTITUTIONS

				<ul style="list-style-type: none"> □ Azerbaijan (1.93) ▼ Bosnia & Herzegovina (1.95) □ Georgia (2.00) ▲ Kazakhstan (1.87) ▲ Macedonia (1.93) ▲ Russia (1.99) ▲ Tajikistan (1.69) 	<ul style="list-style-type: none"> □ Albania (2.48) ▲ Armenia (2.22) □ Bulgaria (2.26) ▲ Kyrgyzstan (2.03) □ Moldova (2.35) ▲ Montenegro (2.35) ▼ Romania (2.30) ▼ Serbia (2.17) ▼ Ukraine (2.09) 	<ul style="list-style-type: none"> ▲ Croatia (2.72) ▲ Kosovo (2.63) 	
□ Turkmenistan (0.32)	□ Uzbekistan (0.53)	□ Belarus (1.22)					
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 2011

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

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

When partisanship becomes the raison d'être of a critical mass of media outlets, access to objective information and plurality suffer as only the most avid media consumers have access to diverse ideas and points of view.



IREX prepared the MSI in cooperation with USAID as a tool to assess the development of media systems over time and across countries. IREX staff, USAID, and other media-development professionals contributed to the development of this assessment tool.

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

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

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

Scoring: A Local Perspective

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

The scoring is completed in two parts. First, panel participants are provided with a questionnaire and explanations of the indicators and scoring system. Descriptions of each indicator clarify their meanings and help organize the panelist’s thoughts. For example, the questionnaire asks the panelist to consider not only the letter of the legal framework, but its practical implementation, too. A country without a formal freedom-of-information law that enjoys customary government openness may well outperform a country that has a strong law on the books that is frequently ignored. Furthermore, the questionnaire does not single out any one type of media as more

important than another; rather it directs the panelist to consider the salient types of media and to determine if an underrepresentation, if applicable, of one media type impacts the sustainability of the media sector as a whole. In this way, we capture the influence of public, private, national, local, community, and new media. Each panelist reviews the questionnaire individually and scores each indicator.

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

IREX editorial staff members review the panelists' scores, and then provide a set of scores for the country, independently of the panel. This score carries the same weight as an individual panelist. The average of all individual indicator scores within the objective determines the objective score. The overall country score is an average of all five objectives.

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

Changes and Additions in 2011

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

Highlights of the Changes

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

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

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

Impact on Scores of the Methodology Changes

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

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

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

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

I. Objectives and Indicators

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

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets' access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

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

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens' access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources
- > The media provide news coverage and information about local, national, and international issues.

MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

II. Scoring System

A. Indicator Scoring

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

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

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

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

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

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

B. Objective and Overall Scoring

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

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

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

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

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