

# KAZAKHSTAN



## MEDIA SUSTAINABILITY INDEX 2019

Tracking Development  
of Sustainable  
Independent Media  
Around the World



# KAZAKHSTAN

## AT A GLANCE

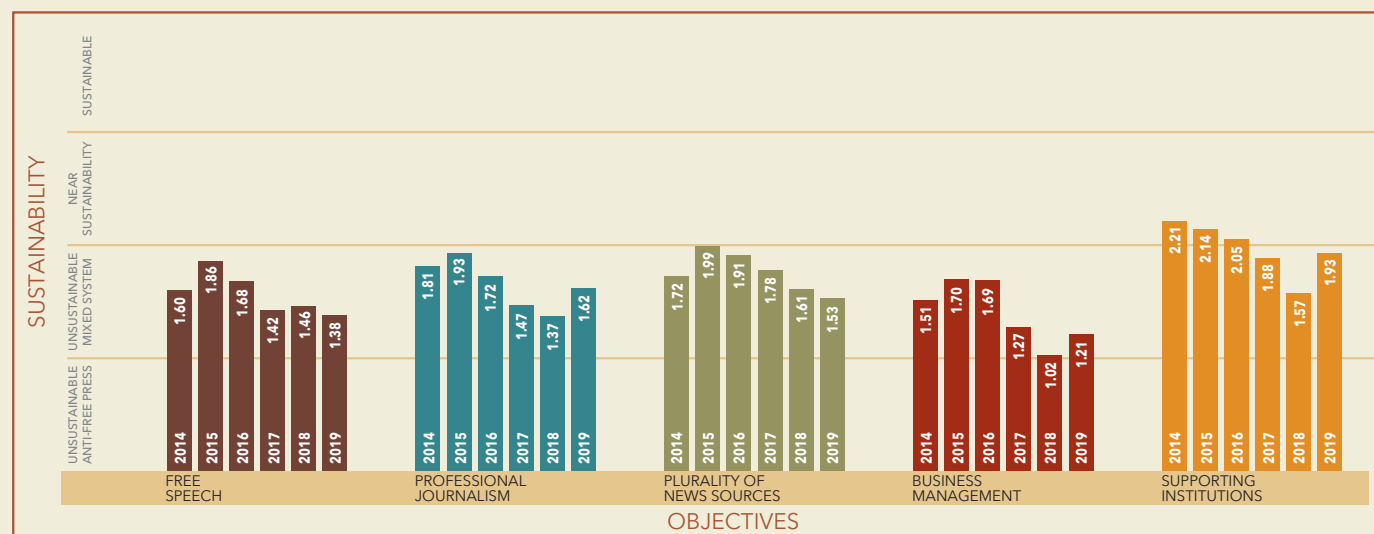
### GENERAL

- **Population:** 18,376,178 (December 2017, Committee on Statistics, Ministry of National Economy, Kazakhstan, stat.gov.kz)
- **Capital city:** Astana
- **Ethnic groups (% of population):** Kazakh (Qazaq) 67.47%, Russian 19.76%, Uzbek 3.18%, Ukrainian 1.53%, Uighur 1.46% (2018 est., Committee on Statistics, Ministry of National Economy, Kazakhstan, stat.gov.kz)
- **Religions (% of population):** Muslim 70%, Christian 26% (mainly Russian Orthodox), 0.6% others (Committee for Religious Affairs, Ministry of Culture and Sport, Kazakhstan)
- **Languages:** Kazakh (state language) 64.4%, Russian (official, used in everyday business) 95% (2001 est., CIA World Factbook)
- **GNI (2017-Atlas):** \$142,275 billion (World Bank Development Indicators, 2017)
- **GNI per capita (2017-PPP):** \$23,440 (World Bank Development Indicators, 2017)
- **Literacy rate:** 99.8%; male 99.8%, female 99.8% (2015 est., CIA World Factbook)
- **President or top authority:** President Nursultan Abishuly Nazarbayev (December 1, 1991 to March 2019). President Kassym-Jomart Kemelevich Tokayev (elected March 20, 2019)

### MEDIA-SPECIFIC

- **Number of active print outlets, radio stations, television stations:** Print: 2,790 newspapers and magazines; Television Stations: 128; Radio Stations: 70; Information Agencies and Websites: 340 (Ministry of Information and Communication, Kazakhstan, 2019)
- **Newspaper circulation statistics:** Top four by circulation: *Karavan* and *Karavan-Class* (partly private, in Russian, weekly), circulation 500,000 combined; *Yegemen Qazaqstan* (state owned, in Kazakh), five times weekly, 201,750; *Kazakhstanskaya Pravda* (state owned, in Russian), five times weekly, 100,000; *Ekspress-K* (partly private, in Russian), five times weekly, 100,000
- **Broadcast ratings:** Top four channels: 1 Channel Eurasia, NTK, KTK, 31 Channel (Kantar TNS Central Asia, 2018)
- **News agencies:** 41 news agencies, of which the most used are: Kazakhstan Today, KazInform, Bnews, Business Resource, Interfax-Kazakhstan (Ministry of Information and Communication, Kazakhstan, 2018)
- **Annual advertising revenue in media sector:** Advertising agency statements vary widely. Estimated annual revenue in media is \$154 million, distributed as follows: TV 67%, radio 12%, print 10%, internet 5%, outdoors 6% (Kantar TNS Central Asia, <2018)
- **Internet usage:** 77% (TNS Web Index, Kantar TNS Central Asia, 2018)

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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>



Kazakhstan's overall MSI score rose to 1.54, which still places it in the unsustainable/mixed system classification. This year's panelists observed that journalists limit themselves to safe content and reflections on topics discussed by experts, reducing Kazakhstan's media to opinions not supported by facts and statistics. Traditional print and broadcast media continue to experience financial pressure, as broadband and mobile Internet access is developing rapidly, social networks and bloggers are growing in popularity, and advertisers are redistributing their budgets in favor of websites and bloggers. Panelists also highlighted that the Internet and all user network activities are monitored and controlled. As a result, all discussions of current issues in the country have moved to social networks and instant messengers, which are not controlled by authorities.

