

# KAZAKHSTAN



## MEDIA SUSTAINABILITY INDEX 2018

Tracking Development  
of Sustainable  
Independent Media  
Around the World



# KAZAKHSTAN

## AT A GLANCE

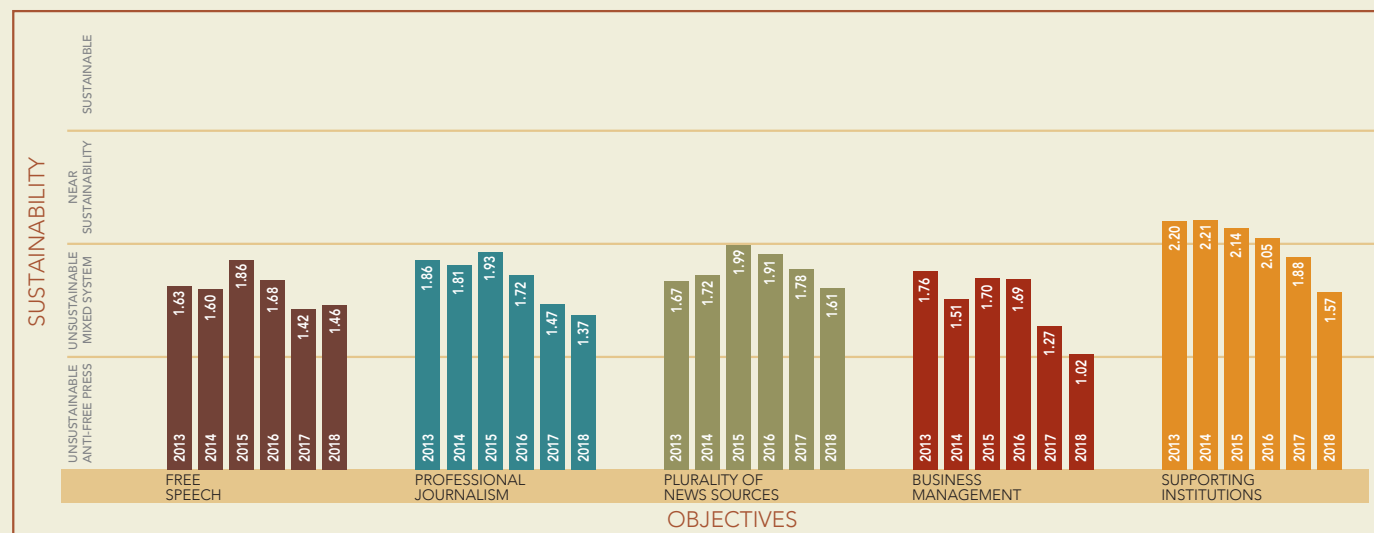
### GENERAL

- **Population:** 17,994,200 (May 2017, Committee on Statistics, Ministry of National Economy of Kazakhstan, stat.gov.kz)
- **Capital city:** Astana
- **Ethnic groups (% of population):** Kazakh (Qazaq) 66%, Russian 21%, Uzbek 3%, Ukrainian 1.6%, Uighur 1.4%, other 7% (2015 est., Committee on Statistics, Ministry of National Economy of Kazakhstan, stat.gov.kz)
- **Religions (% of population):** Muslim 70%, Christian 26% (mainly Russian Orthodox), other 0.6% (Committee for Religious Affairs, Ministry of Culture and Sport)
- **Languages:** Kazakh (state language) 64.4%, Russian (official, used in everyday business) 95% (2001 est., *CIA World Factbook*)
- **GNI (2015-Atlas):** \$196.8 billion (World Bank Development Indicators, 2015)
- **GNI per capita (2014-PPP):** \$21,710 (World Bank Development Indicators, 2015)
- **Literacy rate:** 99.7% (male 99.8%, female 99.7%) (2009 est., *CIA World Factbook*)
- **President or top authority:** President Nursultan Abishuly Nazarbayev (since December 1, 1991)

### MEDIA-SPECIFIC

- **Number of active print outlets, radio stations, television stations:** Print Outlets: 1,156 newspapers, 1,169 magazines; Radio Stations: 61; Television Stations: 108; Cable Operators: 108; Satellite Operators: 8 (Ministry of Information and Communications, 2016)
- **Broadcast ratings:** Top four: 1 Channel Eurasia, NTK, KTK, 31 Channel (<http://www.tns-global.kz>)
- **News agencies:** 41 news agencies, most-used include Kazakhstan Today, KazInform, Bnews, Business Resource, Interfax-Kazakhstan (Ministry of Information and Communications)
- **Annual advertising revenue in media sector:** Advertising agency statements vary widely. Estimated annual revenue in media is \$154 million, distributed as follows: television 67%, radio 12%, print 10%, Internet 5%, outdoors 6% (TNS Kazakhstan)
- **Internet usage:** 71% (TNS Web Index)
- **Newspaper circulation statistics:** Top four, by circulation: *Karavan* and *Karavan-Class* (partly private, weekly), circulation 500,000 combined; *Yegemen Qazaqstan* (state; in Kazakh, five times weekly), circulation 201,750; *Kazakhstanskaya Pravda* (state; in Russian, five times weekly), circulation 100,000; *Ekspress-K* (partly private; in Russian, five times weekly), circulation 100,000

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### SCORE KEY

**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 <https://www.irex.org/msi>



Four out of the five objectives scores decreased this year, affecting Kazakhstan's overall score by dropping it to 1.41 from last year's score of 1.56. Objective 1 which measures freedom of speech was the only objective that increased, due to changes to the Law on the Media. Lack of qualified managers and limited funding streams that are exacerbated by poor economic conditions keeps business management as the lowest scoring objective at 1.02.

**M**ore than four million people from over 150 countries visited Kazakhstan in 2017 for the international EXPO exhibition, which focused on the future of energy and pioneering energy solutions—the largest event in the country's history, at a cost of \$2 billion. Additional visitors came for the 28th Winter Universiade, the country's first multi-sporting event. Kazakhstan also hosted several rounds of talks on the Syrian conflict, drawing diplomats, politicians, and armed opposition groups to the country.

Early in the year, President Nursultan Abishuly Nazarbayev announced a constitutional reform that redistributed power between the branches of authority. Parliament acquired additional powers; the prime minister, in conjunction with parliament, will make proposals on the structure and composition of the government, except for the Ministers of Defense and Foreign Affairs, who will be appointed by the head of state.

