

**JX FUND**

# **SILENCED BUT RESILIENT**



# **BELARUSIAN EXILED MEDIA SINCE THE 2020 REVOLUTION**

Research Report | Berlin, March 2024

## **Purpose and approach of this research**

Three and a half years have passed since the brutal suppression of the revolution in Belarus in 2020. Even by the standards of what is now three decades of Alexander Lukashenko's oppressive rule, the severity and viciousness of the ensuing crackdown has been devastating – resulting in the forced cessation of publishing activities and mass exodus of the last remaining independent media.

Belarusian media have struggled in exile. Their finances are precarious, making them reliant on donor financing. Maintaining relations with audiences is difficult when websites and social media are blocked, and when ordinary Belarusians face retaliation for sharing or even viewing “extremist content” (security forces frequently inspect the phones of people, both “suspect” and random).

Yet despite these challenges, independent Belarusian media are uniquely valued by their audiences. The five biggest sites had over 17 million visits in December 2023. That same month, the average time spent on site was over 10 minutes for leading Belarusian outlets, compared to an average of just above 3 minutes for top Russian ones.

These figures show that although the state spent an estimated 50 million euros on propaganda in 2023<sup>1</sup>, Belarusians – both inside the country and abroad – still value objective and trustworthy coverage very highly.

JX Fund, together with the media researchers from The Fix Research and Advisory, have compiled and continue to maintain a database (see page 35 for additional information) of both individual media and the sector overall. We want to thank the Belarusian Association of Journalists for their collaboration and meticulous efforts in documenting the mass persecution of journalists.

The present report relies on data collected from various sources, including open channels, and data shared by both media themselves and sector experts. We believe a data-driven approach from both media managers and the development community will help better navigate the barriers to sustaining and strengthening the Belarusian media community.

Penelope Winterhager, Managing Director, JX Fund

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## 1 Executive Summary

### A final curtain to years of oppression

- After years of struggle and persecution, **the post-2020 crackdown finally brought an end to independent media publishing activities** on the territory of Belarus and an exodus of the last remaining independent media.
- In addition to digital censorship and physical abuse of media workers, the Belarusian authorities have developed a **series of administrative measures meant to prevent the operation of independent media**.
- Importantly, the measures include the republication, sharing and reporting of so-called “extremist materials”, which effectively **transfers the burden of censorship onto users**, who can face fines and arrest.
- Belarusian authorities have started **joint efforts with Russian counterparts** to unite lists of extremist media and which could develop into further censoring independent voices and platforms (e.g., YouTube).

### Resiliency and survival in exile

- Despite the overwhelming pressure, Belarusian independent media have **not only managed to continue to serve their audiences, but in some regards outperform global peers** – both from free and not-free countries.
- This shows both an ability to adapt to fast-changing circumstances and a **persistent demand for objective and trustworthy coverage on behalf of Belarusian audiences** (both inside and outside the country).
- Furthermore, **Belarusian media have shown themselves to be resilient in exile**, with few media projects being shut down. On the contrary, the rise in new projects since 2020 suggests a relatively vibrant sector.

### Funding at scale, hiring and keeping staff are fundamental challenges

- **Finances are the biggest challenge**. Donor funding initially grew fast in 2020-2022, in 2023 the tide turned with a plurality of surveyed media experiencing severe declines. Very high dependence on donors (over 90% for most media) makes them very unstable year on year.
- Given their transient existence and lack of clear vision for the future, it is **difficult for media managers to attract staff** (especially local specialists) to staff their teams – and **even more challenging to retain them**, which can drive high turnover and reduce media’s impact.
- With time, **finding journalists who have reported from the ground will become harder** – they are incredibly hard to replace, and this is a major-long term threat to the sector’s viability as an information source for Belarus based audiences.

### A vision is needed to manage a likely difficult future

- Belarusian **media are highly dependent on donors** – in 2010-2019, Belarus was the 4<sup>th</sup> biggest recipient of development aid for media from OECD states and received the **most donations per capita** among major recipients.
- **Any space vacated by independent media will soon be filled by Russia-aligned projects**, which will be detrimental to Belarusians’ access to information and the regional political situation.
- Despite their importance, Belarusian media will **keep suffering funding shocks** that are both psychologically and operationally damaging. This can probably not be avoided – but **these shocks should be managed to avoid a chaotic breakdown** that causes irreparable harm.

