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BELARUS

Belarus's overall score has remained largely unchanged over the past several years, reflecting the somewhat stagnant state of the Belarusian media sector. The indicators measured by the MSI study where the government's grip and interference are most apparent scored the lowest. Those traditionally include registration and licensing of media outlets, editorial independence of public and state media, access to public information, self-censorship, unbiased reporting by state media, state subsidies to media, and access to printing and distribution facilities.

Just as in other sectors, the government of hardline President Aleksandr Lukashenka has adopted a Soviet-style vision of journalism, where media should support the leadership rather than operate as a watchdog. The preponderance of Belarusian media, by measure of audience, is still state-owned. They toe the official line rather than offer any range of debate or viewpoints. Digital platforms, however, have grown more popular and offer more balanced coverage. Only online media, and several dozen private newspapers and expatriate broadcasters, provide reporting and commentary that is otherwise not tolerated in mainstream media.

The legal environment remains hostile, with strict registration and compliance requirements in place for traditional outlets. Libel is criminalized, and public officials enjoy enhanced protection. Critical media face hefty fines, or jeopardize their registrations or licenses. Many laws regulating the media are vaguely worded, with the lack of precise definitions opening up the potential for massive abuse. Meanwhile, the resources and impact of trade and professional associations, as well as NGOs, is very limited.

Most media are also trying to survive a tough economic climate. Although the advertising market grew by a healthy 30 percent in 2013, it was still only \$100 million. Around 2,000 of both "old" and online media find it very difficult to rely on their advertising revenue. As a result, the amount of direct funding is immense. The national government alone provides \$70 million in subsidies and offers tax breaks to the biggest state-owned broadcasters. Many private outlets are either funded by their owners or are looking for sponsors, both domestic and foreign. Printing presses, transmitters, newspaper kiosks, and telecommunications infrastructure are largely state-owned—thus, they are politicized and, in most cases, inefficient.

Insufficient revenue continues to erode editorial independence, making it difficult to retain key staff. Hence, the quality and depth of reporting suffers. The state of journalism is further exasperated by restricted access to information, as the Belarusian government tries to keep a lid on most public information. Meanwhile, officials also accused privately owned news outlets of bias and pro-opposition editorial lines, contributing to the polarization of the media sector.

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," which 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.

BELARUS at a glance

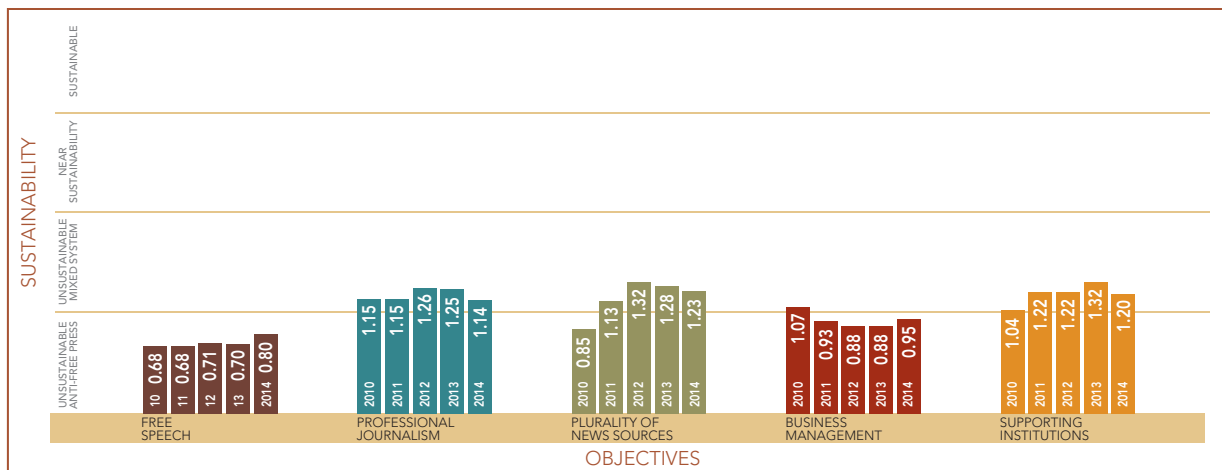
GENERAL

- > Population: 9,608,058 (July 2014 est., *CIA World Factbook*)
- > Capital city: Minsk
- > Ethnic groups (% of population): Belarusian 83.7%, Russian 8.3%, Polish 3.1%, Ukrainian 1.7%, other 3.2% (2009 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 (official) 53.2%, Russian (official) 41.5% (2009 census)
- > GNI (2012-Atlas): \$61.76 billion (World Bank Development Indicators, 2013)
- > GNI per capita (2012-PPP): \$14,960 (World Bank Development Indicators, 2013)
- > Literacy rate: 99.6 % (male: 99.8 %, female: 99.5%) (2009 est., *CIA World Factbook*)
- > President or top authority: President Alexander Lukashenka (since July 20, 1994)

MEDIA-SPECIFIC

- > Number of active print outlets, radio stations, television stations, Internet news portals: 1,746 (Newspapers: 692, journals and magazines: 739, radio stations: 166, TV stations: 89, bulletins: 40, catalogs: 9, information agencies: 9 and almanacs: 2 (December 2012, Ministry of Information); Internet News Portals: 25 (2012, Gemius)
- > Newspaper circulation statistics: Top three by circulation *SB. Belarus Segodnia* (circulation 2,000,000, state-owned), *Komsomolskaya Pravda v Belorussii* (circulation 522,000, private, Russia-owned), *Respublika*, (circulation 240,000, state-owned) (December 2012, Medusa advertising agency)
- > Broadcast ratings. Top three by share: ONT—26.71%, NTV-Belarus—17.89%, RTR-Belarus—14.1% (January–June 2012, NOVAK)
- > 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, 2012)
- > Annual advertising revenue in media sector: \$76.2 million (\$41.9 million television, \$10.1 million press, \$7.9 million Internet, \$4.11 million radio) (ZenithOptimedia advertising group, December 2012)
- > Internet usage: 4.437 million (2010, www.internetworldstats.com)

MEDIA SUSTAINABILITY INDEX: BELARUS



MEDIA SUSTAINABILITY INDEX 2014: OVERALL AVERAGE SCORES



CHANGE SINCE 2013

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

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

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

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

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

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

OBJECTIVE 1: FREEDOM OF SPEECH

Belarus Objective Score: 0.80

Legal and social norms, which are intended to underpin the freedom of speech, remain weak and largely ineffective. Although the score for this objective saw slight improvement, up to 0.80 from 0.70 the previous year, it once again fell short of meeting the requirements of at least partial sustainability. The growth was attributed to similar business requirements for market entry (indicator 3) and the lack of crimes against journalists (indicator 4); otherwise, all indicators remained static.