Other key events included a border dispute and war of words with neighboring Kyrgyzstan that broke out in the summer, causing civil unrest. In the fall, miners, demanding higher pay, went on strike, refusing to emerge from an underground mine in Karaganda. People only heard about the incident

through social networks and independent media, while official publications remained silent.

Amendments to the media law, initiated by the Ministry of Information and Communications, dominated the media sphere during the year. Several of the measures significantly curbed the freedom of speech of the media and citizens, prompting media NGOs to send letters of protest to parliament, the Ministry of Information, and the country's president. Following active discussion in civil society circles, several aspects of the amendments were softened, and several new elements were introduced. Additionally, the authority to manage all communication networks (as well as to block websites) has been transferred from the jurisdiction of the Ministry of Information and Communications to the Committee for National Security. During the year, a draft law also emerged on the protection of children from harmful information; it is still under discussion and development.

At the end of the year, Seytkazy Matayev, chair of the union of journalists, was released early from prison—but his son remains in jail. They were both sentenced in 2016 on charges of tax fraud and embezzlement of state funds—charges Matayev said were retaliatory for his work supporting press freedom.

**OBJECTIVE 1:  
FREEDOM OF  
SPEECH**

1.46

**Amendments to the Law on the Media proved to be the media sphere’s main event of 2017. During the year, NGO and media representatives and social activists discussed the Ministry of Information and Communication’s proposals for change—some positive, some negative. Among the positives was a relaxation of the media’s administrative responsibility for either non-reporting or unclear reporting of production material, such as output data, circulation, and identification of the editor and editorial office. Whereas before, a publication would be threatened with closure, now they would receive a warning first, followed by a fine for subsequent violations.**

For the first time, the law now lists the conditions that absolve journalists from needing permission to publish someone’s image: photographs taken at public events; photos of people carrying out official duties; or if “the image of the person portrayed is used in order to protect the constitutional order, public safety, human rights and freedoms, or public health and morals.”

The new law also prohibits the publication of photographs, videos, or any identifying information about children who have been affected by violence or are suspected of committing crimes. This applies not only to the media, but also to telecommunication networks such as messaging services. Also during 2017, a law to protect children from harmful information was under development. The main points of this law are to introduce age-markers on information production and to create Internet “whitelists,” aimed at restricting children’s access to only certain resources approved and authorized

by the government (approximately 3,000). At the moment, however, the law is still under consideration in parliament, looking to be adopted in mid-2018.

The law also contains some very contentious rules, which provoked vigorous public discussion, such as the obligation for Internet users to enter into an agreement with site owners when publishing any information. The requirement for the media to publish a refutation in cases where they lack proof (previously, a refutation was published only by court decision) also stirred controversy, along with the change in the procedure and timing for the provision of information. Whereas before, the authorities had to answer journalists’ requests within three days, now they have up to seven days for many types of requests. Finally, the law stipulates that journalists must obtain permission before publishing personal information about someone. The journalism community believes that this could essentially put an end to investigative journalism, since it will not be possible to publish information about people suspected of corruption.

According to Gulmira Birzhanova, a media lawyer at the Legal Media Center in Astana, there are arguments that the law is outdated and that Kazakhstan needs a new law on the media. The Minister of Information himself suggested that in 2018 the ministry might initiate the adoption of a new law on mass communications. Despite this, the amendments were rapidly adopted. Society reacted with sharp disapproval, with many calling it the end of Kazakhstani journalism.

However, Olga Kolokolova, editor in chief of *Nasha Gazeta*, is convinced that freedom of speech and freedom of the press are not valued in society: “At this stage, the influence of the media on public sentiment is in decline. People prefer to rely on information distributed through social networks, rather than professional journalism materials. And this is a growing trend.”

The “Cyber Shield” cyber security project, which envisions introducing changes to 40 laws, has also received government approval. A special unit has been set up under the Ministry of Defense and Aerospace Industry to deal with issues of digital security.

There are no changes in terms of licensing and registration. As before, print media need to be registered via a process transferred in mid-2017 to the regional Population Service Centers and made primarily electronic. Electronic media need a license, which is issued by a special commission of the Ministry of Information and Communications.

**Legal and social norms protect and promote free speech and access to public information.**

**FREE-SPEECH INDICATORS**

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

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Registration is not required for Internet resources, except for online publications.

As before, there are no taxation benefits, and foreign ownership is restricted to 20 percent shares—which significantly hinders the development of the media industry. According to Tulegen Askarov, president of BIZ-Media, “The media market in Kazakhstan does not develop normally, as the conditions of its activities are significantly distorted by the state, which controls directly or indirectly electronic media which are loyal to it—providing them with both financial and other support.” In the print media market, the authorities continue to create unfair competition, supporting the state press through compulsory subscriptions to official publications. In addition to direct state control and state-commissioned information, the authorities use oligarchic private structures and the financial resources of national companies and state-run enterprises to control the media market. At the regional level, the situation has somewhat improved as a result of the privatization of regional media.

According to the Adil Soz Foundation, six attacks on journalists were recorded in 2017. In March 2017, unknown assailants beat a camera operator and broke his cameras at the funeral of a man who took someone hostage in Aktobe before being killed by the police.<sup>1</sup> In April 2017, guards staged a scuffle with journalists at a concert by Dimash Kudaibergen in Astana. On November 3, 2017, journalists from several publications covering a special operation to detain particularly dangerous criminals in Almaty reported being threatened by

people in plainclothes, and there was no action on the part of the police.<sup>2</sup>

At the beginning of the year, Bigelda Gabdullin, editor-in-chief of *Central Asia Monitor* and director of the Radiotochka website, was sentenced to five years of “limited freedom” on charges of extortion. The prosecution claimed that he demanded government procurement contracts from state officials for his publication—or threatened to publish impartial information.

**Mikhail Dorofeev, editor in chief of informburo.kz, observed: “The status of journalists is not fully defined, society does not fully understand their role, the essence of their work, and the media is losing the audience’s confidence. At the same time, there has been increasing pressure on journalists—not by the state, government, or on the part of officials—but by businesspeople, public figures, and ordinary citizens.”**

On September 7, Zhanbolat Mamay, editor in chief of *Sayasi kalam/Tribuna*, was convicted of “legalization of money or other property acquired illegally” and sentenced to three years of “limited freedom” and prohibited from engaging in journalism activities.

In November, Matayev, who was accused of embezzling state funds a year earlier, was released on parole.

In all three cases, international journalism advocacy organizations claimed the charges were trumped up and designed to stifle independent voices in the media.

The websites ratel.kz and forbes.kz forfeited KZT 50 million (\$155,250) to the entrepreneurial Kakimazhanov brothers (in a claim for protection of honor, dignity, and business reputation). The court sat in closed session and also prohibited the media from covering the process or commenting about it in social networks.