In January 2018, for the first time in the history of the country and its central Asian neighbors, Kazakhstan headed the United Nations (UN) Security Council, an auspicious event for a country that is not a permanent member of the UN political body. Additionally, through presidential decision, Kazakhstan made a highly controversial official move from a Cyrillic-based alphabet to Latin. Observers believe that this change will further weaken Russia's influence over information and give the Kazakhstan government new impetus to enter the international arena.

A major tragedy during the year was the senseless and brutal murder of Olympic figure skating champion Denis Ten. This resonated widely in society and social networks, revealing a mood of protest and showing an active civil society demanding immediate and effective changes within the law enforcement system. The Kok-Zhailau campaign, which works against replacing a national park in Almaty with a ski resort, was a similar catalyst for civil activity.

The digitalization of all types of processes continued rapidly, including conversions in e-government, health care, and education. Civil activists began to engage in anticorruption investigations based on data readily available from the public procurement database.

Amendments to the law on mass media have come into force, with positive and negative outcomes. Key media events include the closure of one of the most popular independent news sites, Rstel.kz, and regular Internet blockages during broadcasts of the disgraced oligarch, Mukhtar Ablyazov. The Legal Media Center lost a lawsuit against the Ministry of Information and Communications (MIC) regarding MIC's failure to disclose how the government distributes funds to the media. All appeal courts, including at the supreme court level, have upheld the decision.

Officials also outlined their understanding of a journalist's responsibilities. Speaking at a youth conference, Dariga Nazarbayeva, a politician and the daughter of long-time President Nursultan Nazarbayev (who resigned in March 2019), said, "In my opinion, the biggest challenge facing journalism is to be the moderator, or mediator, between the state and society. To make government official gibberish understandable by the widest possible audience."

In 2018, Kazakhstan was ranked 158 out of 180 in the 2018 World Press Freedom Index published by Reporters Without Borders (Reporters Sans Frontières). Freedom House's Freedom in the World 2018: Democracy in Crisis report rated Kazakhstan at 6.7 points on a seven-point scale (seven being "least free") for lack of freedoms.

OBJECTIVE 1:  
FREEDOM OF  
SPEECH

1.38

During 2018, the situation regarding freedom of speech and information access did not change for the better. Major amendments were added to the law on mass media. Positive aspects include a ban on posting or printing images and personal data of children affected by violence as well as the individuals suspected of committing such crimes. The law has granted journalists more freedom in taking photos and videos in public places, and they can photograph people in public places without their consent. The list of exemptions of journalist liability has been expanded. Now, only the original source (i.e., a media organization registered in Kazakhstan) is held responsible for disseminating false information. The media law's penalties of suspension and media confiscation for minor technical offenses have been removed, and a liability penalty (a warning for a first-time offense) has been introduced.

Identification procedure is one of the controversial amendments. This procedure means that those users who want to leave comments on Kazakhstani information websites have to be registered. This has become a barrier to the expression of freedom of speech for both users and Internet resources. Many large mass media outlets ([zakon.kz](http://zakon.kz), [sputniknews.kz](http://sputniknews.kz), [informburo.kz](http://informburo.kz)) decided to switch off the option of leaving a comment because it requires a lot of money and certain procedures. Currently, the Ministry carries out inspections to ensure compliance with this provision. Last fall, "Nasha Gazeta" received a warning that, if it did not introduce an identification procedure on its website,

legal consequences would follow. The newspaper was forced to turn off the comments option.

State bodies—such as the General Prosecutor's Office, the National Security Committee (NSC), the Ministry of the Interior, and the Ministry of Defense—can now block Internet resources in the case of a social, environmental, or man-made threat or emergency and during a state of emergency. The General Prosecutor's Office and NSC can execute all other types of blocks (by court decision, as directed by the authorized body).

In the past year, some mass-media were closed and blocked online. For example, [Ratel.kz](http://Ratel.kz) was closed by a court decision due to the site owner's death, and Editor-in-Chief Marat Asipov was banned from engaging in professional activities for three years. According to panelist Olga Kolokolova, the editor-in-chief of *Nasha gazeta* (*Our Newspaper*), its website [Ng.kz](http://Ng.kz) was blocked on November 15, although they were not able to pin the blockage on a government agency. "For the entire month, we tried to figure out who had done that. We made inquiries to the MIC and Kazakhtelecom, the General Prosecutor's Office, and the police department," she said, "Officially, we were told that no one had blocked us. If this can happen to the site of a small regional newspaper, it would be not hard to imagine what would happen to real opposition press."

YouTube and Facebook access speeds slow down regularly in the evenings. Although this usually happens when outlets broadcast Mukhtar Ablyazov, leader of the banned party Democratic Choice of Kazakhstan (DCK), no one claims responsibility for the blackouts.

All Kazakhstan domain names must be hosted by a server located within Kazakhstan.

MIC and the Ministry of National Economy approved criteria for risk assessments and a checklist for monitoring compliance with current

media legislation. Now, all media are divided into three categories of potential violations: significant, insignificant, and major. Officially, this been implemented to reduce the number of media tax audits. However, the standards for categorizing raise many questions: print media is considered high risk, while Internet resources are regarded as low risk, and TV channels are not mentioned at all.<sup>1</sup>

**Panelist Lukpan Akhmediyarov of *Uralskaya nedelya* said that "often, when covering criminal events, incidents, investigations, and inspections, journalists are required to apply in writing to law enforcement agencies. This takes at least two working days, and by that time, the information has become hopelessly outdated."**

Control over Kazakhstan's information space has intensified. The Center for Analysis and Information of the Ministry of Information and Communications receives about \$3 million annually in state funding for monitoring all media for compliance with the law and sends notifications on legislative violations to the media outlets' editorial staff. The number of supposed violations is

<sup>1</sup> Ministry of Information and Communications and Ministry of National Economy, Republic of Kazakhstan. "Совместный приказ Министра информации и коммуникаций Республики Казахстан от 9 ноября 2018 года № 473 и Министра национальной экономики Республики Казахстан от 15 ноября 2018 года № 69 Об утверждении критериев оценки степени риска и проверочного листа за соблюдением законодательства Республики Казахстан о средствах массовой информации." [Online.zakon.kz](http://online.zakon.kz) (Online Laws of Kazakhstan). November 15, 2018. [https://online.zakon.kz/Document/?doc\\_id=32508659#pos=4;155](https://online.zakon.kz/Document/?doc_id=32508659#pos=4;155).