The freedom of expression is, in the words of one of the panelists, allegedly guaranteed by the Belarusian constitution and other legislation, including the media law. "These laws and regulations are enforced, to a degree, so as to restrict the freedom of speech. And since there are hardly any protections, there is no need to set them aside in case of an emergency."

Another panelist lambasted the ambiguity of Belarusian laws: "All laws—whether they deal with social security or media—are full of legal traps." The media law, for example, contains a vague requirement that information reported by media should be "compliant with reality." The law on extremism was also very loosely drafted, making any critique of the government dangerous.

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.

The panelists also doubted that courts could offer protection against unjust threats or legal action. "No one even tries [to seek that protection in court]," a panelist argued, recalling years of politicized court rulings that were used to punish the media and journalists critical of the government.

One of the panelists mentioned the withdrawal of the license from Lohvinau Publishers, an independent book publishing house in Minsk, in the past year. The Belarusian Ministry of Information, a regulator of both the media and publishing sectors, canceled the company's publishing license in September 2013, citing gross violation of licensing requirements. In its notice, the Ministry referred to a decision by the Ashmiany district court in the Hrodna region, in northwestern Belarus, that branded an album of news photos published by Lohvinau Publishers as extremist. This April 18, 2013 decision was upholding a request by the Belarusian KGB security service to classify the photo album as extremist and therefore degrading national pride.

The 160-page *Belarus Press Photos 2011* showcased the best news photos of 2010, selected by an international jury. All of the photos were sent to the photojournalism contest by Belarusian photographers working for state and private media, as well as international news agencies. "Extremism" was found in news photos, most notably pictures of police crackdowns on anti-government protests, and in photos in the nature and sporting categories.

Prosecution-retained experts said the album "contained only negative aspects of the life of Belarusians, presenting them as penurious and hard-drinking people, and the country itself as a militarized society. It also left the reader with a negative impression about both Belarusian people and the state as a whole, suggesting distribution of distorted information about Belarus that degraded the national honor and dignity of Belarusian people."

In November 2012, border guards seized 41 copies of the photo album from competition organizers as they returned to Belarus from Lithuania, where the book was printed, despite the fact that hundreds of copies had already been sold in Belarusian bookstores and donated to libraries in 2011 and 2012.

In June 2013, the regional court in Hrodna upheld the earlier decision by the district court to classify the book as extremist. It should be noted that Lohvinau Publishers was never a party to the two aforementioned "extremism" hearings. Its subsequent legal action against the Ministry of Information to reinstate the license was unsuccessful.

Violations of freedom of speech do not cause any public outcry, the panelists agreed. "People do not think that the government is accountable, so they prefer not to waste

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efforts on things they feel they cannot change,” one panelist commented.

The law guarantees the confidentiality of news sources, but that right may be lifted by a court order or a request from an investigating authority as part of a court hearing or criminal investigation. The panelists mentioned several cases when journalists—in most cases, those who covered law enforcement and corruption issues—were summoned to the public prosecutor’s office and requested to reveal the identities of their sources. However, as far as the panelists know, no one was punished for failure to do so.

The law requires registration of print and broadcast media. Print media with a circulation of more than 299 copies and broadcast media reaching more than 10 people, as well as information agencies, must obtain registration from the Ministry of Information. Applicants are required to list numerous details about the outlet, including the proposed specialization (topics to be covered), frequency, area of distribution, sources of funding, and detailed information about the would-be editor-in-chief. The latter ought to have journalism diplomas and at least five years of editing experience.

From January through November 2013, 89 outlets obtained their registration from the Ministry of Information; of those, 81 were private. Applications for 56 magazines and journals (54 private), 21 newspapers (19 private), four television stations (two private), two radio stations (one private), and five catalogs and bulletins (all private) all won approval from the ministry. Meanwhile, five newspapers, three magazines and journals, and two catalogs lost their registration.

The 2008 Law on Media mentioned online media, yet so far they have avoided those cumbersome registration and compliance procedures. And yet, there are hardly any benefits or safeguards their registered status might offer them, the panelists agreed.

The government restricts access to public information. Under the 2011 Law on Requests by Individuals and Legal Entities,

requests for information from media outlets are treated in exactly the same way as those from other organizations or individuals. In general, the law allows an organization, a business, or a public authority 30 days to respond to an information request. Many government bodies and local authorities use an unregulated system of press accreditations to deny access to both information and access to events for critical media outlets, regardless of their registered status.

Several statements by government officials, most notably by a deputy information minister, suggested that the government would adopt a law requiring registration of the most popular online media, with unclear criteria to assess “popularity.” “Definitions, as usual, will be quite vague, thus making it possible [for the government] to use the law at its own discretion. The biggest websites would be registered; the others most likely will not be allowed and will be kept instead in limbo,” one panelist predicted.

In addition to the aforementioned registration procedure, television and radio stations also must prove their fitness for a broadcast license. Frequencies are allocated via a tender administered by the Republican Commission on TV and Radio Broadcasting—the nine-member body of government officials headed by the minister of information. Successful bidders then receive a license from the Ministry of Communications and Information to use the allocated frequency.

The government did not publish the list of available frequencies; it was up to the Ministry of Information to decide whether a certain region needed one more television or radio station. In 2013, the Ministry announced only one frequency tender—for an FM radio station in the northeastern city of Viciebsk. According to a panelist, he came to know about the tender quite accidentally. There were no announcements on the Ministry’s website or in state media. The tender was announced in November 2013, with the deadline less than a month away. As noted above, applicants should already have registered both a media outlet (registration takes up to 30 days to complete) and a company to act as a broadcaster. Just as with registering a media outlet, bidders should provide detailed information, including the so-called creative concept that details what kind of programming the station would be offering. As usual, the Ministry failed to report whether it received any applications.

Both registration and licensing procedures remained opaque and politicized. “Disloyal media are de facto banned from obtaining official status of registered broadcast outlets. There is no television channel or an FM station, with editorial lines running counter to governmental policies. Print media are rigidly licensed: there is an unwritten

rule that the decision on registration of a newly created media is made in the presidential administration, after personal dossiers of both the founder and the editor are scrutinized. On the other hand, online media are not yet licensed, and such websites are usually not blocked," a panelist commented.

Although digital terrestrial broadcasting would theoretically allow more room for numerous radio stations and television channels, there was only one television multiplex with eight channels (only one of them was private, and it offered only entertainment content). Two more multiplexes were to be launched soon, yet the inclusion procedure is not yet known. Digital radio adoption remains low (there is only one state-run radio station).