According to information from Gulnar Assanbayeva, an independent media expert, many publications (*Infoburo, Vlast*) have already removed comment sections from their sites for fear of prosecution stemming from comments placed by readers, trolls, or anonymous commentators. “The media in Kazakhstan are deprived of the possibility of interactive communication with the audience,” she said.

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Despite declared editorial independence, media materials are removed (most commonly redacted from informational sites) after a phone call, or journalists are required to disclose their information source, as happened to the newspaper portal *Uralskaya Nedelya* over a report about a major accident.<sup>3</sup>

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1 “The cameraman was beaten at the funeral of a man who took a hostage in Aktobe.” March 17, 2017. Tengri News. Accessed March 15, 2018: <https://tengrinews.kz/crime/teleoperatora-izbili-pohoronah-mujchinyi-zahvativshego-314359/>

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2 “The Prosecutor General’s Office reacted to reports of journalists about an attack during a special operation in Almaty.” November 13, 2017. InAlmaty.kz. Accessed March 15, 2008: <https://www.inalmaty.kz/news/1858637>

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3 “Journalist: police ask ‘Ural Week’ to reveal the source of information.” April 4, 2017. Radio Azzatik. Accessed March 15, 2008: <https://rus.azattyq.org/a/28409259.html>

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According to Assanbayeva, authorities suppressed coverage of the scale of damage caused by spring flooding. In particular, materials and videos shot by Kostanay bloggers and journalists were subsequently blocked on the Internet, and Akimat (local executive body) representatives held explanatory discussions with some of the authors. Police and rural Akimat officials blocked road access by journalists of the Karaganda public Internet television, 101.tv. Roskomnadzor (Federal Supervision Agency for Information Technologies and Communications) demanded that journalists from the media company Rika TV delete material from the website [www.rikatv.kz](http://www.rikatv.kz) concerning a man who poured gasoline over himself during a failed attempt to enter the ROVD (Regional Department of Internal Affairs) building.

The difficult situation surrounding criminal liability for libel and insult remains unchanged. According to the Adil Soz Foundation, in 2017 some 61 charges were brought forth under this statute, leading to guilty verdicts in five cases. An accusation of spreading information of a “slandorous nature that defamed the honor and dignity of Batua company founder, Nurlan Biyadilov, and damaged his business” resulted in Aidyn Yegeubayev being sentenced to two years of “restricted freedom.”

The use of Article 174 (“the incitement of religious, national, social, class, and intergenerational strife”) also became more prevalent last year. According to the Legal Media Center, in 2017, 37 people were convicted under this article, of whom 15 were given an actual prison sentence. A notable case was that of Teymur Akhmedov, a representative of Jehovah’s Witnesses, who was sentenced to five years of restricted freedom for “exalting his religion over others.” At the end of the year, an Almaty court acquitted four users of the social networks Facebook and VKontakt who had discussed rumors

about the ethnic conflict through the messaging site WhatsApp. According to Birzhanova, there are virtually no acquittals under this article, and the majority of cases involve Internet users. None of these verdicts are published and cannot be found in official sources.

Access to information is another area in which constitutional guarantees are hampered by poor quality legislation, lack of appropriate institutions, and officials who do not have responsibility for violating or limiting the right of access to information. The problems can also be attributed to the reluctance of government agencies and the quasi-governmental sector, or other private owners of information, to implement systemic changes in this sphere to convert the culture of secrecy and inaccessibility to a culture of openness, transparency, and accountability.

At the end of the year, the Legal Media Center sued the Ministry of Information and Communications for refusing to provide the media with information on the recipients of government money. The minister issued an order restricting this information, saying the documents were for official use only. Shortly thereafter, the court rejected the claim, stating that “the rights of the plaintiff were not infringed,” and that if the information were to be divulged, it would infringe on the interests and rights of others.

At the same time, the website [ratel.kz](http://ratel.kz) managed in court to obtain information from an Akimat about agricultural subsidies. The information was posted on the Akimat’s official website.

Kolokolova said that officials have developed an ideal method for ignoring journalists: not answer requests at first, not answer them in full, and forward them from one department to the next. When material does emerge that touches on a really painful topic: do not raise a scandal, do not

demand a retraction, but simply drown it in silence. As a result, the more socially active citizens are indignant, but they are a minority. Since nothing at all happens, any outcry simply fades away in such a sterile environment. According to Ashat Erkimbay, head of the NGO Minber, the conflict with foreign workers in Astana showed that official comments flow only after people start actively to discuss the subject online.

Formally, access to foreign sources of information is not limited in any way. If they have language skills, journalists can use various news sites. However, last year, the state’s policy toward Kazakhstan’s Internet space toughened. Access to social networks, messaging sites, and YouTube is regularly restricted, usually coinciding with Internet appearances by disgraced businessman Mukhtar Ablyazov. A government decision by the office of the prime minister transferred two state agencies, the Center for Technical Protection of Information and the Center for Qualification and Advanced Training of Specialists in Information Security, to the KNB (National Security Committee).

Journalists also report problems with access to courtrooms and official institutions. For example, journalists in Shymkent were not allowed to attend a court hearing on a bribed judge; in Aktobe, journalists were not allowed to attend a court session on the year-end results. Media access during the Karaganda region miners’ strike in December 2017 was partially restricted as well.

Entry into the journalism profession remains free and is not restricted by any licensing requirements, or need for examined qualifications, etc. However, unpublished blacklists still exist that limit access to state media for a number of opposition media journalists.

**OBJECTIVE 2:  
PROFESSIONAL  
JOURNALISM**

1.37

**Journalism in Kazakhstan is developing under difficult conditions. On the one hand, strict requirements and restrictions, including legislation, feed the growth of self-censorship. On the other hand, effective self-regulatory mechanisms for the journalism community have not been created. There is no effective ethical code, nor are there universal mandatory professional standards or rules. All disputes are resolved in the courts and often not in favor of journalists.**

Quality print outlets and television channels try to observe basic professional principles: checking information from different sources, allowing both sides in a conflict to be heard in their reporting, and inviting experts to discuss the issue. However, as Kolokolova said, not everyone does this: “The problem is that state-commissioned journalism in Kazakhstan focuses not on clarifying the true state of affairs, but on complying with the commissioning body. I personally encountered this practice in receiving a request for a commissioned piece—an article required urgently on the development of the official language, the immigration policy of the state, etc., and to be shown strictly in a positive light. And the justification: It’s a government request.”