## 2a Belarusian Media and Audience Trends

The Belarusian media community has faced hardships few can imagine. For the better part of three decades, free press has been systematically blocked, undermined and persecuted.

The brutal repressions that followed the 2020 rigged presidential election made publishing virtually impossible in Belarus and led to the exodus of the last remaining independent media.

With journalists jailed, websites blocked and audiences within Belarus threatened with harsh punishment for engaging with affected media (see page 17 for details) it is a wonder Belarusian media continue to maintain relations with the users.

Yet Belarusian media are not just widely consumed – they outdo peer in the region (see exhibit 1).

### KEY FACTS AND FIGURES

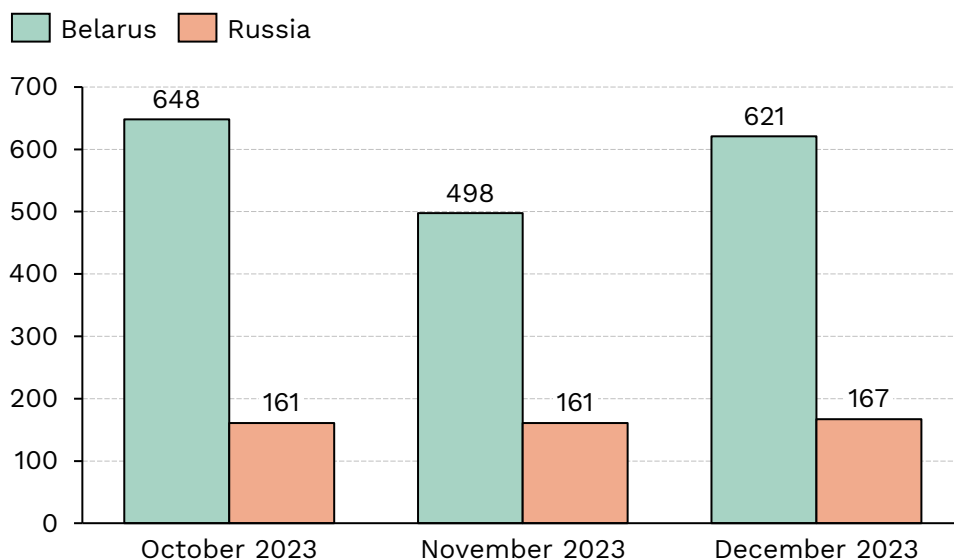
- 69 independent Belarusian media in exile<sup>2</sup> included in this study.
- Over 19.2 million cumulative monthly website visits (N=44<sup>3</sup>).
- Over 1.3 million cumulative Telegram followers (as of December 2023; N=49<sup>4</sup>).
- Over 21 million cumulative YouTube views.
- 41 media out of 69 designated as having published “extremist materials”.

Source: JX Fund Dashboard.

Exhibit 1

### Belarusian Media: Uniquely Valuable for Audiences

Average time on site for 5 major media per country\* across all devices (in seconds; N=10)



\* For each country, media were selected so as to represent a relatively diverse thematic and audience focus. The media selected: Belarus (Charter 97, Zerkalo, Nasha Niva, Devby, Tribuna), Russia (Meduza, Rules of life, Novaya Gazeta Europe, Arzamas, The Moscow Times). Note: because quality of data deteriorates the smaller a publication is, larger media were favored (even if it meant reducing thematic or audience diversity).

Source: JX Fund Dashboard Research, SimilarWeb.

2 Key elements of the definition of independent media in exile are having core operations outside of the country of origin, broad adherence to journalistic principles and engaging in journalistic activities, and not being reliant on funds from the state or Politically Exposed Persons (PEPs). However, exiled media are characterised by a fair amount heterodox solutions and structures, making it reasonable to include various hybrid or mixed cases. For details, see Appendix I, page 35.

3 Cumulative total for all media in the JX Fund database registered as having a website. Similar logic for following figures.