Market entry for media was essentially the same as in other sectors, except that unlike in other sectors, sole proprietors could not run a media business. Ownership-wise, the media law capped at 30 percent foreign ownership of outlets. Another exception is that activity of any registered media outlet could be suspended for up to three months without a court ruling, following a written warning from the Ministry of Information—for example, over allegedly incorrect reporting. Taxation of media outlets is the same as for other businesses, although the three biggest state-controlled television and radio networks have been enjoying value-added tax (VAT) and profit tax breaks for several years.

Crimes against journalists remain rare. At the same time, journalists do not feel secure, mostly because of crimes against journalists several years ago that were never properly investigated, according to one panelist. Some journalists covering law enforcement and corruption have come under pressure from the office of the public prosecutor, according to another panelist. Meanwhile, the police briefly arrested 45 journalists in 2013, according to the Belarusian Association of Journalists, a press-freedom watchdog. Four of these journalists had to spend three to 15 days in jail for allegedly disobeying lawful police orders. "Press cards are not affording any particular protections, or preferential access to information or certain venues," one panelist noted.

Belarus has no public media. As for state-owned outlets, they enjoy very little editorial independence from the government. The president himself appoints editors of key national media, while his administration or regional authorities approve candidates to serve as editors for smaller outlets.

Direct government funding, subsidized tariffs, and tax breaks for the biggest outlets further compromise the state media's prospects for editorial independence. At the same

time, rather than promoting a range of viewpoints, they have become tools of government propaganda. "State media are fully subordinate to the government. The public has no leverage over them," a panelist added. And although the media law does not discriminate against private outlets, their access to official information remains restricted, mostly via an unregulated system of accreditations.

Criminal libel provisions still reside in Belarusian statutes and carry a prison sentence of up to six months. Separately, individuals and businesses can also bring civil defamation charges in civil courts. Unlike with criminal libel charges, the burden of proof for civil suits falls on the defense.

Although dozens of journalists faced criminal libel charges in previous years, "such attacks against media remain very pointed and are still uncommon," a panelist said. There were no reports of criminal libel charges brought against media outlets in 2013. In the case of civil charges, paying the legal costs of defending such suits and even damages awarded to the claimant "is not likely to bankrupt an outlet," the same panelist added. The Criminal Code also has a chilling effect on reporting about public officials: the penalty for "insulting a representative of the authorities" is up to six months in prison. Most notably, "insult of the president" is punishable by up to two years in prison, and "calumny toward the president" by up to four years.

Online forums, chats, and blogs make it much easier to post potentially defamatory content. And since many users were paying little consideration to possible legal implications, more of them were becoming targets of both criminal and civil lawsuits, in most cases filed by public officials or law enforcement.

In July 2013, a district court in the capital, Minsk, handed down a \$700 fine over two critical comments about the police, posted on a forum of Belarus's biggest portal, TUT.by. The defendant, a playwright with a Minsk theater, said he also had to quit his job after his boss received a phone call from the ideology department of the Minsk City administration.

In August 2013, the office of the public prosecutor in the western town of Pruzhany started an inquiry into alleged defamation of judges by commentators at a local website.

In the same month, police in the southeastern town of Svetlahorsk confiscated the computer of a local blogger and civil society activist, as part of a libel investigation. The blogger made a rather controversial video and posted it on several social networking sites, alleging that the local government was spending public funds on building an expensive house for the mayor, rather than bolstering the town's poor infrastructure. The mayor's wife filed a libel complaint with the local police claiming that the video was

“obscene” and insulted her and her family. There were no reports about further developments, although the blogger said he received text messages with threats.

In November 2013, police confiscated the computer of an editor of a local website in the eastern town of Rahachou, as part of a criminal investigation into alleged insult of a public official. Also in November 2013, a journalist with one of the news agencies was fined \$2,000 for insulting a judge in a comment under a courtroom story.

The law, meanwhile, absolved Internet service providers (ISPs) and web hosts of liability for third-party content that they either transmit or store.

Both the Belarusian constitution and the 2009 Law on Information, Informatization, and Protection of Information guaranteed the right to “receive, store, and disseminate complete, truthful, and timely information on the activities of state bodies, public associations, political, economic, cultural and international affairs, and the environment.” Still, access to public information remains a sore point: “Access to sources of public information is restricted and dependent on a media outlet’s loyalty to the authorities. Laws on access to information are not enforced, by means of bureaucratic hurdles,” a panelist said.

On the other hand, the same laws allow government bodies to classify any information as “secret” or “of limited distribution” and thus restrict access. Furthermore, in many cases information could be obtained only via press services or ideology departments, most of which, especially regional ones, tend to be closemouthed. “Most officials grew accustomed to making public statements either via press conferences or to journalists who would agree to have their stories redacted before publication,” a panelist commented. “In addition, many government organizations think private outlets are biased or pro-opposition. As a result, even the most innocuous pieces of information are withheld—such as, for example, the number of foreign students at the local university, or when reconstruction of a local train station will begin, or whether any students of the local sporting school will attend a certain competition.”

Media, just like any other organizations or individuals, may request information under the 2011 law on requests by individuals and legal entities. The law set a maximum time for response of 15 days (30 days when additional inquiry is required). Although information requests are supposed to be handled free of cost, the 2004 Law on State Statistics said statistics departments “may offer paid services.” For instance, the statistics department of a local administration told one of the regional private newspapers that the department would either provide information that was readily available, or charge for the time and resources

involved in conducting requests, according to a panelist. Sometimes government bodies dismissed information requests on the grounds that such information had been already been given to state-owned media, regardless of whether the state media ever published, or intended to publish, the information.

Separately, many events required accreditations, which in most cases could be obtained only by officially registered outlets. State bodies and local governments also used accreditations to secure better access to information for noncritical (usually state-owned) media.

At the same time, very few media outlets attempted to fight the restricted access to information. The panelists mentioned only two private regional newspapers, *Intex-press* and *Brestskaya Gazeta*, both in the southwestern Brest region, that were trying to appeal dismissal of accreditations and information requests. Their claims, which were filed both with local and regional governments, were brushed off. “I do not recall a single case when an official was held responsible for the failure to provide information,” one panelist added.

Access to both domestic and international news sources has remained “relatively free,” as one of the panelists put it. Although there was a blacklist of some 80 websites, banned in state institutions, libraries, schools and universities, as well as by some ISPs, both newsrooms and the general public had no problem accessing them or reading their stories on other websites. Several popular pro-opposition news websites, a popular blog, and the website of a human-rights group were on this not-for-publication list, according to numerous reports. On several occasions in 2013, those same websites were also subjected to DDoS (distributed denial of service) or hacking attacks that took them offline for several hours, but those attacks were quite rare.