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estimated to be in the thousands, with about half of them related to regional TV channels. After NGO and media industry intervention, lawmakers amended the monitoring procedures. Editors can now raise objections to notifications of legal violations, and the regularity of monitoring has changed. Data regarding the monitoring, however, is still considered classified information.

Receiving a license is easy enough but obtaining a frequency for broadcasting is nearly impossible. A commission within MIC still handles the allocation of frequencies, and the official reason for rejections is the lack of available frequencies.

Media market access is open to local businesses, although broadcast media are regulated closely. The law sets a limit of 20 percent foreign ownership in media boards, justified by needing to ensure that the information space is effectively protected from foreign influence.

Most printing houses in Kazakhstan were privatized a long time ago and have official private tax status. However, they are under the strict control of authorities, and the state can stop their activities at any time.

The mass media law has introduced an official definition of propaganda, along with requiring journalists to obtain consent from individuals prior to publishing any of their confidential information.

Kazakhstan has seen an increase in the number of court cases related to the incitement of national, religious, and social hatred. They have applied mainly to posts and comments on social networks and often have had a political basis. Practically no acquittals occur with these situations.

The criminal offense of spreading false information has also become popular. In April, Forbes.kz and Ratel.kz journalists were detained when Zeinulla Kakimzhanov, the ex-minister of state revenues (now a prominent business owner),

accused them of intentionally spreading false information that affected his business. At the time of this writing, the case is still in process.

The majority of criminal cases are initiated against Internet users. They are accused of committing crimes by using the media and calling for public action that is prohibited in Kazakhstan. Activists Ablovas Jumayev and Aset Abishev were convicted for reposting and “liking” publications of the prohibited political party DCK (Democratic Choice of Kazakhstan). They were sentenced to three and four years in prison, respectively. Legal experts said that these penalties are excessive and do not correspond to the degree of the committed act.

This year saw several notable legal cases involving the media. For the first time in Kazakhstan, police opened a criminal case on obstructing journalism. Galymzhan Kunakbayev, a senior executive at JSC ArcelorMittal Temirtau, was charged for impeding the lawful professional activities of journalist Oleg Gusev: Kunakbayev demanded that the journalist not write negative coverage about the company and threatened Gusev, who recorded everything and submitted it to the police. In another case, a Pavlodar city official’s wife accused Ratel.kz journalist Dzhamilya Maricheva of disclosing her personal information when the journalist reported on foreign trips that were tracked through her Instagram account. The court decided to fine the journalist KZT 200,000 (approximately USD \$500) as compensation for “moral damages.”

Also this year, journalist Irina Beketova was murdered, although police subsequently determined that it was committed by her husband.

On Independence Day (December 16), journalists and activists were detained in various regions of Kazakhstan. Journalists Maria Melnikova and Raul Uporov of the weekly *Uralskaya nedelya*

spent several hours in a police station and were later released without any explanation given. According to experts, the journalists were detained to avoid drawing new focus to the December 2011 massacre of striking oil workers in Zhanaozen. Panelist Gulnar Assanbayeva commented that this is “unprecedented evidence of the complete impotence of the state in its attempt to influence public opinion and its inability to work with the population.”

Independent media journalists, especially investigative journalists, do not feel safe and encounter various obstacles when they want to travel abroad, panelists said.

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

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The media are still divided into public and private sectors. The state public media are 100 percent financed from the budget and has no competition. The amount spent for this purpose was about \$110 million. Private media are much smaller, but the majority also receive state funding through e-procurement or by decision of a commission that distributed money for the state information policy.

MIC has classified as “for official use only” its information on how much funding it allocates to private media. The Legal Media Center challenged this in court, with a demand to recognize such action as illegal. However, the courts rejected the demand. Thus, taxpayers are now officially denied the right to know where the state spends their taxes in the media sphere.

Unfair competition continues in the print media market, with citizens who are employees of state organizations (i.e., schools, hospitals) forced to support the state press through subscriptions to official publications.

Standards for accessing information have changed. Information is now divided into “official” and “other” categories. State bodies must respond to inquiries concerning official statements within three days, and to “other” statements within seven days. However, the law is violated continually. Government agencies do not respond in time and use noncommittal and incomplete answers, and access to official information is problematic, especially since almost any type of information can be classified as official by government decision. Panelist Lukpan Akhmediyarov of *Uralskaya nedelya* said that “often, when covering criminal events, incidents, investigations, and inspections, journalists are required to apply in writing to law enforcement agencies. This takes at least two working days, and by that time, the information has become hopelessly outdated.”

The law has no special prohibitions on

journalists accessing foreign sources of information. Government agencies attempt to inform the state media first about socially significant events and local information. According to Askar Shomshekov, this practice is rationalized as an attempt to minimize any manipulation of public opinion by private media as well as in the interest of national security.

As per 2018 amendments to the 2017 Law on Television and Radio Broadcasting, foreign television and radio channels are required to register a legal entity or a branch office representing them in Kazakhstan within six months. By July 9, 219 foreign media had met the requirements. However, 88 channels did not complete registrations and ceased broadcasting in August.

The law places no restrictions on becoming a journalist. A university graduate can begin working in journalism, as can any person without specialized education. Accreditation is still necessary for certain events, such as those in which the president participates.

