BEYOND THE COLD WAR OF WORDS

HOW ONLINE MEDIA CAN MAKE A DIFFERENCE IN THE POST-SOVIET SPACE

rnw

The Hague Centre for Strategic Studies

SECURITY

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Executive Summary

The annexation of Crimea, the subsequent conflict in the East of Ukraine, and the lingering uncertainty hanging over this part of the world owing to Russian President Vladimir Putin's pledge to 'protect Russian speakers' abroad, has brought the post-Soviet world right back into the center of the world's attention. Arguably, one of the major factors fuelling the Ukraine conflict is the asymmetric provision of information, including the use of propaganda. Media outlets such as RT (the former Russia Today) and Sputnik News which broadcast in several countries and in multiple languages are vital elements of the Russian propaganda machine. The rise to prominence of these organizations and their at times divisive messages only help to increase the suspicions that Russia may engage in similar covert operations in other countries that once belonged to the Soviet Union, as it did in Ukraine.

Apart from the fact that the crisis caused the biggest stand-off in East-West relations since the end of the Cold War, the anti-Western messages broadcast by the likes of RT and Sputnik risk undermining fundamental rights such as freedom of speech, human rights, and democracy within nations that lie within the Russian orbit, as alternative sounds are crowded out. These developments are particularly important to the young generations—who are most likely to want to hold their leaders to account, and seek the freedom to shape their lives in their own image. These worrying trends call for a Western response that aims to prevent, or counteract, one-sided coverage of events and developments in the post-Soviet space. However, rather than engaging in a kind of two-sided *information warfare* as took place during the heydays of the Cold War, western media should instead focus on shared (societal) values such as enshrined in the Helsinki Accords of 1975. Such an approach would avoid the pitfalls of confrontation and escalation, whilst at the same time allow for the support of fundamental rights and values in those countries where these are under pressure.

This report is commissioned by RNW, an international media organization based in The Netherlands that aims to promote free speech and fundamental freedoms in countries where these are severely restricted. RNW (co)creates content and online platforms where young people can form and express their opinions about sensitive issues. This study zooms in on a select number of countries belonging to the post-Soviet space that lie on the fault lines of overlapping spheres of influence between Europe and Russia. Specifically, the report assesses the risks of the current one-sided media services to Russian speaking minorities in Latvia, Belarus, Ukraine and Moldova. In doing so, the study examines the extent to which RNW could make a meaningful contribution to a more balanced information service, focusing on online and social media. Furthermore, the report analyzes the opportunities for RNW to operate in these countries, and provides an inventory of the kinds of (legal) barriers that exist that could hinder this aim.

Notwithstanding a notable increase in the concentration of ownership among media outlets in recent years, the Latvian market stands out among all four countries investigated in terms of its pluralistic media landscape. With internet penetration at a very high level, a third of the population qualifying as ethnic Russians, and an even higher share having Russian as their first language, online Russian language content is likely to find a significant audience. In terms of fundamental rights, the major divisive issue in Latvian society is the issue of citizenship. A large share of the ethnic Russian population do not enjoy full Latvian citizenship, a fect eagerly exploited by Russian media outlets.

Focus on this issue is important not only from the perspective of countering Russian propaganda, but also to foster integration of the Russian speaking minority in Latvia.

In contrast to the situation in Latvia, in Belarus the ability for independent media to operate freely is highly curtailed. Also, despite high internet penetration, internet use is hindered by state regulation, censorship and harassment of online journalists and activists. Organizations wishing to enter the online media market in Belarus should thus take this into account. But, with Russian widely spoken, the problem is not so much finding an audience capable of understanding the material; rather, the problem lies in the risks posed by a possible crackdown by the authorities. Discussion of political freedoms, constitutional rights, and general criticism addressed to President Lukashenka can easily result in being blocked.

Lower on the governmental radar appear to be issues pertaining to religious-, minority-, and sexual rights. As such, these topics could provide a niche opportunity to new market entrants.

A point of concern in Ukraine is the high degree of ownership concentration in the media sector among political and business elites. For this reason, cooperation with local partners should always be preceded by a properly conducted background check. Online media, particular social media, have become instrumental since the Euromaidan protests. Moreover, as the conflict in the east drags on, the popularity of western social networks such as Facebook have greatly increased. For new market entrants from the West, this could prove to be a valuable opportunity. Language-wise, Ukraine is a truly bilingual nation, meaning Russian language content will have no problems finding a suitable audience. In terms of societal issues, the most pressing topic by far is government corruption. Owing to the murky ownership structure of media enterprises in Ukraine, many of the largest media companies avoid discussing this sensitive topic. Topics such as sexual rights and HIV/aids also do not receive the attention they deserve in the mainstream Ukrainian media. This could provide opportunities for newcomers wishing to address these problems in Ukrainian society.

Moldova too has a high concentration of media ownership linked to political elites. Thus, as in Ukraine, any decision to engage with local partners should be given thorough prior scrutiny. Despite this concentration, media in Moldova today enjoys much more freedom than they did some years ago. The same cannot be said about the breakaway region of Transdniestria, where media are tightly controlled by the de facto authorities. Although internet use in Moldova has been increasing steadily over the years and there is a high concentration of internet users in urban areas, Moldova's general low urbanization rate compared to the other countries in this study is likely to hamper the size of a sizeable audience. Online media in Moldova are more oriented on the Romanian language, rather than Russian. This can be a challenge in the sense that Russian language content is therefore much less likely to find a receptive audience. However, it also means that the Russian speaking population is effectively deprived of a quality online media outlet that broadcasts in Russian, giving opportunities to western online media outlets that wish to bring an alternative sound to the region. In terms of societal issues discussed in the media, there is a certain void with respect to sensitive issues such as gender and sexual rights, mainly due to the primary role of the Orthodox Church. These topics are much more heavily discussed on social media. As such this is an area that could act as a potential niche for newcomers onto the Moldovan media market.

The report finds that the traditional broadcasting landscape in the countries investigated is often dominated by either state-owned, or otherwise large privately operated outlets, and entry barriers are significant if not prohibitive unless large amounts of funds are invested. Therefore, the chance of successfully reaching out to the target audience of young, higher educated, and urbanized Russian speakers in the four countries is highest via online and social media, rather than through traditional broadcasting. New entrants to the post-Soviet market that are in a bid to counter Russian propaganda, therefore would do wise to strategically position themselves in the online and social media segment.

Introduction

The annexation of Crimea, the subsequent conflict in the East of Ukraine, and the lingering uncertainty hanging over this part of the world owing to Russian President Vladimir Putin's pledge to 'protect Russian speakers' abroad, has brought the post-Soviet world right back into the center of the world's attention.[1] Whereas Russia justifies its action by blaming the West for interfering in its sphere of influence and having fomented a coup d'état in Ukraine, the European Union (EU) and the United States (US) instead claim Russia is out to destabilize the European order by waging a clandestine war in a sovereign state on the edge of the continent. Much debate currently centers on the risk that the conflict in Ukraine may spill over to other countries that host sizeable Russian-speaking minorities. The Baltic States in particular occupy a delicate position in this regard, owing to their membership of both the EU, as well as NATO.

The asymmetric provision of information, including the use of propaganda, plays a key role in the Ukraine conflict. In fact, one of the reasons behind the apparent success of Russia's strategy is its well-functioning propaganda machine. Media outlets such as RT (the former Russia Today) and Sputnik News which broadcast in several countries and in multiple languages are good examples in case. The rise to prominence of these organizations and their at times divisive messages heightens the fear that Russia may engage in similar covert operations in other countries that once belonged to the Soviet Union, as it did in Ukraine.

Apart from the fact that the crisis caused the biggest stand-off in East-West relations since the end of the Cold War, the anti-Western messages broadcast by the likes of RT and Sputnik risk undermining fundamental rights such as freedom of speech, human rights, and democracy within nations that lie within the Russian orbit, as alternative sounds are crowded out. These developments are particularly important to the young generations—who are most likely to want to hold their leaders to account, and seek the freedom to shape their lives in their own image.

These worrying trends call for a Western response that aims to prevent, or counteract, one-sided coverage of events and developments in the post-Soviet space. However, rather than engaging in a kind of two-sided *information warfare* as took place during the heydays of the Cold War, Western media should instead focus on shared (societal) values such as enshrined in the Helsinki Accords of 1975. Such an approach would avoid the pitfalls of confrontation, whilst at the same time allow for the support of fundamental rights and values in those countries where these are under pressure.

This report is commissioned by RNW, an international media organization based in The Netherlands that aims to promote free speech and fundamental freedoms in countries where these are severely restricted. RNW (co)creates content and online platforms where young people can form and express their opinion about sensitive issues. The main questions of this study are threefold. First, what are

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[1] "Putin's Full Crimea Speech Annotated," *BBC News*, March 19, 2014, http://www.bbc.com/news/world-europe-26652058; Marek Menkiszak, "The Putin Doctrine: The Formation of a Conceptual Framework for Russian Dominance in the Post-Soviet Area | OSW," March 27, 2014, http://www.osw.waw.pl/en/publikacje/osw-commentary/2014-03-27/putin-doctrine-formation-a-conceptual-framework-russian; Mark Mackinnon, "Sergey Karaganov: The Man behind Putin's Pugnacity," *The Globe and Mail*, March 30, 2014, http://www.theglobeandmail.com/news/world/sergey-karaganov-the-man-behind-putins-pugnacity/article17734125/.

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the risks of the current one-sided media services to Russian speaking minorities in countries that lie on the fault lines of overlapping spheres of influence between Europe and Russia? Second, to what extent could RNW make a meaningful contribution to a more balanced information service, focusing on online and social media? Third, what are the opportunities for RNW to operate in countries that belong to the Post-Soviet space, and which barriers exist that could hinder this aim?

Up front, this goal has two important implications. First, RNW will be a new player in the media landscape of the countries investigated. This means that it is important to pay attention to the presence of entry barriers. Second, as RNW intends to focus on online and social media, close attention should be paid to the 'reach' of social media in a country, the topics under discussion in the domain of fundamental rights and the dominant language used.

Countries that fall within the Post-Soviet Space (excluding Russia) are Estonia, Latvia, Lithuania, Belarus, Moldova, Ukraine, Georgia, Armenia, Azerbaijan, Kazakhstan, Uzbekistan, Turkmenistan, Kyrgyzstan and Tajikistan. This diverse group of countries would constitute a too large geographical area for RNW to fully cover. Therefore, in order for RNW to deliver a meaningful contribution in light of the aforementioned trends and developments, we considered countries to be of interest when they corresponded to a number of selection criteria.

First, the country must be located in both the Russian and European sphere of influence due to historic ties, or because of existing, or possible future EU membership. Second, the country must be home to a sizeable Russian minority. Finally, from the perspective of running an efficient business operation, there should be possibilities for RNW of achieving synergy advantages across markets. In other words, the selection of countries should allow for similar formats of broadcasting, without the need for tailor-made coverage per issue and, or country.

On the basis of these criteria many of the former Soviet republics in Central Asia and the Caspian Sea area are excluded from the analysis. EU membership is simply not in the cards for countries such as Tajikistan, Uzbekistan, Turkmenistan, Kazakhstan, and Kyrgyzstan. Moreover, in many of these countries the local population speaks languages that are unique to the country in question, which would require tailor-made broadcasting. Armenia, Georgia and Azerbaijan are different cases, given that they are close neighbors who are all members of the EU's Eastern Partnership initiative. However, also for these countries membership of the Union is currently not being discussed, and is also unlikely to be in the foreseeable future. Moreover, here too ethnic, religious, and linguistic differences are likely to require a tailor-made approach.

From the perspective of possible synergies therefore it is recommended to focus the analysis on the 'European core' of the former Soviet Republics, including Belarus, Ukraine, Moldova, and the Baltic States. Besides synergy, there is a number of other reasons as to why these countries are of interest. First, the importance of Ukraine goes without saying. It is currently embroiled in an active conflict with Russian-backed separatists, is home to a sizeable ethnic Russian population, and has repeatedly indicated a willingness to join the EU.

Second, Moldova, awash with memories of how the breakaway region of Transdniestria was created, fears to fall victim to Russia's doctrine of protecting its compatriots abroad, and, it too has

repeatedly made clear that it wishes to join the EU. Third, the Baltic States, who are already members of the Union, equally fear to become another flashpoint in Russia's standoff with the West. Latvia, home to the largest Russian minority, is a particularly poignant case in this regard.

Fourth, Belarus –although it never formally indicated a desire to join the EU- in the months following Russia's annexation of Crimea has become increasingly interested in better relations with Brussels, especially on economic cooperation. Moreover, of late, Minsk has seen a deterioration of its relations with Moscow after Russia found out Belarus was circumventing a Russian ban on EU dairy and meat products, by re-exporting Latvian, Polish and Lithuanian products to Russia under Belarusian labels. The resultant Russia-imposed ban on Belarusian food imports prompted an angry reaction from Minsk.[2] Finally, and not unimportantly, Belarus recently adopted legislation under which the appearance of armed foreign forces on its soil will be viewed as an act of aggression, irrespective of whether they are regular troops – a clear reaction to the events that unfolded in Ukraine.[3]

The report consists of six sections. Section 1 begins by examining the extent to which the countries belonging to the former Soviet-space have historically been the subject of a 'tug-of-war' between the European and Russian orbit. Section 2 takes a closer look at some of the characteristics of the potential target audience for RNW in the selected countries. The third and fourth sections provide an analysis into the fundamental rights situation both in the broader region, as well as in the individual countries. Section 5 assesses the media landscape in the selected countries, highlighting noteworthy challenges and opportunities for new market entrants. Finally, section 6 provides a number of conclusions and observations on the ability for media organizations such as RNW to successfully contribute to balancing the social media landscape in the post-Soviet space as a new entrant to the market.

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[2] Valentina Pop, "Belarus May Start Talks on Visa-Free EU Travel," *EU Observer*, January 12, 2015, https://euobserver.com/beyond-brussels/127158.

[3] "Under New Belarus Law, 'Little Green Men' Would Mean War," *RadioFreeEurope/RadioLiberty*, January 26, 2015, sec. Belarus, http://www.rferl.org/content/green-men-in-belarus-will-mean-war/26814048.html.

1. Russian Resurgence in a Pivotal Region

The area stretching from the Baltic to the Black Seas has been a marching ground for great armies for centuries. How did this come about? According to the early 20th century geographer Sir Halford Mackinder, this was because the key to world domination lies in who rules the Eurasian continent, and that in turn, this is determined by who controls its heartland. And the key to controlling the heartland that lies in who dominates the zone of countries between Europe proper and Russia.[4] It is an area that has been highly contested in the past century, having led to dramatic changes in borderlines. This very area saw the bulk of the fighting in World War II, earning it the epithet 'bloodlands'[5], and was at the heart of the Cold War. While the end of the Cold War and the peaceful expansion of the EU looked to have finally pacified this region, the crisis in Ukraine that begun in late 2013 once again opened up old fissures and has led to the greatest crisis in relations between Russia and Europe since 1989. The question now is whether the genie can be put back into the bottle and if so, how this can be done.

1.1 Russian Assertiveness

To answer this question, it is important to understand how this crisis came about. Some experts and security analysts –many of whom emanate from Russia- assert that Russia's actions in Ukraine are the result of NATO and EU expansion into an area of Europe that is critical to Russia's security, and that the expansion of the Western security architecture was deliberately aimed to contain Russia in the long run.[6] Conversely, many in the West would argue that this has rather to do with Russian aggression in a bid to re-establish international respect, single-handedly pushed by President Vladimir Putin himself. Or, even more bluntly, that Russia, ever since Putin came to power in 2000, had been on a path towards aggression all along, and that expansion of the Western security community has made no difference whatsoever.[7] This would fit a policy that views expansion, rather than balancing, as the key to Russia's long-term security.[8] Indeed, recent research by The Hague

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[4] Halford Mackinder, "The Geographical Pivot of History," *The Geographical Society* 23, no. 4 (April 1904): 421–37.

[5] Timothy Snyder, *Bloodlands: Europe Between Hitler and Stalin* (New York: Basic Books, 2013). But see also Marek Jan Chodakiewicz, *Intermarium: The Land between the Black and Baltic Seas* (New Brunswick, New Jersey: Transaction Publishers, 2012), 373, which argues that at present, this belt of countries is better compared with the former Soviet satellite states.

[6] See speeches of President Vladimir V. Putin: Reissa Su, "Russia Shifts Blame On US For Ukraine Crisis, Putin Accuses West of 'Remaking World,'" *International Business Times AU*, October 26, 2014, http://au.ibtimes.com/russia-shifts-blame-us-ukraine-crisis-putin-accuses-west-remaking-world-1382588; and Courtney Weaver and Jack Farchy, "Defiant Vladimir Putin Blames West for Russia's Economic Woes," *Financial Times*, December 18, 2014, http://www.ft.com/cms/s/ad07ef96-8685-11e4-9c2d-00144feabdc0,Authorised=false.html?_i_location=http%3A%2F%2Fwww.ft.com%2Fcms%2Fs%2F0%2Fad07ef96-8685-11e4-9c2d-00144feabdc0.html%3Fsiteedition%3Duk&siteedition=uk&_i_referer=#axzz3QlXPiryV. See also John J. Mearsheimer, "Why the Ukraine Crisis Is the West's Fault," *Foreign Affairs*, October 2014, http://www.foreignaffairs.com/articles/141769/john-j-mearsheimer/why-the-ukraine-crisis-is-the-wests-fault.

[7] See e.g. Edward Lucas, *The New Cold War: Putin's Threat Russia and the West* (London: Palgrave Macmillian, 2014); Anne Applebaum et al., "How He and His Cronies Stole Russia," *The New York Review of Books*, December 18, 2014, http://www.nybooks.com/articles/archives/2014/dec/18/how-he-and-his-cronies-stole-russia/.

[8] Henry Kissinger, *World Order: Reflections on the Character of Nations and the Course of History* (London: Penguin Books, 2014), 52.

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Centre for Strategic Studies has shown that there has been a gradual increase in Russian assertiveness for years.[9]

Things truly came to a head when following the deposing of Ukrainian president Yanukovych in February 2014, Russia took advantage of the turmoil that engulfed the capital of Ukraine, Kiev, by seizing the Crimea peninsula in March. Since then, Russia expanded its activities by stoking unrest in the east of Ukraine, and by encouraging home-grown, or Russia-directed separatists to establish their own independent republics. The ensuing civil war became a matter of prime importance to the Netherlands when a Malaysian jetliner carrying 298 passengers, including 193 Dutch citizens, was shot down by a missile launched from rebel-held territory in east Ukraine.

Elsewhere in Eastern Europe, concerns arose about the possibility that Russia would also seek to destabilize other countries. All countries between the Baltic and the Black Seas feel increasingly threatened by Russian rhetoric, and now have sorties of NATO jetfighters that patrol the skies close to their borders. But countries in the Caucasus and Central Asia also feel the heat. Much of this perceived pressure is said to be the result of Russian government statements claiming to protect the rights of Russian speaking minorities living in countries bordering Russia.[10]

In extending its sphere of influence –or rather, in trying to push back the Western sphere of influence- Russia created its own organization in seeking to draw former Soviet states back to the old motherland. The main vehicle designed for this purposes is the Eurasian Economic Union (EEU), which at present includes Belarus as its only member west of Russia. Moldova and Ukraine were offered membership, but chose to pursue future integration with the EU, signing Association Agreements in 2014 instead. Conversely, Transdniestria – the breakaway region wedged between Moldova and Ukraine – and rebel held territories in Ukraine have sought inclusion in the EEU.[11]

In the four countries studied in this report, both the nature of the media-based information Russia sends across its borders as well as its impact differs per country. In order to understand the risks that countries in Eastern Europe are exposed to, and the possible impact that a contribution from the side of RNW can make to counter the impact of Russian propaganda as well as to promote pan-European fundamental rights, the situation per country is examined below.

