

STRATEGY PAPER

Supporting Belarusian Media: Quality, Diversity, Reach

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Made for minds.

Executive Summary

In 2021, the Belarusian media landscape experienced a radical transformation. Suppressing protests against the official results of the 2020 presidential election, the state mounted an unprecedented attack on the independent media. This included criminally prosecuting journalists and media managers, forcing them into exile, blocking websites, cutting-off funding sources, and labelling media resources and content as extremist. At the same time, the Belarusian state and media actors connected to the Russian state seek to capture the media market and the attention of the audience using various tools of manipulation and propaganda. In these circumstances, states, organizations and individuals provided initial assistance to independent Belarusian media, in particular by facilitating the relocation of media professionals. Still, this does not guarantee the survival of media institutions as viable actors that provide their audiences with timely and reliable information.

This strategy paper answers the following question: What can the donors, media NGOs, and the management of professional media both in exile and in Belarus do to maintain the quality and the reach of Belarusian independent journalism?

Establishing **sectoral standards** of audience engagement and quality control and keeping **independent media as diverse as possible** is the solution this paper advocates. If this strategy is implemented, independent media will play a key role in shaping the political discourse in Belarus, enabling a dialogue between different parts of an atomized Belarusian society. In a way, this will be a continuation of the crucial role these media played during the protests in 2020 and the first six months of 2021.

Realistically, the business models of the recent past have collapsed for all, or almost all, of Belarus' independent media. In the coming years, both project and institutional funding will be key to the survival of independent media. Equally important will be a robust NGO sector supporting the cooperation of professional media at the sectoral level. The key recommendations are described in greater detail below.

Objective 1.

Maintaining the diversity of independent media

We recommend core support for **established national media** that deliver quality content and professionally engage with the audience, thereby setting standards for other actors. The quality of their work is akin to a public good. At the same time, many journalists and managers work part-time and as freelancers. Their **experimental projects** (social media blogs, media initiatives or start-ups) can be points of growth for the sector. Project funding for these initiatives solves two problems: it keeps qualified people in the profession and engages niche audiences who are inevitably neglected by more established media. Finally, support must be provided for the **regional media** in Belarus. These outlets reach audiences within the country and are their last alternative to Russian propaganda and Russian digital aggregators. Given the obstacles erected by the state, organizing this support will require both ingenuity on the part of implementors and flexibility on the part of the donor community.

Objective 2.

Maintaining the variety and quality of content

Media should be supported to produce not only news but a **broad spectrum of quality content** on cultural trends and social practices. They should foster debate about values and a discussion forum about the future of Belarus and be accessible to various audiences. Without this broad positive agenda, one risks being stuck in a reactive confrontation with the state and Russian propaganda.

This brings us to the question of **quality standards**. Facing state propaganda and an increasing influence from Russia, the Belarusian media must retain the trust of its audience. This means that professional quality standards must be the editorial boards' priority despite organizational difficulties as well as the fierce competition for the audience's attention from new media, activist projects, bloggers and anonymous channels. Quality requires the following components: a clear editorial policy; a content strategy and digital infrastructure for its implementation; commitment to journalistic standards; professional management; and a motivated team with the necessary competences in content production and social media marketing (SMM). Such a **sectoral standard** must be the result of collaboration between all relevant media actors.

Objective 3.

Audience research and development: Maintaining and increasing the reach of independent media

The independence of information in Belarus requires that independent media continue to reach their audiences within the country. Many players have been able to find for themselves adequate tools of audience research and engagement. But these individual efforts are not sufficient for strategic decisions at the sectoral level. Just as with quality, independent media require a **sectoral standard** on audience research and safe audience engagement, including quantitative and qualitative measurement tools. One challenge to be addressed is the differentiation between activist projects and professional journalism regarding the indicators of audience coverage. This differentiation is important both for donors and media management and must be part of the emerging sectoral standard.

Produced by a consortium of players and accessible to all, a comprehensive audience monitoring instrument – a **Media Landscape Matrix** – could play the role of a “public good”, helping media management optimize their digital strategy. The Matrix would also help the donor community to base their decisions on a deeper understanding of the Belarusian market beyond basic statistics.

Objective 4. Developing an institutional framework for independent media in exile

The quality of communication within the media sector is important. The circumstances of repression and exile lead to atomization, a breakdown of professional and personal ties. It is recommended to develop the emerging **media hubs**, managed by civil society institutions and funded by donors. As part of this collaboration, an **Audience Development Laboratory** would be responsible for the Media Landscape Matrix.

If media are not to be confined to the role of producing information about fleeting consumer goods, and are to play a more autonomous role in the shaping of national political discourses, a **think tank** focusing on the elaboration and communication of **quality standards** and the monitoring of quality is necessary. As part of the media hubs, the think tank would focus on accumulating expertise and generating strategic initiatives across the entire spectrum of the media sector's activity.

Belarusian independent media will not survive without a range of **funding instruments**, including institutional support for established players, project support for new initiatives, and project management and reporting standards adapted to the security needs. Moreover, the **performance indicators** should not only reflect the audience reach but also reward long-term thematic projects and sector-wide collaborations, and support a broader political debate in the professional media.

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The goal and scope of the strategy

This strategy formulates a set of key recommendations for actors interested in preserving and strengthening the independent Belarusian media space. It includes the international donor community, civil society actors working with media, such as the Press Club Belarus, the Belarusian Association of Journalists and the Lviv Media Forum as well as media managers. An attempt has been made here to formulate a strategic vision, which will help relevant actors to clarify and adjust their priorities for the coming years.

These recommendations are based on a study of the major factors affecting the functioning of both exiled Belarusian media and those continuing to work within Belarus. This includes both the changing patterns of media consumption and the institutional development of professional media in 2021. The methodology incorporated sample monitoring of media, in-depth case studies, focused discussions, in-depth interviews and focus groups.