### OBJECTIVE 2: PROFESSIONAL JOURNALISM

1.62

**While attending a youth conference, MIC Minister Dauren Abayev was quoted as saying, “Over the past 15 years, journalism in some areas has lost its sharpness, while conversely in others, it has been re-sharpened by going from one extreme to another. You need to understand all the intricacies of the profession. If you ask the right and smart questions, you will get the right and smart answers.” This statement caused a flurry**

**of disputes in social networks.<sup>2</sup> The Union of Journalists of Kazakhstan’s Board Chair Seitkazy Mataev considered these remarks inappropriate, commenting, “What kind of sharpness can we talk about if there is practically no information in the country that is different from the state ideology?”**

Events in Kazakhstan are not always covered objectively, as the government’s media financing is contained in the framework of social service procurements. Only a few media organizations avoid receiving money from the state as a matter of principle to retain their editorial independence. The overwhelming majority are regular recipients of state funding, which local authorities use to give directives to editors on what topics they cannot cover. As a result, all central publications and most regional media avoid reporting on protest events.

In the pursuit of sensationalism, some journalists create and spread fake information. Others, working on state information orders, just copy the propaganda sent to them by government bodies. Panelist Igor Bratsev, director of MediaNet International Center for Journalism, noted that the media has had a dumbing-down effect: “Today, Kazakh media is increasingly becoming just a rebroadcaster of news generated by the state sector, which does not stimulate critical thinking within the public. The news has become nothing more than obvious propaganda.”

Panelists noted that Kazakh journalists do qualitatively analyze situations in other countries but limit themselves to factual statements when it

<sup>2</sup> Turzhan, Nurila. “Абаев считает, что форум Jas Qalam станет эффективной площадкой для решения проблем в журналистике.” *BNews.kz*. October 12, 2018. [https://bnews.kz/ru/news/za\\_poslednie\\_15\\_let\\_zhurnalistika\\_poteryala\\_svoju\\_ostrotu\\_abaev](https://bnews.kz/ru/news/za_poslednie_15_let_zhurnalistika_poteryala_svoju_ostrotu_abaev).

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concerns events in their own country.

Within the journalist community, ethical norms and rules work in a very dubious way. The media sphere has no common standard of ethics or self-regulatory institutions, such as a media or press council. These shortcomings lead to a large number of lawsuits and court hearings.

Kazakhstan does not have a single media entity that fully meets professional standards. New media outlets ignore such ethics and only chase after “likes” and page views. Traditional media are forced to maneuver between how reporting should be done and how the advertiser or owner insist on it being done.

Journalists often violate ethical guidelines that concern children. For example, in a high-profile case of a boy who was raped, the media showed the faces of his relatives and disclosed the details of the case.

According to the panelists, the media sector’s guiding factors are bias and poor-quality journalism, mass publication of paid advertising and public relations, and constant high-level corruption in the industry. News commercialization by the media remains high. Social networks have an active presence of bloggers who promote consumer goods and services, as well as cover events on a paid basis and through bartering. In addition to gifts for journalists, “blogger care” has also increased in popularity: bloggers are assembled in groups, put in a vehicle, and taken to events where they receive presents, good food, and drinks. In return they are expected to write positive articles.

According to the results of a study conducted in 2018 by the MediaNet International Center for Journalism, more than 65 percent of Kazakhstan’s media specialists believe that censorship exists to a varying degree. At the same time, almost all reporters, editors, and owners point out

that self-censorship by journalists and even by publication owners is the primary problem. Reporters themselves not only know the limitations from their editorial offices on covering certain individuals and topics, but the editors also are fearful when preparing materials on social and political issues. Any unguarded word can lead to complaints from officials and lawsuits, which could result in losing work and ruining the media company. So reporters whitewash, preferring to cover safer, noncontroversial topics.

Assel Janabayeva, a journalist with Obk.kz and Factcheck.kz, explained that “self-censorship in editorial offices is called ‘flagging’ — that is, the editor, depending on who pays them, sets up topics their journalists can write about, with the reservation [that they] write nothing at all about certain persons or write only good things about them.”

**Igor Bratsev noted, “Today, Kazakh media is increasingly becoming just a rebroadcaster of news generated by the state sector, which does not stimulate critical thinking within the public. The news has become nothing more than obvious propaganda.”**

Panelists said all media, regardless of ownership, are aware of a number of persons, social movements, and topics that constitute a blacklist. For example, Kazakhstan media are directly banned from mentioning the fugitive politician Abyazov and his political party DCK, labeled as extremist by the courts. Many journalists do not understand how best to write about them, and consequently have been summoned to the prosecutor’s office and advised not to publish such material. Any articles about Abyazov and DCK could be regarded as incitement

propaganda for extremist activities.

Media degradation is also driven by the pursuit of traffic and ratings in social networks. Serious material gives way to short news items of criminal content (traffic accidents, murders, rapes) and to reports on the life of “stars” and descriptions of online community life. Social network posts often become “news” without proper verification and editing — for example, by not redacting hate speech.

Against the background of the economic crisis, journalist salaries are falling, the number of reporters is decreasing, and some publications have ceased to exist. At the same time, highly specialized journalists remain in demand due to a shortage. The salaries paid to journalists vary greatly, depending on the region and the financial health of their media organizations. Private independent media outlets often pay “gray” wages, given that media businesses have no tax benefits and their incomes have been decreasing yearly. According to a National Chamber of Entrepreneurs (NCE) survey of 24 universities, the average salary of a journalism graduate from 14 of the universities is less than KZT 100,000 (\$260) per month.<sup>3</sup> The difference between fixed salaries at independent media and state publications is significant. To compensate, journalists of independent media often do side work as freelancers.

At many publications, it is considered a norm for newspaper executives to ask their local administration to “recommend” that, for example, school and hospital employees subscribe to their newspapers; similarly, it is common for publications to use “contractual” advertising and plugola (hidden

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3 Atameken. “Рейтинг Вузов: Какие Образовательные Программы Вызывают Вопросы у Бизнеса?” *Atameken.kz*. July 23, 2018. <http://atameken.kz/ru/news/30084-reyting-vuzov-kakiye-programmy-vyzyvayut-voprosy-u-biznesa>.