“At the same time, respect for copyrights is not up to par: there are many cases of pirated use of intellectual property,” a panelist said. The 2011 copyright law gives a somewhat ambiguous definition of the fair use of copyrighted work. In most cases, stories were usually copied in full (primarily by online media and bloggers).

Entry into the journalism profession is relatively free. Still, the government does use a definition of a journalist: one who works for an officially registered Belarusian media outlet or is accredited with the foreign affairs ministry as a foreign correspondent. Although press-card holders have very few benefits over freelancers, civil journalists, and bloggers, the latter are even less protected. One of the panelists mentioned brief arrests of reporters covering protests, as well as warnings handed out by the office of the public prosecutor to those who work for foreign media

without accreditations. The Belarusian Association of Journalists reported about 51 cases of violation of the rights of freelancers and bloggers throughout 2013. Two-thirds of those cases were related to incidents during newsgathering and mostly involved interference by police and other officials with access for media covering news events.

One of the panelists referred to the accreditation of foreign correspondents as a sort of lever the government might use to influence the employment policies of foreign media organizations. He mentioned four offshore broadcasters targeting Belarus. "There is a [satellite] television channel, Belsat television, and three radio stations, Radio Racyja, European Radio for Belarus, and Radio Liberty. Only the latter two were allowed to open offices in Belarus and accredit a certain number of reporters the foreign affairs ministry deemed sufficient for them. As a result, they were able to work more openly. As for non-accredited journalists working for Belsat and Radio Racyja, they oftentimes just cannot do their jobs properly, and on top of that are forced to withstand warnings and arrests. Freelancers and bloggers face similar hurdles. Citizen journalism is virtually non-existent, as there are no legal protection mechanisms and no financial support."

There is a special requirement for chief editors: they should have journalism diplomas and at least five years of editorial experience for their outlets to receive registration with the government. The government also controls entrance to journalism schools via admission interviews that although being "much of a formality, still have certain ideological criteria," as one of the panelists put it. On top of that, graduates who receive their education for free are required to work for two years wherever the government sends them or reimburse the cost of their tuition and stipends (around \$13,800, equivalent to two years of the country's median salary). For several years now, graduates of state-controlled journalism schools are sent to work at government-owned media only, mostly to regional newspapers.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Belarus Objective Score: 1.14

Professional standards are still hampered by political interference, self-censorship, and inadequate remuneration practices. This year's score showed a slight drop due mostly to a lower evaluation of indicator 4 (coverage of key events). Other indicators remained more or less unchanged.

Belarusian media remain polarized and divided along ideological lines. As a result, journalism standards suffer. One of the panelists described one particularly entrenched

attitude: "Read a government-owned newspaper, then an oppositional one, add both together, and divide it by two. People think that's the only way to get more or less unbiased information."

His colleague argued: "As journalism in Belarus often turns into propaganda, only certain irrelevant aspects of social life are covered objectively by state-owned media. Particularly aggressive propaganda is broadcast through the television. Hence, objective journalism is the lot of independent media, and yet not all of the independent outlets manage to maintain high standards of journalism." Information is oftentimes just borrowed from other sources and not verified. In many cases, media outlets recycle stories from news agencies. And while agencies, in general, offer balanced coverage, individual stories might be one-sided. "Media just borrow those individual stories and paint any picture they want," one panelist remarked.

There is also a preconceived opinion that state bodies will give no comments to independent media. State media, meanwhile, do not seek comments from people who they think might be related to the opposition or civil society, so they try to get comments from state officials only. Furthermore, most newsrooms feel they have neither time nor resources for background research. Technical experts are another traditional sore point. Mostly economists and political analysts are approached for comments. "Yet they are a small group, and the same experts give the same comments that end up in several outlets at the same time," one panelist explained.

Two organizations of journalists operate in Belarus: the government-controlled Belarusian Union of 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).

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and the independent Belarusian Association of Journalists. Both have ethical codes of conduct that are actually quite similar. Yet, the panelists argued, both organizations fail to fully employ their codes. “Yes, there are ethical codes, but they are only taken out when someone is to be punished or chided. Journalists are hardly keeping them in mind. When there is a need, they will sell out, both journalists and newsrooms,” one panelist said.

Hidden advertising is quite common as well: 42.7 percent of those polled in a national market survey said they have faced hidden ads in media. In many cases, they were used to sidestep legal requirements that restricted the amount of advertising to a certain percentage of content. Sometimes advertorials made it to the top news of the day, even “de-throning” stories about the Belarusian president, most notably on the website of the government news agency BelTA or during the flagship news program at a key state-controlled television channel. “If there is any way to avoid marking the story as sponsored content, most outlets will choose to do so,” a panelist said. Although there was no convention on plagiarism, there had been some improvements, such that more outlets were quoting original sources.

Self-censorship remains the rule of the day, especially with regard to political coverage. Government-owned outlets kept tight control on any negative information. Private media were susceptible to both political and commercial influence. Self-censorship is so commonplace, one of the panelists argued, that *SB. Belarus Segodnia*, the country’s most popular daily and the mouthpiece of the presidential administration, sometimes turns out to be more sharp-toothed than many private ones.

Not all topics are covered: “Personal life of the president; businesses connected to his family; the business interests of his allies...those are topics to be avoided. Corruption cases are something on the verge. Still, there are topics that are ‘permitted.’ For example, when an official falls out of favor, his or her [corruption] case can be reported. And on the other hand, let’s recall the case of the blogger who made a

video about the mayor’s house. You can be punished even for something like that,” a panelist said.

Covering law enforcement, especially the way major cases were handled, is yet another problem. Most notable was reporting about the bombing of Minsk’s busiest metro station in April 2011, which killed 15 and wounded more than 300 people. The alleged perpetrators were caught two days later, put to trial, convicted, and finally executed in 2012. Yet many believed they were forced to confess, while the actual bombers and masterminds are still at large. The government did not respond in a welcoming way to any scrutiny of this attack, Belarus’s biggest terror attack.

In April 2013, several days before the second anniversary of the attack, Aleh Hruzdilovich, a correspondent with the Belarusian service of the Prague-based Radio Liberty, decided to test the allegedly beefed-up security of Minsk metro system. He made three attempts to carry a large bag with a metal object past security officers at the same metro station that alleged bombers had used on the day of the attack. He was stopped only once, which he mentioned in his report for Radio Liberty. A month later Hruzdilovich, who has also written a book, *Who Bombed the Minsk Metro*, was summoned to Minsk’s office of the public prosecutor and asked to provide written explanations on how he was trying to smuggle the bag past security. After that he was handed a warning that mentioned both the Radio Liberty report and the book. Hruzdilovich was charged with “dissemination of biased and deliberately distorted information.” In particular, the prosecutor’s office believed that his book cast doubts on “the official results of the criminal investigation... as well as the fairness of Belarusian judicial system as a whole.” Hruzdilovich was also warned of criminal liability (up to two years in prison) over discrediting Belarus and its official bodies.