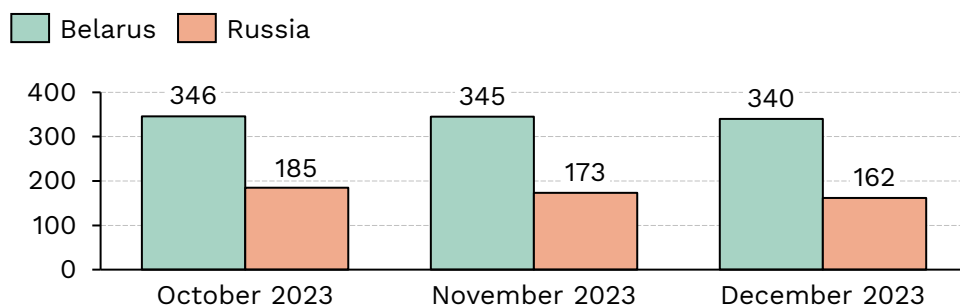
4 This does not include Nexta Live (1M subscribers as of January 2024) as it primarily targets international audiences (i.e., a recent Telegram poll with over 140K respondents showed that just 19% were from Belarus [https://t.me/nexta\\_live/55096](https://t.me/nexta_live/55096)).

This comparison becomes even more stark when looking at mobile consumption (mobile consumption tends to be favored by younger users, suggesting Belarusian youth is especially open to longer forms of content). Importantly, a comparison of Belarusian vs. global media (see Appendix IV, page 40), shows the former also perform strongly when it comes to the number of pages per visit and bounce rate (the share of visitors who leave the site after visiting just one page).

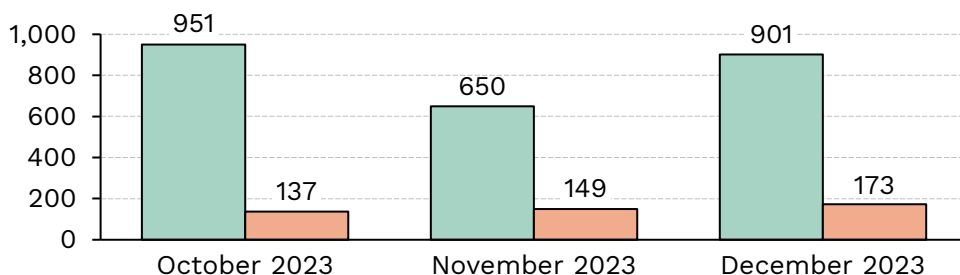
Exhibit 2

### Enjoying Long-Form Content on Your Phone

Average time on site for 5 major media per country\* on desktop (in seconds; N=10)



Average time on site for 5 major media per country\* on mobile (in seconds; N=10)



\* For each country, media were selected so as to represent a relatively diverse thematic and audience focus. The media selected: Belarus (Charter 97, Zerkalo, Nasha Niva, Devby, Tribuna), Russia (Meduza, Rules of life, Novaya Gazeta Europe, Arzamas, The Moscow Times). Note: because quality of data deteriorates the smaller a publication is, larger media were favored (even if it meant reducing thematic or audience diversity).

Source: JX Fund Dashboard Research, SimilarWeb.

This optimistic perspective should not be interpreted, however, as Belarusian audiences being oblivious to state pressure and how it affects consumer behavior. On the contrary, the past few years have witnessed several remarkable transitions.

The protests of the rigged presidential elections in 2020, henceforth referred to as the Belarusian revolution<sup>5</sup>, triggered a massive shift in media consumption, faced with media bans and the shutdown of up to 80% of bandwidth (at times, internet availability for major providers fell to just a few percent<sup>6</sup>).

As a result, protesters and other news consumers shifted to Telegram, sparking massive growth of key channels (see exhibit 3), the sole platform that could operate in such a low-bandwidth environment. This led some to label the protests as the “Telegram Revolution”<sup>7</sup>.

5 Although there has been some debate about whether the 2020 protests qualified as a revolution, the term has been widely used, including by both the key stakeholders and in academic literature (see example: <https://www.jstor.org/stable/27256508>).