Sponsored news reporting in the media remains high, especially on television and radio, where paid-for releases appear in news reports, as well as in online media and social networks. On social networks, brand ambassadors are actively promoting consumer goods and services, and large numbers of bloggers cover events for direct monetary payment and for bartering rights.

A number of advertising agencies that previously worked mainly with traditional media now work with bloggers or are independently active in messaging services, using their own staff bloggers.

Shavkat Sabirov, president of the Internet Association of Kazakhstan, feels certain that the use of new technologies and media is resulting in journalism taking on the format of blogger broadcasting. Journalism standards have descended to the point that many journalists limit themselves to the press releases of official bodies, according to journalist Ascar Aktleouv.

Olga Kaplina, director of e-event.kz, added that the unprofessionalism of journalists and their drive to grow their audience leads to the appearance of unreliable, click-bait headlines. One example, an article about young Kazakhstanis’ desire to emigrate, appeared on the web portal Kursiv. The piece drew on research data from the Ebert Foundation that found 10 percent of respondents wanted to leave the country, out of which 54 percent wanted to immigrate to Russia. However, the material was released under the headline “54 Percent of Young Kazakhstanis Want to Move to Russia.” Journalists from other media noticed the error and, through the closed Journalists of Kazakhstan Facebook group, they asked the editors to change the headline. The request provoked much discussion around the fact that such headlines seem designed to attract an audience and increase website traffic. Only under pressure from the journalism community was the headline changed.

Government officials got involved in journalistic ethics in the past year as well. In her Eurasian Media Forum speech, a senate deputy, Dariga Nazarbayeva, proposed an oath for journalists. The Minister of Information, Dauren Abayev, personally undertook an explanation of journalistic ethics, recording a special video presentation about the law coming into effect, On Mass Media. However, such top-down

efforts to regulate ethics have not enjoyed any success. Abayev, remembering a terrorist situation in Almaty when a lone shooter annihilated several people in a matter of moments, pointed a finger at the media: “In a matter of minutes following the start of a criminal act, a huge number of rumors erupted. Some media organizations succumbed to these rumors and published unverified information, provoking panic.”<sup>4</sup> It is obvious that the first preventive factor to counter the appearance of rumors should have been information from the emergency situation committee about actual events in Almaty. But therein lies the problem: The silence

<sup>4</sup> “Principles of journalistic ethics will serve as a guide for the entire industry: Dauren Abaev.” September 27, 2017. Kazinform.kz. Accessed March 15, 2018: [http://www.kazinform.kz/ru/principy-zhurnalistskoy-etiki-posluzhat-ori-entrom-dlya-vsey-otrasli-dauren-abaev\\_a3069286](http://www.kazinform.kz/ru/principy-zhurnalistskoy-etiki-posluzhat-ori-entrom-dlya-vsey-otrasli-dauren-abaev_a3069286)

**Journalism meets professional standards of quality.**

**PROFESSIONAL JOURNALISM INDICATORS**

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

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of Akimat officials was the precise reason for the rumors and panic.

According to Kolokolova, ethical standards are blurred by a false understanding of the essence of journalism, which is increasingly viewed as an institution that serves not the interests of society, but power; there are a few publications, she said, “where the advertising department is clearly separated from the editorial, and where journalists do not go in search of advertising, and, in the extremely rare

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case of being given a paid-for job to write an article, they merely receive a standard fee. ...Naturally, the article is always marked as advertising. It is not done to receive so-called holiday money from agencies, unless it is being given as the reward for winning a competition. But this is rather an exception to the rule. Hidden advertising, made-to-order materials, rewards from interested agencies—these are all part of today’s typical practice.”

Journalists work less and less with traditional information sources and increasingly rely on social networks, which results in a narrowing of the information field.

Dorofeev agrees that the situation in the regions is awful. However, he is encouraged by the fact that more and more editors recognize the unacceptably low ethical bar and are trying to raise it, and by the fact that the professional community periodically works to strengthen ethical standards (for example, right now the Kazakhstani Media Alliance is updating its ethics code).

The popular blogger Erlan Rashev, who for a long time borrowed others’ texts and published them under his own authorship, represents one striking example of plagiarism. Despite the swift condemnation and outrage of the Internet community, Rashev persists.<sup>5</sup>

Dorofeev, however, said that “self-censorship is the scourge of Kazakhstan’s journalism.” As often as not, it exists not just at the editorial level, but also inside the mind of every single journalist, photographer, and video operator. As a rule, it is based on an exaggerated understanding of the danger of repression, threatened if you publish “something not quite right.” However, some media are actively fighting self-censorship—successfully, in some cases.

Erkimbai believes that in both traditional and new media, there are still some taboo topics, such as inter-ethnic issues that could threaten public order. Journalists are also afraid to write about religious topics. Self-censorship is also found in online media. Popular bloggers often request that no negative comments be made under their posts, or they simply delete them.

Kolokolova is sure that many media do not regard the concept of “self-censorship” negatively. Journalists perceive it, rather, as a kind

of self-discipline. This explains why many media voluntarily limit themselves in the range of topics covered.

Journalists do not cover all major events and topics in the country. Even when certain issues show staying power on social networks, the country’s official channels simply stay silent—as seen during a large miners’ strike in Kazakhstan last year. For the first days, the pro-government media did not release any material whatsoever on the topic; only independent publications mentioned it.

All media are subject to pressure from the authorities, but local media receive slightly more freedom than national media in their coverage of national-level events. Kazakh-language media are freer than the media reporting in Russian—though they tend to self-censor more. The freest of all are small-circulation Internet media and social networks, excluding bloggers.

According to the panelists, the media are biased and generally lack objectivity. This may be connected with editorial policy, pressure from business influences or the government (a shining example being the miners’ strike), or due to journalists’ low levels of education and professionalism. Some journalists simply lack the imagination to consider there might be other viewpoints in a given story—or they believe that one article should express one party’s side of a conflict, and if the other party turns up, then let them have their turn. This attitude is mainly found in the Internet media and social networks but is a shortcoming across all media in the country.

Kaplina believes that inter-ethnic relations are still a very controversial topic and that as a result, related stories are not usually aired on television. For example, Internet media covered the conflict between Indian workers and Kazakh citizens that occurred in Astana, but there was no television coverage, either

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<sup>5</sup> “Why does Rashev steal someone else’s texts?” May 27, 2017. Matritca.kz. Accessed March 15, 2018: <http://www.matritca.kz/news/44410-zachem-rashev-voruet-chuzhie-teksty.html>



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on state or private television channels. Bloggers posted video footage on the Internet.