One of the panelists also mentioned a 2013 outbreak of African swine flu and the way it was handled by the government. At first, the Ministry of Agriculture denied that it detected the disease, “openly telling journalists it would file libel suits against anyone who reported about the alleged outbreak,” according to a panelist. Later the authorities had to acknowledge that there was indeed an outbreak and took unprecedented measures to contain it by killing livestock on large pig farms as well as in private households, causing widespread popular discontent.

Speaking of the topics the media tend to focus on, one of the panelists argued that there are very few stories about the lives of ordinary people, and “many stories covering the establishment, the authorities, the opposition, and things like that. There are very few stories about life in rural areas, or hyper-local topics. Hardly anyone writes about these.

There are very few ‘human stories.’ And all of that is not government-imposed; it’s just happened that way. There is just no tradition. And yet painfully, they write about political topics that readers have no interest in.”

Media professionals are better off than those who work in schools and hospitals, yet their salaries are hardly higher than the country’s average, the panelists agreed. “There are many journalists who would like to earn more and are looking for work in other outlets. Yet very few new media projects, and thus very few additional workplaces, emerge. At the same time, the supply of journalists’ labor is growing,” said a panelist. Many journalists, especially in the capital, Minsk, and regional centers, tend to work for several outlets. Bloggers and citizen journalists rely on other jobs. The turnover had been quite high for several years already, with many experienced reporters leaving their outlets either for other industries (primarily advertising and public relations) or other countries (mostly Russia).

Pay levels vary across the sector, with heavily subsidized state-controlled outlets, as a rule, offering higher salaries. Yet private outlets are somewhat catching up, according to the panel, mostly because of both salary cuts in state outlets and hikes in private ones. Entry-level reporters usually draw \$350 a month, experienced reporters around \$500, while editors and sub-editors might earn \$1,000–\$1,500, according to a panelist. Those figures might be higher for bigger outlets and in bigger cities. Meanwhile, the national monthly average reached \$620 in December 2013. One of the panelists mentioned that major online media, such as TUT.by and Onliner.by, are among highest-paying companies and thus have started to influence pay levels across the industry. Their competitors are finding it very difficult to retain key reporters and advertising managers.

Commercially popular entertainment content tends to eclipse news and information pretty much everywhere except in some newspapers and websites, according to the panelists. They also said audiences are opting for entertainment more and more, especially as so much of the news reporting provides little new information. Despite this, 72.3 percent of adults polled in a national survey said media’s main job is to provide news, while only 5.4 percent said that media’s main purpose is to entertain.

Basic equipment and technology for newsgathering and reporting is easily available. Yet more and more outlets are looking beyond that. However, only the larger media organizations can afford professional equipment for high-quality, multimedia reporting; they also cannot afford to build sophisticated websites with extra services that could help monetize their content. Widespread use of pirated software is another sore point. One of the panelists argued

that there is a lack of knowledge on how to efficiently use the technology and equipment that is already at journalists’ disposal. “For example, everyone has mobile phones. Every phone has a voice recorder. But people do not use it [during interviews] because they do not even know that is possible,” the panelist said.

Some niche reporting exists, yet its quality is somewhat below par, the panelists argued, saying that low salaries, political and ideological restrictions, and a lack of adequately trained staff are all to blame. “Investigative journalism and media think it is only about crime and corruption, which has almost gone extinct. There is some business journalism, yet it still leaves something to be desired. Local reporting is still alive, but not in all regions. Political journalism is simply of no interest either for readers or journalists. In general, all this analytical reporting is time-consuming, and since nobody wants to pay for that, it is often being passed over,” said one of the panelists. Also, another panelist added, there is no economic reporting and analysis that could explain—in layman’s terms—what is happening to the national currency. It devalued by 189 percent in 2011, and by 25 percent in 2009. And since the government is still pursuing the same populist economic policies, people are haunted by memories of those meltdowns. Yet they were not able to make well-informed decisions, and in most cases had to rely either on rumors or on everything-will-be-fine slogans.

OBJECTIVE 3: PLURALITY OF NEWS

Belarus Objective Score: 1.23

By and large, Belarus is well served by various types of media. Yet not all of them produce their own news or unique content, and thus a multitude of media outlets has not translated into a great variety of viewpoints that Belarusian audiences are exposed to. In addition, the quality and depth of reporting are compromised by commercial imperatives. Indicators dealing with biased editorial policies of state media (indicator 3), state monopolization of media ownership (indicator 6), and under-reported minority issues (indicator 7) received the lowest scores. The overall score of this objective remained almost unchanged, with the tiny decrease due to a lower evaluation of indicator 7.

In December 2013, Belarus’s information ministry had over 1,825 “traditional” media outlets on its registers; 1,235 of them were private. In particular, there were 709 newspapers (503 private), 791 magazines and journals (598 private), 168 radio stations (24 private), 93 television channels (59 private), 40 bulletins (29 private), nine information agencies (seven private) and two almanacs (all private). Apart from those, there are hundreds of online media.

Television remains the primary news source: 91.9 percent of those polled in a market research study in June 2013 cited television as their preferred source of news. The Internet came in second place; Belarusians said they turned to it the most for news (63 percent), followed by newspapers (60.9 percent) and radio (48.5 percent). Preferred news sources vary mostly by the audience age. Older generations put more emphasis on television and newspapers, and less so on the radio. The widest margins were recorded for digital platforms: 93.7 percent of those aged 18–29 said they get news from the Internet, compared with 79.1 percent for people aged 30–44, 43.7 percent for those aged 45–60, and only 14.3 percent for those aged 61 and older.

The government retains tight control over most of the traditional media, first of all broadcast outlets. “Print media, radio, and television are—with some exceptions—the mouthpieces of pro-regime propaganda, and their coverage of news and social processes is biased,” a panelist commented. “Information pluralism is observed only in online media and on social networks, and to some extent in print media.” Another panelist added, “State media unequivocally stick to the single point of view; ‘semi-state’ media cover social issues yet shun political ones. As for private media, it depends on how bold they are. But in many cases it is worthwhile for them to report on some sensitive issues and criticize the government, since that is the reason people buy them. That is why, in many cases, they do offer varying viewpoints.”

Meanwhile, according to the same survey, an average Belarusian generally watches six television channels,

uses four websites, reads three newspapers, and listens to three radio stations. Rural areas were in most cases served by fewer state-owned television and radio stations and government-owned newspapers. The panelists also mentioned that ZALA, an interactive television service from state telecommunications monopoly Beltelecom, is gaining in popularity, including in rural areas that are not reached by other cable networks.