1.2 Janus-faced or Not? Pivot States in Eastern Europe

A recent study by HCSS developed a methodology to single out so-called 'pivot states', i.e. states that are located in overlapping spheres of influence; which represent key strategic interests for great

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[9] See *Strategic Monitor 2014: Four Strategic Challenges* (The Hague: The Hague Centre for Strategic Studies, May 2014).

[10] Protection of Russian minorities living abroad (albeit within the former Soviet sphere) has become part of an unofficial Russian foreign policy doctrine named after Putin advisor Sergey Karaganov. See Rob de Wijk, *Machtspolitiek* (Amsterdam: AUP, 2014), 103,122. See also Ian Traynor, "Kazakhstan Is Latest Russian Neighbour to Feel Putin's Chilly Nationalist Rhetoric," *The Guardian*, September 1, 2014, http://www.theguardian.com/world/2014/sep/01/kazakhstan-russian-neighbour-putin-chilly-nationalist-rhetoric; Murat Sadykov, "Uzbekistan: Minorities Taking Advantage of New Russian Citizenship Rules," *EurasiaNet*, July 9, 2014, http://www.eurasianet.org/node/68936.

[11] See e.g. Nicu Popescu, *Eurasian Union: The Real, the Imaginary and the Likely*, Chaillot Papers (EU ISS, September 2014).

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powers; and which move around between these great powers based on mutual attraction. The degree of proximity to a given great power is the function of several categories, basically made up of military, economic and diplomatic ties.[12] On the basis of this methodology, relationships between the EU, Russia and the countries under consideration in this study can be plotted over time.

Plotted below are three charts spanning a time period from 1996 up to 2012 (see Figure 1, Figure 2 and Figure 3). These charts cover all countries that were considered initially, followed by a more in-depth analysis of four countries being studied in-depth: Latvia, Belarus, Ukraine and Moldova. These distance charts should be read as follows: plotted along the x-axis is the total volume of interaction with the EU. Plotted along the Y-axis is the total volume of interaction with Russia. Interaction consists of military, economic and diplomatic relations. The further a country is away from the black diagonal axis, the stronger are its ties with one or the other great power. When moving along the black axis (from bottom left to top right) the volume of interaction with either the EU and/or Russia increases. In other words, a country that is above the black axis but in the left hand corner has little interaction with the EU *and* Russia, but has relatively more interaction with the EU alone. A country in the top right corner that would be below the black axis yet closer to Russia would experience high levels of interaction with *both* the EU and Russia, but be closer to Russia.

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[12] The graphs and figures included here are based on a modified version of the pivot states index, which aims to quantify how smaller states use their resources to position themselves strategically vis-à-vis the great powers. The part of the index used here, relationships that flow, examines three aspects of the more dynamic relationships between nations; military, economic and ideational relationships. It is based on data from the Stockholm International Peace Research Institute (SIPRI), trade data from Feenstra et al. and the United Nations (UN) COMTRADE database and voting data of the UN general assembly respectively. From these datasets, data was extracted on the relationship between each individual pivot state and the four great powers, and subsequently normalized. For the EU as a single actor, its weight is a composite of all military, trade and diplomatic (average UN voting) ties over time, i.e. taking into account accessions to the Union since 1996, but excluding Estonia, Latvia and Lithuania so as not to include trade between Latvia as part of the EU and Latvia as pivot state. The military score is expressed as a ratio of the arms transfers between a pivot state and a great power and the total arm transfers of that nation in a given year. A three year rolling mean was used to account for volatility in the arms transfer data. The trade data was similarly used to compute a ratio of the trade between a pivot state and a great power and the total trade of that nation. The ratio was then transformed so that nations score a 1 when 50%, or more, of their trade is with one great power. This was done as 50% trade dependence signifies great 'interwovenness' and there are few nations who are dependent for more than 50% of their trade on one great power. Finally we transformed the scale of the UN Voting dataset from 0 to -3 to 1 to 0 to better match the other indicators used. See Tim Sweijs et al., *Why Are Pivot States so Pivotal? The Role of Pivot States in Regional and Global Security* (The Hague: The Hague Centre for Strategic Studies, 2014); "SIPRI Arms Transfers Database," Page, *Stockholm International Peace Research Institute*, accessed February 23, 2015, http://www.sipri.org/databases/armstransfers; Robert Feenstra et al., *World Trade Flows: 1962-2000* (Cambridge, MA: National Bureau of Economic Research, January 2005), http://www.nber.org/papers/w11040.pdf; "UN Comtrade | International Trade Statistics Database," *UN Comtrade Database*, accessed February 23, 2015, http://comtrade.un.org/; Anton Strezhnev and Erik Voeten, "United Nations General Assembly Voting Data," *Harvard Dataverse Network*, February 2013, http://thedata.harvard.edu/dvn/dv/Voeten/faces/study/StudyPage.xhtml?globalId=hdl:1902.1/12379.

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Figure 1: Relationships between Former Soviet Republics and the EU and Russia in 1996
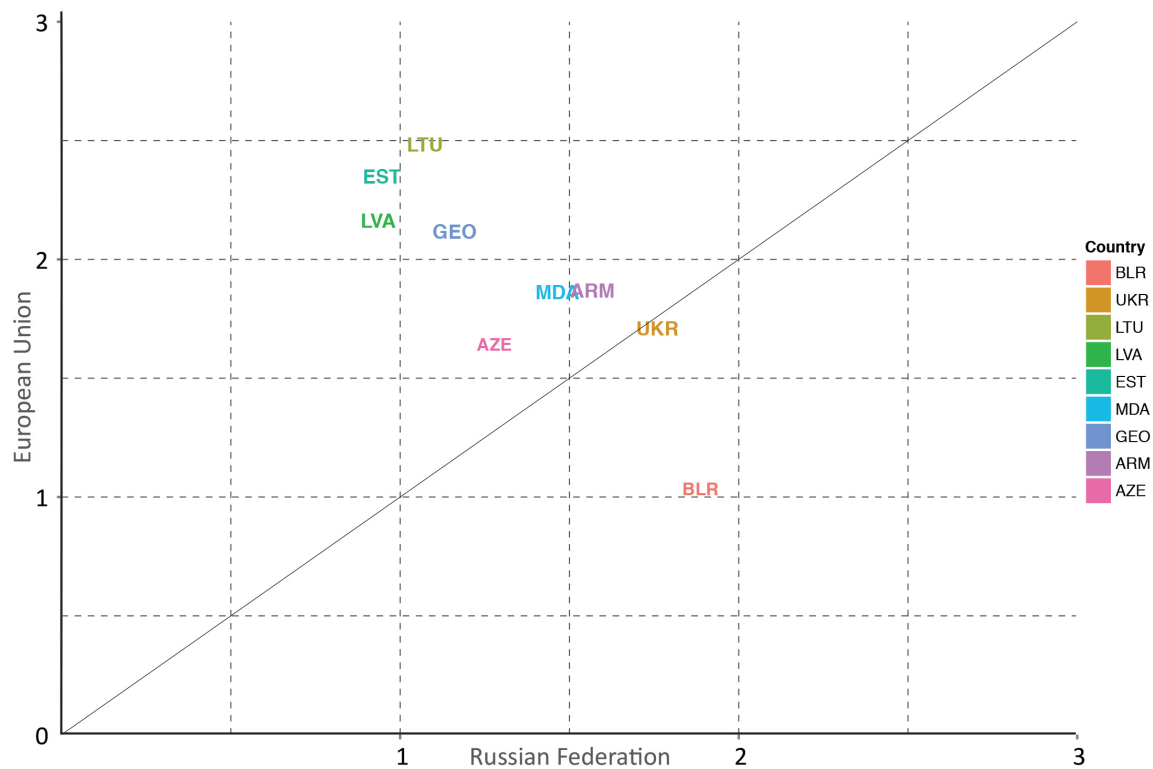
Figure 2: Relationships between Former Soviet Republics and the EU and Russia in 2004

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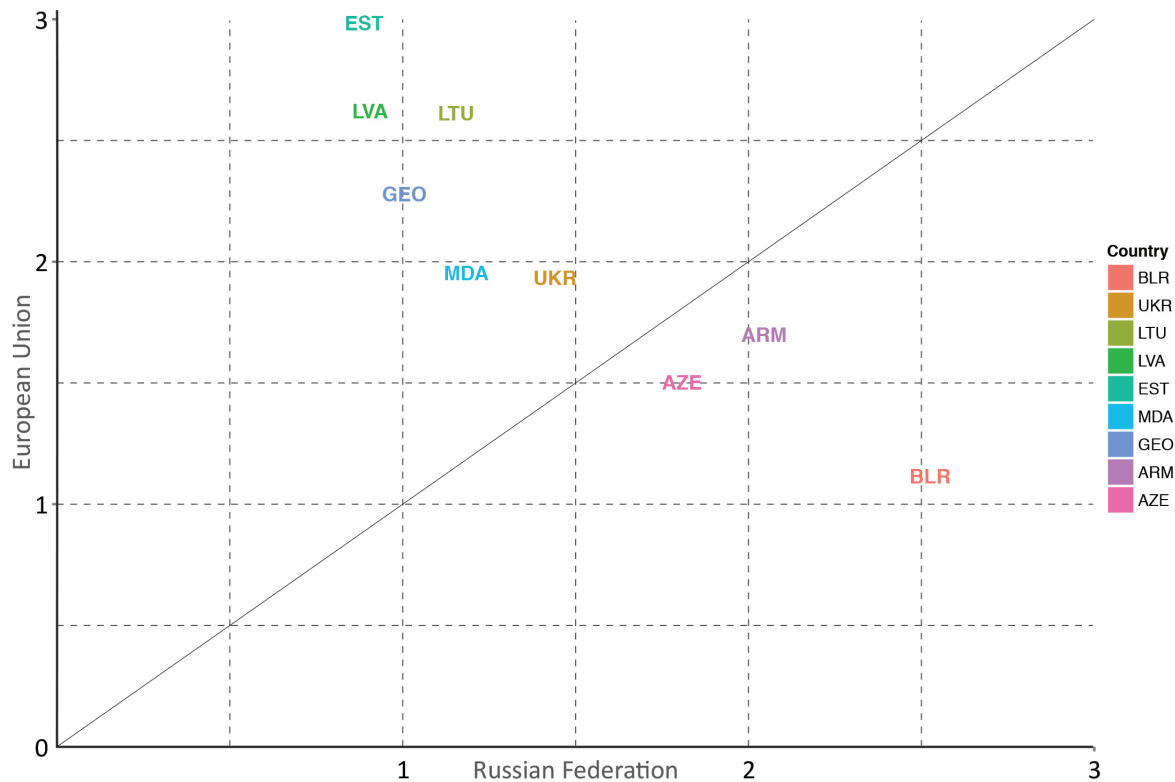
Figure 3: Relationships between Former Soviet Republics and the EU and Russia in 2012

Looking at the three distance charts, a number of interesting trends emerge. Estonia, Georgia and, somewhat surprisingly, Moldova, have made definite moves into the direction of the EU, while countries that were already on the EU side, such as Latvia and Lithuania consolidated their positions. Also remarkable is how Ukraine over time moved from the Russosphere, across into the EU's orbit. The one exception bucking all trends is Belarus, which in effect only moved closer to Russia, owing to increased ties. As a result, we see that in 2012, a familiar picture emerges with Armenia, Azerbaijan and Belarus on the Russian side, while the others all have gravitated towards the EU.

1.2.1. Latvia

Looking at Latvia more specifically (see Figure 4), it is clear that relations with the EU were strengthened straight after Latvia became independent.

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Figure 4: Relations between Latvia, the EU and Russia[13]

In 2004, the country's accession to the EU gave mutual relations an obvious further boost. Meanwhile, relations with Russia remained at a lower level overall. Most of the difference is due to the fact that Latvia has been trading much mor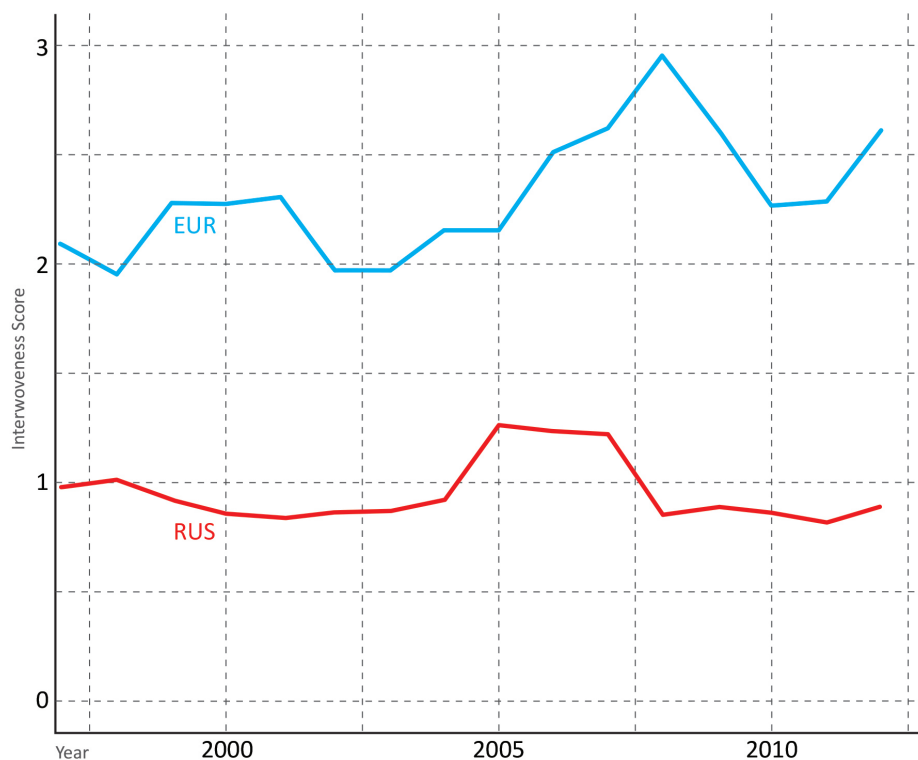e with the EU, and that in terms of diplomatic relations, Latvia and its EU counterparts are more strongly aligned in terms of UN voting patterns. Russian foreign policy towards Latvia would focus on its Russian minorities, and in the wake of the Ukraine crisis, Latvia is making extra efforts to quell potential tensions, while minority organizations themselves have been active in countering radical voices, showing that "Russian minorities are not a monolithic entity with homogeneous interests and a pro-Moscow agenda."[14] As chairman of the EU for the first semester of 2015, Latvia is keen to build a bridge to Moscow whilst toeing a tough line.[15]

1.2.2. Belarus

Compared to the other three countries examined here, Belarus is the great exception, being consistently aligned with Russia throughout the observed period (see Figure 5).

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[13] Sweijs et al., *Why Are Pivot States so Pivotal? The Role of Pivot States in Regional and Global Security*; "SIPRI Arms Transfers Database"; Feenstra et al., *World Trade Flows*; "UN Comtrade | International Trade Statistics Database"; Strezhnev and Voeten, "United Nations General Assembly Voting Data."

[14] See "The Baltic Countries Respond to Russian Minorities," *Stratfor Global Intelligence*, May 21, 2014, https://www.stratfor.com/analysis/baltic-countries-respond-russian-minorities; and also Michael Birnbaum, "In Latvia, Fresh Fears of Aggression as Kremlin Warns about Russian Minorities," *The Washington Post*, September 26, 2014, http://www.washingtonpost.com/world/europe/in-latvia-fresh-fears-of-aggression-as-kremlin-warns-about-russian-minorities/2014/09/26/b723b1af-2aed-44d1-a791-38cebbbadbd0_story.html.

[15] Latvia is also planning to host a potentially controversial summit meeting of the EU's Eastern partnership countries, including Belarus, Moldova, Ukraine and the Caucasus states. See Adrian Bridge, "Latvia to Maintain Tough Line on Russia as It Assumes EU Presidency," *The Telegraph*, December 31, 2014, http://www.telegraph.co.uk/news/worldnews/europe/latvia/11319895/Latvia-to-maintain-tough-line-on-Russia-as-it-assumes-EU-Presidency.html.
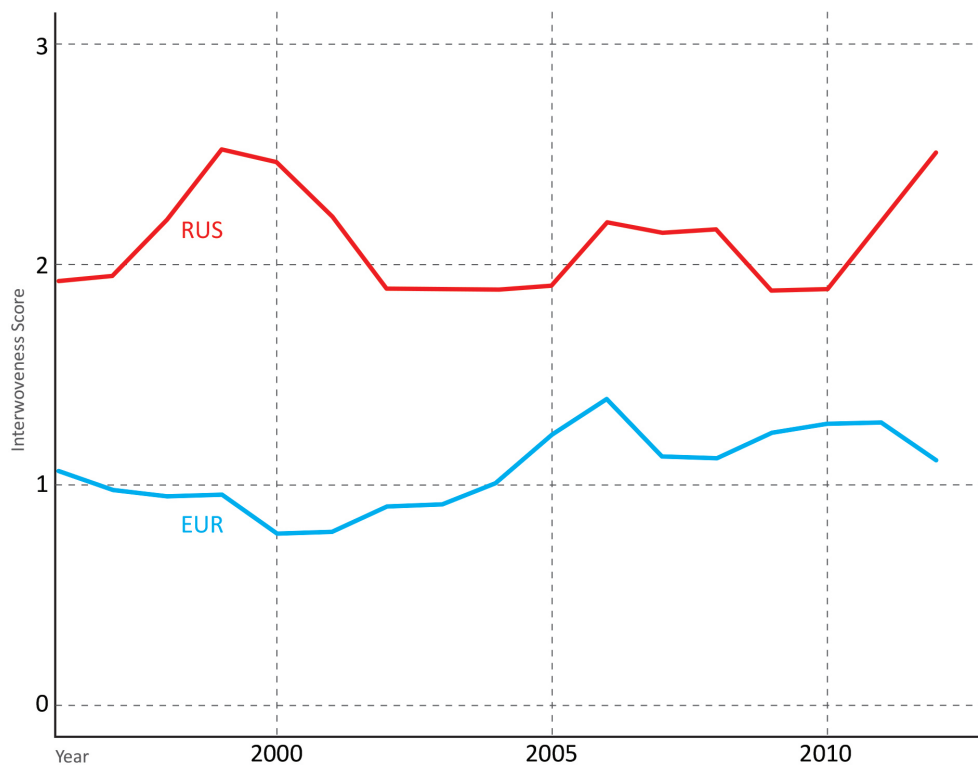
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Figure 5: Relations between Belarus, the EU and Russia[16]

Russian dominance is chiefly attributable to strong trade relations, trading over 50% of all commodities in terms of export and import of Belarus. Also, there is a strong alignment of UN voting patterns. That said, Belarusian wariness of Russia[17] – that is, president Lukashenka's suspicions towards Russian president Putin- creates a perspective for the EU to improve relations with Belarus, albeit only in the long run. What is more, Russian encroachment upon Ukraine has also created worries about Moscow's designs towards Belarus.[18] Hence, Belarus currently conducts a very delicate dance. It is no accident that the ceasefires between the Ukrainian government and rebel forces concluded in Minsk, demonstrating that Lukashenka's survival strategy lies in playing balancing role.[19] The elections later this year will show where Belarus really stands—not because of the outcome, but because of how Lukashenka will position himself vis-à-vis Russia and the EU.