Journalists are not highly compensated for their work; the average salary of a journalist is \$150–300 a month. The difference in pay between television and Internet media workers has all but leveled out, with those in the state media being paid less than those in private media, and those in the regions far less than their counterparts in Astana and Almaty. State media employees receive quarterly awards and a thirteenth-month bonus payment. There is a steady flow of journalists from the media into public relations or production.

According to Olga Didenko, a media lawyer with Internews Kazakhstan, legislative restrictions hamper the thematic diversity of local media content. Entertainment content tends to dominate. When the media do publish articles on political or socially important topics, the quality is low. Kaplina said that in 2017, due to a shortfall in advertising budgets, the media were forced to reduce entertainment programming, devoting more attention to information programs with lower production costs. Television channels KTK, Khabar, and Astana, for example, expanded their information programming. Some new regional websites also appeared, in Balkhash and Semey.

The media have no difficulty with Internet access, and they are equipped with modern and effective equipment for collecting information, as well as producing and distributing news—but not all workers are familiar with the new technology. Pro-government media that receive state-commissioned procurements are able to acquire the latest technology, but independent media organizations face a slower process.

Nominally, economic, environmental, and medical journalism are developing in Kazakhstan. However, during complex situations, such as the

miners' strike, no media provided an economic analysis of the situation; everything was presented as a social problem.

Askarov said that there is virtually no specialized journalism in the regions. Investigative journalism is hampered by a lack of interest from media managers, who know it demands a considerable time investment—which is expensive in terms of labor cost and staffing levels for editors.

It is not surprising, then, that media anti-corruption investigations are practically nonexistent, said Didenko. This stems from several factors: first, legislative restrictions (criminal liability for defamation, insults, and similar content; unlimited deadline periods in cases of protection of personal nonproperty rights; etc.); second, the judicial track record of taking investigative journalists to trial and most often finding them guilty.

Assanbayeva said that many topical issues are reported incompetently—for example, matters relating to developments in science or higher education. There are no journalists specializing in the digital economy. In particular, articles about blockchain technology or cryptocurrencies—issues already facing the banking sector and the entire financial system of the country—are written in highly technical language that fails to capture readers' attention, doing little to facilitate understanding of these new economic phenomena.

Finally, the panelists commented that ethical standards are not observed in the coverage of contemporary religious trends.

### OBJECTIVE 3: PLURALITY OF NEWS

1.61

**According to data from the Ministry of Information and Communications, there are 2,973 media outlets operating in Kazakhstan; 84 percent are print, nearly nine percent are electronic, and about seven percent are news agencies.**

For many years now in Kazakhstan, there have been only private or state media. The Law on Mass Media does not include provisions for creating public media, so they continue to be nonexistent; according to the Ministry of Information and Communications, over 80 percent of media in Kazakhstan are privately owned. However, almost all receive state funding, which significantly undermines their independence. This creates an imbalance and reduces the number of sources of information and news for the population. As a result, the audience is fed homogenous content, in which there is no pluralism of points of view on socially important issues.

The trend toward the displacement of traditional (print and broadcast) media from the market continued as a result of the rapid development of broadband and mobile Internet access. As the popularity of social networks grows, so too does their leaders' influence on society. The strengthening of the ruble against the tenge played a significant role, leading to a further increase in press costs, which depends on paper supplied from Russia. The expenses of cable networks paying for the content of Russian television channels also increased, which led to a temporary cessation of broadcasting by some of them. The redistribution of advertising budgets in favor of "new" online media and bloggers also continued.

The circulations of national print publications

**Multiple news sources provide citizens with reliable and objective news.**

**PLURALITY OF NEWS SOURCES INDICATORS**

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

continue to decline, as the system designed to sell publications through a network of kiosks and other distributors has nearly collapsed. Efforts to sell issues through the Magnum supermarket chain in Almaty have yet to yield tangible results. The trend away from publishing local versions of leading Russian newspapers and magazines continues.

In general, people receive information mainly from the Internet. There are publications with alternative points of view, but they are small in number and are primarily Internet publications, such as Ratel.kz and Radio Azzatik. At a local level, *Nasha Gazeta* provides a platform for alternative opinions in the Kostanay region. Similarly, in Uralsk, there is *Uralskaya Nedelya*, and in Aktobe, *The Diapazon*.

Customers determine the reliability and objectivity of information independently on the basis of their own interest in a topic being reported. "The objectivity of materials in the state media is very low, because government-sponsored orders dictate coverage of 'necessary' news," and from the expected perspective as well, said Assel Dzhanaeva. For example, Kazakh media coverage of the information war over accusations made by former President Atambayev against Kazakhstan—of election interference in a neighboring country—was rather scant and muted, relying exclusively on the official version of events. The true border situation and scale of the war could be judged only by Facebook posts.

The Kazakh-speaking audience prefers to obtain its news from VKontakt, Facebook, and YouTube, especially in the remote regions, where newspapers are delivered rarely and irregularly.

More and more citizens receive and disseminate information via messaging services, such as WhatsApp, Telegram, and Viber. According to Kolokolova, this is not encouraging, because "the Internet has practically gobbled up paper and television, and social networks are devouring websites." As a consequence, consumers of news understand less and less precisely what kind of news they are reading, and who owns it. This means they do not know whether it is fake or who is behind the specific news, which is important for their critical evaluation, given the situation regarding objectivity of information. In the past year, instant messaging services were actively used for mailing fake news, at both national and regional levels.

Every now and again, the authorities block websites of both domestic and international media. For example, in January 2017, access to Lada.kz was restricted, and appeals to the prosecutor's office to lift the restrictions failed. In February 2017, the site was blocked. The websites Medusa and

Klopp remain inaccessible in Kazakhstan, as before. Access to social websites is restricted during video broadcasts by disgraced businessman Abyazov.

According to Birzhanova, the human rights organization website www.lmc.kz fell victim to a hacking attack, most likely due to the fact that the site provides information on which media receive funding and to what extent.

There is access to foreign channels, but according to Dorofeev, language barriers are an issue for some, the choice of channels is limited, and neither consumers nor the authorities are making any noticeable efforts to expand the offerings. The online journal Vlast.kz supports permanent communication with international media, and its council of experts includes journalists and specialists from Russia, the United States, Kyrgyzstan, and Armenia.

In December 2017, several Russian television channels from the NTV and REN TV groups vanished from some cable operators' channel lists. Increased licensing costs forced the operators to cease rebroadcasting.