6 Netblocks (Aug. 9, 2020). <https://netblocks.org/reports/internet-disruption-hits-belarus-on-election-day-YAE2jKB3>.

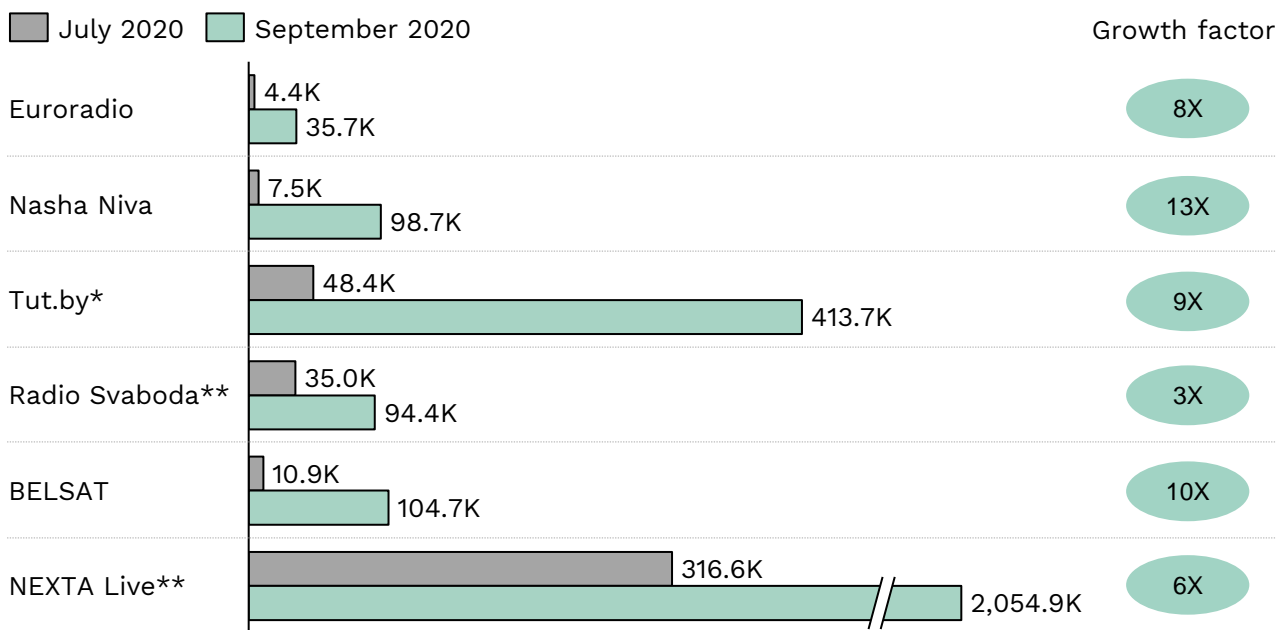
7 Associated Press (Aug. 21, 2020). <https://apnews.com/article/international-news-technology-business-ap-top-news-europe-823180da2b402f6a1dc9fbd76a6f476b>.



Exhibit 3

### The “Telegram Revolution”

Telegram channels of selected media by number of subscribers (‘000s)



\* After lengthy procedures and pressure, Tut.by was shut down in June 2022 and replaced by a successor media, Zerkalo.

\*\* Although not included in the survey, both media outlets are emblematic and used to showcase trends in the Belarusian media space.

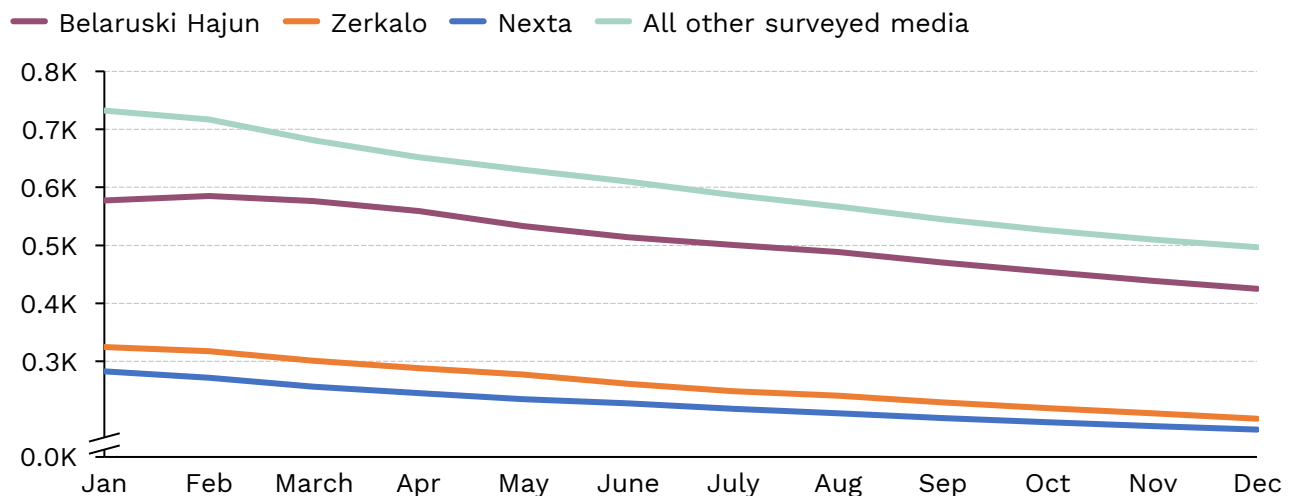
Source: JX Fund Dashboard Research, TGStat.