1.2.3. Ukraine

Ukraine's relations with the EU and Russia show a markedly different pattern. While being outside the EU, Ukraine has long been poised between the two great powers, although relations with the EU

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[16] Sweijs et al., *Why Are Pivot States so Pivotal? The Role of Pivot States in Regional and Global Security*; "SIPRI Arms Transfers Database"; Feenstra et al., *World Trade Flows*; "UN Comtrade | International Trade Statistics Database"; Strezhnev and Voeten, "United Nations General Assembly Voting Data."

[17] See e.g. Ryhor Astapenia, "Belarus and the Eurasian Economic Union: The View from Minsk," *European Council on Foreign Relations*, January 7, 2015, http://www.ecfr.eu/article/commentary_belarus_and_the_eurasian_economic_union_the_view_from_minsk.

[18] From interviews with country experts. See also Reid Standish, "Russia May Need to Say 'Do Svidaniya' to Belarus," *Foreign Policy*, January 30, 2015, http://foreignpolicy.com/2015/01/30/russia-may-need-to-say-do-svidaniya-to-belarus/.

[19] See e.g. Alec Luhn, "Belarus Hopes to Benefit as Host of Ukraine-Russia Talks," *The Guardian*, August 26, 2014, http://www.theguardian.com/world/2014/aug/26/belarusia-president-lukashenko-benefit-host-ukraine-russia-talks.

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have steadily improved since the 1990s, with a particular upsurge in bilateral ties since the Orange revolution in 2004 (see Figure 6).
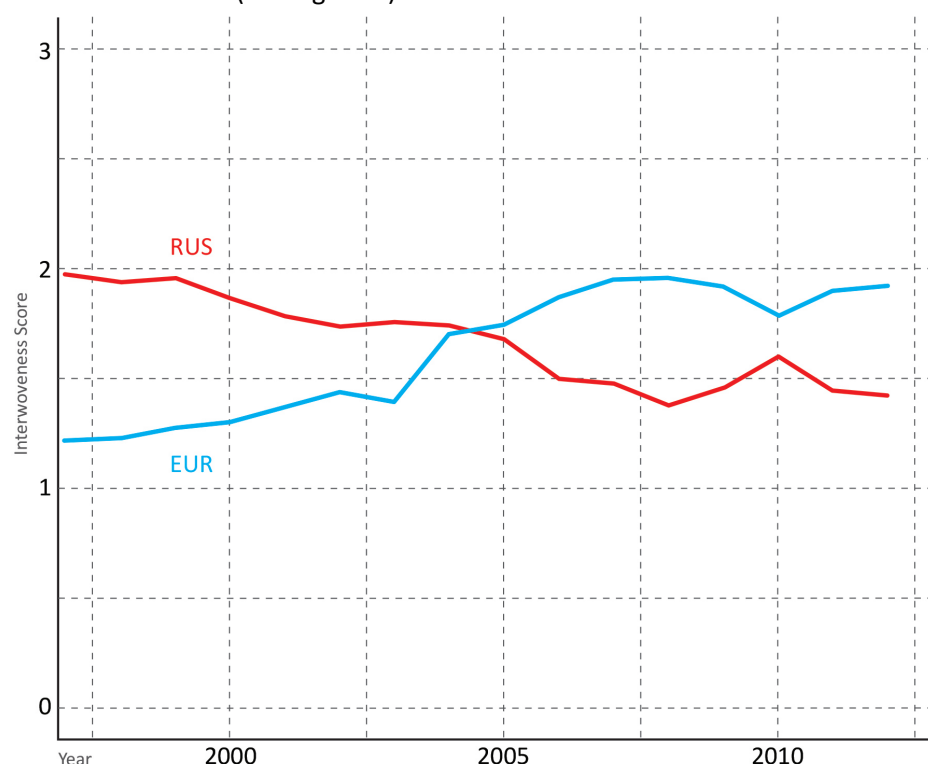

Figure 6: Relations between Ukraine, the EU and Russia[20]

Relations with Russia went into the opposite direction, and only picked up somewhat when Yanukovych returned to power in 2010. The differences between Russia and the EU in relation to Ukraine are largely explained by the fact that trade volumes with Europe are consistently higher, and because Ukrainian and EU voting patterns in the UN have converged over the years.

Ukraine's geopolitical importance for Russia is evident to many.[21] The point is squarely made by Robert Kaplan, who recently wrote that "[Putin's] concentration on Ukraine as part of a larger effort to re-create a sphere of influence in the near-abroad is proof of his desire to anchor Russia in Europe, albeit on non-democratic terms."[22] Beyond establishing a sphere of influence, it should also not be excluded that in the long run, Russia seeks to wholly incorporate parts of what used to be called 'Novorossiya', i.e. the entire southern flank of Ukraine—lands which had been conquered under Catherine the Great in the 18th century, and stretch from Mariupol to Odessa and the borders of Moldova.[23] Crimea forms part of this territory. If so, geopolitical stability in this part of Europe will not be re-established for years to come.

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[20] Sweijs et al., *Why Are Pivot States so Pivotal? The Role of Pivot States in Regional and Global Security*; "SIPRI Arms Transfers Database"; Feenstra et al., *World Trade Flows*; "UN Comtrade | International Trade Statistics Database"; Strezhnev and Voeten, "United Nations General Assembly Voting Data."

[21] A good example is Zbigniew Brzezinski, *The Grand Chessboard: American Primacy and Its Geostrategic Imperatives* (New York: Basic Books, 1998).

[22] Robert D. Kaplan, *The Revenge of Geography: What the Map Tells Us about Coming Conflicts and the Battle against Fate* (New York: Random House, 2013), 180–181.

[23] See e.g. Adam Taylor, "'Novorossiya,' the Latest Historical Concept to Worry about in Ukraine," *The Washington Post*, April 18, 2014,

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1.2.4. Moldova

Relations between Moldova, Russia and the EU show a similar patterns to those of Ukraine, albeit that the level of 'interwovenness' with the EU is stronger than in the previous case (see Figure 7).
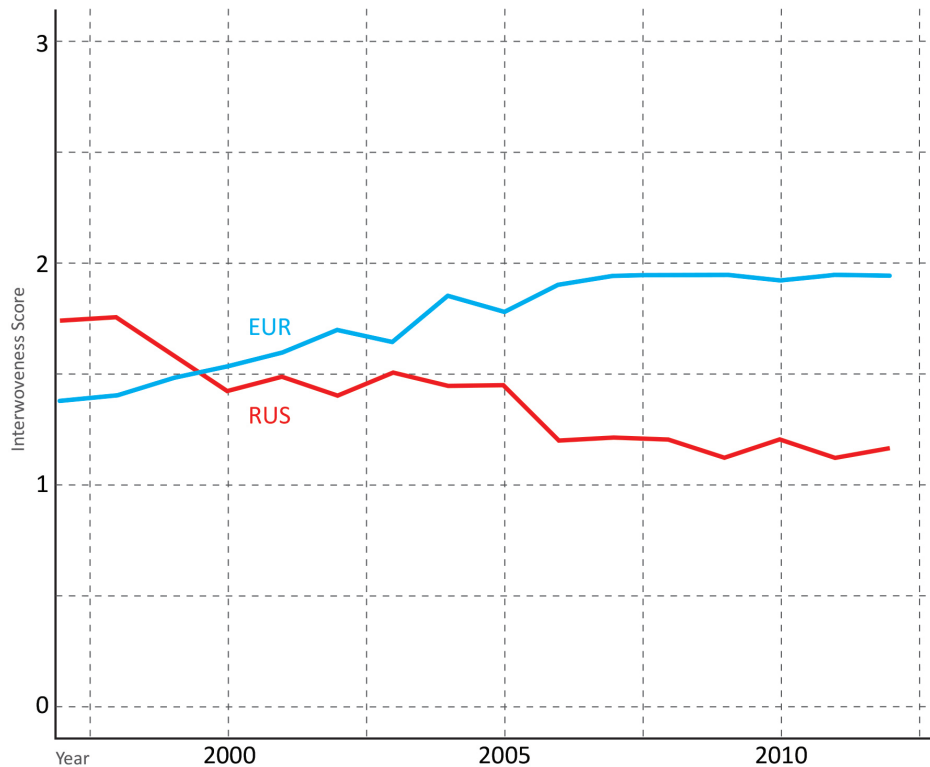

Figure 7: Relations between Moldova, the EU and Russia[24]

For Moldova, just as for Ukraine, trade is an important distinguishing factor. More than 50% of all trade with the former Bessarabian republic is with the EU, although all of its gas is supplied by Russia.[25] As for the UN voting record, Moldova gradually became completely aligned with the EU while a comparison with Russia shows diverging patterns instead. One problem is of course that whereas in Ukraine, the data provides a good reflection of who is in power, in Moldova this is not as clear since breakaway Transdniestria is not represented in the Chisinau government, nor in parliament. In the November 2014 elections, pro-European parties had connived to make sure that a pro-Russian party would not be able to compete.[26] In a larger context, it is difficult to see to what extent Moldova can push forward on its self-chosen trajectory towards the EU for as long as the situation in Ukraine remains in the balance. In the words of prime minister Leanca, the country risks to become a geopolitical "hostage."[27]

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http://www.washingtonpost.com/blogs/worldviews/wp/2014/04/18/understanding-novorossiya-the-latest-historical-concept-to-get-worried-about-in-ukraine/.

[24] Sweijs et al., *Why Are Pivot States so Pivotal? The Role of Pivot States in Regional and Global Security*; "SIPRI Arms Transfers Database"; Feenstra et al., *World Trade Flows*; "UN Comtrade | International Trade Statistics Database"; Strezhnev and Voeten, "United Nations General Assembly Voting Data."

[25] Gela Merabishvili, *Triangular Geopolitics in Europe's Eastern Neighborhood*, CEPS Commentaries (CEPS, December 2, 2014).

[26] See "Moldovans Choose Europe, Barely," *The Economist*, December 1, 2014, http://www.economist.com/news/europe/21635339-moldovans-choose-europe-barely.

[27] "A Geopolitical Hostage," *The Economist*, November 23, 2013, http://www.economist.com/news/europe/21590601-path-european-integration-goes-through-ukraine-geopolitical-hostage.

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1.3 Preliminary Conclusions

From a geopolitical and historical perspective, it is clear why the countries at issue here have been battlegrounds where Western and Eastern powers have vied for continental dominance. Today, those powers are the EU and Russia. While Russia often is seen to have the upper hand in this struggle, looking at the underlying fundamentals, the EU appears strongly positioned with respect to all four countries, also taking into account that strong-arming of Lukashenka by Moscow has in effect only driving him closer to Europe.

From a long-term perspective, it looks unlikely that the zone between the Baltic and the Black Seas will ever be fully pacified. That said, promotion of common civilizational standards such as those enshrined in the 1975 Helsinki Accords –some of which RNW is actively pursuing- shows that there is room for finding common ground between the EU and Russia. In turn, this could be the basis for stable development based on democratic values for several countries in eastern Europe that once more are fearing the specter of conflict, or are actually, and tragically, experiencing this today.

2. The Potential Audience

In order to assess the likely impact of RNW's activities, it is important to understand the main characteristics of the potential target audience in the four countries of our study. It can be argued that young, (higher) educated and urbanized residents, who have Russian as a first or second language, are most likely to be receptive to Russian language RNW content. To that effect, we complied several key-indicators, which provide an initial estimate of the size of the potential target audience for RNW's initiatives.

2.1 Demographics

Demographics matter. For example, depending on whether a country has a relatively 'young' or 'old' population, the extent to which a topic finds a suitable audience differs greatly. Figure 8 shows the median age and urbanization rate in Belarus, Latvia, Moldova and Ukraine, respectively. The size of the icons is proportionate to the population size in the respective countries.
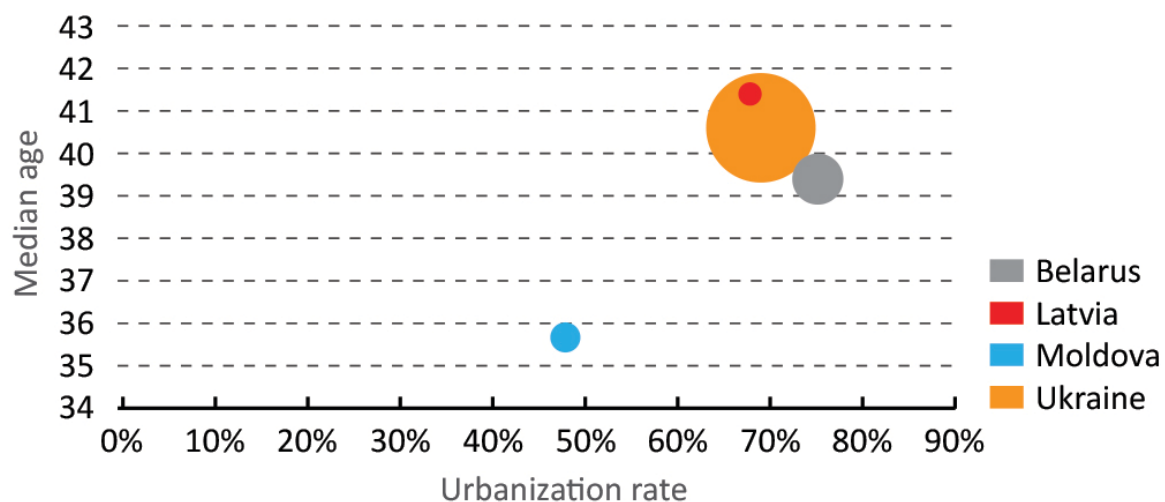
Figure 8: Median age and urbanization rate in Belarus, Latvia, Moldova and Ukraine[28]

As Figure 8 illustrates, the population of Belarus, Ukraine and Latvia is predominantly urbanized and of a mature age. Moldova's demographics differ significantly: its population is younger and much less urbanized. It can also be seen that the potential target group in Ukraine is more than three times larger than in the other three countries combined. This is primarily due to the fact that Ukraine has a population of over 44 million inhabitants, which is in sharp contrast to Belarus (9,6 million), Moldova (3,5 million), and Latvia (2,1 million).[29]

The level of urbanization matters, as it influences information acquisition among residents. Urban residents are more likely to rely on a wider range of information sources than others, and are more likely to get local news and information via internet searches and digital platforms such as Twitter, blogs and the websites of local newspapers and TV stations. Rural residents, on the other hand, are more likely to rely on traditional platforms such as newspapers and television to get access to news. It may also be the case that in some rural communities, they have fewer choices of media platforms,

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[28] World Bank Development Indicators, CIA World Factbook.
[29] "Countries - Index Mundi," 2014, http://www.indexmundi.com/factbook/countries.

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what limits the range of information provided. Moldova stands out with an urbanization rate of only 47,7%.

Similarly, education levels can act as a proxy variable for the extent to which citizens may be engaged with the politics of their nation. We estimate that the adult population with a higher level of educational attainment is more likely to follow politics and international affairs on a daily basis, as well as to seek information from a wider range of mass-media information sources, including on-line. Figure 9 shows the total gross enrolment ratio in tertiary education in the selected countries, as well as that of the EU, for comparison purposes.
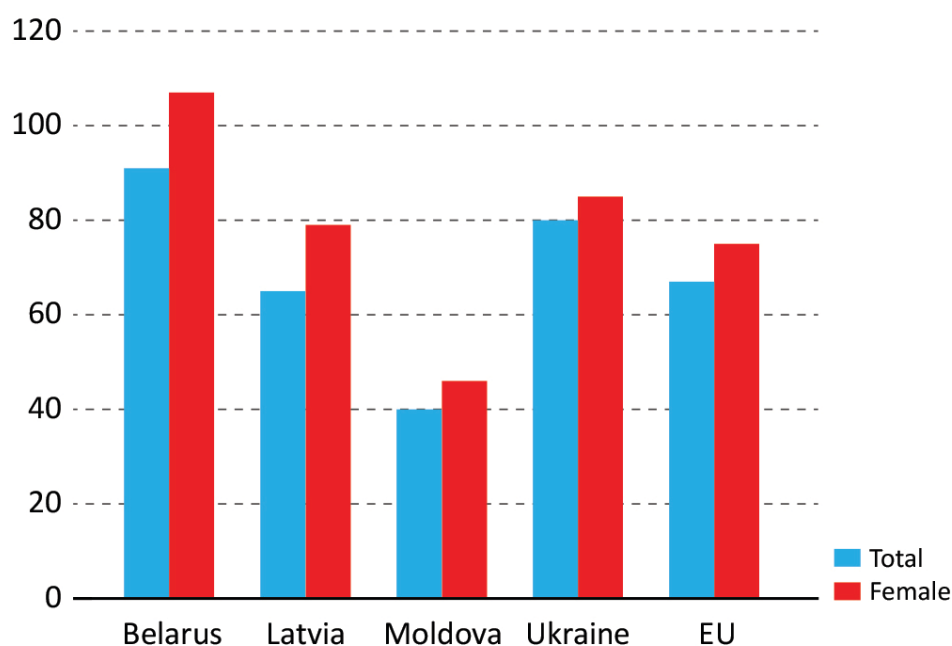
Figure 9: The total gross enrollment ratio in tertiary education (% gross) in Belarus, Latvia, Moldova, Ukraine and the EU[30]

As Figure 9 illustrates, enrollment in tertiary education is particularly high in Belarus (91%) and Ukraine (80%), which both exceed the total enrollment in tertiary education in the EU. The case of Latvia is in line with the overall EU level. Moldova, however, visibly lags behind, with only 40% enrollment in tertiary education. This result is arguably related to low levels of urbanization and economic underdevelopment in the country, which influence the access to higher education.

2.2 ICT Development

Indicators measuring the state of ICT development in a country are particularly important given that RNW intends to enter the market by means of online media. Figure 10 and Figure 11 show the level of ICT penetration in all four countries for 2010 and 2013, with a particular focus on the number of internet users, fixed broadband internet subscribers, and mobile cellular subscriptions, set against the level of ICT development in the EU (100%).

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[30] World Bank.