State-run media unequivocally serve the government and the authorities, reflecting reality in an extremely biased way. At the same time, editors and journalists of state publications often believe that by serving the government, they are fulfilling their duty. The situation is not particularly different in the private media, which receive money from the government through e-procurements. There is simply no place for opposition in such press. Moreover, the opposition itself in Kazakhstan is extremely weak and does not provide special news opportunities.

The problem is also aggravated by the fact that discussion between representatives of state bodies is extremely rare. Appealing to the public, even in the course of discussing initiatives and decisions that are vital for the population, does not occur, as

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it might cost an official their job. The ethical code of a state employee in Kazakhstan explicitly prohibits public expression of an opinion on public policy or official activities if it does not comply with state policy. The circle of independent experts is limited, especially in the regions; therefore, the media face great problems in preparing materials related to the discussion of socially significant decisions. Thus, Kazakhstani media publish quality reports about events taking place in foreign countries but are cautious in their analysis of local events.

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News agencies work with all media. The most popular sources of domestic news are Interfax and KazTAG, while Reuters and AFP’s television channel are popular for international news. However, there is a barrier associated with the high cost of subscribing to the feeds of international news agencies, though some agencies provide news for free. According to Kolokolova, there are no exclusive materials in the news agencies; the same news is always presented on all the major information portals.

Almost every major media operator has the capability to produce its own news items; even recognized aggregators (Nur.kz, Zakon.kz) create their own versions of news. Of the major television channels, only television’s Channel 7 has no

news, since it refuses to air public and political broadcasts. Notably, even television Channel 31, with a Russian-media shareholder—the same group that owns the STS channel, which is known for developing exclusively light entertainment television—has its own news production. Due to labor restrictions and limited funding, the mass media often aggregate news from other resources when it is related to international events, conflict zones, or events in hard-to-reach places.

Nothing prevents the local media from publishing international and general nationwide news. The volume of reports and their direction are determined by the internal editorial policy. Naturally, local media give preference to local news, endeavoring to select international news in terms of its degree of special importance and particular interest for readers in the given region. Private media are divisible into those that produce their own content, including news, and those who survive on digests, reposts and relaying foreign broadcasts. The latter are becoming increasingly scarce.

The media ownership structure remains opaque. There are few joint stock companies, and media company shares are not quoted on the Kazakhstan Stock Exchange and do not appear on the debt capital market. There are some exceptions (e.g., media assets of *Verny Capital*), but that does not change the overall situation. Commercial bodies own media indirectly, through funds and public organizations, or through nominal fronts. There is little foreign capital in the media market, as its participation is limited by legislation (no more than 20 percent ownership of a media outlet is allowed).

An article on media ownership in May 2017 surprised everyone by naming mass media owners who were completely unknown—not only to media

consumers but even to those within the industry itself.<sup>6</sup>

### OBJECTIVE 4: BUSINESS MANAGEMENT

1.02

**The main hindrances to media industry development include a lack of funding for infrastructure projects (such as in the transition to digital terrestrial broadcasting and the retail distribution structure of the press); unfair competition and concentration of media resources by the state; legislative restrictions on media business investments; a lack of supportive measures for those media that experience difficulties in their activities due to economic circumstances; and a lack of research and accurate measuring in the media industry.**

Traditionally, Kazakhstan’s media emerged as instruments of influence, not business projects. However, several media have appeared recently that position themselves as business ventures (primarily online; The Steppe, for example). At the same time, other media are striving for profitability in order to strengthen financial stability and reduce the cost burden on their founders.

In Kazakhstan, there are few qualified media managers. Often, the editor and publisher are one and the same person. The main qualification for a media manager is to have connections in the power structures; this provides additional sources of

6 Shibutov, Marat and Lyazat Shibutova, “Who really own the media in Kazakhstan.” March 26, 2017. REGNUM. Accessed March 15, 2018: <https://regnum.ru/news/2280402.html>

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income from information services rendered to state bodies, freer access to information, and protection against lawsuits from government departments. In these conditions, political loyalty is valued more than professional knowledge.

One of the main sources of income is financing from the state to support mass media. Subscriptions as a source of media finance are dead and buried, while crowdfunding is not practiced (the example of Vlast.kz in this sense is instructive). According to Dorofeev, the commercial advertising market is underdeveloped in Kazakhstan, with low capacity, and large advertisers and advertising agencies dictate the rules of the game. In addition, global players, such as Google, Facebook, and YouTube, are entering the market and biting off much of the already small advertising pie from the Kazakhstani media.

### Independent media are well-managed businesses, allowing editorial independence.

#### BUSINESS MANAGEMENT INDICATORS

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

Flagging advertising revenue, especially at the beginning of the year, made 2017 a very difficult year for the media. The largest regional newspaper, *Ak-Zharyk*, stopped producing a print version. Some media have experienced cuts. In many ways, media processes are not optimized; the staffing levels even in regional media can exceed 100 or more people, which highlights the fact that the media depend heavily on government-sponsored procurement.

According to Select Communication's CEO, the media advertising market in Kazakhstan is only KZT 38 billion (\$118 billion). Of this, just 10 percent relates to digital, while about half of the total digital market belongs to Google and Yandex—with the former's share at around 75–80 percent. Television in Kazakhstan remains the main beneficiary of advertising budgets: about 56 percent of the total media pie.

Askarov believes that in 2017, Kazakhstan's advertising market began to recover from its crisis and estimates that growth could be in the region of 10–12 percent. Television and online resources are poised to benefit from this first, with print media to a much lesser extent. At the same time, a significant part of the advertising business has moved across to bloggers, brand ambassadors, and other recipients of advertising and PR budgets engaged in the online promotion of goods and services. Additionally, many advertisers prefer to go directly to social networks with their own offers (Raimbek, Arba Wine, Alma-Bio, AB Restaurants, hotels, bars, shops, farms, etc.).

In terms of organizational structure, the advertising market in Kazakhstan remains underdeveloped, in contrast with Russia and other more developed countries. Recently, the owners of advertising companies have had to branch out into other businesses; for example, the owner of the communications agency Insight Media announced its involvement in the project Stavni.kz, for the

production and installation of steel blinds.

The amount of advertising (advertising time and volume in print) in the media as a whole is limited. Those media that receive significant public funding run advertising at far lower costs than private media—not because they want to lower market rates for advertising, but rather because of the low rating of the media itself compared with private media. In the regions, advertising agencies are not developed, and each media organization has its own advertising department. Some national radio and television companies have branches. In most cases, however, advertisers turn to advertising departments within the media.

The media advertising market is also subject to numerous restrictions, which have caused a significant decline in advertising revenues over the past few years. Due to legislative restrictions on the advertising of certain products, media ad revenues are constantly shrinking. This forces private media to seek support, which can be provided in only one form: public procurement of information services. Such dependence may entail a change in editorial policy or the loss of editorial autonomy and independence when it comes to selecting topics for publication.