Social networks are quite popular: 28.9 percent of those polled in another survey, also in June 2013, said they were using Vkontakte.ru, a popular Russian-owned service; 28.4 percent mentioned Odnoklassniki.ru, another Russian social network. Facebook and Twitter were cited by 14.8 percent and 7.9 percent, respectively.

The Belarusian government retains tight control over distribution channels, though, as a means to restrict access to critical media. Non-loyal domestic publications are either banned from state-owned distribution and postal networks, or they are allowed to sell only a certain number of copies. Strict registration and licensing rules made it impossible to start an independent broadcaster. Cable operators must first seek approval from local governments of television channels they plan to transmit via their networks. Foreign press and broadcasters need express permission from the Ministry of Information to be distributed in Belarus.

On the other hand, the Internet is still largely unregulated, and it is both widely available and affordable. Installing a satellite dish does require a permit from local housing authorities, yet that is just a formality that is often ignored, according to a panelist. Alternatively, the permit could be obtained via a company that sells satellite equipment, for a small extra charge. Affordability is an issue mostly in the case of foreign media. At the same time, domestic press sales are dwindling, less so in the case of regional newspapers.

Belarus has no public media, the panelists emphasized. State-owned media are, in the words of a panelist, “instruments of state propaganda and manipulation of public opinion... Groups and activists that embody a political alternative were either ignored or deliberately discredited. The lion’s share of state media content is propaganda that extolls the achievements of Belarus’s paternalistic government.”

Nine companies, seven of them privately owned, are registered as information agencies by the Ministry of Information. Yet only four of them offer newswire services to other outlets, the panelists said. Two, BelaPAN and BelTA, are domestic, and two are Russian-owned (Interfax-Zapad and Prime-TASS). Prime-TASS offers only economic news and analysis. Others cover all sectors and sell various products. They also ran websites that offered news for

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.

personal use. Newswire subscription prices varied from \$300 a month for daily updates to \$600 for real-time updates. However, according to a panelist, even larger media mostly purchased daily updates and tended to rely on news syndicated for free from other sources. State-controlled media, in most cases, were using news and other products offered by BelTA, the official news agency of the Belarusian government. Private outlets tend to rely on BelaPAN and Interfax-Zapad. Very few media organizations buy news from the handful of domestic agencies. Apart from news and analytical reviews, BelTA and BelaPAN offer photos, infographics, and video. BelTA is also publishing two journals and a weekly newspaper, selling television listings to other media, and building and running websites for other organizations, including state-owned regional newspapers and governments. Newswire subscriptions, photos, and other services offered by international news agencies were affordable only for the biggest outlets, such as the national state-owned television networks, the presidential administration's daily *SB.Belarus Segodnya*, or Belarus's biggest web portal, TUT.by.

By and large, all 83 privately owned Belarusian broadcasters, registered by the Ministry of Information, focus heavily on entertainment offerings, with very little news content. Their news bulletins consist mostly of official information, some local news, sports, and weather. Radio stations are music-based, while local content on television stations is unlikely to make up the whole of their schedule, and they must rely on entertainment content provided by bigger television networks—in most cases Russian. Expatriate broadcasters that target Belarusian audiences generally conduct a lot more primary newsgathering and offer their own reports and analysis. Radio Liberty is largely audio-based. European Radio for Belarus and satellite television Belsat offer a mix of information and entertainment programming.

Privately owned newspapers and websites also produce their own news, yet to varying degrees. Reliance on news agencies and content syndicated from other media remains significant, especially among national outlets. One of the panelists argued that understaffed and cash-strapped newsrooms are finding it increasingly difficult to produce their own news, and the share of content curated from third parties is, in fact, increasing. Bloggers are no different, the panelists agreed, yet sometimes they do fund news coverage or even break stories themselves. In general, though, user-generated content and citizen journalism are not deemed reliable news sources.

The media law requires the disclosure of founding companies of "traditional" media, yet the actual owners of those outlets, as well as the people behind blogs or websites, might not be easily apparent. On the other hand, the panelists argued, the general public hardly cares about media ownership. "It is always obvious whether an outlet is state-controlled or private, and that is enough. And that will remain so until the media business becomes more lucrative," said a panelist.

Belarus has no history of media consolidation, other than by the government. Foreign investment remains fairly insignificant, in keeping with the media law that caps immediate foreign ownership of media outlets at 30 percent. An exception was made for those media organizations that were foreign-owned before that requirement was introduced in 2009. Russian companies own several popular newspapers, *Komsomolskaya, Pravda v Byelorussii* (daily), and *Argumenty i Fakty* (weekly), two news agencies, Interfax-Zapad and Prime-TASS, and VTV, an entertainment television channel.

Many social issues, such as gender, religion, sexual orientation, and subcultures, receive very limited coverage in mainstream media. Most of that coverage was just keeping tabs on daily happenings and failed to examine issues in depth, or from an unexpected angle. There was some debate on gender, though, one panelist said. Other issues were dealt with in specialist media, mostly online or in small newspapers. Some ethnic groups, most notably those in the Polish minority, also run their own small-circulation publications.

The news output of most media organizations includes stories covering local, national, and global issues. Although local media tend to focus on local affairs and information, there is an obvious lack of hyper-local news, and thus people have no opportunity to learn about what is going on in smaller communities, one panelist said. To some degree, the newsgathering capabilities of all outlets are restricted, and as a result they must rely on third-party content. International news, in many cases, is syndicated from foreign Russian-language media. Local and national outlets rely on each other for national and regional coverage, respectively. Online media offer localized content, in many cases syndicated from other sources. The biggest portals, such as TUT.by, dispatch networks of their own reporters in the regions. The state-owned television network Belarus 2 and Radio 1 offer opt-outs for regional news.

OBJECTIVE 4: BUSINESS MANAGEMENT

Belarus Objective Score: 0.95

The panelists agreed that most Belarusian media are not self-sufficient and the situation remains more or less the same compared with last year. Reflecting this, the score for Objective 4 remained essentially unchanged.

“Achieving self-sufficiency is hampered by the lack of a market environment in the media sector, politicized restrictions for independent media, and the media’s inability to monetize media content via modern digital technologies on the Internet. Dependence on external subsidies deprives the media of any motivation to improve their self-sustainability,” one panelist said. Media are making some basic short-term business plans, which are often a compulsory requirement even for those who rely on external funding. Yet creeping inflation (16.5 percent in 2013), rising production costs, and stagnant revenues made it difficult to both budget and adhere to those plans.