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advertising or advertising under the guise of news reporting). Commercial advertising buys outflow to such global networks as Facebook, Google, and Mail.ru, which deprives local media of any realistic monetization prospects.

Journalists are taking fewer risks in their coverage and are more oriented to non-political news. Reporters limit themselves to safe content and reflections on topics discussed by experts, reducing Kazakhstani journalism to opinions not supported by facts and statistics, panelists observed. This is especially true for regional media that are exposed to administrative and economic pressures. Entertainment TV always wins out over informational news on important sociopolitical events. The breakdown is the same for Internet content.

### 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).

Internet access in Kazakhstan is affordable, given that the equipment for online media is not as expensive as a mobile TV unit for a TV channel, for example. With regard to technical capabilities, many media organizations have switched to a mobile journalism format. State media is equipped with the most modern of technology. High-quality specialized journalism is represented primarily in the business segment. Consumers can observe active contributions from well-known businesspeople on social networks. The National Bank and the Ministry of National Economy have also become significantly more active in social media.

The media are unofficially prohibited from publishing investigations concerning certain businesspeople (e.g., Kenes Rakishev, Zeynulla Kakimzhanov, Timur Kulibayev), the president's family, and the head of the National Security Committee's family. Information about them is not published even in so-called "open" sources.

Foreign investors are still passive in the media market, due to a 20 percent cap on their ownership in any company. Russian information resources actively promote themselves in the Kazakhstan market, including those funded by grants from the Russian Federation. The presence of Kazakhstan's media abroad remains minimal, but panelists underscored that Armanzhan Baytasov (Forbes.kz owner) was invited to take charge of the Russian edition of *Forbes* magazine; and Alexander Vorotilov, who was the deputy chief editor in the magazine *Forbes Kazakhstan*, was appointed to a similar position in *Forbes Russia*.

### OBJECTIVE 3: PLURALITY OF NEWS

1.53

**According to MIC, Kazakhstan has 2,897 media outlets: 87.7 percent produce print publications, 6.2 percent are electronic editions, and 6.1 percent are news agencies and network publications. In addition, the entire territory of Kazakhstan is covered by national satellite television channel OTAU TV, with 81.7 percent covered by digital broadcasting. The media is divided into two categories: state and private. No community-based media exist in Kazakhstan.**

The trend of pushing traditional print and electronic media out of the market continues. The shift is a result of broadband and mobile Internet access developing rapidly, as well as social networks and bloggers growing in popularity. Advertisers continue to redistribute budgets in favor of new media websites and bloggers. People prefer those channels as sources of information because traditional media are very much dependent on the government and cannot cover many important topics. Bratsev identified the risk of believing online posts over news reporting. "People's distrust of traditional media motivates them to use social networks as an alternative information platform. The problem is that those networks contain unverified and often deliberately false information," he said.

In the panelists' view, bloggers present themselves as opinion leaders, but still cannot assume the role of "the ruler of people's minds." Their scope of knowledge is narrow, they are fascinated with hype, they participate in plugola, and they lack clear principles, panelists said.

Because consumers do not receive all the news information they need, a new media source



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has emerged and is gaining strength: instant messengers and, in particular, WhatsApp.

According to the research company Analysis and Consulting Team (ACT) Kazakhstan, the popularity rating of social networks ranked from highest to lowest is as follows: VKontakte, Odnoklassniki, Instagram, Moy Mir, Facebook, and Twitter, with most users located in Almaty, Karaganda, Shymkent, and Astana. YouTube is particularly popular, and although the Kazakh authorities deliberately slow down the speed of the Internet when Ablyazov is streaming, it only increases public interest in what he says, panelists observed.

### 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.

Government agencies are now maintaining accounts on social networks, where authorities comment on certain topics. Journalists actively use their comments as official sources of information. Business and financial material can be found there, as they are in the public domain.

A new website, Compr.kz, has emerged. This site compiles data on businesspeople and commercial companies and then provides the information to the general public. Another new website, Publicbudget.kz, describes all the financial operations of social programs sponsored by the state.

Panelists noted positive technological developments: almost all state print media have web versions that allow displaying "mosaic" multimedia content, thereby focusing on consumer needs. More and more online media entities are creating mobile applications as well.

Kazpost JSC, the dominant subscription company for periodicals, provides low-quality service. Publication of daily newspapers has practically ceased due to Kazpost JSC's high cost for services and its inability to deliver newspapers to subscribers in a timely manner.

Citizens' access to foreign media is not limited by law, but consumers have economic restrictions: they must pay for cable TV to receive access to foreign media, because cable operators must also pay for that channel to include it in their packages. Cable operators also practice self-censorship; for example, many do not include in their packages the Ukrainian channels because of the ongoing conflict between Ukraine and Russia.

Several information agencies are available, including Interfax-Kazakhstan, Kazinform, KazTAG-Kazakh Telegraph Agency, Reuters, and Bloomberg. These agencies represent the most effective and reliable sources of information, and all types of

media have subscriptions. Some of the information provided by news agencies is available through free access, and the rest is purchased, as the price is quite affordable for many publications. Also, the Chinese agency Xinhua has appeared in the market.

Private media produce their own content, mostly in news format. In this respect, TV channels are the most independent: they generate their own news and analytical programs. At the same time, the state-owned media offer non-controversial content, both in terms of topics and key messages. Private media offer a more critical approach in covering events and problems of the state, but due to the reasons described above, they often limit themselves to writing on insignificant topics and even avoid certain issues completely.

State media cover international news and conflicts very poorly, with no analysis of the issues. Against this background, Russian informational content remains in demand, even though it cannot be regarded as impartial. However, its high technical and professional quality makes it attractive to an uncritical audience.

Many media organizations belong to financial and industrial groups and monopolies. But media ownership transparency remains a serious problem. The ultimate owners of the media remain unknown to general society, and the government has not supported efforts to disclose this information.

The year of 2018 witnessed a noteworthy lawsuit brought by the Legal Media Center against MIC. They sued MIC for refusing to provide information about media organizations that receive government financing. Despite the arguments of the plaintiffs that the information is socially important, the court upheld the MIC minister's claim that the information is confidential.