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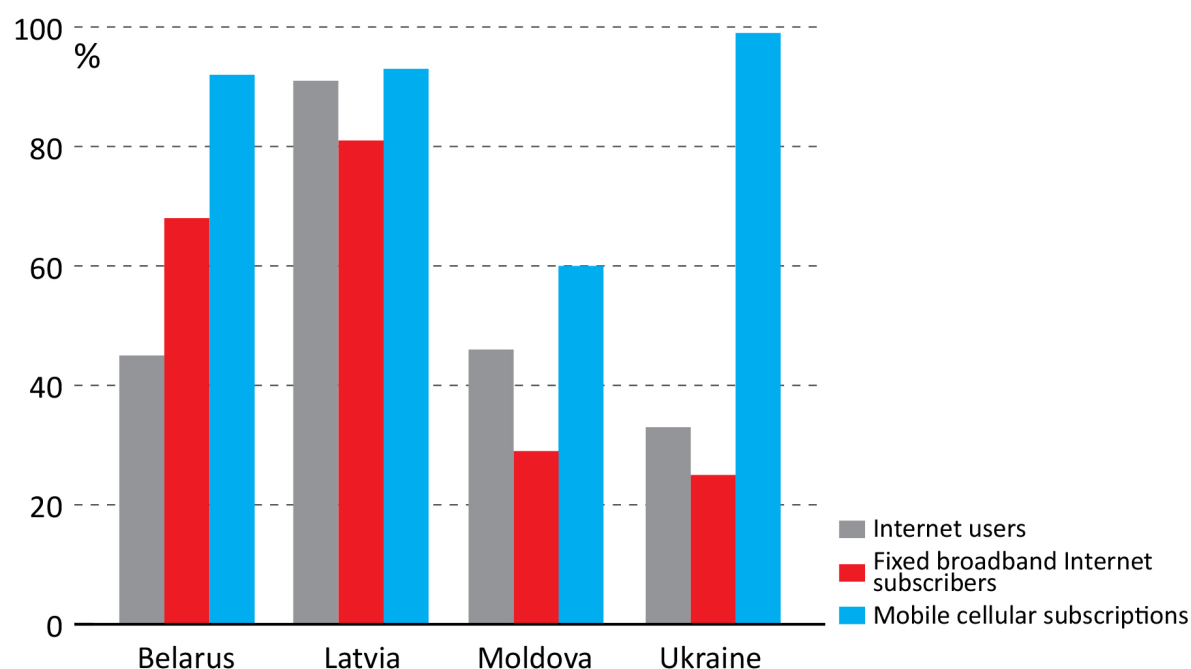
Figure 10: Level of ICT penetration in Belarus, Latvia, Moldova and Ukraine (2010)[31]
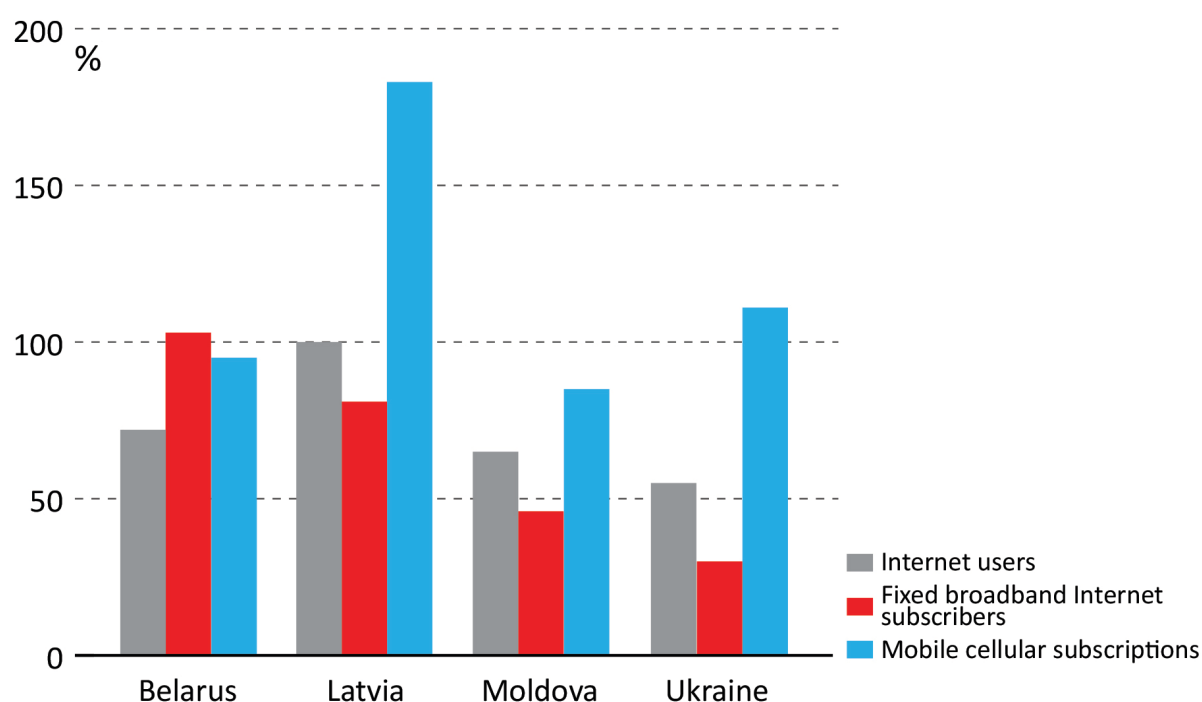
Figure 11: Level of ICT penetration in Belarus, Latvia, Moldova and Ukraine (2013)[32]

As both figures illustrate, all four countries demonstrate a reasonable level of ICT penetration, with the overall connectivity being visibly higher in Latvia and Belarus, compared to Moldova and Ukraine; mobile cellular subscriptions being the only exception. Belarus stands out as an interesting case study: the number of fixed broadband internet subscribers in 2013 exceeded the EU level, while mobile phone subscriptions stood at 95%. This is however not surprising as Belarus is listed among

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[31] World Development Indicators, International Telecommunication Union (ITU).

[32] Ibid.

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the most technologically advanced republics of the former Soviet Union and possesses considerable technical ICT infrastructures today.[33] Additionally, the government continues to support the realization of the country's internet potential and the development of its ICT sector. To illustrate, in 2005, the High-Tech Park – hosting 78 ICT companies – was established in an attempt to enhance the competitiveness of the national high-tech sector, develop modern technologies while attracting foreign ones, as well as to increase Belarusian exports in ICT products and services.[34] Moldova, on the other hand, visibly lags behind on all three selected indicators despite a notable increase in mobile cellular subscriptions between 2010 and 2013. Even though the authorities do not generally restrict access to internet, underdeveloped telecommunications infrastructure, coupled with high fees for internet connections, have resulted in limited internet usage.[35] In the case of Ukraine, internet penetration continues to increase steadily, partly due to diminishing costs and the growing ease of access, in particular to mobile internet.[36]

Looking at data on the share of the population that accesses social media from their mobile phones (see Figure 12), it appears that in all four countries, the overall number of internet users is considerably higher than the number of users who access social media from their phones, which suggests that the majority of users access social media from their computers, or, alternatively, from internet cafes.
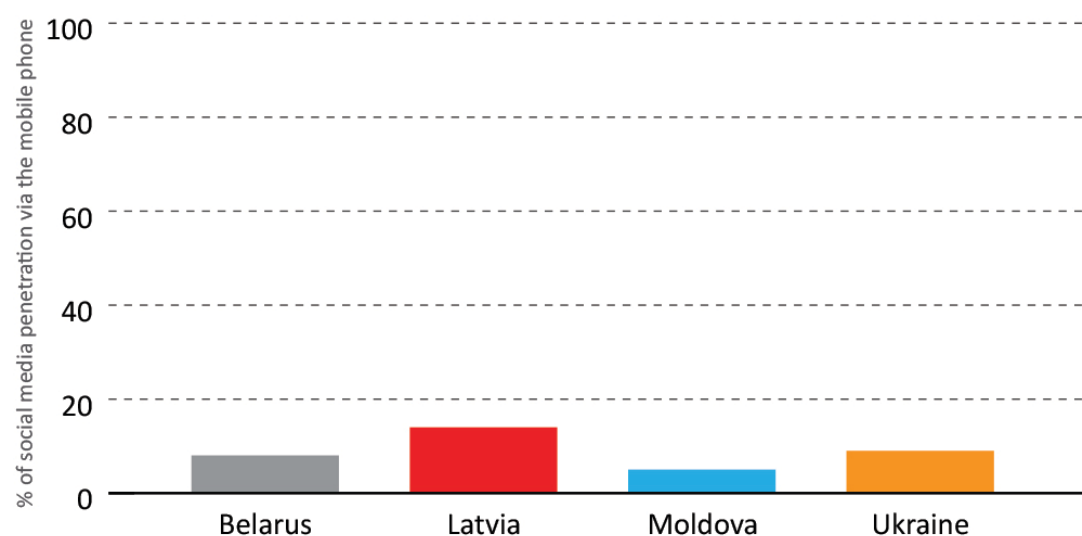
Figure 12: Percentage of mobile phone users accessing social media from phones (2014)[37]

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[33] "Belarus," *EU-Eastern Europe and Central Asia Gateway for Research and Innovation*, accessed February 2, 2015, http://www.eeca-ict.eu/belarus.

[34] Ibid.

[35] "Moldova: Freedom of the Press 2014," *Freedom House*, accessed January 12, 2015, https://freedomhouse.org/report/freedom-press/2014/moldova#.VJrWTV4CA.

[36] *Ukraine: Freedom on the Net 2014* (Freedom House, n.d.), https://freedomhouse.org/sites/default/files/resources/Ukraine.pdf.

[37] We Are Social Italia, "Social, Digital & Mobile in Europa 2014," accessed February 4, 2015, http://es.slideshare.net/wearesocialit/social-digital-mobile-in-europa-2014.

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2.3 Economic Development

Overall economic development statistics can be useful in shedding light on whether socio-economic inequality may be an issue that is lingering in society. Figure 13 shows GDP per capita, as well as the inequality-adjusted Human Development Index (IHDI) scores (the actual level of human development, adjusted for income inequality within countries) for Belarus, Latvia, Moldova and Ukraine.
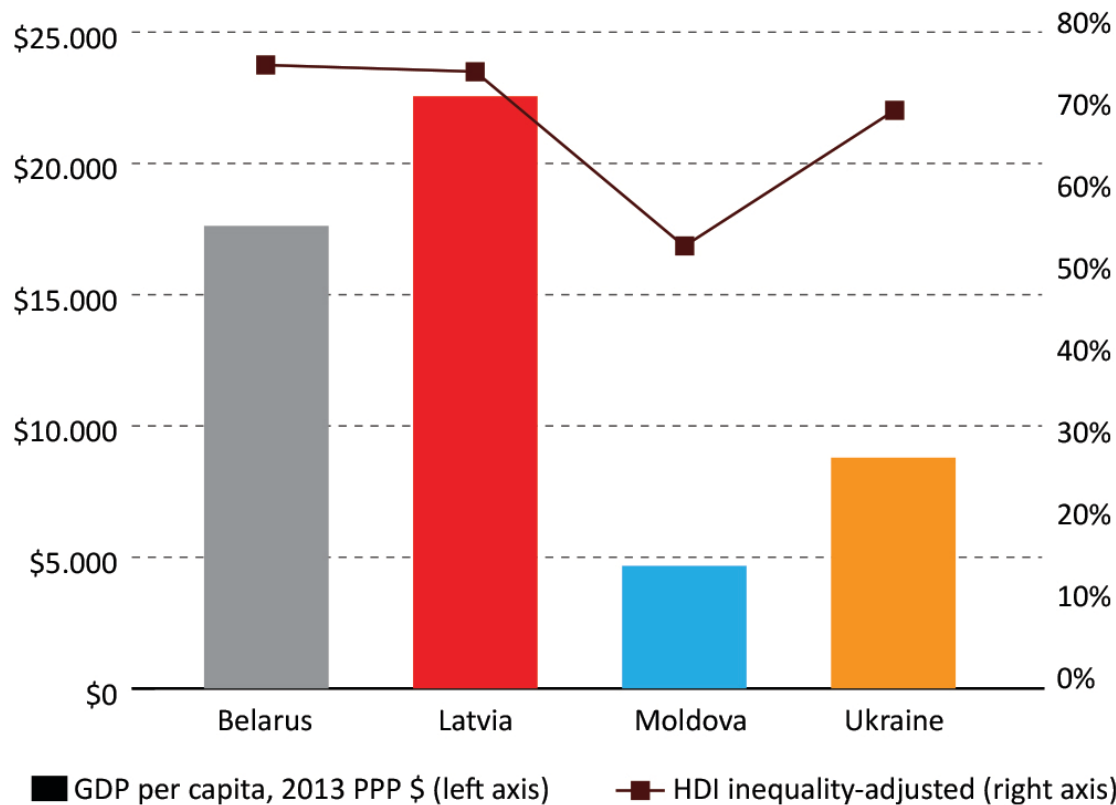
It is common practice to focus on GDP per capita to assess a country's economic performance. Per capita GDP is also used as an indicator of the welfare of citizens, with higher per capita GDP being understood as citizens having a higher standard of living. On top of prosperity, countries with a higher GDP per capita are associated with greater political stability, while political instability, in turn, can lead to lower economic growth. As Figure 13 shows, in 2013, GDP per capita was highest in Latvia, and lowest in Moldova. The fact that Moldova scores the lowest, is a reflection of the low economic performance and high incidence of political instability in the country. Moldova remains one of the poorest countries in Europe, when measured in terms of GDP per capita.

As could be anticipated, the IHDI scores for the four countries show Latvia and Belarus ahead of the other two countries. Whereas, the difference with Ukraine is not very large, the difference with Moldova is significant. Also on IHDI Moldova lags significantly behind the other countries in the

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[38] World Development Indicators, UNDP.

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study, suggesting that (economic) underdevelopment in Moldova could be a potential issue of attention for RNW.

2.4 Russian Language

In light of RNW's intention to generate content in the Russian language, it is important to determine the number of Russian speakers in each selected country. Table 1 shows the number of Russian-speaking citizens in Belarus, Latvia, Moldova and Ukraine as a share of the total population.

Table 1: Russian speakers in Belarus, Latvia, Moldova, Ukraine[39]

	Belarus	Latvia	Moldova	Ukraine
Ethnic Russian population	8.3%	26.2%	5.9%	17.3%
Russian as the first language	70%	34%	16%	24%
Chose Russian in Gallup poll, 2008	92%	N/A	23%	83%
Use of Russian in country domain sites	86.9%	N/A	N/A	79%

As Table 1 illustrates, major differences exist among Russian speakers across the region. A distinction must be drawn between ethnic Russians and Russian speakers, who adopted Russian as their first language. In Latvia and Ukraine, ethnic Russian population is particularly large, constituting around 26% and 17% of their respective total populations. In Belarus, the Russian population constitutes only 8,3 % of the total population, while in Moldova the number of ethnic Russians is even lower, at just under 6%. These numbers are important, as ethnic Russian minorities are more likely to be susceptible to Russian propaganda, not least because Russia has been vocal about its willingness to protect ethnic Russians abroad.[40] The annexation of Crimea, as well as the on-going support for separatists in eastern Ukraine further underline this claim.

The number of Russian language speakers is often a highly political issue in these countries, and as a result available estimates often differ significantly. In any case, their numbers are visibly higher than the number of ethnic Russians in all four countries. According to some estimates (CIA Factbook), the percentage of the total population for whom Russian is the first language was 70% in Belarus, 34% in Latvia, 24% in Ukraine, and 16% in Moldova. However, in the Gallup poll conducted in 2008 92% of Belarusian and 83% of Ukrainians answer questions in Russian, rather than in Belarusian, or Ukrainian. In terms of the geographic distribution, Russian ethnic minorities living in Ukraine are concentrated in the east and the south of the country; in Latvia, Russian-speakers are concentrated in the capital and in territories close to the border with Russia; in Moldova and Belarus, ethnic Russians mostly live in urban areas. On the whole, the knowledge of the Russian language tends to be better in urban areas than rural ones. Specifically with regard to the use of Russian language on the web, the percentage of the population using country domain sites in Russian is noticeably high in Belarus and Ukraine.

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[39] Gallup, CIA World Factbook.
[40] Katie Engelhart, "Putin's Legalism," *Foreign Policy*, March 24, 2014, http://foreignpolicy.com/2014/03/24/putins-legalism/.

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2.5 English Language

In case RNW were to consider to generate content in English, it is useful to have an idea of the population of English-speakers in the selected countries. According to the EF English Proficiency Index, which ranks English skills worldwide, Latvia is classified as having a high level of English proficiency and ranked slightly above the European average.[41] Low English proficiency was recorded in Ukraine, which earned one of the worst scores in Europe, ranking below the European average.[42] Although Belarus and Moldova have not yet been assessed in the English Proficiency Index, the knowledge of English among Belarusians remains low. With regard to Moldova, although the level of actual English proficiency among the population is difficult to assess, Moldova's National Bureau for Statistics revealed that more than 60% of students study English as their primary foreign language, followed by French.[43]

2.6 Conclusions

Based on the above findings, it can be argued that the population of Ukraine stands out due to its size, and geopolitical importance. The population of Belarus appears as an equally promising target audience. The country has the second largest population, as well as high levels of social, economic and ICT development. Similarly to Ukraine, enrollment in tertiary education is high. Moreover, the use of Russian language is noticeably higher in Belarus than elsewhere. Latvia is substantially smaller, yet has the highest GDP per capita and it meets European standards in terms of both education level, as well as ICT development. The use of the Russian language in Latvia is higher than in Moldova and Ukraine, although visibly lower than in Belarus. Moldova appears to lag behind the other three countries, owing to its low urbanization rate, lower level of ICT development including limited internet usage, as well as a low enrollment in tertiary education.

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[41] "Country Fact Sheet: Latvia," *Education First (EF)*, 2014, http://www.ef.nl/epi/spotlights/europe/latvia/.

[42] "Country Fact Sheet: Ukraine," *Education First (EF)*, 2014, http://www.ef.nl/epi/spotlights/europe/ukraine/.

[43] "English – the Most Preferred Foreign Language among Moldovan Students," *Moldova.org*, July 1, 2013, http://www.moldova.org/english-the-most-preferred-foreign-language-among-moldovan-students-234764-eng/.

3. Fundamental Rights in the Region

The ability for journalists, commentators, publicists and the like to freely speak their mind is the basis for general freedom of speech and, as such, one of the highest defendable goods in any country. Table 2 provides for a comparison of press freedom across the four countries in this study, based on the 2014 Freedom House report. The score, which is subdivided into three classes, reflects the degree of freedom that journalists, news organizations, and citizens enjoy in each country, and the efforts made by the authorities to respect and ensure respect for this freedom.[44]

Table 2: Freedom of the Press[45]

	2005		2010		2014	
	Score	Ranking	Score	Ranking	Score	Ranking
Belarus	86	186	92	190	93	193
Moldova	65	137	65	144	53	113
Ukraine	59	124	53	108	63	139
Latvia	17	29	26	55	27	50
Status and Ratings (Free, Partly Free, Not Free):						
*	Free (F): 0-30					
*	Partly Free (PF): 31-60					
*	Not Free (NF): 61-100					

Press freedom varies widely across the region (see Table 2). Whereas Latvia is classified as a truly 'free' society and Ukraine and Moldova as only 'partly free', Belarus – known as Europe's last dictatorship, even occupies the bottom category. When compared to other countries worldwide, it is interesting to note that, with the exception of Moldova, all countries in our study are deemed worse off today than they were back in 2005.

Another important variable underpinning free media is the ability to use the internet without any form of unlawful governmental oversight or interference. Table 3 provides an overview of the 'Freedom on the Net' score collected by Freedom House, which indicates the extent to which internet use in a country can be considered 'free' from such interference. Ratings are determined through an examination of whether obstacles to (internet) access exist, whether there are limits on online content, and last whether violations of user rights take place.[46]

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[44] *Freedom of the Press 2014: Belarus* (Freedom House, 2014), https://freedomhouse.org/report/freedom-press/freedom-press-2014.

[45] Ibid.