The absence of mechanisms for stable and effective development of media enterprises as businesses leads to a decrease in audience or readership, a reduction in the audience's level of trust in the media, and reduced competitiveness.

Despite the continuing trend of Internet audience growth, Internet advertising sales are weak. The major agencies are focused primarily on large Internet resources. In 2017, a handful of media branched out into new revenue streams: Lada.kz took up advertising on social networks and holding events; otyrar.kz and *Uralskaya Nedelya* conducted surveys. On March 1, there was a presentation by

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the international television channel ID Fashion Kazakhstan, which opened under the aegis of the existing channel Kazakhstan 7 (ERA TV Company).

The domestic media business is adversely affected by the poor economic conditions in Kazakhstan: a weak tenge against the dollar, high inflation, and state information procurement. These factors reduce the effectiveness of media management, dragging down financial performance and journalists' creativity. As a result, in terms of their levels of management, human resources, and in other areas, media companies lag behind government agencies, companies with state participation, and private companies in other industries.

Russian electronic media exert significant influence on the domestic media market, primarily television, and the resources of Runet. For a brief time, cable networks suspended the transmission of several Russian channels, which resulted in public complaints.

This year, Radio MM Kazakhstan (Radio Media Metrics), an Internet radio station, launched. Television channel Atameken Business Channel became Kazakhstan's first channel to begin regular broadcasting in Russia via the Yamal satellite system, which also covers the entire CIS territory, Eastern Europe, Germany, Italy, Turkey, Mongolia, China, South Africa, and Japan.

In April, information was released about the arrival of the first network communications holding company in Kazakhstan. Dentsu Aegis Network announced it had completed the acquisition of Kazakhstan independent company Fifty Four Media LLC, a key player in the local communications market that occupies a leading position in the field of media planning and purchasing.

State subsidies are still distributed in a closed, nontransparent manner. The problem here is due to several factors: the unaccountability of state-owned

media when spending budget funds; imperfect procurement procedures; and poor data on the effectiveness of the use of budgetary funds by state media. Ten state-owned media received \$120 million; the remaining 70 non-state media received \$75 million. The information ministry declared the information on the latter to be a state secret.

The system of distribution of state procurements improved slightly this year but remains opaque. State funding is now being distributed among the media as payment for projects that the media must present and detail. However, the state-funded media still come under pressure from the government and local authorities.

### **The absence of mechanisms for stable and effective development of media enterprises as businesses leads to a decrease in audience or readership, a reduction in the audience's level of trust in the media, and reduced competitiveness.**

Only online and television media routinely study their audiences: first, using special tools (most commonly Google Analytics); second, via media metrics conducted by Kantar TNS. Marketing research in the form of public opinion polls or focus groups is rarely conducted by the media due to its high cost.

The main indicators of media effectiveness (circulation, audience coverage, number of views, and number of unique users) are usually overstated, without a single universally recognizable tool or metric to provide an objective picture. As a result, newspapers show inflated circulation numbers, and online media use various tools to overstate the number of views. The only exception is television, because there the measurement system has long

been in place and the market as a whole trusts the results, although there are constant doubts about the relevance of such studies.

Impulsive management practices can prevail, as evidenced by the decision not to broadcast advertising on television channel Khabar starting in 2018. As a result, this state-owned channel knowingly excluded itself from the competition.

Television audience measurements in Kazakhstan are conducted by Kantar TNS via people meters, and advertising agencies and advertisers accept the data. Regional media, until recently, could not aspire to large commissions, as there were no data (the number of people meters in the towns precluded gaining representative samples). In fall 2017, with the support of Internews, Kantar TNS undertook an audience study of 7 regional channels, which allowed ratings to be determined for regional nonstate television companies for the first time.

There is no authoritative circulation auditing service for print media, and as a result, their circulation figures are vastly overestimated. Online media routinely massage traffic numbers to attract advertisers, and bloggers similarly cheat. This year, Nur.kz and Gizmeteo.kz announced their withdrawal from the Zero.kz rating service, following in the footsteps of Kolesa.kz, Krisha.kz, Market.kz, and online platform OLX.

The authorities actively use advertising as a means of pressure and incentives. Thus, in managing bids for the placement of information materials (documents, decrees, etc.), they use principles fine-tuned over the years to exclude the undesirable. In particular, bid terms and conditions stipulate the required number of newspaper editions per week (there is only one publication that comes out three times a week). Market research by editors at the local level is extremely rare, especially recently. The most they can afford is a survey of

readers in a focus group. Polls on current topics do appear frequently in newspaper pages and on websites.

**OBJECTIVE 5:  
SUPPORTING  
INSTITUTIONS**

1.57

**The creation of the Kazakhstan Media Alliance marked the biggest change in the realm of supporting institutions. The new organization's leader, Armanzhan Baitassov, identified three primary areas of work: representative functions, work on mediation, and the establishment of horizontal links between mass media. The journalism community met the new organization with some diffidence because of the state's markedly loyal posture toward it and a certain dilution of the conditions for membership. In their statement of intent, the organizers described their aim "to unite the workers of the mass media, publishers, cultural figures, politicians, public bodies, associations, and unions." However, the alliance has yet to deliver any significant results.**

The Confederation of Associate Journalists of Kazakhstan, a member of the International Federation of Journalists, also emerged.

Against a backdrop of criminal cases against Matayev, the chair of the union of journalists, and his son Aset Matayev, the union has had to somewhat surrender its role. According to Assanbayeva, "Under pressure from local authorities, regional offices could not openly state their position in relation to the case, the highest-profile case in the history of Kazakhstan journalism."

Despite a long history of attempts, Kazakhstan

has never managed to create an independent trade union. In fact, the journalism community is fragmented and does not have a structure capable of taking on the protection of journalists' interests on an equal footing with the authorities. The situation for bloggers is exactly the same.

The main active business associations—the National Association of Television and Radio Broadcasters and the Association of Internet Providers—continue their work. However, as in previous years, NGOs, including Adil Soz, Legal Media Center, MediaNet, and Journalists in Trouble, proved most active in protecting journalists' rights. Their actions, appearances, open letters, and discussion of legal amendments made the world aware of the plight of arrested journalists and bloggers, and positively influenced the outcome of some court cases. Sometimes, though, the state uses NGOs as a screen: "to hide behind their authority, to legitimize legislation intensifying control over the media," according to Ascar Shomshekov, media manager at Ertis-Media.