The spectrum of public interests is covered narrowly in traditional and new media, social

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networks, and instant messengers. Such stories are mostly subordinated to either government orders or the interests of advertisers. The opposition press and online sources have practically disappeared from the market, and only individual users of social networks express any opposing viewpoints.

**“People’s distrust of traditional media motivates them to use social networks as an alternative information platform. The problem is that those networks contain unverified and often deliberately false information,” Bratsev said.**

Media representing Kazakhstan’s ethnic diasporas are in a difficult position due to a reduction in their audience, and they almost always serve the ideological interests of the state. The national state newspaper, *Deutsche Allgemeine Zeitung*, is the only paper directed toward ethnic Germans in Kazakhstan. The paper is published once a week, with a circulation of 1,000 copies, and is supported by funding from the MIC and the Institute for Foreign Cultural Relations of Germany. A Korean-language newspaper, *Korea Ilbo*, has a circulation of 1,650 copies.

The varying media have their individual approaches to religious, national, and sexual minorities. Minority topics are presented from a positive perspective as per state orders, and mostly concern the larger religious minorities (Islam and Orthodoxy) as well as issues of national unity and friendship among peoples. Sexual minorities are practically not discussed at all. Non-government entities cover these topics in a harsher way, often by using discriminatory language. This is especially characteristic of the Kazakh-speaking media, who

are subjective in the discussion of such issues and sometimes even openly intolerant about sexual minorities.

The Internet campaign “NeMolchi” (Don’t Stay Silent), organized by activist Dina Tansary, received wide media coverage in 2018. This campaign emphasized the detrimental effects of not speaking up on rape, bullying, and violence against women. The campaign was recognized by many governmental agencies, activists, and foreign communities. The Kok-Zhailau campaign, protesting the construction of an expensive ski resort in a forest in the foothills of Almaty, was of the same scale.

The media will only use foreign content that most positively reflects the country’s government and its leadership, government programs, visits of top officials, and the Eurasian Economic Union. Publications on the international agenda determine their tone and topics largely by the positions of official institutes. These publications are also influenced by propaganda campaigns of neighboring countries such as Russia, China, and Turkey. As a rule, Kazakhstan’s media do not have their own correspondents in other countries, nor do they have full-time employees specializing in international topics.

Local news is aired in the national media but in a truncated format: only incidents, criminal cases, and in particular high-profile crimes. The media have an interest in regional life just in cases of a “state order” or in the event of a scandal related to a municipality or its head — when such reporting is ideologically advantageous to the authorities.

Sometimes topics arise that most people prefer not to discuss. In a recent case of a rape of a child by minors, the story was hushed up by all possible means. Journalists, lawyers, and social activists came under pressure from law enforcement agencies and even from the Ombudsman for Children’s Rights

— although they saw the situation as an opportunity for public relations.

### OBJECTIVE 4: BUSINESS MANAGEMENT

1.21

**The national media continue to suffer from the negative impact of macroeconomic conditions in Kazakhstan. One factor is the weak exchange rate of the Kazakh tenge versus the US dollar and the Russian ruble, especially because Russia is the main supplier of newsprint. High inflation is problematic, and the state information procurement order system is challenging.**

Media management is relatively ineffective, in essence just receiving and implementing state orders. With regard to management quality, media companies are significantly inferior to leading companies in other economic sectors. According to Dorofeev, “The editor-in-chief and the entire editorial staff usually do not think about financial issues. They don’t even have basic knowledge about business planning, marketing, and so on.”

The panelists said that these low management ratings indicate the obvious problem of lacking editorial independence. They held the view that independence should be a main priority of Kazakh media, regardless of who owns the outlet.

Today, the media industry is facing the following problems:

- ▶ The state holds a dominant position as media owner.
- ▶ State-owned media are managed inefficiently. According to estimates by the accounts committee of Kazakhstan, government funds are spent

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inappropriately and ineffectively.

- ▶ The state's announced goal of increasing media competitiveness has not been achieved.
- ▶ Advertising is restricted at the legislative and institutional level. Top advertising sellers work only with specific TV channels.
- ▶ The state media, with 100 percent government financing, competes in the advertising market along with the private media.
- ▶ Kazakhstan has only one measurement meter for television audiences, and no circulation ratings at all for print media.
- ▶ Government funds are not allocated to infrastructure projects encompassing the media market; instead they go to individual media outlets, mainly state-run.
- ▶ Media enterprises have no tax relief.

Most media depend on foreign investments by their founders and grants from international organizations. At the same time, self-sustaining media organizations diversify their sources of income as much as possible via subscriptions, distribution, advertising, special projects, and government orders. These sources are used to varying degrees by many private media outlets.

The advertising market is still small. Because advertisers are looking for mass coverage they are gradually moving toward social networks. Television remains the most attractive for media advertisers, but it requires large budget outlays. Global players such as Facebook, Google, and YouTube are gradually consuming more and more of the advertising market share. The effectiveness of banner advertising is decreasing as well. These issues have led to a crisis in the financing of the media advertising model.

At the regional level, significant parts of advertising budgets are redistributed in favor of social networks. They have become a good source of income for bloggers and specialists in social media marketing. In such an environment, the print media has been forced to compensate for losses by raising subscription prices. The increase has led to a drop in print media circulation, to only half or a third of previous levels. For example, in 2018, the *Star of Priirtyshya*, once the most popular newspaper in the Pavlodar region, had a circulation of only 10,000 copies. That total is four times less than its 2015 circulation, and 7,000 copies less than 2017's total.

Consequently, publications with revenues that depend on subscriptions are becoming biased toward entertainment content. On the other hand, outlets receiving state funds allocate significant airtime and printed pages to coverage and implementation of government programs.

According to Kantar TNS Central Asia, the total volume of advertising increased by 18.6 percent during the first half of 2018, compared to the same period in the previous year. However, print media volume decreased by 22.7 percent, while radio had an increase of 8.5 percent, and TV 22.6 percent. This growing trend shows that advertisers are independently approaching consumers through social networks to offer their goods and services in Kazakhstan's advertising market. The shift has reduced advertising revenues of the media, public relations, and advertising agencies.