[46] Examples include governmental efforts to block specific applications or technologies; legal, regulatory, and ownership control over internet and mobile phone access providers; the filtering and blocking of websites; other forms of censorship and self-censorship; manipulation of content; the diversity of online news media; usage of digital media for social and political activism; restrictions on online activity; surveillance; privacy; and repercussions for online activity, such as legal prosecution, imprisonment, physical attacks, or other forms of harassment. See "Freedom on the Net | Freedom House," *Freedom House*, 2014, https://freedomhouse.org/report-types/freedom-net#.VL5zJHsYFIY.

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Table 3: Freedom on the Net[47]

	2011 Score	2012 Score	2013 Score	2014 Score
Belarus	69	69	67	62
Moldova	no data	no data	no data	no data
Ukraine	no data	27	28	33
Latvia	no data	no data	no data	no data
Status and Ratings (Free, Partly Free, Not Free):				
*	Free (F): 0-30			
*	Partly Free (PF): 31-60			
*	Not Free (NF): 61-100			

Although no data is available for Latvia and Moldova, it is clear that Belarus is among the world's worst when it comes to internet freedom. Several examples aptly illustrate this reputation. Between 2012 and 2013, the Belarussian authorities blocked numerous websites, including Change.org, an online petition platform. Also, in possible connection with the release of two unjustly apprehended citizens, the Belarusian government arrested several online activists, lodged court proceedings against media practitioners linked to internet publications, and orchestrated multiple technical attacks against websites of independent media and civil society organizations.[48]

Ukraine appears to be on a gradual slide towards lower internet freedom since 2011, down to 33rd in 2014, from 27th in 2005. In August 2012, Ukraine witnessed the beating up of online journalist and activist Mustafa Nayyem. Another worrying sign was that on the day of the parliamentary elections in 2012 – which were won by, now former President, Viktor Yanukovych – DDoS attacks were launched against election monitoring websites and opposition websites.[49] In 2014, social media played a major role in the Euromaidan protests that ultimately swept Yanukovych from power, providing constant updates about the situation on the ground.[50]

Whether such acts as described above are allowed to take place depends to a great extent on the strength of the rule of law. Table 4 provides an overview of the Rule of Law score of the World Bank, a composite indicator that captures the perceptions of the extent to which agents have confidence in and abide by the rules of society. It measures in particular the quality of contract enforcement, property rights, the police, and the courts, as well as the likelihood of crime and violence.[51]

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[47] Ibid.
[48] *Freedom on the Net 2014: Belarus* (Freedom House, 2014), https://freedomhouse.org/sites/default/files/resources/Belarus.pdf.
[49] "Freedom on the Net 2014: Ukraine," *Freedom House*, accessed January 20, 2015, https://freedomhouse.org/report/freedom-net/2013/ukraine#.VL51-HsYFIY.
[50] Pablo Barbera and Megan Metzger, "Tweeting the Revolution: Social Media Use and the #Euromaidan Protests," *The Huffington Post*, February 21, 2014, http://www.huffingtonpost.com/pablo-barbera/tweeting-the-revolution-s_b_4831104.html.
[51] "Worldwide Governance Indicators," *World Bank WGI 2014 Interactive*, accessed January 20, 2015, http://info.worldbank.org/governance/wgi/index.aspx#doc.

Table 4: Rule of Law (-2.5 to 2.5) [52]

	2005 Score	2010 Score	2013 Score
Belarus	-1.19	-1.04	-0.89
Moldova	-0.4	-0.39	-0.41
Ukraine	-0.79	-0.81	-0.83
Latvia	0.59	0.78	0.75
Status and Ratings :			
*	-2.5	Poor	
*	2.5	Excellent	

What is clear from Table 4 is that Latvia has by far the best perceived legal system of all countries in the study. The perception of the rule of law improved over the years, only dipping slightly between 2010 and 2013. Belarus saw reasonable progress between 2005 and 2013, but it should be pointed out that the country still has a long way to go. By contrast, perceptions of the rule of law slightly worsened in Ukraine and Moldova. The current crisis in Ukraine and the deterioration of stability in the east of the country, as well as around the Transdniestria region near Moldova will undoubtedly have a negative effect on the scores for 2015.

A final variable which sheds some light on the functioning of society is the prevalence of corruption. The extent to which corruption is effectively curtailed is indicative of the degree to which the law and the effectiveness of public policies are undermined by issues of graft.

Table 5 provides an overview of the 'control of corruption' based on data provided by the World Bank. Control of corruption captures perceptions of the extent to which public power is exercised for private gain, including both petty and grand forms of corruption, as well as "capture" of the state by elites and private interests.[53]

Table 5: Control of Corruption (-2.5 to 2.5) [54]

	2005 Score	2010 Score	2013 Score
Belarus	-0.87	-0.73	-0.52
Moldova	-0.64	-0.69	-0.74
Ukraine	-0.69	-0.98	-1.09
Latvia	0.32	0.13	0.27
Status and Ratings :			
*	-2.5	Poor	
*	2.5	Excellent	

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[52] Ibid.
[53] Ibid.
[54] Ibid.

Based on the results in Table 5, it appears that only Latvia has a good overall control of corruption, despite an increase in corruption levels between 2010 and 2013. The three other nations all are in the negative when it comes to their ability to effectively curb graft. Worst among the four is Ukraine, which saw corruption increase significantly since 2005. In 2014 Ukraine was Europe's most corrupt country, ranking 142nd out of 175 countries reviewed by Transparency International.[55] Moldova is equally performing poorly when it comes to control of corruption. Large socio-economic divisions and high perceptions of corruption, in particular in political institutions remain key problems after the 2014 elections.[56] In Belarus, despite an improvement from 2005 to 2013, corruption remains an integral part of the Belarusian system, on both high and low levels. In the 2014 ranking by Transparency International, Belarus was ranked 119th out of 175 countries reviewed.

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[55] "Ukraine Remains Most Corrupt Country in Europe - Transparency International," *Interfax-Ukraine*, accessed January 21, 2015, http://en.interfax.com.ua/news/economic/237633.html.
[56] Daniel Brett and Eleanor Knott, "The Moldovan Elections of 2014 Are More than about Putin or the EU: Corruption, Poverty and Parties," December 17, 2014, http://blogs.lse.ac.uk/lsee/2014/12/17/the-moldovan-elections-of-2014-are-more-than-about-putin-or-the-eu-corruption-poverty-and-parties/.

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4. Fundamental Rights Situation per Country

Whereas the analysis in the previous chapter created a birds eye view of the fundamental rights situation in the selected countries, a greater level of detail is needed in order to uncover the most important fundamental rights challenges per country. To that effect, this chapter provides for a country-level analysis into the fundamental rights situation, highlighting poignant issues where appropriate.

4.1 Latvia

The start of a new year marks the moment at which a new country heads the European Union's Council of Ministers for a six-months period. In the first half of 2015, it is Latvia that get's a chance to steer some of the EU's political and legislative work. After joining the Euro only a year ago, the Council Presidency marks the next step in Latvia's integration into the European community since the collapse of the Soviet Union.[57]

Roughly a third of Latvia's population is Russian speaking, and around half of those do not speak fluent Latvian. As a result, language divisions have come to the fore in recent years. In 2011, a group of Latvian ethnonationalists from the new ruling coalition attempted to arrange a referendum to install Latvian as the sole language of instruction in all public schools.[58] The initiative ultimately faltered on a lack of public support. The move triggered a counter-referendum that would make Russian the country's second official language. A total of 70.7 percent of eligible voters turned out to cast their ballots, and nearly 75 percent voted against the proposition.[59]

Since, the outbreak of the Ukraine crisis has stoked fears that Russia would seek to create further divisions in Latvian society along linguistic lines. For example, the major Russian-language television station in the Baltic region, Pervi Baltiiski Kanal (PBK), is viewed by many in the Baltics as a troubling incursion of Russia's soft power.[60] On 30 January 2015, images circulated via Facebook showing a map of Latvia with Latgale, home to a large population of ethnic Russians, as a separate entity close to the Russian border. It also showed a flag with Cyrillic writing that said 'Latgale People's Republic'. Although the images were quickly taken down by their authors, the Latvian authorities took the issue seriously and an inquiry into the images was launched by the Latvian security services.[61] Beyond the use of (social) media, no compelling evidence of Russian incursions into Latvian territory have emerged. Nevertheless, the Ukraine crisis may prompt the Latvian authorities into tackling its lingering problems of integration.[62] The underlying problem is one of cultural identity rights and ethnicity issues concerning the Russian population. A total of 31.7% of ethnic Russians are non-

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[57] "Riga Realities," *The Economist*, January 10, 2015, http://www.economist.com/news/europe/21638198-latvias-turbulent-history-makes-it-well-placed-lead-eu-riga-realities.

[58] Juris Dreifelds, *Latvia*, Nations in Transit 2013 (Freedom House, 2013), 338, https://www.freedomhouse.org/sites/default/files/NIT13LatviaFinal.pdf.

[59] Ibid.

[60] Juris Dreifelds and Valts Kalnins, *Latvia*, Nations in Transit 2014 (Freedom House, 2014), 369.

[61] Andrew Rettman, "Latvia: Facebook Separatism Prompts Alarm, Amusement," January 30, 2015, https://euobserver.com/foreign/127438.

[62] "Riga Realities."

citizens, comprising 65.7% of all non-citizens. [63] Due to their lack of citizenship, they feel discriminated against as they do not enjoy full rights as citizens. [64]

In recent years, economic pressures, have led to consolidation and closures among media outlets and increasingly concentrated media ownership. This has subsequently raised concerns about the ability for the media to act as an effective watchdog. Despite this increased concentration, Latvia continues to have access to a broad spectrum of news outlets including critical investigative journalism. [65] This however does not mean that media is completely free from governmental interference. Political parties have been known to exert influence over the media. In 2012, the National Electronic Media Council (NEPLP) threatened to restrict guests on Latvijas Radio after several former political advisers criticized the ruling party on a talk program. In the past few years, Latvia had several cases in which authorities put pressure on journalists to reveal sources in cases of potential libel or for publishing state information. No reports of harassment or attacks against journalists and media outlets were reported in 2013 however. [66]

Internet use in Latvia is very high, with 61% of the population using the internet daily in 2013. Among those aged 15-19 the daily access rate was a whooping 95%. All national newspapers and many regional newspapers have a presence on the internet. The use of social media is widespread and active social media users form more than half of the population. [67] A 2010 law requires at least 65 percent of TV broadcast programming to be in Latvian. However, this regulation does not affect social media. [68]

The rule of law in Latvia is considered relatively strong, providing reasonable protection for most fundamental political, civil and human rights in both law and practice[69] Judicial independence is generally respected. However, abuses of the judiciary and law enforcement bodies do occur. In one notable case involving journalist Ilze Nagla, police had searched the journalist's home and computer equipment in 2010 without just cause after Nagla had covered a leak from a database of Latvia's state revenue service. The European Court of Human Rights ruled that the legal basis for the search and seizure lacked relevance and was insufficient. [70]

Existing anti-corruption legislation is deemed comprehensive and aministrative corruption has gradually diminished in Latvia over the years. Moreover, the business environment has improved. However, some persistent flaws remain within the system. This includes poor whistleblower protection, insufficient requirements for competitive recruitment in government bodies, and

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[63] *Population of Latvia by Nationality* (Latvia: Office of Citizenship and Migration Affaires, January 1, 2014).

[64] Interview with representative of EU embassy in Latvia, January 20, 2015.

[65] Juris Dreifelds and Valts Kalnins, *Latvia*, 6 and 368.

[66] "Latvia: Freedom of the Press 2014," *Freedom House*, accessed January 12, 2015, https://www.freedomhouse.org/report/freedom-press/2014/latvia#.VLOjCqaQ9hQ.

[67] Juris Dreifelds and Valts Kalnins, *Latvia*, 369; "Social Media Guide for Latvia," *Business Culture*, accessed January 12, 2015, http://businessculture.org/eastern-europe/latvia/social-media-guide/.

[68] ErICarts Council of Europe, "Latvia : 4.2 Specific Policy Issues and Recent Debates : 4.2.6 Media Pluralism and Content Diversity," accessed January 19, 2015, http://www.culturalpolicies.net/web/latvia.php?aid=426.

[69] Juris Dreifelds and Valts Kalnins, *Latvia*, 371.

[70] Ibid., 372.

incomplete transparency in lobbying.[71] Also, certain suspicions of corruption and unethical conduct in the courts linger on. In October 2013, the Constitutional Court requested an inquiry into accusations of collusion between companies undergoing insolvency procedures and particular judges in an apparent scheme by which the companies were able to secure waivers of debt. That same month, a public prosecutor indicted Ziedonis Strazds, a former chair of the Riga City Zemgale District Court on charges of collecting salaries to non-existent employees.[72]

4.2 Belarus

For its systematic violations of fundamental rights and political, economic and social freedoms, Belarus earned the dubious reputation of being 'Europe's last dictatorship'.[73] Although the EU prolonged sanctions against Belarus in 2014 on the basis of human rights concerns, the Union is now extending a hand to its eastern neighbor by offering the prospect of talks on visa liberalization, providing Belarus releases its remaining political prisoners.[74] At the same time, with presidential elections to be held in the autumn of 2015, restrictions on freedom of expression, association and assembly can be expected to increase. 2015 thus constitutes an important year for the human rights situation in Belarus itself, as well as for the country's relations with the European Union.

According to Freedom House's Press Freedom Index for 2014, Belarus ranked among the five worst press freedom abusers in the world, with a score of 93 out of 100 points.[75] Access to information remains highly restricted and subject to a media outlet's loyalty to the authorities, which keep a tight control over sources of public information.[76] Independent outlets are barely able to operate freely, and state-owned media enjoy very little editorial independence. Prospects for editorial independence are further compromised by subsidized tariffs, direct government funding, and tax breaks for the biggest outlets.[77] Fearing regulatory prosecution, journalism gets swept into a practice of self-censorship, particularly in relation to political coverage.[78] To silence free expression in traditional media, draconian laws were put in place, such as the restrictive media law of 2008, criminalization of libel and defamation, or unrelated laws such as "petty hooliganism", which serve as a tool to arrest and detain journalists.[79]

Although access to the internet continues to improve in Belarus, the Belarusian government holds a tight grip. The government regularly controls, regulates, and restricts the scope of online content, all whilst violating user rights. The government administers a list of blocked websites, which is believed to contain approximately 119 websites – including some leading news, political and human rights websites.[80] Just as traditional media reporters, online activists and independent reporters regularly fall victim to persecution on petty and vexatious charges. Moreover, the government uses digital

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[71] Ibid., 373.

[72] Ibid., 371–372.

[73] "Rice: Belarus Is 'Dictatorship,'" *CNN*, April 20, 2005,
http://edition.cnn.com/2005/WORLD/europe/04/20/rice.belarus/.

[74] Pop, "Belarus May Start Talks on Visa-Free EU Travel."

[75] *Freedom of the Press 2014: Belarus*.

[76] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Asia* (IREX, 2014), http://www.irex.org/sites/default/files/u105/EE_MSI_2014_Belarus.pdf.

[77] *Ibid.*

[78] *Ibid.*

[79] Andrei Aliksandrau and Alaksiej Lavoncyk, *Belarus: Pulling the Plug* (Xindex, January 2013).

[80] *Freedom on the Net 2014: Belarus*.

methods to censor free speech online, such as surveillance techniques, web filters, the removal of secure access to particular websites, DNS re-routing, or DDoS attacks.[81] On top of laws regulating online media – in place since 2008 – in January 2015, new legislation came into force, extending restrictions on the traditional press to the online media. Important to point out is that the new law limits the share of foreign ownership of any news site to 20 percent, down from 30 percent under current law.[82]

The year 2014 marked Alexander Lukashenka's 20 years in office. Dubbed "Europe's last dictator", Lukashenka continues to preside over a strongly centralized, authoritarian system, infamous for repressing dissent and political opposition.[83] In comparison to other European countries, political rights and civil liberties in Belarus are severely restricted. Separation of powers between the legislature, the executive, and the judiciary is non-existent and, as the 2012 elections demonstrated, the electoral process in Belarus remains undemocratic and neither free, nor fair. According to a UN assessment, rule of law is undermined by opaque court proceedings, which can result in executions without a meaningful legal guarantee.[84] It is worth pointing out that Belarus is the last European country where the death penalty is still practiced, and one of the last remaining countries in Europe that holds political prisoners.[85]

As the control of corruption index illustrates (see Table 5) the situation in Belarus is better than in Ukraine, or Russia. True as this may be, the country itself still remains fairly corrupt. The opaque and highly centralized political system in Belarus itself encourages the pervasiveness of corruption in both public and private sectors.[86] At the same time, it is interesting to note that Lukashenka first came to power in 1994 thanks to his anti-corruption slogans.[87] In fact, the President termed corruption and economic crime as "the main threats to the state", repeatedly demanding more active involvement in the struggle against corruption.[88] A number of arrests of managers of state-owned enterprises and top officials – including Anatolii Gramovich in 2011 or Gleb Berdickii in 2013 – may suggest that the war against corruption has intensified. However, the persistent lack of democratic reforms and the flourishing of nepotism on the other hand may suggest that this is a mere ploy from the government to improve its image ahead of the 2015 presidential elections.[89]

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[81] Aliksandrau and Lavoncyk, *Belarus: Pulling the Plug*.

[82] "Belarus Law Makes It Easier To Close Online Media," *Radio Free Europe (RFERL)*, December 17, 2014, http://www.rferl.org/content/new-media-law-on-blearus-targets-internet/26748888.html.

[83] Alexei Pikulik and Dzianis Melyantsou, *Nations in Transit 2014: Belarus* (The Freedom House, 2014).

[84] "UN Rights Expert Deplores Human Rights Violations in Belarus, Urges Co-Operation," *OHCHR*, June 14, 2013, http://www.ohchr.org/en/NewsEvents/Pages/DisplayNews.aspx?NewsID=13454&LangID=E.

[85] *Belarus - Country of Concern*, Human Rights and Democracy Report 2013 (Foreign & Commonwealth Office, October 4, 2014), https://www.gov.uk/government/publications/belarus-country-of-concern/belarus-country-of-concern.

[86] Ryhor Astapenia, "Fighting Corruption in Belarus: Barking up the Wrong Tree?," *Belarus Digest*, April 15, 2014, http://belarusdigest.com/story/fighting-corruption-belarus-barking-wrong-tree-17502.

[87] David Filipov, "From The Archive: Lukashenko Is Big Victor, Wants New U.S.S.R.," *The Moscow Times*, November 7, 2014, http://www.themoscowtimes.com/news/article/from-the-archive-lukashenko-is-big-victor-wants-new-u-s-s-r/503308.html.

[88] Paula Borowska, "Combating Corruption, Harvest and Snowden - Belarus State TV Digest," *Belarus Digest*, August 8, 2013, http://belarusdigest.com/story/combating-corruption-harvest-and-snowden-belarus-state-tv-digest-14988.

[89] "Lukashenka Starts Purges among Officials ahead of 2015," *Charter 97*, May 19, 2014, http://charter97.org/en/news/2014/5/19/99127/.