The author analyzed the statistics on independent digital media outlets and considered recent studies of the global media trends and digital audience behavior. Over a three-month period, the author conducted sample monitoring and content analysis of the information about Belarus aggregated by the Russian digital service Yandex, a service which plays a special role in shaping media consumption. The audience coverage was analyzed with the help of SimilarWeb. The data from several sociological studies of Belarus' media market were also used. The author took part in the Lviv Media Forum, held in Lviv, Ukraine, 26-28 August 2021, where she moderated the session on Belarus. The discussion was attended by approximately 60 representatives of the Belarusian media community. In October 2021, the author also contributed as a researcher and moderator to a session at the Belarus Media Sector Coordination Meeting (Vilnius, Lithuania), organized by Free Press Unlimited, FOJO Media Support and International Media Support. These focused discussions resulted in a mapping of positions and needs assessment for independent media, NGOs supporting the media (such as the Belarusian Association of Journalists and Press Club Belarus), and the donor community. To validate the study's preliminary results, the author organized two expert webinars, one held November 15, 2021 ("Media consumption after the "clean-up" of the Belarusian media space") and the other held November 17, 2021 ("Professional community of media managers: what can we do for each other?"). That month, the author also participated in a scenario analysis seminar on media sustainability together with a group of international experts, and organized by Belarus in Focus. This paper reflects the results of these discussions.

01

Belarus 2021: The changing media landscape

In 2021, the Belarusian media market as we had known it ceased to exist. Since the closure of the leading independent media TUT.by in May 2021, the expression “clean-up” has been publicly used by the Belarusian authorities when they speak about civil society and independent media. Administrative and criminal charges against journalists, the closure of media, the cutting of funding sources, and the psychological warfare on television and social media now constitute the state’s media policy. At present, there is no reason to believe that positive change is possible in the short term; however, the political future of the country remains highly uncertain. This is occurring against the background of a crisis in Belarus’ relations with the EU and the US, with the latter two supporting independent media.

The physical repressions and threats have resulted in massive emigration. A significant number of media professionals left for Lithuania, Ukraine, Georgia, and Poland. There is no exact data regarding the number of journalists and managers who have left the country. Approximately three hundred journalists are active in the Telegram chats in Kyiv, Vilnius, Batumi (Georgia) and other cities, but from private conversations, one concludes that these are not the only media professionals who have left the country. Some have stayed under the radar for reasons of personal safety and others are contemplating leaving the profession and working in other fields. It must be said, however, that many are still working in Belarus (see Section 2 for more details). From the perspective of donors and other international partners, the situation reflects the concept of “exile media”, with similarities to the cases of Afghanistan and Myanmar. This, in turn, affects the nature of international support for independent media. Both the media themselves and Belarusian NGOs working with the media must redefine their strategies, make difficult staff-related decisions, and even change their organizational structure.

The words of Elena Dub, a media consultant who headed the SMM department of Radio Liberty in 2014 and analyzed the mistakes of the *Krym.Realia*’s editorial board apply to the situation in Belarus: “There was a lot of confusion, we did not always understand who we were working for. Because of this much of what was done was makeshift, including building the team. This was due to the whole turbulence of the moment, not the lack of professionalism. And this delayed everything, including content production and further development. This is why you should have a thought-out strategy for your media. And make sure the whole team knows what they’re doing and for whom. This will help them avoid chaos in their work.” (Dub 2021).

1.1 Media consumption online: The dynamics in 2021

There are three major trends regarding online media consumption:

- Social platforms and messengers are the space where audiences want and can get information. People trust these information sources more than television. Telegram is of primary importance. This is where the socially active audience is concentrated. YouTube and Instagram are growing organically. Viber is a potential and underestimated point of growth in media consumption.
- Independent media have lost digital audiences because of physical repressions and propaganda campaigns on social networks. The destruction of TUT.by correlated with a drift toward the Russian information service Yandex (www.yandex.by).
- It is difficult to assess changes in media consumption and audience preferences due to the lack of a commonly accepted tool for audience research and engagement for websites, social networks and messengers. Sociological studies often provide non-comparable data, upon which experts make divergent conclusions.

Prior to the Belarusian authorities suppressing protests, closing independent media and "cleaning up" the media space, the media sector was quite transparently structured and covered the main thematic niches. Media consumption practices of the Belarusian audience were generally in line with global trends: the audience moved online. The number of Internet users in 2020 reached 7.8 million (the country's population is 9.45 million). The online audience continually exceeded 5 million per month. This was more than the share of the state television, the centerpiece of the regime's information policy. In January 2020, the top Belarusian informational social and political websites, social platforms, and messengers were as shown below (Table 1).

Viewers of key outlets: January 2020

| Major Belarusian media reporting on political affairs | Social platforms/news aggregators | Messengers |
|---|---|------------------------|
| TUT.by - 3.4 million | Mail Group (VKontakte, Odnoklassniki) - 3.7 million | Viber - 3.5 million |
| onliner.by - 2.6 million | Instagram - 3.3 million | Telegram - 1.5 million |
| naviny.by - 1.4 million | Yandex - 2.8 million | |
| kp.by - 1.0 million | YouTube - 2.7 million | |
| | TikTok - 1.3 million | |
| | Facebook - 750 thousand | |


Table 1. Sources: Webexpert 2020; Digital Belarus 2020.