Non-profit public advertising is poorly represented in the Kazakh media.

Most of the regional media companies do not have clear business plans. Print media are the main type to have management staff. As such, most media's business decisions are made based on crises, such as staff cuts and state funding revisions. The accounting departments of such media outlets

have the same shortcomings. They do not make adequate use of new technologies capable of automating financial processes.

The government distributes funds among the media in a non-transparent manner. Media companies have seen improvements, though, compared to previous years. The changes include the formation of a special commission that now works with public representatives; editorial staff members developing new projects; and outlets' popularity and ratings now being considered in funding decisions. But in general, the distribution of government procurements is done without proper public control. These practices partially explain why MIC refuses to disclose information on how state procurement orders are allocated.

**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.

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Most media outlets, especially print and online publications, do not conduct any regular marketing studies. This choice is largely due to insufficient funding. As a result, media entities either do not understand or have an incorrect understanding of their target audience. The exceptions are TV channels, many of which measure their target audience using several parameters, and online media outlets, which use corresponding measurement tools (Google Analytics, Yandex Metrica, Mediator, etc.).

**According to Dorofeev, “The editor-in-chief and the entire editorial staff usually do not think about financial issues. They don’t even have basic knowledge about business planning, marketing, and so on.”**

TV ratings are measured by Kantar TNS Central Asia. But according to the panelists, professionals are increasingly questioning its audience measurements. The primary criticism is Kantar not controlling for social, linguistic, and geographical factors that, according to some experts, may cause distortions of the true data.

Several tools are used to measure audiences for specific online publications, and often these outlets use the findings to attract advertisers. The government agencies that distribute funds within the framework of state public orders also use these indicators when forming the terms for procurement offers. This results in a bid offer having technical specifications that often just fits the parameters of a particular media organization, making it impossible to apply to a different service provider.

Kazakhstan has no unified circulation service for measuring the print media, and this leads to an overestimation of the circulation of newspapers

and magazines. The practice of overestimating is widespread. In 2018, in the city of Pavlodar, an authorized agency conducted an inspection of media outlets and demanded that they provide actual circulation numbers of each publication on its release. It was discovered that the actual number of copies in circulation was two to three times less than what was being declared.

Online media commonly attempt to artificially increase the traffic and attract advertisers, and bloggers use similar methods. In 2018, the news website Informburo.kz announced its withdrawal from the Internet statistical service Zero.kz. Nur.kz, 365info.kz, Gizmeteo.kz, Kolesa.kz, Krishna.kz, and other popular resources had already withdrawn from Zero.kz.

Costly marketing research is only affordable for large advertising agencies affiliated with the national media. Often, this also leads to research results being falsified in favor of the customer. The same situation can be observed in the conducting of rating studies.

### OBJECTIVE 5: SUPPORTING INSTITUTIONS

1.93

**Among the business associations that provide services to media owners and managers is the National Association of Television and Radio Broadcasters of Kazakhstan. The association includes regional TV channels as well as the Internet Association of Kazakhstan. They provide various consulting services for developing the media market and try to influence legislative bodies that regulate the media. The Association of Information and Communication Technologies Companies, as well as the Association of**

**Kazakhstan’s Internet Business and Mobile Commerce, are engaged in the improvement of Internet conditions. The Association of Financiers of Kazakhstan actively participates in discussions of legislative changes regarding the Internet.**

Professional associations include the Association of Satellite TV, the Association of Publishers of Kazakhstan, and the Club of Chief Editors. As a rule, they only represent the interests of a limited circle of people. A trade union to back all media workers has never been created, although many media stakeholders have made attempts.

NGOs play an essential role in significantly helping media organizations defend their right to freedom of speech. They also offer professional development, participate in lawsuits, conduct public campaigns, and actively participate in the legislative process. In particular, the Legal Media Center regularly monitors state funding of the media and contacts government agencies with the aim of protecting media rights.

Legal assistance to independent media is provided by Adil Soz, the Foundation for Protection of Freedom of Speech, and by Internews Kazakhstan, which constantly monitors violations of freedom of speech and information access. Although these organizations operate mainly in larger cities of state significance, such as Astana and Almaty, they cooperate actively with the regional media as well. Often journalists persecuted for their professional activities are defended by individuals known as “people’s lawyers,” such as Ayman Umarova, Baurzhan Azanov, and Bakhtiyar Galimzhanov.

The work of Kazakhstan’s NGOs has a minimal effect on the overall situation, according to Dorofeev: “The statement that if Kazakhstan’s human rights activists did not defend the human rights to freedom of speech, then the current situation would be



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much worse, is of little comfort. Media NGOs are fully dependent on grants from international organizations or from the state budget.”

Recently, the National Chamber of Entrepreneurs of Kazakhstan (NCE) Atameken surveyed journalism departments in 24 universities. They found that the best departments are North Kazakhstan State University, Kazakh University of International Relations and World Languages, Atyrau State University, International University of Information Technology, and Al-Farabi Kazakh National University. Universities enjoy academic freedom: they can program up to 85 percent of their course content curricula.

Some employers are sharply critical of journalism education quality, and this has led to the creation of the Alma Mater of Journalism Club. The club includes the heads of journalism departments, practicing journalists, and media managers and is designed to upgrade educational programs in journalism. The club held two main forums in 2018, one of which was in Turkistan.

A study conducted by the NGO MediaNet International Centre for Journalism confirmed the following: “After four years of studies in the university, the market receives mainly media experts, lecturers-theorists, and media researchers rather than practicing journalists who are willing to work directly in media editorial offices.”<sup>4</sup> MediaNet is actively working on fact-checking.

The quality of academic education and vocational training in Kazakhstan’s traditional universities do not meet actual media demands. In particular, journalism faculties do not cover

multimedia formats or information regarding promotion in social networks. Most importantly, academic institutions do not develop students’ ethical approach to journalism as an institution serving society. “Almost all universities are preparing propagandists and not journalists,” asserted Akhmediyarov.