4.3 Ukraine

The 2014 Ukrainian presidential elections, dubbed the most important since independence, resulted in the victory of Petro Poroshenko who won on a promise to put an end to the war and bring peace to a united Ukraine.[90] The ensuing parliamentary elections showed the dividedness of Ukraine. Following the unexpected victory of Arseniy Yatsenyuk's People's Front party over President Poroshenko's block, forming a coalition proved particularly difficult.[91] Despite Poroshenko's efforts to bring an end to the chaos in the country, Ukraine today remains in a continuous state of turmoil. On top of this, pro-Russian and Western media have engaged in an information war to promote their framing of the conflict, in an attempt to sway public opinion in their favor.

For a long time, Ukraine's media sector was considered to be among the freest of all post-Soviet states. However, following the Euromaidan protests, which were accompanied by an increase in violence and harassment against journalists – including deliberate attacks by hired thugs and police – Ukraine's status dropped from "partly free" to "not free".[92] Although a pluralistic media landscape exists in Ukraine, meddling by political and business elites increased, particularly under Yanukovych's presidency.[93] As a result of ties between business and politics, media outlets marginalize coverage of politically sensitive issues, or provide content that is biased. The effects of ownership structure are particularly evident in the case of Russian-owned media outlets, which have been repeatedly blamed for distorting the news.[94] Transparency of media ownership remains murky. The adoption of a law on transparency of media ownership in July 2013 did little to improve this situation as it allows for the true owners to remain hidden.[95]

During the Euromaidan protests the internet turned out to be the most objective source of news.[96] In contrast to traditional media outlets however, no legislation is currently in place to regulate the work of online media. This lack of legislation places journalists working on the internet in a vulnerable situation.[97] For example, during the Euromaidan protests, and in the run-up to the planned 2015 elections, online journalists and social-media activists faced threats, intimidation, and

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[90] Shaun Walker and Alec Luhn, "Petro Poroshenko Wins Ukraine Presidency, according to Exit Polls," *The Guardian*, May 25, 2014, sec. World news, http://www.theguardian.com/world/2014/may/25/petro-poroshenko-ukraine-president-wins-election.

[91] "Good Voters, Not Such Good Guys," *The Economist*, November 1, 2014, http://www.economist.com/news/europe/21629375-poll-results-were-promising-future-ukraine-dauntingly-difficult-good-voters.

[92] "Ukraine: Freedom of the Press 2014," *Freedom House*, accessed January 12, 2015, https://freedomhouse.org/report/freedom-press/2014/ukraine#.VLOxpKaQ9hQ.

[93] Ibid.

[94] Alan Yuhas, "Russian Propaganda over Crimea and the Ukraine: How Does It Work?," *The Guardian*, March 17, 2014, http://www.theguardian.com/world/2014/mar/17/crimea-crisis-russia-propaganda-media; Bridget Kendall, "Russian Propaganda Machine 'Worse than Soviet Union,'" *BBC News*, June 5, 2014, http://www.bbc.com/news/magazine-27713847.

[95] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Eurasia* (Washington DC: IREX, 2014), http://www.irex.org/sites/default/files/u105/MSI_EE_2014_Full.pdf.

[96] Ibid.

[97] *One Step Forward, One Step Back: An Assessment of Freedom of Expression in Ukraine during Its OSCE Chairmanship* (Washington DC: Freedom House, December 2013), One Step Forward, One Step Back: An Assessment of Freedom of Expression in Ukraine during its OSCE Chairmanship.

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physical violence, as they were explicitly targeted for their work.[98] Additionally, multiple cyber attacks were reported during the protest period.

According to Thorbjørn Jagland, Secretary-General of the Council of Europe, "in Ukraine, the absence of an independent judiciary and lack of the checks and balances which a functioning parliament and free media should provide, allowed endemic corruption and misuse of power to thrive unchecked. This caused mistrust, social unrest and ultimately a revolution."[99] Ukraine's judicial system suffers from two main problems: corruption and political dependence, resulting in the general public's low trust in the courts. Under Yanukovych's presidency courts became tools for punishing political opponents, all whilst increasing the president's own power.[100] The politically motivated arrest of ex-Prime Minister Yulia Tymoshenko's in 2011 illustrates this claim. By selectively enforcing electoral laws, attacking opposition figures, suppressing Euromaidan, and looking the other way as Yanukovych accumulated power, judges repeatedly violated political and civil rights.[101] Thus, it did not come as a surprise that a stronger rule of law was among the Euromaidan protesters' main demands. It is questionable, however, whether the lustration policy adopted by the new government will yield expected results.

Deeply embedded corruption constitutes a great impediment to Ukraine's long-term stability. In 2014, Transparency International ranked Ukraine 142 out of 175 countries surveyed in its Corruption Perceptions Index.[102] In comparison with other countries our report focuses on, Ukraine scored by far the worst. On top of judicial corruption, graft is widespread at all levels of government. The most problematic sector where corruption is rife is public procurement. Purchasing by state companies lacks transparency, as the vast majority of state enterprises do not provide any public information on their procurements. New anti-corruption laws passed in October 2014 oblige high-level officials in the government, law-enforcement, and the judiciary to declare their own and their families' assets as well as financial transactions.[103] This arguably constitutes a successful step toward reform.

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[98] "Freedom on the Net 2014: Ukraine."

[99] Joshua Rozenberg, "Europe's Rule of Law in Worst Crisis since Cold War, Says Council Chief," *The Guardian*, April 14, 2014, sec. Law, http://www.theguardian.com/law/2014/apr/14/europe-rule-law-crisis-council-thorbjorn-jagland-report-ukraine.

[100] Maria Popova, "Ukraine's Legal Problems," *Foreign Affairs*, April 15, 2014, http://www.foreignaffairs.com/articles/141187/maria-popova/ukraines-legal-problems.

[101] Ibid.

[102] "Transparency International - Country Profiles. Ukraine.," *Transparency International*, 2014, http://www.transparency.org/country/#UKR.

[103] Richard Balmforth, "Ukraine Acts to Push through Anti-Corruption Laws before Election," *Reuters*, October 7, 2014, http://www.reuters.com/article/2014/10/07/us-ukraine-crisis-corruption-idUSKCN0HW0V820141007.

4.4 Moldova

Moldova's parliamentary elections held on 30 November 2014 reflected the country's struggle in tackling corruption, promoting basic human rights and to address fundamental shortcomings in the rule of law. In the run-up to the elections, which followed a collapse of a governing coalition in 2013 after a vote of no confidence on charges of corruption, Moldovan courts banned a pro-Russian party competing; a move widely criticized as political abuse of the judiciary.[104]

Post-election analysis conducted by the OSCE revealed a lack of transparency with regard to criteria for determining the number and location of polling stations abroad, contributing to public perceptions that the government sought to discourage voting in the Russian Federation, while increasing the number of polling stations in other countries.[105] Furthermore, residents of the breakaway region of Transdniestria were banned from voting altogether by the *de facto* authorities, further impacting the perceived legitimacy of the vote.[106]

Press freedom in Moldova has improved significantly since 2009 owing to political and legal developments, in particular the passing of laws that increased the rights of journalists and the level of protection of press freedom.[107] Although Moldova's mass media have enjoyed broader pluralism in recent years, they still face challenges with respect to editorial independence, transparency of media ownership, a climate of enduring self-censorship and a lack of awareness, or erroneous enforcement of legislation.[108] This lack of transparency – enabled by weak legislation that covers the issue only superficially – is supplemented by the "oligarchization" of the media. For instance, Vladimir Plahotniuc, one of Moldova's richest men and influential politicians, owns substantial media holdings, including Prime TV and a share of over 50% of Publika TV.[109]

Internet freedom and the ability to use online media freely is an important virtue in Moldova. Arrests, assaults or the persecution of digital activists or bloggers are no longer common, nor are cases of blocking of internet websites.[110] Access to the internet is generally not restricted by the authorities, nor is there any market or state monopoly on internet providing services, which allows

[104] "International Election Observation Mission: Republic of Moldova - Parliamentary Elections, 30 November 2014" (OSCE, November 30, 2014), http://www.osce.org/odihr/elections/moldova/128476?download=true; "Slouching towards Europe," *The Economist*, December 6, 2014, http://www.economist.com/news/europe/21635508-pro-russia-parties-lose-close-vote-corrupt-land-slouching-towards-europe.

[105] "International Election Observation Mission: Republic of Moldova - Parliamentary Elections, 30 November 2014," 2.

[106] "Moldova Elections: Pro-Russia Parties in Lead," *Deutsche Welle (DW)*, November 30, 2014, http://www.dw.de/moldova-elections-pro-russia-parties-in-lead/a-18102889; "Slouching towards Europe."

[107] "Memo on Press Freedom in Moldova: 3 May 2012 - 3 May 2012" (Independent Journalism Center, June 2012), http://www.ijc.md/bulmm/2012%20iunie/eng/31_33_MM-June-2012-ENG-11.pdf.

[108] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Eurasia* (Washington DC: IREX, 2014), http://www.irex.org/sites/default/files/u105/MSI_EE_2014_Full.pdf.

[109] Andrew Wilson, "Filat's Gamble," *OpenDemocracy*, May 23, 2013, https://www.opendemocracy.net/od-russia/andrew-wilson/filat%E2%80%99s-gamble.

[110] *ENP East Media Freedom Watch: Moldova* (Independent Journalism Center, EaP Media Freedom Watch, 2014), http://media-azi.md/sites/default/files/Media%20Freedom%20Index%20fourth%20reporting%20period%20January-March%202014.pdf.

for the free development of online media and blogging.[111] Limited Internet use appears to be chiefly the result of high fees charged for internet connections. It is worth mentioning, however, that in 2013 the government attempted to pass a draft law which would permit authorities to shut or block websites containing "extremist" content. The proposal was met with criticism for attempting to limit free expression online, and was subsequently withdrawn.[112]

Improving the rule of law and tackling corruption remain major challenges in Moldova. The overall separation of powers is unbalanced and political influence over the judiciary endures, as witnessed by the 2014 parliamentary elections.[113] Importantly, the reputation of Moldova's judiciary is stained by corruption. A money-laundering scandal emerged in the summer of 2014, in which over 20 Moldovan judges were allegedly involved.[114] Beyond such large-scale infringements of the law, petty corruption remains particularly rampant with criminal organizations having a strong influence in politics. This entanglement between political and economic interests continues to be significant, which in turn lowers public trust in politicians.[115] Institutional capacity, transparency, and accountability of key justice sector institutions need strengthening so as to overcome the system's politicization and corruption.

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[111] Ibid.

[112] "Moldova: Freedom of the Press 2014."

[113] *Bertelsmann Stiftung, BTI 2014 - Moldova Country Report*, Bertelsmann Stiftung's Transformation Index (BTI) (Bertelsmann Stiftung, 2014), http://www.bti-project.org/uploads/tx_itao_download/BTI_2014_Moldova.pdf.

[114] Victoria Puiu, "Moldova: Money-Laundering Case Puts Judiciary on the Spot," *EurasiaNet*, October 30, 2014, http://www.eurasianet.org/node/70681.

[115] *Bertelsmann Stiftung, BTI 2014 - Moldova Country Report*.

5. Media Landscape

For companies wishing to establish a presence in the media market of another country it is important to have reliable information about the relative ease with which this can be accomplished. Conversely, if barriers to market entry exist, it is important to be well informed about what can be done as to avert any negative consequences that may result from market entry impediments. This Chapter presents an in-depth analysis of the media landscape of Latvia, Belarus, Ukraine and Moldova. Special attention is given to relevant issues with respect to market entry, the target audience, and the fundamental rights topics covered.

5.1 Latvia

The Latvian media market, which has been growing in recent years, can in general be classified as free and fair.[116] An increase in internet penetration has enabled a larger number of citizens to have access not only to newspapers, but also social media. Moreover, openness to foreign media outlets makes Latvia accessible for companies trying to set up online or broadcast media in the country.

The Latvian media market is composed of a variety of both state-owned, as well as and private media companies and broadcasts by both Russian and Latvian-language media offers a diversity of information. However, it should be stressed that the quality of the information accessed may vary depending on the source and language used (Latvian or Russian). In that respect, it is important that the cultural identity of the Russian population is taken into account when broadcasting on politically sensitive issues. Given that part of the population feels discriminated against owing to their lack of full citizenship, it is easy for Russian propaganda to use this feat to their advantage, particularly if Latvian media outlets do not extensively cover this issue.

Notwithstanding Latvia's pluralistic media landscape, a recent study on media ownership in the country noted an increase in the concentration of media ownership. In 2012, declining advertising revenues propelled new ownership and consolidation among newspapers, including among the country's three main Russian-language dailies.[117] At the same time, press freedom is under stress due to the conflicts of interests of media owners, and by the difficulties for serious and independent media to financially sustain themselves.

Foreign ownership in the Latvian media market is common. The two most popular TV channels in Latvia – LMT and TV3 - belong to the Swedish group MTG.[118] Local ownership remains dominant however.[119] Russian-speaking media in the country is largely privately-owned,[120] with some of them based off-shore.[121] This shows that there are no apparent difficulties for foreign media outlets to establish themselves in Latvia as private entities.

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[116] "Latvia: Freedom of the Press 2014."

[117] Ibid.

[118] Interview with representative of EU embassy in Latvia, January 12, 2015.

[119] Interview with representative of EU embassy in Latvia, January 20, 2015.

[120] Dovilé Daveluy, "The Media Landscape in the Baltic States," *INA Global*, August 22, 2011, http://www.inaglobal.fr/en/ideas/article/media-landscape-baltic-states.

[121] "Latvia: Freedom of the Press 2014."

Data from 2014 reveals that 74% of the countries' total population has access to internet.[122] Figure 14 depicts how there has been an increase in internet users over the last few years, especially among older generations.
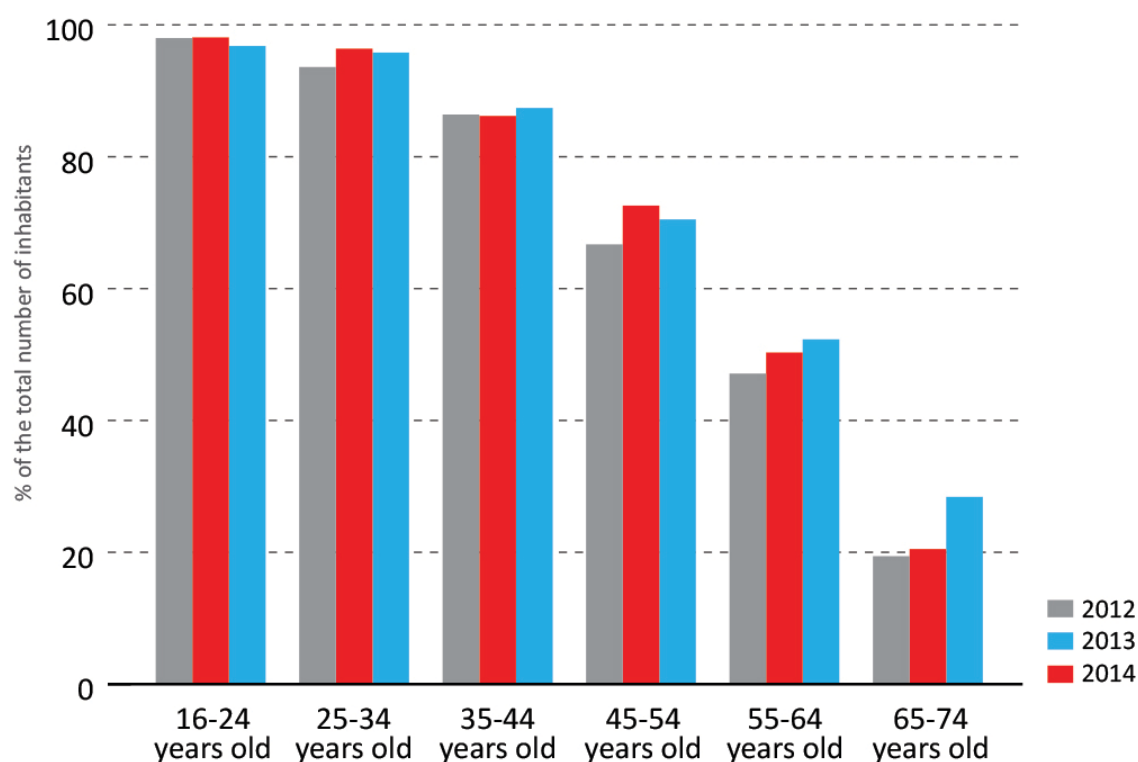

Figure 14: Share of the population using the Internet in Latvia per age group

Although the share of mobile phone users with a 3G contract constituted was around 38% of the population, only 7% of these users access social media from their phone.[123] As far as the internet is concerned, the largest cohort of users among the population are those aged between 16 and 34 years: an average of 96.3% of them use internet at least once a week.[124]

As stated in Chapter 2, around a third of the population is Russian speaking. The result of this linguistic diversity is a digital "language race" between Latvian and Russian in the media landscape,[125] especially after a law passed in 2010 established that 65% of broadcast programming should be in Latvian. Also, there are unconfirmed reports that in the East of the country Latvian citizens can only access Russian language news.[126]

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[122] Internet World Stats, "Europe Internet Usage Stats Facebook Subscribers and Population Statistics," accessed February 17, 2015, http://www.internetworldstats.com/stats4.htm.
[123] Ibid.
[124] Central Statistic Bureau of Latvia, "Number of Inhabitants Regularly Using computer/Internet, % of the Total Number of Individuals within the Corresponding Group," accessed February 15, 2015, http://www.csb.gov.lv/en/print/dati/number-inhabitants-regularly-using-computerinternet-total-number-individuals-within-correspondi.
[125] Vita Zelče, Klinta Ločemele, and Olga Procevska, "Latvia - Media Landscape," *European Journalism Centre (EJC)*, accessed January 12, 2015, http://ejc.net/media_landscapes/latvia.
[126] Interview with representative of EU embassy in Latvia, January 20, 2015.

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Data on the five websites with the biggest reach in Latvia is shown in Table 6.[127] Although the top four website are all Latvian, it should be pointed out that the two main news outlets in the country also have a Russian language version, which can be easily accessed through the main page.

Table 6: Most popular websites in Latvia (per reach in the market)[128]

Website	Reach	Type of website
inbox.lv	59.15%	Personal email
delfi.lv	57.73%	News agency
tvnet.lv	55.99%	News agency
draugiem.lv	47.49%	Social network
mail.ru	20.60%	Personal email

State-financed media in Latvia are perceived as more reliable by the general public than Russian (private-owned) media, which are often accused of being politically-oriented and propagandistic.[129] Russian media, such as the First Baltic Channel or Vespi newspaper, often publish information akin to Russian propaganda.[130] With this in mind, as well as what has been said regarding the ongoing "language race" and how Latvian-language news is sometimes difficult to access, the importance for media companies to step up efforts to counteract one-sided broadcasting is beyond doubt.[131]

Generally speaking, journalists are free to report on news that may have a negative impact on the public sphere (public officials and/or authorities). Nonetheless, there have been issues when journalists uncover serious corruption cases.[132] Not only do journalists face being taken to court, but there are also isolated cases of journalists from Russian media being attacked and wounded for revealing compromising information.[133]

Regarding corruption, Latvia occupies 55th place out of a 100 countries surveyed; it also ranks 51st out of 71 for financial secrecy.[134] As such, these issues are likely to be in the spotlight. However,

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[127] Central Statistic Bureau of Latvia, "Number of Inhabitants Regularly Using computer/Internet, % of the Total Number of Individuals within the Corresponding Group."