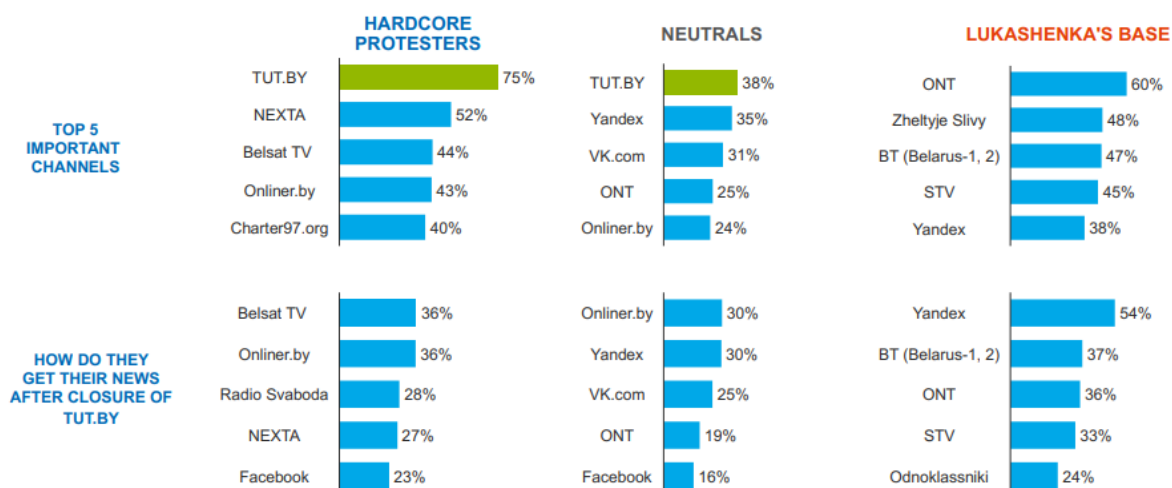
Until 2021, a wide range of national and regional independent outlets each covered on average 5-8% of the Internet audience. They shaped the socio-political agenda through their high-quality news and analytical content. TUT.by (closed down in May 2021) redistributed the most relevant content of regional and niche media to the mass audience. They rewrote news content and added expert comments or background. As a result, the average consumer had access to quality news on a broad range of topics. The socio-political reporting had a stable core audience with a high loyalty index. Content distribution through social networks led to audience growth, given that 3.9 million people in Belarus are users of social networks and messengers.

In general, the Belarusian media consumption followed worldwide trends. A distinctive characteristic of digital media consumption is the amount of time the audience spends online. In 2021, this reached almost seven hours - comparable to a full working day - of which two hours a day were spent in social networks. Another important characteristic of media consumption is the use of multiple platforms. The average number of accounts per person on different platforms is seven, and the representatives of the younger generation (18-25 years) have on average nine different accounts. The attention of the audience is scattered and fragmented and the platforms with sufficient popular content and the user's social circle are preferred (Kepios 2021). That is, even beyond the influence of the socio-political context, we can characterize media consumption as personalized, asynchronous, interactive and impulsive (a person chooses which content to use, where, when and how).

Changes of media consumption in 2021: The role of Yandex.

The Chatham House study *Belarusians' views on the political crisis* (July-August 2021) identified three clusters of the Belarusian society: the "hardcore protesters" (36%), the "neutrals" (36%) and "Lukashenka's base" (28%). More than a third of the "neutrals" and "Lukashenka's base" representatives cited the news aggregator Yandex as among their most important channels of information. 30% of "neutrals" and 54% of "Lukashenka's base" had been receiving news from Yandex since the closure of TUT.by. For their part, the "hardcore protesters" were receiving news from media working in the EU (Belsat and Radio Svaboda) and also from Onliner (www.onliner.by), the Nexta telegram channel, and Facebook (Chatham House 2021).

From this list of information sources, please choose the ones that were important sources of social/political information for you over the past half year? 



Chatham House | The Royal Institute of International Affairs

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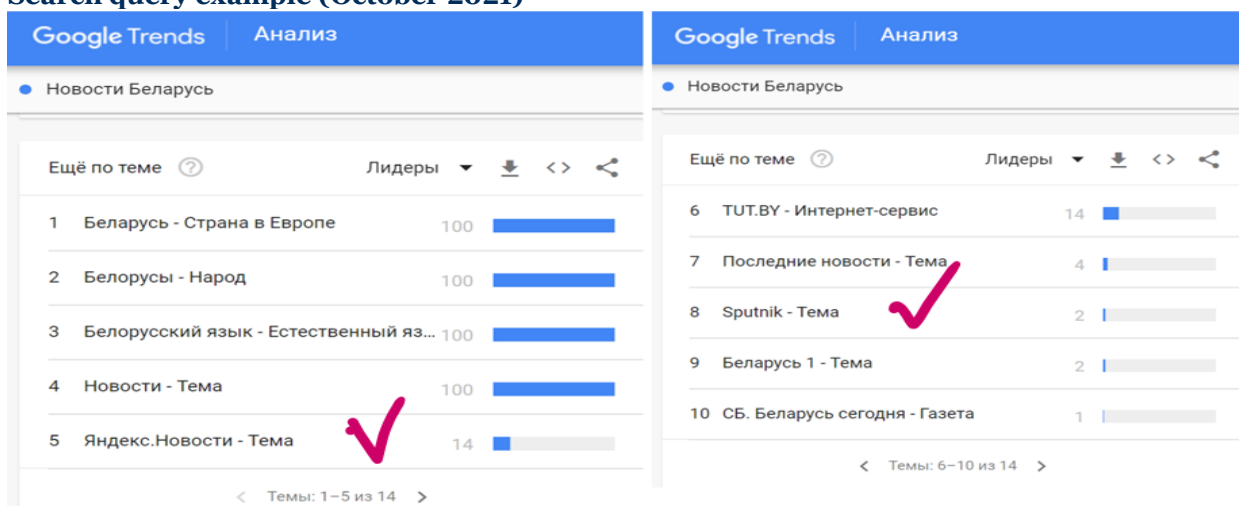
Graph 1. Source: Chatham House report, 2021.

When TUT.by was blocked and then closed in May 2021, the mass audience was forced to find another convenient and safe source of information. For many "neutrals" it was the main Russian digital service Yandex (www.yandex.by). Socially active audiences and activists installed VPNs and continue to visit blocked news sites; part of the audience actively uses Telegram, and significant media consumption shifted to social networks. Onliner has also

gained in popularity as a safe channel with largely apolitical entertainment and consumer content (at the time of the survey it still offered some political content).

Search queries illustrate the situation. The most popular search tool in Belarus is Google, where people search for news, including the Russian resources Yandex and Sputnik, and TUT.by. An example of a search query from October 2021 shows queries including the words "Belarus", "Belarusians", "Belarusian language" or "news", 14% included the word "Yandex", 14% the word "TUT.by" and 2% the word "Sputnik" (see Screenshot 1 in Russian).