However, cooperation between NGOs and universities strengthened. The Legal Media Center, in partnership with UNICEF, rolled out a teaching module on coverage of childhood issues in 10 of the country's universities. The new training guide, "Fact Checking as a Trend of Investigative Journalism: Opportunities and Prospects," was developed in both the Kazakh and Russian languages by the international journalism center MediaNet, with support from the Soros Foundation-Kazakhstan. The guide is being distributed free of charge to mass media workers and journalism students. The Legal Media Center also developed a manual and conducted a very in-demand comprehensive training for journalists on combating hate speech online.

Faced with an acute shortage of qualified personnel, many media industry representatives

complain habitually about feeble journalism education, accusing it of lagging behind market requirements. This year drew heavy commentary from public figures on a proposal to close all of the country's journalism faculties, except the one at Kazakh National University (KazNU).

Dorofeev believes that graduates have not learned the basics of the profession, or the core principles of journalism. They have not been instilled with ethical standards, and they do not understand how the mass media operate, given how media consumption has changed in recent years. With regard to the quality of journalism, one fact speaks volumes: The same professors who train journalism students train those studying PR, under a unified

**Supporting institutions function in the professional interests of independent media.**

**SUPPORTING INSTITUTIONS INDICATORS:**

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

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syllabus. In some higher-education establishments, it is even a combined specialty. There is no systemic effort to develop media literacy in schools without journalism programs.

Student media are merely educational versions of state-funded mass media, strictly controlled by the faculty administration. Too few practicing journalists are invited to participate in the training process. Important subjects, such as stylistics and literary editing, are conspicuously absent altogether. Kolokolova is sure that most students have no intention of entering the profession. Low salaries, lack of status in society, and the difficulties involved in mastering the profession adversely affect its popularity.

Assanbayeva feels that quality educational programs can grow and mature only on the basis of comprehensive mutual cooperation between universities and the media industry. Fortunately, new examples of productive cooperative efforts bode well for an improved outlook. ALMAU, a new brand of the International Academy of Business, in close cooperation with the leaders of the Kazakhstani media industry, is preparing to launch a master's degree in media management. In support of this effort, the Isker Media publishing house opened the Media Laboratory, or MediaLab, in September.

Kazakh media also benefited from the translation into Russian of UNESCO's new curricula on journalism. Ten journalism curricula covering the subjects of journalistic data, the basics of media economics (sustainability), inter-cultural dialog, coverage of science and bioethics, security issues for journalists, human trafficking issues, and others should help bring university education closer to meeting actual market needs. The University of Suleiman Demireli also began offering courses in News Literacy and Journalistic Data in the Kazakh language this year.

Many journalism faculties in Kazakhstan are actively seeking to acquire international accreditation, which the panelists hope will lead to more journalism training opportunities.

Short training course opportunities are growing as well. For the most part, they are financed by funds from international NGOs. However, there are also examples of courses provided by governmental or commercial bodies to increase journalists' knowledge on specialized topics (medicine, economics, etc.)—for example, the Unified Pension Deposit Fund (ENPF), whose advisory board includes prominent business journalists, the Fund for State Social Health Insurance, First Credit Bureau, Home Credit Bank of Kazakhstan, Rompetrol, and the Chinese Embassy of Kazakhstan. More and more attention is being paid to the skills of multimedia journalism and work in social media channels.

**Kolokolova is sure that most students have no intention of entering the profession. Low salaries, lack of status in society, and the difficulties involved in mastering the profession adversely affect its popularity.**

According to Askarov, today's media owners are not interested in specialized journalists but are betting on the concept of "universal journalists" able to cover a variety of topics. The extensive brain drain of personnel from journalism, especially business journalism, to press services and the PR departments of companies, banks, and government agencies continues. Consequently, media staffing capability in general, and business media in particular, is deteriorating, which is driving the transition to a business model without full-service editorial teams.

The infrastructure necessary for mass media resides in both private and public hands. The means of distribution for television and radio signals are in the hands of the state, and key players in the press distribution market—the national companies Kazakhstan Temir Zholy and Kazpochta—belong to the state. Printing houses belong to both private companies and state agencies, while cable operators and Internet providers are private (although the national company Kazakhtelecom owns the network infrastructure). However, the government has influence over all owners of media infrastructure, regardless of the form of ownership. Information technology is well developed, and bandwidth is high. The state does not regulate what tools to use or with which service provider media organizations should cooperate.

In 2017, newspaper kiosks were demolished in Almaty to give the city a new look, which negatively impacted media business.

Despite official claims of near-100 percent Internet penetration, the quality of connections in rural areas is not always strong. The popularity of mobile Internet use has grown significantly and is now the sole outlet for many.

At the end of the year, the government approved a state program called Digital Kazakhstan. It consists of four goals: 1) implementation of a digital Silk Road—the development of a reliable, affordable, high-speed, and secure digital infrastructure; 2) development of creativity in society—focused on increasing the digital literacy of the population and preparing IT specialists; 3) digital transformations in the economic sectors—the widespread introduction of digital technologies to improve the competitiveness of various sectors of the economy; and 4) transition to a proactive state, through improving the government's electronic and mobile systems and optimizing the provision

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of public services. Along those lines, the government's electronic website, e-gov.kz, is gaining popularity. It makes many services available online, including filing requests for information and lodging complaints and appeals. It also provides opportunities to participate in budget and draft legislative discussions.

### List of Panel Participants

**Olga Didenko**, media lawyer, Internews-Kazakhstan, Almaty

**Tulegen Askarov**, financial journalist, president of business journalism center BIZ-Media

**Gulmira Birzhanova**, media lawyer, Legal Media Center (NGO), Astana

**Ascar Aktleouv**, journalist, Aktobe

**Ascar Shomshekov**, media manager, Ertis-Media, Pavlodar

**Shavkat Sabirov**, president, Internet Association of Kazakhstan, Almaty

**Assel Dzhanabaeva**, journalist, obk.kz, factcheck.kz, Almaty

**Olga Kolokolova**, editor-in-chief, *Nasha Gazeta*, Kostanay

**Olga Kaplina**, director, e-event.kz

**Ashat Erkimbay**, head, Minber (NGO)

*The following participants submitted a questionnaire but did not attend the panel discussion.*

**Gulnar Assanbayeva**, PhD, KIMEP, teacher, independent media expert, Almaty

**Mikhail Dorofeev**, editor-in-chief, informburo.kz

### Moderator and author

**Diana Medvednikova**, director, Legal Media Center (NGO), Astana

*The panel discussion was convened in Almaty on December 22, 2017.*