[128] Delfi.lv and tvnet.lv are also available in Russian. Draugiem.lv is also available in Russian, English and Hungarian.

[129] Latvia – Freedom House Country Profile. (p.342).

[130] EU representative in Latvia (reference interview – UK embassy). For instance, in 2012 British media company Ofcon accused REN TV Baltic and Mir Baltic, two Russian-language TV channels with Ofcon licenses, for using programming to promote a political agenda: encouraging viewers to vote for Russian as an official language in Latvia in the February referendum. "Latvia: Freedom of the Press 2014."

[131] The European Endowment for Democracy (EED) launched a study on how the EU can fight back against Russia's "information war". The initiative was launched with the support of a Dutch government grant. Source: Andrew Rettman, "EU Mulls Response to Russia's Information War," *EU Observer*, January 8, 2015, https://euobserver.com/foreign/127135.

[132] Interview with representative of EU embassy in Latvia, January 12, 2015.

[133] Ibid.; "Latvia: Freedom of the Press 2014."

[134]Transparency International, "Transparency International - Country Profiles: Latvia," accessed February 17, 2015, http://www.transparency.org/country#LVA.

media outlets should not focus solely on these issues as far as news is concerned, given that several media outlets have already been accused of exclusively hunting for scandals.[135]

There is a contrast between the global view of Latvian language newspapers and the parochial approach taken by Russian language newspapers. The latter focus mostly on Latvia's Russian-speaking community, Russia itself, and its spheres of influence in the former USSR.[136] Media coverage that is able to integrate Latvian and Russian issues appears to be largely lacking.

This divergence again points to the underlying problems regarding cultural identity rights and ethnicity issues affecting the ethnic Russian population. These cultural rights issues appear as are more salient among human rights debates in Latvia than other issues, such as LGBT rights.[137] Part of the reason why issues such as LGBT rights are not openly discussed is the conservative nature of Latvian and (ethnic) Russian society.[138] That said, on social media these issues are discussed in detail, thus making it a good platform for new outlets that wish to address these topics.

5.2 Belarus

Belarus has one of the most hostile and restrictive media environments in Europe. The ruling regime continues to exercise tight control over the media market through both administrative, as well as legislative restrictions. As a result, the internet has become an important source of independent information, in Belarus, offering citizens space to freely express themselves. In 2013, internet penetration stood at 54.2% and it continues to grow, which acts as a stimulus for the free flow of ideas and information.[139]

The majority of media outlets in Belarus are state-owned and do not enjoy much editorial independence from the ruling regime. What's more, state media are generally considered to be part of the ideological machine of the authorities, which is evident particularly in the case of the leading nationwide television and radio company (Belteleradio) that regularly reiterates government discourse and propaganda.[140] This model of communication – based on the top-down flow of information from the authorities to the population – is sustained through budget subsidies to state media, censorship as well as ideological filters between sources of information and audience.[141] That said, it is interesting to note that state media enjoy a high level of trust. According to a survey conducted by the Independent Institute of Social, Economic and Political Studies (IISEPS) in 2013, 55% of the population trusts state media, whereas only 39% has confidence in independent outlets.[142] As a result, little over half of Belarusians are likely to accept broadcasted information as universal truth.

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[135] Interview with representative of EU embassy in Latvia, January 12, 2015.

[136] Zelče, Ločemele, and Procevska, "Latvia - Media Landscape."

[137] Interview with representative of EU embassy in Latvia, January 12, 2015; Interview with representative of EU embassy in Latvia, January 20, 2015.

[138] Zelče, Ločemele, and Procevska, "Latvia - Media Landscape."

[139] World Bank, "Internet Users (per 100 People)," accessed January 29, 2015, http://data.worldbank.org/indicator/IT.NET.USER.P2.

[140] Interview with country expert on Belarus, December 24, 2014.

[141] Yanina Melnikava, "Belarus: Media Literacy vs Propaganda," *Index on Censorship*, March 23, 2013, http://www.indexoncensorship.org/2013/03/media-literacy-belarus-propaganda/.

[142] Ibid.

Although the law does not explicitly discriminate against private outlets, their activities are rendered more difficult through other means. Not only are they economically disadvantaged compared to subsidized state media, but also their access to official information remains restricted, primarily through an unregulated system of accreditation.[143]

Regarding market entry, the existing law requires the registration of print and broadcast media. This process, however, remains highly politicized and opaque.[144] Although the law does not require the official licensing of online media outlets, the Information Ministry reserves the right to monitor their activities so as to "ensure that materials used by the websites correspond to Belarusian legislation."[145] On top of this rather ill-defined requirement, the authorities also control entrance to state-funded journalism schools, through admission interviews.

On the subject of foreign ownership, the newly adopted law limits foreign share of ownership to 20%, down from 30% under the previous law.[146] Among foreign broadcasters active in Belarus, the ones based in Russia are considered to be most active and successful. Russian companies own several popular newspapers (Komsolomskaya, Argumenty i Fakty, Pravda v Byelorussi), two news agencies (Interfax and Prime-TASS) and an entertainment television channel (VTV).[147] Western media companies present in Belarus include Deutsche Welle, Radio Free Europe/Radio Liberty, European Radio for Belarus, Radio Racyja, and Belsat TV.[148] Broadcasts from Poland play an important role in Belarus. Belsat TV for example was the first independent channel in Belarus and is considered as the most important exile media.[149] However, financial problems set aside, its journalists often find themselves under pressure from the Belarusian authorities, who reject accreditation requests and subsequently target journalists for their work.[150] Given the popularity of Belsat TV and other media in exile, coupled with their experience in dealing with the Belarusian authorities, it may be sensible for newcomers to the market to learn from their experiences.

One of the features of the online media market in Belarus is the powerful position of Russian media corporations.[151] The vast majority of Belarusians speaks Russian, and as much as 70% of the population considers Russian as its first language. It should not come as much of a surprise therefore that Russian social networks *VKontakte* and *Odnoklassniki* dominate the social media market in Belarus, while Facebook ranks third in terms of the number of registered user accounts.[152] Although *VKontakte* has a lot in common with Facebook in terms of design, one of the main benefits for its users is the possibility to share free music and video content. *Odnoklassniki*, meaning

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[143] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Asia*.
[144] Ibid.
[145] "Belarus Law Makes It Easier To Close Online Media."
[146] Ibid.
[147] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Asia*, p. 175.
[148] Interview with representative of EU Embassy in Belarus, January 16, 2015.
[149] Bohdan Siarhei, "Broadcasting Democracy to Belarus," *Belarus Digest*, January 11, 2012, http://belarusdigest.com/story/broadcasting-democracy-belarus-7248.
[150] Ibid.
[151] Aliksandrau and Lavoncyk, *Belarus: Pulling the Plug*.
[152] Ibid.

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"schoolmates", is a social network service for old friends and classmates, accessed by a slightly older audience than the one accessing *VKontakte*. Social media in Belarus are primarily used as a form of entertainment, or as a combination of newsgathering and entertainment.

Regarding news outlets, no dedicated online news media is listed in the top ten websites visited by Belarusian internet users. On the whole, users appear to prefer reading news on news aggregators and portals, where they are able to access other services as well (see Table 7).[153]

Place in overall rating	Name of site	Type	No. of real users
16 *	charter97.org	Independent news site	358 912*
18	kp.by	Russian-owned newspaper	323 127
27	naviny.by	Independent news site	224 724
28	ria.ru	Russian news agency	208 397
35	ctv.by	Site of a state TV channel	155 045
49	telegraf.by	Independent news site	109 006
56	utro.ru	Russian news website	88 007
58	21.by	Independent news site	86 786
59	euroradio.fm	Site of independent radio	80 002
81	udf.by	Independent news site	57 834

* The rating as well as the no. of real users for charter97.org is based on dataset from February 2014.

Table 7: Top 10 news websites visited by Belarusian internet users, including the number of individuals in Belarus who visited them in August 2014. Source: Gemius, GemiusAudience, 08/2014

As Table 7 illustrates, independent news sites enjoy greater popularity among internet users than do state-run media, or pro-government websites. Moreover, it is evident that Russian websites have a considerable market share in terms of Belarusian audience. It is important to note that in 2014 Charter97 – the most popular independent news site in Belarus – was blocked in by the national telecom operator Beltelecom for all users on its channel, which is the reason why it does not figure in the most recent datasets.[154] Despite having blocked it, Beltelecom denied any responsibility and attributed the blocking to a DDoS attack.[155] Although the blocking of the website took place without any explicit government explanation or court order,[156] it was most likely tied to the outlet's overall coverage of the political-economic situation in Belarus, in particular the troubling financial developments.[157]

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[153] Andrei Aliaksandrau and Andrei Bastunets, *Belarus: Time for Media Reform. Policy Paper on Media Freedom in Belarus* (Index on Censorship, February 2014).
[154] "Beltelecom Blocks Charter Website," *Charter'97*, December 19, 2014, http://charter97.org/en/news/2014/12/19/131516/.
[155] "Reporters Without Borders: Belarusian Authorities Impose Alarming Internet Controls," *Charter'97*, December 25, 2014, http://charter97.org/en/news/2014/12/25/132420/.
[156] "Belarusian Authorities Impose Alarming Internet Controls," *Reporters Without Borders*, December 24, 2014, http://en.rsf.org/belarus-belarusian-authorities-impose-24-12-2014,47420.html.
[157] Vadzim Smok, "Will Belarus Increase Internet Censorship after December's Financial Panic?," *Belarus Digest*, January 6, 2015, http://belarusdigest.com/story/will-belarus-increase-internet-censorship-after-decembers-financial-panic-21056.

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As was previously mentioned, when it comes to choosing a source for political news, Belarusians have shown a preference for official state media over independent ones. However, media experts point to a shift in this regard. With increased internet penetration, the social media community in Belarus is expected to expand in near future, which will undoubtedly create new opportunities for broadcasters at home and abroad. For now, however, the full-scale development of new opportunities that internet provides is hindered by state regulation, censorship of online content, and harassment of online journalists and activists. In fact, in January 2015, new legislation came into force, extending restrictions already in place to the online media.[158]

There are differences between the content published by privately owned and state-owned media outlets – differences that particularly manifest themselves during important political events, such as elections.[159] Moreover, topics covered and approaches to coverage vary depending on media ownership. According to a recent policy paper on media freedom in Belarus, published by Index on Censorship, the most noticeable difference between independent and state-owned media lies in the coverage of political opposition. Whereas, independent outlets tend to provide extensive coverage of the activities of the political opposition, civil society organizations, independent trade unions and activists, state-owned media almost never cover opposition activities.[160] Moreover, a number of human rights and social issues, including repressive measures taken by the authorities, death penalty, religion, gender, sexual orientation, or language issues, receive very limited coverage in state media, yet they are widely covered by the independent outlets.[161] Although there is no legal restriction on discussing these topics online, the blocking of many independent news websites, including Charter 97, as well as the passing of the new media law, should be taken into consideration, as such restrictive measures may eventually affect the work of newcomers to the Belarusian media market.

5.3 Ukraine

For a long time, Ukrainian media listed among the freest and most progressive among all post-Soviet states.[162] However, since the crisis erupted a year ago, Ukraine's media landscape has been witnessing a freedom crisis, as stated by the OSCE Representative on Freedom of the Media.[163] Internet penetration currently stands at 42%, and the number of Internet users continues to grow. Social media and online platforms significantly gained in popularity during the Euromaidan protests and the social media sphere is expected to expand even more in the coming years.

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[158] "Belarus Law Makes It Easier To Close Online Media."
[159] Aliaksandrau and Bastunets, *Belarus: Time for Media Reform. Policy Paper on Media Freedom in Belarus*.
[160] Ibid.
[161] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Asia*; Interview with country expert on Belarus; Aliaksandrau and Bastunets, *Belarus: Time for Media Reform. Policy Paper on Media Freedom in Belarus*.
[162] Richard Balmforth, "Where Did Ukraine's Yushchenko Go Wrong?," *Reuters*, January 11, 2010, http://www.reuters.com/article/2010/01/11/ukraine-election-yushchenko-idUSLDE60102920100111.
[163] Dunja Mijatović, *Report by the OSCE Representative on Freedom of the Media: Media Freedom under Siege in Ukraine* (Vienna: OSCE, 2014).

Although Ukraine has a pluralistic media landscape, media outlets remain dependent on political and business influence, and hence lack full transparency.[164] The five big media holdings – namely Inter Media, Ukrainian Media Holding, 1+1 Media, StarLightMedia, and Media Group Ukraine – belong to rival privately owned financial groups, and are ultimately controlled by Ukrainian "oligarchs".[165] For example, President Petro Poroshenko himself owns the influential Ukrainian news channel – Channel 5 TV.[166] However, independent public broadcasting is in the process of development in Ukraine. A number of media organizations in Ukraine already pursue an independent or critical line, such as newspapers *Den, Zerkalo Nedeli,* and *Kommentarii;* the website *Ukrainska Pravda;* the magazine *Ukrainskiy Tyzhden;* and TV channel TVi.[167] It is worth mentioning that in 2013, an internet television station Hromadske.TV started operating in Ukraine, as a joint initiative of Ukrainian journalists to provide objective and unbiased information about current processes in Ukraine.[168] However, following a media crackdown during the Euromaidan protests, Freedom House downgraded Ukraine's status from "partly free" to "not free".[169]

While currently no legal framework exists that regulates or limits online content, in August 2014, Ukrainian authorities approved the first draft of a law that would give the government broad powers to block or shut down any domestic or international media, considered threatening to "security and national interests".[170] Under the initial draft law, any kind of media activity – including internet activity – would be vulnerable to restrictions or termination. However, following considerable criticism from rights groups and the international community, deputies agreed to soften and remove most of the censorship measures, moving some of them to existing media laws.[171]

Although no explicit legal restrictions exist for foreign media outlets to operate in Ukraine, Ukraine has imposed barriers to foreign equity ownership.[172] In particular, the Law of Ukraine on Television and Radio Broadcasting forbids foreign investors from establishing TV broadcasting companies and The Law on Publishing Businesses imposes a 30% limit on foreign ownership of publishing houses.[173]

In recent years, Russian news providers/exporters have come to occupy a prominent position within the Ukrainian media market, particularly in the east of the country. Ukrainian editions of Moscow-based mass circulation publications include *Argumenty i Fakty v Ukraine* and *Komsomolskaya Pravda v Ukraine*. *Izvestiya v Ukraine* (1+1 Media) and *Kommersant-Ukraine* had an equally prominent

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[164] Joanna Szostek, "Russia and the News Media in Ukraine A Case of 'Soft Power'?," *East European Politics & Societies* 28, no. 3 (August 1, 2014): 463–86, doi:10.1177/0888325414537297.

[165] Ibid.

[166] "Profile: Ukraine's Petro Poroshenko," *BBC News*, June 7, 2014, http://www.bbc.com/news/world-europe-26822741.

[167] Szostek, "Russia and the News Media in Ukraine A Case of 'Soft Power'?."s

[168] "Hromadske TV: Info," accessed February 15, 2015, http://wwitv.com/tv_channels/b6697-Hromadske-TV.htm.

[169] "Ukraine: Freedom of the Press 2014."

[170] "Rights Groups Criticize Ukraine's Draft Law on Media," *Refworld*, August 13, 2014, http://www.refworld.org/docid/54003ee19.html.

[171] "In the Fight Against Russia, Ukraine Flirts with Kremlinesque Internet Censorship," *Global Voices*, August 14, 2014, http://globalvoicesonline.org/2014/08/14/ukraine-russia-censorship-media-security-sanctions/.

[172] Interview with representative of EU Embassy in Ukraine, January 2, 2015.

[173] "Data on Ukraine - Investing Across Borders," *World Bank Group*, 2014, http://iab.worldbank.org/Data/ExploreEconomies/ukraine.

presence until their closure in 2013 and 2014, respectively.[174] TV broadcasting from Russia is available via cable and satellite, and its reach is substantial, particularly in urban areas. Russian state-owned TV channels RTR Planeta, NTV Mir and Pervyy Kanal enjoy a large viewership. However, Ukrainian viewers seem to be more attracted by entertainment programs on the Russian channels than news and current affairs, which the majority of population gets from Ukrainian channels 'Intern' and '1+1'.[175]

In 2013, Ukraine had an internet penetration rate of nearly 42%.[176] Due to diminishing costs and an increased ease of access, the number of internet users continues to grow steadily, what suggest that social media will play an even more important role in the coming years. More precisely, in just three years, the share of population with internet access increased from 23.3% in 2010 to 41.8% in 2013.[177] Among all internet users, 82% live in urban areas and 18% in rural areas, where internet access keeps growing.[178]

Although television remains the most popular medium among Ukrainians, internet has come to constitute the most objective and trustworthy source of news.[179] Particularly during the Euromaidan protests, almost half of the population (46%) turned to the internet to obtain credible sources of information.[180] The Ukrainian social media sphere expanded considerably during the protests and social networks and online media played an important role in coordination and mobilization efforts.[181]

According to Yandex Ukraine, Ukrainians are active users of social media, and have created over 40 million accounts on all popular social networks together.[182] The leading social network in terms of visitors and page views is VKontakte, followed by Facebook and Odnoklassniki.[183] However, regarding the number of registered accounts, Russian social networks VKontakte and Odnoklassniki continue to lead, with over 27 million and 11 million registered users respectively, compared to only 3.2 million accounts created on Facebook.[184] The three leading social networks are used for different purposes: while VKontakte and Odnoklassniki are visited primarily for entertainment, as well as to stream music and videos, Facebook is often used for information sharing or political discussions.

It is important to note that as the conflict drags on, the popularity of existing Russian social networks appears to be declining. According to StatCounter data, as cited by Ukraine Digital News, by July

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[174] Szostek, "Russia and the News Media in Ukraine A Case of 'Soft Power'?."

[175] Ibid.

[176] "Freedom on the Net 2014: Ukraine."

[177] World Bank, "Internet Users (per 100 People)."

[178] "Freedom on the Net 2014: Ukraine."

[179] Katerina Tsetsura, Anastasia Grynko, and Anna Klyueva, *The Media Map Project Ukraine: Case Study on Donor Support to Independent Media, 1990-2010*, The Media Map Project, 2011, http://www.mediamapresource.org/wp-content/uploads/2011/04/Ukraine.pdf.

[180] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Asia*.

[181] "Freedom on the Net 2014: Ukraine."

[182] Yandex, "Review of Social Networks and Twitter in Ukraine.," 2014, http://download.yandex.ru/company/Yandex_on_UkrainianSMM_Summer_2014.pdf.

[183] "Alexa - Top Sites for Countries," *Alexa*, accessed February 16, 2015, http://www.alexa.com/topsites/countries.

[184] Yandex, "Review of Social Networks and Twitter in Ukraine."

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2014, the share of VKontakte's page views in the total page view volume declined from 37% to 21.9%, while that of Odnoklassniki, declined from 10% to 3.6%.[185] In contrast, the share of Facebook viewers increased from 29% to 41.5%, and the popularity of Twitter from 7% to 14%.[186] At the same time, new domestic social networks have emerged in Ukraine, such as Druzi (meaning "Friends"), Ukrainci ("The Ukrainians"), or WeUa.[187] As such, the window of opportunity appears to be wide open for newcomers to the Ukrainian market.

With respect to news sites, no dedicated online news media outlet ranked in top 10 websites visited by Ukrainian internet users. Table 8 shows most visited news websites in Ukraine, excluding web portals.