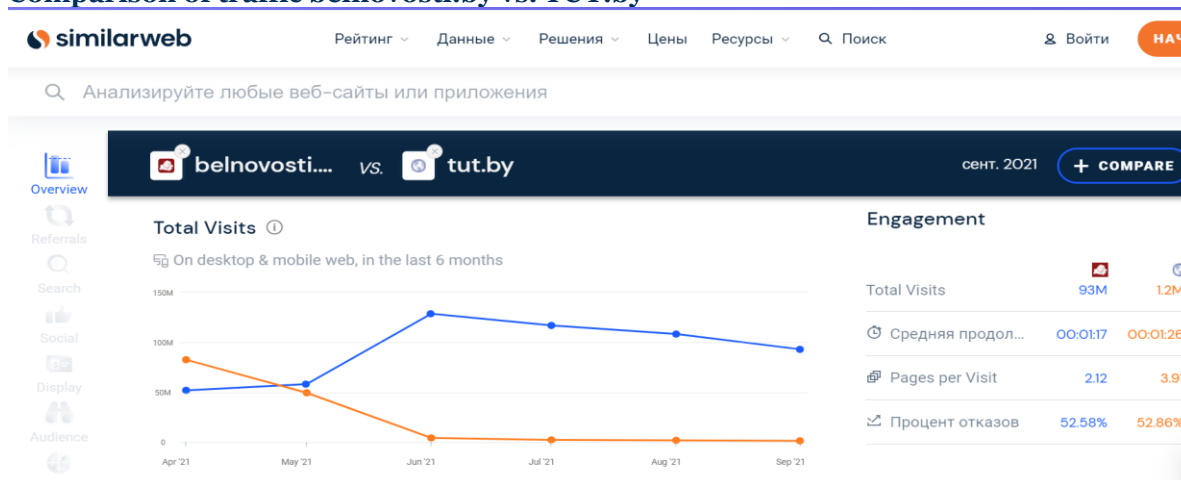
Search query example (October 2021)



Screenshot 1.

As an example of Yandex's influence, a large part of the audience shifted to politically neutral or pro-state news aggregator sites that receive traffic from Yandex. For example, Belnovosti (www.belnovosti.by), which rewrites news and consumer content, had a reach surpassing that of TUT.by on the eve of the latter's closure. The site receives up to 30% of its traffic through Yandex.

Comparison of traffic belnovosti.by vs. TUT.by



Screenshot 2.

Source: Traffic rating Belnovosti.by |(similarweb.com)

This means that a large audience is looking for information and entertainment on resources aggregating and referencing news content (Yandex, social networks and messengers) and is

staying outside the reach of independent media. Despite all efforts to develop media literacy, the average consumer of aggregators' services tends to accept Yandex as a source of information. Even in some sociological surveys of media consumption, professional journalism, political and anonymous Telegram channels and platforms such as Facebook, Odnoklassniki and Yandex are put in the single category of "sources of information".

Yandex is an algorithmic aggregator that typically favors Belarusian and Russian state media and regional publications, especially as regards the most important political news. As a powerful generator of traffic, Yandex also plays a role for independent Belarusian media. These media cannot, however, influence the non-transparent algorithms and are forced to adjust to the aggregator's technological requirements.

On a more speculative note, Yandex appears to be responsive to Russia's political agenda. For example, the Belarusian audience can selectively access media blocked in Belarus through Yandex without a VPN. But when a key online meeting between Putin and Lukashenko took place on November 4, 2021, the presence of oppositional and independent media such as naviny.by, gazetaby.com, euroradio.fm, reform.by dramatically decreased.

Greater role of social media

According to the sociological survey *Media Consumption and Media Literacy in Belarus in August 2021*, commissioned by the Baltic Internet Policy Initiative, more than 70% of the audience considered websites to be their main sources of news. Social networks came second (54%) and messengers came fourth (34%) - marginally less important than relatives, friends and acquaintances (35%). When the audience was asked to name the sources of information they trusted most, the ranking was as follows: websites and/or internet media were trusted by 34% of the audience, Telegram channels and other messengers by 21%, and relatives, friends and acquaintances by 20%. Social networks followed at 18%. According to the study, the confidence in online media is growing (Doroshevich 2021).

The experiences of 2020-2021 show that a digital infrastructure relying on social networks and messengers can retain their audience in an emergency where websites become inaccessible. In the days when the websites of leading independent media outlets were blocked, Telegram channels became the main tool for disseminating information. The number of subscribers to these T channels grew rapidly. Among the regional independent media outlets, the following channels had more than 10,000 subscribers: Silnye Novosti from Gomel (26,700), Brest-based Binokl (20,700), Novosty Grodno (www.s13.ru, 20,100) and Mogilev Online (19,600) (Source: Belarusky Telegram 2020). Telegram became a trend. At its peak, it was used by 2.5 million people. However, the main Telegram audience is concentrated in Minsk and the Minsk region, thus extremely limiting its potential. See the following table.

Regional distribution of Telegram users (% of the national total)

| | Oblast | City |
|---------|--------|------|
| Minsk | 81% | 70.6 |
| Brest | 6.4% | 3.8 |
| Grodno | 5.3% | 3.4 |
| Gomel | 5.1% | 3.4 |
| Vitebsk | 1.0% | 2.4 |
| Mogilev | 1.2% | 1.9 |

Table 3. Source: https://t.me/tg_analytics

Still, the number of subscribers and the post reach generally fell between October and November 2021, possibly reflecting both the political fatigue and state propaganda about the “extremist” content specifically on Telegram. Notice that this decline was smaller for the channels with a stable core audience, such as *Euroradio* and *Nasha Niva*. The Russian state-affiliated Sputnik grew on both counts; another state-affiliated channel Belta increased the average post reach, possibly because the audience wanted information about the crisis on the Polish-Belarusian border.