While all media hire dedicated professionals to deal with accounting and advertising sales, in-house lawyers and marketing specialists are less common. Furthermore, most media lack professional managers, one of the panelists argued.

There is also a broad spectrum of financial success across various media outlets. Some hover on the verge of bankruptcy, while others have watched their revenue grow steadily. Only those able to rely on classified ads or advertising from major brands are more or less stable, one of the panelists argued. Another panelist added that

many small businesses benefited from state-mandated salary hikes and were in turn buying more ads from regional newspapers. It is unclear how heavily a commercial imperative weighs on the shoulders of state media. For years, the government had been providing generous subsidies—usually comparable to national ad spend for the whole sector—claiming the ideological component was superior to self-sustainability. In 2013, though, the government was finalizing the merger of a dozen state-owned newspapers and magazines into two media holdings, in an attempt to cut running costs.

A majority of outlets draw revenues from several sources. State-owned outlets rely heavily on direct funding and subsidized fees. The National State Television and Radio Company, a media holding of five national television channels and five national radio stations, as well as five regional companies with their own television and radio stations, had been enjoying tax breaks since 1996. The national television channel ONT (which also runs a radio station) was similarly exempt from VAT and profit tax. State-controlled media also benefited from other unfair competition practices, such as state-imposed newspaper subscriptions, restricted access to distribution channels for private outlets, and unofficial bans for businesses to advertise in outlets critical of the government. Official notices (such as tender announcements or bankruptcy notices) are also to be placed in state-owned newspapers only.

Private media rely mostly on advertising, and sometimes on funding from their owners’ other businesses or grants from foreign donors. According to one panelist, major advertisers do influence editorial policies. “Very often advertisers, especially banks and mobile operators, ask that their ads should not be placed alongside negative information about the president. And sometimes newsrooms have to come up with some positive stories—not necessarily about the president—that they would never write otherwise.”

The advertising market grew 28 percent in 2013, according to the advertising group ZenithOptimedia. Yet per capita ad spend was only \$11 per year. Television’s hold on advertising budgets remains strong, at 53 percent of the total market. For the first time, the Internet became the second most popular medium, capturing a 15 percent share, after 55 percent growth against a year earlier. Elsewhere, television was up 30 percent, radio 20 percent, and print 10 percent.

The market is still dominated by major advertising agencies that managed accounts for the largest advertisers: domestic mobile operators and lotteries, and the likes of Unilever, Procter & Gamble, Nestle, and Coca-Cola. Budget-wise, those media buying and planning contracts accounted for around

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.

90 percent of total ad spend, according to some estimates. In most cases, ad agencies prefer to buy ad slots from media with national reach: national broadcasters and press, as well as the biggest online portals. However, classified ads from small businesses in their communities formed the bedrock of local media. Local broadcasters also rely on congratulatory messages.

Most, yet not all, media managers are eager to increase advertising revenues. Several panelists said that many state-owned outlets, first of all newspapers, were reluctant to pursue higher ad sales and relied on state subsidies instead. Meanwhile, many private titles had seen dwindling copy sales and had to rely on advertising or external funding. Those who were successful in maintaining advertising revenues either registered additional newspapers to accommodate ads or published more advertorials, all to comply with legal requirements restricting the amount of advertising in media. The law capped advertising at 30 percent in the press (25 percent in state-owned outlets) and 20 percent for broadcast media (including 30 percent during prime-time).

Government subsidies are meant only for state-owned outlets. In 2013, the national budget provided for \$70 million in direct funding. In comparison, the national advertising market totaled \$104 million in 2013. Regional governments also subsidize their own media organizations. The subsidized status of state newspapers, for example, allowed them to undersell their privately owned competitors by offering lower copy prices and advertising tariffs. Both the government and state-owned companies were buying very little advertising, yet the government has pressured advertisers for many years to withdraw ads from critical media.

Use of market research is still very limited. Only the richest media companies, such as national television networks, can afford professional market research. The panelists recalled only one such survey commissioned by a media organization in 2013. It was made by TNS, a market research outfit, for Toloka, a publisher of numerous household magazines. There was also a state-of-the-media survey produced for one of the media development organizations, and dozens of private outlets did have access to its results, according to one panelist. In most cases, however, such surveys were commissioned by advertising agencies, and media outlets had no such access. There also were some in-house incentives by local media, mostly in the form of online or paper questionnaires.

Several private research companies offered broadcast ratings and Internet statistics. GEVS offered television ratings (obtained via People Meters), as well as measured radio

and press audiences via phone interviews. NOVAK has used self-completion diaries for television and radio ratings, and face-to-face interviews for press. The Internet research firm Gemius is the go-to place for Internet statistics. It uses a combination of website counters, online panels, and offline research and offers both usage statistics and demographic profiles. Unlike GEVS and NOVAK, Gemius shares a lot of information about Internet usage trends for free. Basic online ratings were also available from Akavita.

Results from reports on newspaper sales are still viewed suspiciously. Meanwhile, many small advertisers, as well as some media professionals (including ad sales personnel), still have difficulties in dealing with ratings terminology.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Belarus Objective Score: 1.20

Objective 5 experienced a small decrease of 0.12 in the overall objective score. Printing and distribution facilities remain politicized and inefficient, while professional associations, the work of supporting NGOs, and short-term training opportunities received relatively better evaluations from the panelists, although none of the indicators exceeded a 2.00 score.

Two trade associations operate in Belarus. United Mass Media brings together 13 regional newspaper publishers in central and western Belarus. The Telecommunications Industry Union represents almost 100 local television stations

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.

and cable operators. Both organizations offer mostly networking and learning opportunities for their members. There were also attempts to bulk-sell advertising and purchase newsprint and programming rights through those organizations. The associations try to represent and support their members, but they have very little power, the panelists said. Lobbying, for example, is hardly ever possible.

Belarusian journalists, in their turn, have two professional associations working to protect their rights. The Belarusian Union of Journalists (BUJ) is a 2,000-strong organization of media workers from state-controlled outlets. There is also a private counterpart, the Belarusian Associations of Journalists (BAJ). It includes around 1,000 members, mostly working for private outlets, as well as freelance journalists. Both organizations offer legal assistance, networking opportunities, and training activities to their members. Both claim that they represent journalists, but they in fact work with newsrooms, one of the panelists argued, and in case of a conflict between an employer and a journalist, those organizations tend overwhelmingly to support the management. "Over the course of this year, BUJ has never acted in support of its members, never supported journalistic solidarity with regard to violations of journalists' rights. This organization is very much a phantom structure needed to demonstrate the presence of democratic institutions," one of the panelists claimed. BAJ, in its turn, tries to act as a press-freedom watchdog by monitoring and publicizing violations of the rights of the entire media community, much to the dislike of the Belarusian government. BAJ also much more actively cooperates with similar organizations and other development institutions in other countries. Again this year, the panelists emphasized that media professionals had no trade union of their own.