Panelists also pointed out examples of effective cooperation between universities and NGOs. The Legal Media Center, with support from the UN Children’s Fund (UNICEF), introduced a training module “Covering Children’s Rights in the Media” that was offered in 10 universities.

Short-term training programs are organized mainly by NGOs and international institutions. In the middle of the year, with European Union support, Internews launched a project<sup>5</sup> that aims to increase capacity building of journalists, civil activists, and media professionals for the creation of high-quality media content. The project also focuses on increasing civil society’s level of critical media consumption.

This year, a 15-month online campaign called “Three Points” was held, focusing on media literacy, social media, and platforms of instant messaging exchange within Central Asia. This campaign was the first of its kind in Kazakhstan.

The panel members described several other educational offerings. In December, Internews launched a five-year project, funded by USAID, for media development called Central Asian Media Program (CAMP) in all five central Asian countries. The program is directed at developing quality journalism, and increasing media literacy for all

segments of the population, conducting research on media consumption and the level of media literacy in the country, and possibly improving legislation. Some countries’ embassies—such as China, Germany, and the United States—organize press tours and seminars for journalists and bloggers. Financial organizations and state bodies including the Ministry of Agriculture and the National Bank are also active in holding such events. The Public Council, which includes well-known business journalists, continues its work with the support of the United Pension Fund. In addition, educational courses on analytical topics for Kazakh-speaking journalists are beginning to be offered.

### 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.

4 MediaNet International Center for Journalism. “Брошюра: Журналистское образование в Казахстане независимая рыночная оценка академических программ.” *MediaNet.kz*. November 1, 2018. <https://medianet.kz/ru/biblioteka/novaya-statya-536>.

5 New Reporter. “Internews запустил новый проект ‘Содействие стабильности и миру в Центральной Азии.’” *NewReporter.org*. May 17, 2018. <https://newreporter.org/2018/05/17/internews-zapustil-novyyj-proekt-sodejstvie-stabilnosti-i-miru-v-centralnoj-azii/>.

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Kolokolova said that *Nasha gazeta* provides its staff with study opportunities. “For a long time, we have been training our own journalists independently. We actively use courses, seminars, and webinars, which are conducted by public organizations and international foundations. Currently, we find that this is the most effective school to develop journalistic excellence.”

However, organizers of short-term courses sometimes have problems. The editorial board of *Uralskaya nedelya* invited a Ukrainian journalist, Alexander Verkhovsky, to conduct training for local journalists on the topic of fact-checking. However, the police did not allow it to proceed, and the court imposed a fine for violating immigration laws.

**“Almost all universities are preparing propagandists and not journalists,” asserted Akhmediyarov.**

In Kazakhstan, the sources of newsprint paper, printing equipment, printing houses, and Internet service (except Kazakhtelecom) are private establishments, but the state fully controls all activity. Even after the recent large-scale privatization of state assets, the government continues to own national media assets. The state also owns the press distribution key companies, such as Kazakhstan Temir Zholy and Kazpost. In the Internet market, the national company Kazakhtelecom is the main lever of state control.

The quality of work of printing houses is acceptable, but they have little chance for steady development given the constant increase in paper cost and the complete dependence on Russian producers for paper supply. Russian companies sell paper to Kazakhstan’s printing houses with a substantial profit margin of 20 percent. This markup

leads to higher prices for media products, as well as reduces the competitive advantage of Kazakhstan’s press over Russian media — itself represented in the Kazakhstan market through a large assortment of publications.

The Kazakh digital broadcast technical infrastructure is monopolized, which has become a critical issue for the national broadcasting industry and for the general public. Kazteleradio, the provider and a government company, has the right to apply fees for the inclusion of TV channels in the digital multiplex, and the fees are not affordable for most small regional TV stations under private ownership. Also, favorable conditions for inclusion in the multiplex are created only for state channels. Kazteleradio’s local executive bodies have refused to help socially vulnerable segments of the population purchase decoders during the transition to digital broadcasting, which began in 2018 and is scheduled to be finalized in 2021. The audience for free digital television remains unknown as well. Private broadcasters do not receive any guarantees for continuing their activities and are highly dependent on good relations with the authorities, especially in the regions. After switching to digital, channels that had previously broadcast in analog mode lost their autonomous infrastructure for transmitting their signal.

The retail distribution system of print media has been practically decimated in Almaty, the largest city. More than 60 periodical kiosks were dismantled during 2018 under the pretext of reconstruction and improvement of the urban environment. So far, nothing has taken their place.

Print media continue to experience difficulties with subscriptions. The problems stem from the high delivery costs, especially to rural areas and over long distances; and the government still forcing its employees to subscribe to state print media.

According to Finprom.kz, the number of Internet users at the end of the year was 2.5 million, which is two percent less than the previous year. The value of Internet services provided during the first three quarters of 2018 amounted to KZT 180.5 billion (\$474.7 million). This is a 6.7 percent increase over the year before; however, experts on the panel noted that some remote areas have no Internet connection at all.

Panelists also highlighted that the Internet and all user network activities are monitored and controlled. Also, now that identification is mandatory for users who post information on the network, all discussions of current issues have moved to social networks and instant messengers, which are not controlled by authorities.

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### List of Panel Participants

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

**Tulegen Askarov**, financial journalist; president, BIZ-Media, Almaty

**Gulmira Birzhanova**, media lawyer, Legal Media Center, Astana

**Assel Janabayeva**, journalist, Obk.kz, Factcheck.kz, Almaty

**Gulnar Assanbayeva**, senior lecturer, KIMEP; independent media expert, Almaty

**Igor Bratsev**, director, MediaNet International Center for Journalism, Almaty

**Igor Nevolin**, editor, *Time*, Almaty

**Inga Imanbay**, independent journalist, Almaty

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

**Michael Dorofeev**, editor-in-chief, Informburo.kz, Astana

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

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

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*The Kazakhstan study was coordinated by, and conducted in partnership with, the Legal Media Center, Astana.*

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