Leading Telegram channels: Audience dynamics








| Telegram channel | Subscribers | | | Average post coverage | | |
|--|-------------|------------|----------|-----------------------|------------|----------|
| | 25.09.2021 | 25.11.2021 | Dynamics | 25.09.2021 | 25.11.2021 | Dynamics |
|  TUT.BY новости @tutby_official Новости и СМИ | 526 308 | 452 365 | -73 943 | 230 094 | 205 251 | -24 843 |
|  Onliner @onlinerby Новости и СМИ | 141 101 | 131 628 | -9 473 | 55 512 | 53 501 | -2 011 |
|  Наша Ніва @nashaniva Новости и СМИ | 83 532 | 73 492 | -10 040 | 31 277 | 30 769 | -508 |
|  Еўрарадыё @euroradio Новости и СМИ | 31 849 | 29 364 | -2 485 | 10 056 | 10 287 | 231 |
|  Сильные Новости @gomeltoday Новости и СМИ | 22 303 | 20 717 | -1 586 | 6 450 | 6 663 | 213 |
|  BELTA @belta_telegramm Новости и СМИ | 21 785 | 20 614 | -1 171 | 2 724 | 3 740 | 1 016 |
|  Sputnik Беларусь @sputnikby Новости и СМИ | 17 928 | 20 513 | 2 585 | 6 725 | 8 477 | 1 752 |

Table 4.

The independent media sector has paid little attention to the audience potential of Viber, which is installed on the cell phones of 70% of the population. The media sector also underestimates the potential of Instagram and YouTube platforms, where there is organic audience growth. For example, the Viber channel of the regional outlet NewGrodno has 28,425 participants (14,739 on Telegram, as of November 25, 2021). It is important to note that subscribing to a channel means consciously choosing an information source, whereas scanning the news on an aggregator's website does not make one aware of specific media outlets.

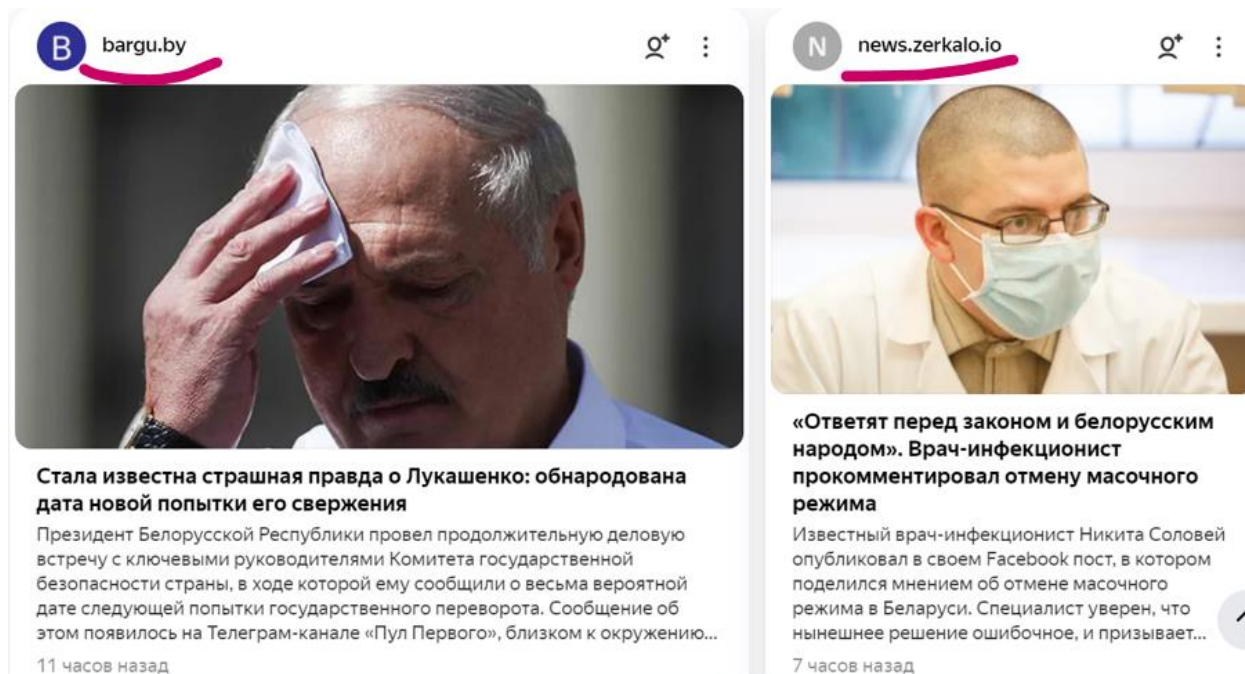
State propaganda conquers the digital space

The Belarusian state not only physically controls information flows in the country but also promotes its narrative and extends its influence beyond print and television to digital platforms where, until recently, it was rather weak. Its approach is familiar: fake news, hate speech, and the dehumanization of opponents.

This strategy of projecting power has at least been partially successful. The trust in state-owned media is generally low, but audiences have become tired of the sociopolitical agenda and fear for personal safety. For example, a scare campaign on the state-controlled Telegram channels, combined with labelling oppositional media as extremist, resulted in a significant outflow of Telegram subscribers from oppositional channels (October 2021).

Another example is www.bargu.by. With three million visitors per month (Similarweb), the site uses clickbait such as: "A horrible truth about Lukashenko revealed: date of new attempt to overthrow him made public" (see Screenshot 3 below). In Yandex's news feed this material was next to professional journalistic material from news.zerkalo.io (former TUT.by) with the headline "They will be held liable. An infectious disease doctor comments on the end of the face mask requirements." bargu.by positions itself as a local news site of Baranavichy. However, the latest Baranavichy news on this site is from 2020; there is also no information about the owners or editors of this outlet which publishes pro-Russian propaganda.

A clickbait by bargu.by can be easily mistaken for an article by news.zerkalo.io (former TUT.by)



Screenshot 3.