Place in overall rating	Name of site	Type	No. of real users
24	segodnya.ua	Independent Russian-language tabloid newspaper, member of the Ukrainian Association of Press Publishers.	2 290 415
25	pravda.com.ua	Independent Ukrainian Internet newspaper	2 268 324
28	tsn.ua	Ukrainian news platform, controlled by 1+1 Media Group (privately owned)	2 212 022
33	obozrevatel.com	Ukrainian news website (in Ukrainian and Russian language)	1 910 128
34	censor.net.ua	Ukrainian news website (in Russian and English language)	1 810 717
36	korrespondent.net	Bilingual Ukrainian and Russian online newspaper, owned by KP media	1 767 657
37	unian.net	Ukrainian independent information agency	1 675 340
39	vesti.ua	Independent Russian-language news site	1 603 303
40	rbc.ua_news	Russian news site	1 594 785
43	24tv.ua	Ukrainian News TV channel	1 474 019
54	podrobnosti.ua	Ukraine-based Russian language Internet news project, affiliated with national TV channel Inter, owned by Firtash and Livochkin	1 228 533

Table 8: Top 10 news websites visited by Ukrainian Internet users, including the number of individuals in Ukraine who visited them in June 2014. Source: Gemius, GemiusAudience, 06/2014

In terms of most visited news sites on social media, the most popular news media outlet in Ukraine is Ukrainska Pravda, with close to 403,000 fans, followed by TCH (TSN) with 396 881 fans, Hormadske.tv with 329,424 fans, 1+1 with around 324,000 fans, and 5 Kanal with over 320,000 fans

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[185] Brendad Maynard, "New Ukrainian Social Networks Emerge to Challenge Facebook, VK, and Odnoklassniki in Domestic Market," *Ukraine Digital News*, July 30, 2014, http://ua.bar.ewdn.com/2014/07/30/new-ukrainian-social-networks-emerge-to-challenge-facebook-vk-and-odnoklassniki-in-domestic-market/.
[186] Ibid.
[187] Ibid.

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on Facebook.[188] The three most popular foreign news websites accessible through Facebook are Forbes Ukraine, BBC Ukraine, and Radio Free Liberty.[189] The popularity of Facebook, Twitter, YouTube and blog-hosting services such as LiveJournal or Worldpress increased considerably during the Euromaidan protests and continues to grow.[190]

According to an OSCE report, Ukraine's media is undergoing a "freedom crisis", which reflects the overall security situation in the country.[191] Since the crisis erupted a year ago, violence against journalists increased; media have been accused of disseminating propaganda; an information war has been raging in the regions affected by conflict; and members of the media have been repeatedly denied access to information and events, often by force.[192] There were signs of negative trends in media legislation as well. A number of repressive laws were passed by the parliament in January 2014, aimed at establishing firmer control over independent media and the online sphere.[193] These laws were eventually rolled back.

As a consequence of political-business ties, many of the largest media companies avoid politically sensitive topics, such as human rights abuses, government corruption, the president's misuse of state resources, oppression of political opposition, or increasing unemployment.[194] Although journalists are free to report negatively on authorities, public officials or those in the public sphere, they often refrain from doing so due to fear of intimidation and violence.[195] The mainstream media also tend to marginalize the coverage of sensitive but critical social problems, such as AIDS/HIV issues, for example.[196] Health care coverage, particularly information connected with procurement of pharmaceutical products, is another area that lacks sufficient coverage.

5.4 Moldova

Over the years, Moldova has been enjoying an increase in media freedom. However, the lack of transparency and regulation regarding the ownership of media outlets noted in section 4.4 is still a source of concern in the country. One of the interviewees contacted for his study estimated that around 80% of media in Moldova is owned by politicians.[197]

Despite mass media in Moldova enjoying much more freedom than it did several years ago,[198] regional differences still exist. Whereas media in the separatists Transdniestria region is still state owned-and-controlled, the rest of the country enjoys pluralistic free media for example.[199]

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[188] "Facebook Stats of Popular Media Pages in Ukraine," *Socialbakers.com*, accessed January 28, 2015, http://www.socialbakers.com/statistics/facebook/pages/total/ukraine/media/.
[189] Ibid.
[190] "Freedom on the Net 2014: Ukraine."
[191] Mijatović, *Report by the OSCE Representative on Freedom of the Media: Media Freedom under Siege in Ukraine*.
[192] Ibid.
[193] Ibid.
[194] "Ukraine: Freedom of the Press 2014."
[195] *"Make Freedom of Expression a Reality, Mr President": A Report on Press Freedom in Ukraine 1 - 3 April 2012* (WAN-IFRA, July 2012).
[196] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Eurasia*, 2014.
[197] Interview with representative of NGO in Moldova, February 4, 2015.
[198] "Memo on Press Freedom in Moldova: 3 May 2012 - 3 May 2012."

By Moldovan law, virtually anyone can establish a new media outlet.[200] There are no limitations regarding foreign investments, although political connections are often needed in order to sign the necessary contracts. Furthermore, Art. 28 of the Broadcasting Code still uses the legal term *founder* instead of *owner*. This means that founders can be legal entities or Limited Liability Companies (LLC's), but not necessarily legal persons. As a result, these companies are usually registered in offshore zones, from where they control media channels or media outlets in Moldova.[201]

In 2013, 49% of the population had access to internet.[202] However, with around half of all users residing in the capital city, that statistic masks the fact that internet access in Moldova is highly restricted to urban areas.[203] In terms of social media use, most users are young (between 15 and 45 years old) and go online at least once a day for a minimum of 30 minutes to check for updated information and news.[204] The access to internet has also increased due to the number of mobile phones with 3G, which pertained to 35% of all phone contracts. However, only 5% of all the 3G phone users access social media through their phone.[205]

In terms of language, internet in Moldova is very much oriented on the Romanian language. This means that Russian speakers are deprived of quality online media outlets in their mother tongue. This forces them to turn to Russian TV, radio and websites such as lenta.ru or gazeta.ru for access to information. Although young Russian speakers are more willing and open to consult foreign press (e.g. BBC), the most popular radio and TV shows are in Russian. For instance, the main channel in the Russian Federation is re-broadcasted in Moldova with some local content.[206] Based on these observations it seems new entrants to the market need to choose a language in accordance with whether they wish to operate in the market for broadcast media, or online only.

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[199] Interview with representative of NGO in Moldova; "Moldova: Freedom in the World 2014," *Freedom House*, accessed January 12, 2015, https://freedomhouse.org/REPORT/FREEDOM-WORLD/2014/MOLDOVA-0#.VJRWSL4CA.
[200] *Media Sustainability Index 2014: The Development of Sustainable Independent Media in Europe and Asia*.
[201] Interview with representative of NGO in Moldova.
[202] "Moldova: Freedom in the World 2014."
[203] Interview with representative of NGO in Moldova.
[204] Ibid.
[205] BATI, "Biroul de Audit Al Tirajelor Si Internetului," accessed February 17, 2015, http://www.bati.md/news.html.
[206] Interview with representative of NGO in Moldova.

With respect to the popularity of social media, Odnoklassniki (a Russian service) is the main platform used in Moldova. [207] It is the second website with the biggest reach in the country (see Table 9).

Table 9: Most popular websites in Moldova[208]

Website	Reach	Type of website
md.mail.ru	55.68%	Personal email
odnoklassniki.md	53.87%	Social media
999.md	27.78%	E-commerce
megogo.net	25.50%	Online movie theater
point.md	17.05%	News agency

Based on the information in Table 9 it appears that internet in Moldova is mainly used for entertainment purposes, rather than as a source of information for the population.

According to the Barometer of Public Opinion, a Survey conducted in November 2014 by the Institute for Public Policy from Republic of Moldova, 63% of respondents in Moldova claim that TV is their primary source of information, while 39% of the respondents deem it the most reliable source of information (15% referred to the internet as being more reliable). Table 10 shows the daily use of different media outlets.

Table 10: Daily use of different media outlets in Moldova

Media	% of respondents that use it daily
TV	82
Internet	45
Radio	42
Newspaper	11

Social media, Odnoklassniki in particular in the case of Moldova, are a good platform for promoting news and media services. Despite the fact that not all Moldovans have access to the internet, Odnoklassniki has been ranked 10th social network in the world; its 65.3 million users correspond to 4.2% of the global audience. [209] Using Russian social media (Odnoklassniki or Vkontakte) as a platform to promote new media outlets may therefore in any case result in a large impact among the Russian population worldwide, not limited to Moldova alone.

Any new media company that wishes to establish itself in Moldova should bear in mind that sensitive topics are difficult to report and touch upon, sometimes even due to lack of information. In fact, self-censorship is still common in the Moldovan press and is viewed as one of the main problems plaguing Moldovan media and ultimately affecting its freedom.[210]Although there are no

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[207] Facebook and Vkontankte are other social media platforms used in the country.

[208] The website point.md is in Russian.

[209] The research was carried out by ComScore's MMX service**.** Source: Rusbase. "Vk.com #9 In the World, but Odnoklassniki is Closing the Gap". 2015. http://rusbase.com/news/author/benhopkins/vkcom-9-world-odnoklassniki-closing-gap/

[210] *Ibid*.

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legal restrictions regarding the use of the internet[211], approaches to certain topics are manipulated and frequently journalists from media owned by or affiliated with politicians will refrain from touching upon sensitive subjects as a result of conflicts of interest.[212] For instance, the case of Transdniestria is a very clear example: most of the local broadcast media are controlled by the de facto authorities in Tiraspol, or by companies like Sheriff Enterprises, linked to the separatist regime.[213]

Since 2009, no foreign journalists have been banned or expelled from the country.[214] However, international organizations have reported attacks on the press, consisting mainly of limiting access to journalists who wished to attend events of public interest.[215] In other cases, public authorities and agencies refuse to release information of public interest under the pretext of fiscal, commercial, or state secret.[216]

As far as thematic coverage in the Moldovan media goes, good governance and democracy appear as the most salient fundamental rights issues. Corruption is widely seen as the country's biggest problem, whilst fraudulent voting and autocratic tendencies in the country are also a concern. [217] Other issues such as gender and sexual rights – including LGBT, who are often victims of harassment[218]- are not so widely touched upon in broadcast media, mainly due to the "special significance and primary role" of the Orthodox Church.[219] Instead, social media is much more prone to highlighting gender and sexual rights. The reason is that younger generation are the main users of social media. In addition, they are also more open-minded.[220]

Most left out of the fundamental rights discourse are (ethnic) minorities and their rights. In particular this affects the Russian minority. Excluding them from quality online media or other areas such as the central government, brings about many of the ethnic troubles affecting the country.[221] In order to avoid that the Russian minority is dependent on information exclusively coming from Russian news outlets, new media companies should focus on providing online content media that, next to Romanian, is also available in Russian.

Although Russian minorities are the most salient case of discrimination, they are certainly not the only group that is affected. Discrimination also affects other group such as the Roma, who suffer serious discrimination in housing, education, and employment, and have also been targets of police violence.[222] Media companies should consider raising awareness on such issues, especially if their aim is to promote human rights.

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[211] Interview with representative of NGO in Moldova.
[212] *ENP East Media Freedom Watch: Moldova.*
[213] "Moldova: Freedom of the Press 2014."
[214] *ENP East Media Freedom Watch: Moldova.*
[215] "Memo on Press Freedom in Moldova: 3 May 2012 - 3 May 2012."
[216] *ENP East Media Freedom Watch: Moldova.*
[217] Interview with representative of EU embassy in Romania, also responsible for Moldova, January 12, 2015; Interview with representative of NGO in Moldova.
[218] "Moldova: Freedom in the World 2014."
[219] Ibid.
[220] Interview with representative of NGO in Moldova.
[221] Ibid.
[222] "Moldova: Freedom in the World 2014."

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6. Conclusions

The main questions this study tried to answer were threefold. First, to assess the risks of the current one-sided media services to Russian speaking minorities in countries that lie on the fault lines of overlapping spheres of influence between Europe and Russia. Second, to analyze the extent to which RNW can make a meaningful contribution to a more balanced information service, focusing on online and social media. Third, to investigate the opportunities for RNW to operate in countries that belong to the Post-Soviet space, and to create an inventory of barriers that may exist that could hinder this aim.

Two types of conclusions can be drawn, those that carry implications *across* the population of countries investigated, and those *specific* to a country in question. Regarding the former, arguably one of the most important conclusions of the report is that the chance of successfully reaching out to the target audience (young, higher educated, urbanized Russian speakers) is highest via online and social media, rather than by means of traditional broadcasting. The study finds that the traditional broadcasting landscape in the countries investigated is often dominated by either state-owned, or otherwise large privately operated outlets and entry barriers are significant if not prohibitive, unless large amounts of funds are invested. Therefore, new entrants to the post-Soviet market that are in a bid to counter Russian propaganda, would do wise to strategically position themselves in the online and social media segment.

On a country-level, chief among the factors that either facilitate or inhibit the chances of new entrants to the media markets in the post-Soviet states in this study have been (i) (legal) barriers to market entry; (ii) the availability and reach of internet infrastructure in the countries examined; (iii) the extent to which Russian is spoken as a language among young people; and (iv) the nature and scope of issues pertaining to fundamental rights that are discussed in the (online) media. The remainder of this chapter uses these factors as categories to classify the most important conclusions per country.

6.1 Latvia

Due to the economic crisis of the last few years Latvia witnessed an increase in the concentration of its media ownership. That said, the Latvian media market stands out among all four countries investigated in terms of its pluralistic media landscape. Entry barriers for new entrants are generally considered low, and a 2010 law that stipulates that 65% of broadcast programming should be in the Latvian language does not pertain to online and social media.

With internet penetration at a very high level, and internet use increasing steadily over the years, the reach of social media across Latvia is greatly facilitated. Latvia has a relatively high share of Russian speakers, with roughly a third of the population qualifying as ethnic Russians, and an even higher share having Russian as their first language. This would indicate that Russian language content is likely to find a significant audience.

The alleged 'language race' taking place in mainstream Latvian media between Latvian language outlets and those who broadcast in Russian touches upon a core divisive issue in Latvian society, namely the issue of citizenship. Given that a large share of the ethnic Russian population do not enjoy full Latvian citizenship, this is a major source of lingering discontent. Moreover, the risk that

Russian media outlets deliberately target this issue with the aim of fomenting further divisions in Latvian society is high. The issue of citizenship therefore ranks high in terms of saliency and possible societal impact. Other issues such as sexual rights, particularly LGBT inclusion, should be approached with greater caution owing to the conservative nature of Latvian and (ethnic) Russian culture.

6.2 Belarus

The majority of Belarusian media are state-owned, heavily subsidized and lack editorial independence. The ability for independent media to operate freely is curtailed due to the fact that the heavy subsidization of state media poses unfair competition, independents have restricted access to official information, and unregulated systems of accreditation perpetuate the advantage of state-owned media over independents. Furthermore, according to the law foreign ownership of media outlets is restricted to 20% only, severely limiting the extent to which western media organizations can formally own and cooperate with local partners.

In general, internet penetration is high and continues to grow, paving the way for a greater role of social media in Belarusian society in the future. That said, internet use is hindered by state regulation, censorship and harassment of online journalists and activists. Organizations wishing to enter the online media market in Belarus should thus take this into account.

The Russian language is widely spoken, with over two-thirds of the population having Russian as a first language. Russian language content will therefore undoubtedly find a suitable audience in Belarus. However, the problem is not so much finding an audience capable of understanding the material. Rather, the problem lies in the risks posed by a crackdown by the authorities. Therefore, in terms of the fundamental rights issues discussed in the (online) media, some caution is advised. As the case of Charter97.org demonstrated, the discussion of political freedoms, constitutional rights, and general criticism addressed to President Lukashenka can easily result in being blocked. Moreover, these issues are already extensively covered by large foreign organizations such as Deutsche Welle and Radio Free Europe/Radio Liberty. Lower on the governmental radar appear to be issues pertaining to religious-, minority-, and sexual rights. As such these topics could provide a niche opportunity to new market entrants. This however does not rule out a similar response by the Belarusian authorities, meaning prudence is advised at all times, in particular when making use of local journalists and activists.

6.3 Ukraine

When looking at entry barriers to the Ukrainian market, the high degree of ownership concentration in the media sector among political and business elites is a cause for concern. For this reason, cooperation with local partners can be harmful to the reputation of a media outlet, if not preceded by a properly conducted background check on the ownership structure. In addition, foreign ownership of Ukrainian media outlets is – as in Belarus – legally capped, at 30%. However, it should be pointed out that contrary to the situation in Belarus, the Ukrainian media landscape can be classified as largely pluralistic.

Internet penetration is high, with internet use showing spectacular growth in recent years. Furthermore, the role of social media has become instrumental in Ukraine since the Euromaidan protests. Moreover, as the conflict in Ukraine drags on, there appears a shift in the popularity of

social networks, with western networks such as Facebook showing a remarkable increase in popularity since last year. For new market entrants from the west, this could prove to be a valuable opportunity.

With respect to the use of the Russian language, Ukraine is a truly bilingual nation. As a result, content in the Russian language will have no problems finding a suitable audience. Whether or not Russian language content is perceived as propaganda is much more the result of the content itself, rather than the fact that it is in Russian as such. Looking at the topics discussed, by far the most pressing issue is government corruption. What´s more, owing to the at times murky ownership structure of media enterprises in Ukraine, many of the largest media companies avoid discussing these sensitive topics. Topics such as sexual rights and HIV/aids also do not receive the attention they deserve in the mainstream Ukrainian media. This could provide opportunities for newcomers wishing to address these problems in Ukrainian society.

6.4 Moldova

Moldova has an extremely high concentration of media ownership linked to political elites. For this reason, as is the case in Ukraine, cooperation with local partners without performing a proper prior background check can be damaging to the reputation of a media outlet. Despite this concentration, media in Moldova today enjoys much more freedom than it did some years ago. The same can not be said about the breakaway region of Transdniestria, where media are tightly controlled by the de facto authorities.

As stated in Chapter 2 about the target audience, the degree of urbanization matters as it influences information acquisition among residents. Urban residents are more likely to rely on a wider range of sources of information than others, and are more likely to get local news and information via internet searches and digital platforms such as Twitter, blogs and the websites of local newspapers and TV stations. Although internet use in Moldova has been increasing steadily over the years – just under half of the population had access to the internet in 2013 – and there is a high concentration of internet users in urban areas, Moldova's general low urbanization rate compared to the other countries in this study is likely to hamper the size of a receptive audience.

The observation that internet media in Moldova are more oriented on the Romanian language is both an opportunity, as well as a challenge. A challenge in the sense that Russian language content is therefore much less likely to find a receptive audience. However, it also means that the Russian speaking population – apart from traditional Russian websites such as lenta.ru or gazeta.ru – is effectively deprived of a quality online media outlet that generates Russian language content, giving opportunities to western online media outlets that wish to bring an alternative sound to the region.

Due to the concentration of ownership in the media sector in the hands of political elites, there is a degree of avoidance on issues of graft and fraud. However, these issues already receive ample coverage from established foreign news organizations. A certain void however exists with respect to other sensitive issues such as gender and sexual rights, mainly due to the primary role of the Orthodox Church. These topics are much more heavily discussed on social media. As such this is an area that could act as a potential niche for newcomers onto the Moldovan media market.

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