The role of NGOs in the promotion of freedom of expression in Belarus is insignificant, the panelists agreed. The authorities do not view them as intermediaries between the journalistic community and the state. There are several human-rights groups, most notably Viasna and the Belarusian Helsinki Committee, that also monitor violations of freedom of speech. They condemn violations, one of the panelists claimed, and sometimes provide legal defense. According to their mandates, both BAJ and Belarusian Helsinki Committee can protect only their own members. Viasna lost its registration with the government several years ago and has been working unofficially ever since. Cooperation of such groups with international organizations remains limited. The law restricts access to foreign funding, and in fact using unregistered foreign aid is a criminal offense in the country.

Journalism degree programs were available from both domestic and foreign universities. Most popular is the

Journalism Institute at the Belarusian State University in Minsk, with around 1,100 students. It offers several majors, in print, broadcast, online, and international journalism, editing, and media management. "The curriculum they use was designed back in the Soviet Union, and later on just slightly changed to incorporate new technologies," one of the panelists argued.

Training is mostly theoretical, the panelists agreed, and as a result graduates are far from job-ready, drawing complaints from editors. Still, more than half of graduates are choosing jobs in public relations and advertising, according to one panelist. The university offers a course in online journalism, but again with very little practical emphasis. "There are not enough strong online newsrooms," a panelist commented, adding that the university is wary of sending would-be journalists to intern for media that might be critical of the government. Similar programs are offered by regional state universities in Homiel, Hrodna, and Viciebsk, as well as several private institutes in the capital.

The European Humanities University (EHU) in Vilnius is the most popular foreign destination for would-be journalists. Once a private university in Minsk and a liberal stronghold, it was shut down by the Belarusian government in 2004, yet reopened a year later in the capital neighboring EU country, Lithuania. Several hundred students were divided among four majors: mass communication and journalism, visual culture (cinema, television, and Internet), design and visual media, and new media. Although curricula were based on Western standards, the purpose of the education EHU provides seemed to be more about broadening minds than equipping graduates with practical skills for the world of work. Moreover, very few of its graduates return to work for Belarusian media, the panelists said.

As academic programs are poorly regarded by the media industry, journalists have had to learn practical skills either on the job, or via various short-term training opportunities. Free courses are available from professional and trade associations, as well as from media-development NGOs, both domestic and foreign, in all kinds of formats: webinars, workshops, study visits, master classes, and internships. The panelists once again noted that those numerous training opportunities mostly target journalists, yet there is a lack of trainings in advertising sales, website promotion, finance, marketing, and leadership. Other challenges were mentioned: "Newsrooms are understaffed and feel they cannot afford to send any employees off on internships. Secondly, trainees find it hard to apply what they have learned ... and new approaches might require additional resources." As a result, media managers tend to favor formats that are less time-consuming and disruptive to newsroom workflows. In-house sessions by

highly experienced practitioners are often viewed as the most efficient.

Paid courses are available from several private companies (mostly in photography, computer graphics, and website promotion) and the Journalism Institute at the Belarusian State University. The latter offers a variety of training opportunities, ranging from one-day seminars to 21-month distance courses in online journalism as well as photojournalism.

As noted above, basic news-gathering and news production equipment is widely available; anything beyond that is affordable only for big media companies. Most notably, the software was almost 100 percent pirated, especially that for photo and video editing. The majority of printing houses are state-owned; others are still heavily controlled by the Ministry of Information—the regulator of both the media and publishing sectors. Only three private printing presses are licensed to print newspapers; several dozens more are allowed to print magazines. For several years, local newspapers that were critical of the government faced restricted access to printing facilities in their regions and had to be printed in the capital or other bigger cities.

The panelists failed to comment on the efficiency of printing presses from a business perspective. Many cash-strapped private outlets found it very difficult to pay several months in advance, and thus lost their discounts. State-owned newspapers were not paying at all, a panelist said, and had huge outstanding debts that drove the printers to court to try to recover. Meanwhile, printing in neighboring countries—for example, in Lithuania—is worthwhile financially, yet that tactic is popular only among non-political monthly magazines. “You just never know whether a [critical] newspaper will make it through the border at all, more so on time,” a panelist commented. Most newspapers use domestically produced newsprint, even despite its somewhat inferior quality. The quality of printing is often lacking.

Similarly, the government retains control over most of the distribution infrastructure. Most papers are sold via Belsajuzdruk, a network of 1,500 newspaper kiosks, and the postal service Belposhta (with around 3,800 post offices and kiosks). Some material, mostly magazines, is sold via supermarkets and smaller shops. Around a dozen private political newspapers face restrictions in accessing those state-owned distribution networks. Some have been banned from newspaper kiosks and subscription catalogs; others are allowed to sell only a very limited number of copies. As a result, many of those papers had to rely on sales via shops or start in-house distribution incentives. Elsewhere, the online service belkiosk.by has sold electronic copies (in PDF) of over 100 newspapers and magazines, both state-owned and private.

The terrestrial broadcasting infrastructure is also almost 100 percent state-owned. Many cable networks are private, but lists of channels they broadcast must be approved by local governments.

While digital platforms remain the least regulated sphere of all, the Belarusian telecommunications infrastructure falls short of what both customers and the media need. “Slow Internet connectivity, overloaded mobile networks: this pretty much sums it up,” a panelist commented. Internet penetration reached 60 percent in November 2013, according to Gemius. Almost 70 percent of Belarusian Internet users use broadband connections. At the same time, Belarus was the slowest in Europe in terms of its average Internet connection speed, according to the IT company Akamai Technologies. In the third quarter of 2013, Belarus relied on an average speed of 2.5 megabits per second (mbps), compared with the global average of 3.6 mbps.

Internet subscription prices are about the same: 2-mbps Internet subscriptions without a traffic cap are sold for around \$10 a month. Many households and businesses must rely on slow copper landlines for their Internet connection, and thus put up with buffering screens while trying to watch video on the Internet.

Mobile penetration exceeded 100 percent, and although phone companies have claimed that fast 3G Internet is available everywhere, users complain about coverage, speeds, and prices. Mobile operators are foreign-owned, yet the government retains a controlling stake in one of the companies. And although most ISPs were also private, connections were possible only via backbone infrastructure still owned by the authorities.

Hosting was another concern of media outlets. Under the 2010 Internet regulation edict, websites selling goods or services (even those running banner ads) must be hosted on servers in Belarus. The panelists criticized pricey tariffs and cited reliability issues as well.

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.

The panel discussion was convened in December 2013.