1.2 Looking for solutions: New viable digital infrastructure for independent media

Independent professional media are attempting to respond to the above challenges and regain and enlarge their reach. A safe media consumption model has emerged which relies on three components of the digital infrastructure:

1. Popular **messengers** such as Telegram and Viber supply customized news and enable communication within a narrow circle of contacts.
2. The **website** serves those who prefer a single entry point for a range of reliable content.
3. **Social networks** reach a wide range of contacts with political and consumer news and entertainment content.

The sequencing of these three components depends on the nature of the media. For regional media, the digital formula could be "Website – Instagram – Viber". For socio-political media, it could be "Telegram – Website – Instagram" or "YouTube – Website – Telegram". The choice depends on the target audiences of the media outlet, their information preferences, and the formats of the relevant social platforms. Finding the right formula saves human and financial resources and ensures audience sustainability as the state begins to dominate the media sector.

This was TUT.by's strategy for several years. The portal was one of the first to create its own digital infrastructure with an editorial policy that set standards appropriate for individual platforms. Thanks to this, the team was able to quickly launch the new zerkalo.io project after TUT.by was closed down and redirect its audience under extremely difficult circumstances. In October 2021 the media outlet had 470,000 subscribers on Telegram, more than 100,000 subscribers on Viber, 832,000 subscribers on Instagram and more than 1.4 million subscribers on YouTube. Crucially, its YouTube content is substantially different from its content on other platforms because it also serves a wider Russian-speaking audience in Russia and Ukraine. This YouTube channel is in fact an independent and financially viable sub-brand of TUT.by / zerkalo.io.

A regional outlet from the city of Gomel Silnye Novosti (t.me/gomeltoday) is another successful example of sustainability. After the site was blocked, the outlet continued to operate exclusively through social networks, retaining its audience and developing multimedia formats.

According to SimilarWeb, another Belarusian outlet operating from Poland, Euroradio.fm has 1.7 million visits per month, fewer than, for example, gazetaby.com (Solidarnost). However, Euroradio.fm also produces daily expert and analytical video content in addition to text content which receives tens of thousands of views on two social platforms: Facebook (22,300 subscribers) and YouTube (68,100 subscribers). On YouTube, Euroradio is among the top 30 of Belarusian video channels. It also has special editorial policy for Instagram (24,000 subscribers), where it gets between 5,000 and 17,000 views per post. On Telegram (30,000 subscribers), each post gets about 10,000 views. Euroradio.fm thus reaches various audiences and, thanks to its digital infrastructure, is a fairly stable media project.

If the site continues to be its main component, then the entire infrastructure needs to be used to ensure that the audience can obtain information there. For Belarus, this requires technical

solutions, such as VPNs. Deutsche Welle, for example, explains how to access its content which is blocked in Belarus (https://t.me/dw_belarus). DW's use of the application Psiphon is a technological solution intended to simplify the use of VPN for consumers.

1.3 Open question: Media metrics and audience research

To make decisions on audience development, one needs data on the audience of the relevant platforms to understand the competitive environment as well as the main media products already used by the platforms' audiences. This is where the issue of media metrics and the use of paid SMM tools for content promotion arises. These strategic tasks cannot be accomplished without donor support.

Media managers mostly use data from Google Analytics to assess the audience dynamics of their websites. They usually count the number of subscribers on their social networks, and this data forms the basis of project reports to donors. Donors rely on the results of sociological surveys they commission for internal use, or media metrics data they obtain with tools such as YouScan and Tubular. As a rule, this information is not made public, even in general reports about the sector. For the media, price constraints play a major role. In the public domain, only tools with limited functionality exist, such as Similarweb, which provide information on the total number of visits to the site and the sources of traffic. The existing marketing tools (such as YouScan, BuzzSumo, Tubular, Brand Analytics and the full version of Similarweb) are too expensive for individual media outlets and will not be directly interested in using them until the media sector has a standard for evaluating performance. As a result, neither donors nor media managers can see the full market picture nor assess the audience dynamics.

The current mappings of the media landscape focus on the most visible players and often mix different types: activist projects, professional journalists, anonymous Telegram channels, etc. However, if these are not measured separately, anonymous statements on social media will appear to have the same weight, or a greater one, as professional journalistic materials.

Individual media can partially solve these problems by acquiring new competences and budgeting more for SMM. Still, more is needed to tackle the problem of audience research at the sectoral level. An infrastructural solution is offered in the Recommendations section (Section 3).

02

Media institutions: Challenges and solutions

This section considers the transformation of the independent media ecosystem under conditions of (partial) exile, and differences between those who left the country and those who stayed in Belarus. Assessing the current state of different types of Belarusian media was the focus of several expert discussions held between August and November 2021, including those organized specifically for the preparation of this paper.

The first face-to-face meeting of journalists, publishers, media managers (approximately 60 in total) with representatives of donor organizations was held August 28, 2021, during the Lviv Media Forum. The meeting made it possible to assess the scale of the relocation and thematize the challenges, such as increasing operating costs, the psychological burden of the transformation, and issues regarding personal safety. A special focus was also on the organization of work of “distributed” editorial offices, where some team members work in Belarus and the rest work abroad. At the time, it was premature to talk about a sectoral strategy because the actors needed to prioritize the immediate challenges of relocating their teams abroad.

The second face-to-face meeting was held October 18, 2021 in Vilnius and was attended by about 40 representatives of the donor community (IMS, FPU, FOJO, NDI, USAID, Fundacja Batorego, Internews), as well as representatives of diplomatic missions and human rights organizations. The session aimed to clarify and agree on the main areas of work and clarify the priorities of donor organizations. Representing the Belarusian independent media sector were delegates from the Belarusian Association of Journalists, the Association of Regional Publishers, Belarus in Focus and three representatives of the expert community. To validate the preliminary results of the study, the author organized two expert webinars on November 15, 2021 (“Media consumption after the “clean-up” of the Belarusian media space”) and November 17, 2021 (“Professional community of media managers: how can we support each other?”).

Analyzing the results of these discussions, one can conclude that independent media working for the Belarusian market can be classified as follows:

- Media in exile, including the key national socio-political resources zerkalo.io, Nasha Niva, kyky.org
- “Distributed” formats with a managing center abroad and some capacity remaining in the country (e.g., Solidarnost, BelaPAN/Naviny)

- Outlets working primarily in the country with a part of the editorial board temporarily residing abroad (Citydog, Narodnaya Volya, Novy Chas, Silnyie Novosti, Intex-press and other regional outlets)
- Foreign media or media originally working from abroad, possibly with some capacity in the country (Deutsche Welle, Radio Svaboda, Belsat)

In the immediate future, the dominant format of the media sector is likely to be “distributed”. This organizational format will make it possible to receive donor support while keeping some journalistic capacity within the country. Although there is no single model of a distributed editorial office, it typically involves two centers of managerial decision making and flexible digital infrastructure for the distribution of content through social networks and messengers from abroad. An emergency relocation plan and algorithms for safe communication for the team are also mandatory. Currently, the media are largely focusing on solving operational problems. Still, the management and owners/founders realize that the old business models are not working and want to establish new ones within the next three years. One has to adapt editorial policies, content and distribution to the new realities.

Two factors are further complicating the situation. A conflict between those who left the country and those who stayed has developed both between and within the media outlets. Furthermore, donors have retained contacts mainly with exile media and tend to think no professional independent media are left in Belarus. The dominant narrative is, "It is impossible to carry out journalistic activities in Belarus today", with the focus of support shifting to those working in exile. Certainly, funding projects in Belarus is very difficult. However, several national and more than a dozen regional editions are continuing to work and have even retained their registration in Belarus. This part of the media sector requires financial, in-kind, and psychological support, including travel for educational and recreational purposes.

Exile media and media professionals face a host of organizational and professional challenges. Individual media professionals experience **difficulties of relocation and accommodation** in a new country, and in **re-establishing social and professional connections** in a new environment. There is no infrastructure to support media professionals looking for jobs abroad. A **surplus** of journalists and photojournalists and a significant **shortage** of digital security specialists and video editors is a challenge for both organizations and individuals.

Even established media have to deal with **the loss of their main sources of advertising revenue** and a two or three-fold **increase in operational costs**. They are forced to lower the quantity and quality of content and face difficulties regarding fact-checking. The breakdown of audience measurement and engagement models and the loss of audience have already been mentioned here. Those still operating in the country are depoliticizing content in response to repressions. One particularly radical, if not fully representative case is onliner.by. Cut-off from external support, they have had to minimize costs in order to remain financially viable.

Both those in exile and those remaining in Belarus face **audiences becoming tired of negative political** news. As confirmed by sociological data, the public sentiment now focuses on personal security and economic survival, and is also threatened by the continuing COVID-19 pandemic. Compared to the protest months, there has also been a **significant decrease in the intensity of the overall news flow**: it has become impossible to

produce visual content in Belarus, and constraints on political reporting from and within the country also exist.

The media sector remains in an atomized state, and the sectoral infrastructure and the system of professional communications need to be restored as quickly as possible. This means that the sector needs viable and safe coordination formats to avoid the accumulation of personal and organizational problems, misunderstandings, and conflicts. A training format and re-training of media professionals is also needed.

Belarus in Focus (Press Cub Belarus) in cooperation with Free Press Unlimited have responded by founding media hubs in Poland (in Warsaw and Bialystok branded as "Belarus Media Port"). Establishing similar hubs in Lviv and Kyiv is being discussed. Hubs can offer co-working possibilities, provide editorial boards and individual journalists with equipment, accumulate advisory assistance, and become centers of technological expertise and sector-wide synergies.

03

Recommendations

It is necessary to find institutional solutions to a connected set of problems regarding quality, reach and security for the whole media ecosystem. This section formulates a set of medium-term objectives and concrete actions for the donor community, media NGOs, and media management.

Objective 1. Maintain variety of media

Those in exile and those who remaining in the country, as well as the established media and niche projects, must be present on Belarus' media market. This requires ensuring the survival of key institutional players and the pool of professionals both in exile and within the country.

Action 1.1 Core (or institutional) support for media with a comprehensive editorial policy, a resilient distribution model, and a stable target audience

Media consumers already know and see these media as reliable sources of information. These resources are the core of the independent media sector and the carriers of standards and professional ethics. Weakening their potential would lower the bar for content quality and destroy the existing professional links between generations of journalists and managers. This core support can only be provided by the **donor community**.

Action 1.2 Project support for experimental formats

Project funding is required to support innovative thematic initiatives and products for niche audiences. The target group for this support are media professionals who have emigrated and may now have to leave the profession due to a lack of employment opportunities. Support for their projects would address this problem in the short run and also create innovative products for niche audiences that enrich the media landscape. To minimize risks associated with the viability of projects like these, **media NGOs** can contribute with their expertise and organizational capacities as implementors.

Action 1.3 Support for the regional media in Belarus

Support for **regional media** working in the country is a priority so that media retain the ability to work with information sources and can be content providers for the national media in exile. For local audiences in Belarus, these media are possibly the only alternative to Russian digital aggregators and Belarusian state propaganda. Preserving them is therefore strategically important. Support for regional media is extremely difficult. **Financial transfers** are risky or impossible.

Providing **in-kind support** in the form of IT and social media marketing (SMM) solutions can be an answer to this problem and be realized by a consortium of media NGOs and established media. The full cycle of face-to-face consulting - development - implementation - remote support can be expensive, therefore substantial donor involvement will be necessary.

Objective 2.

Maintain variety and quality of content

Strategically, independent media shall play a central role in shaping an informed political debate about the political future of Belarus. While media remain free to define the bounds of newsworthiness, they are not merely suppliers of products with a short shelf life. Quality media create healthy social cohesion, whereas the failure of this function leads to atomization and polarization. Media must be able to produce content that fosters a **national civic identity** based on democratic and humanistic values and speaks to different social groups. Today's tactical decisions on physical safety and financial survival must still reflect this fundamental task.

In the dramatic situation of today's Belarus, media entirely or partially in exile fulfil, however imperfectly, the functions of **digital public service media** and need to be evaluated and supported accordingly.

Action 1.1 Content variety

Although political news and analysis are important, they alone reach only the democratically minded and politically active audience. The thematic spectrum must become broader than it is now, otherwise the audience will become

tired of politics and switch to Russian content. The media should be encouraged and supported to produce **educational** content, cultural news, and content relating to local history, health, and entertainment.

For this, one needs to build the media's capacity, and is a question of time and money. Core and project support formats have been described above: they need to be geared to ensure the **diversity of content**. Additionally, **co-production and co-distribution arrangements** among Belarusian media, and between Belarusian media and European partners, will support the efforts of individual media.

Action 2.2 Content quality

Establishing a sectoral standard for quality journalism under the current circumstances means defining professional journalism: what it is and what it is not (activism, anonymous channels, PR, or political propaganda). Well-known journalistic standards are the starting point, acknowledging whether the media is working partially or completely in exile, and specific to each particular platform (websites, messengers, YouTube). The media should be involved in a dialogue about standards, and encouraged to formulate and implement editorial policies based on emerging best practices. Media NGOs have the necessary skills for this. Further institutionalization of standards can be achieved by establishing a dedicated think tank (see Objective 4 below).

Objective 3. Audience development: Maintain and increase the reach of independent media

Action 3.1 Media Landscape Matrix

As previously mentioned, we do not have a tool that meets the sector's requirements for a comprehensive measurement of the changing media consumption and media landscape. Only larger media outlets can afford an adequate Customer Relationship Management (CRM) tool. We propose to jointly develop, test, and implement such a tool that would work for many actors, and perhaps the entire community.

Media Landscape Matrix is a sector-level CRM tool which delivers comprehensive and regularly updated mapping of the state of the media landscape. The Matrix could be owned by a consortium of media NGOs and produced by an external contractor. The sequencing is important here.

Stage 1. The media landscape, including state-affiliated Russian and Belarusian media, is analyzed and indicators appropriate for each type of media are defined. It is important for all decision-makers, including the donor community, that the activist projects (Malanka Media is one of the most successful projects) be considered according to criteria different from those applied to professional journalists. Influencers and bloggers, social media and news aggregators require different indicators. It is also important that state-affiliated media outlets not only be analyzed based on their narratives but also on their technological solutions. Without this, one cannot understand how they have increased their coverage.

Stage 2. The creation of a digital monitoring solution using existing paid services is not affordable for most media outlets.

Stage 3. A periodical monitoring report on audience coverage and engagement is produced. At this stage, the Matrix can be used for decision-making by all relevant actors, from the donor community to smaller media initiatives.

Stage 4. The Matrix becomes a service for individual media, providing analysis of the market on-demand, along with consulting on digital strategies for these media. At this stage, the Matrix can be used for customized training and consulting.

Action 3.2 Sectoral standard of media consumption safety

The issue of safe consumption of media content in Belarus is a strategic one. Some solutions, such as VPN, exist but are not accessible for all consumers. Apart from technological barriers, the fear of prosecution for accessing content officially labelled as extremist limits the reach to a committed and politically active part of the potential audience. In the meantime, the capacity of the Russian, and by extension Belarusian, state to establish a fuller control over the digital space has grown: “Over the past few years, Moscow has introduced a robust legal framework and a plethora of regulations meant to assert Russia’s future digital sovereignty” (Epifanova 2021). Belarus’ digital infrastructure can in this case be taken over as part of the existing Union State of Russia and Belarus.

In response to these challenges, a **sectoral safety standard** would be a set of user-friendly technological solutions whose wide adoption across the media landscape could be facilitated by a **consortium of media NGOs**.

Objective **4.** **Develop an institutional framework for independent media in exile**

Action 4.1 Further development of media hubs, an audience development lab and establishment of a sectoral think tank

The sector needs an infrastructure not bound to one particular media format: multipurpose hubs, audience development services and a sectoral think tank.

Emerging **media hubs** are the first step in this direction. They can function as:

- Spaces for joint project development and implementation, and informal professional communication
- Training centers focusing on digital competences, including training of trainers and masterclasses with experienced media professionals
- Coordinators of long-term collaborations between media

An **audience development lab**, possibly integrable with a media hub, could take care of the creation and running of the Media Landscape Matrix, and include training and communication about the sector-wide standards of audience measurement. The question of

ownership issue remains unresolved, but the concept envisages the collaboration of many actors, including the donor community.

Objectives 2 and 3 refer to a set of quality standards. A dedicated **think tank** would greatly facilitate their collaborative creation, communication and viable implementation. The think tank would foster the debate on "what is good and what is bad" regarding both technical standards and ethical rules reflective of the circumstances of media entirely or partially in exile.

Action 4.2 Optimization of financial support: Recommendations for the donor community

At the meeting in Vilnius, a set of ideas for donors was formulated.

All of the above is hardly feasible without significant support from the donor community. As already indicated, both the complexity of the media landscape and the danger of state harassment require considerable flexibility on the part of the donors. The following summarizes some points previously mentioned:

- Criteria for funding must include qualitative performance indicators and not just audience reach. Media should be rewarded not only for attractive quality content but also for long-term thematic projects and sectoral collaborative efforts, such as content sharing and the establishment of standards.
- Core support (instead of project support) for the largest media outlets will ensure the stable functioning of editorial offices and avoid excessively detailed quantitative performance indicators.
- Retain project financing to support new initiatives aimed at developing digital formats - especially by young journalists - for niche audiences based on content and coverage-related indicators;
- Simplify as much as possible documentation related to the project design and financial reporting, and minimize public reporting that gives grounds for propaganda that links media sector activities with threats to national security and financing of extremism from abroad.

Overall, the dialogue between the stakeholders on **indicators** needs to be continued. As previously mentioned, the Media Landscape Matrix would add depth to this discussion.

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