Since then, however, Telegram use has come under heavy scrutiny by security forces. Subscribers are persecuted, and simply resharing news from media designated as "extremists" or "terrorists" in private messages can lead to fines and arrests. In one case from late-2021, a young couple was detained for over 250 days jointly for resharing news from independent Telegram channels<sup>8</sup>. This is a driver of steadily declining subscriber numbers<sup>9</sup> (see exhibit 4).

Exhibit 4

### Security Forces Drive Belarusians From Telegram

Telegram channel subscribers of Belarusian media (2023; ‘000s)



Source: JX Fund Dashboard Research, TGStat.

8 Deutsche Welle (Oct. 22, 2021). <https://www.dw.com/ru/semjnuju-paru-iz-minska-vosmoj-raz-osudili-za-lichnuju-perepisku/a-59581864>. Note: human rights centre Viasna has acknowledged Sergey and Anastasia Krupenich, the couple in question, as political prisoners.

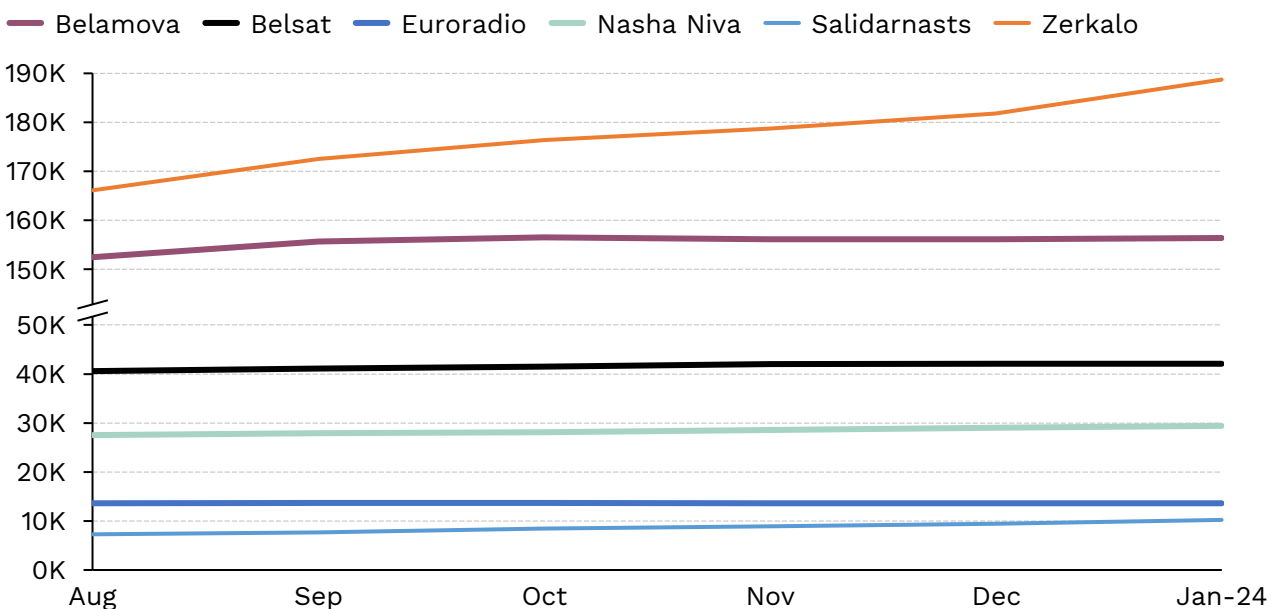
9 It is worth noting the decline of Nexta Live, which lost over half its subscribers since peaking at 2.1M in September 2020.

The shift away from Telegram favored less scrutinized platforms – at least for now – such as TikTok, YouTube, Facebook and Instagram (see exhibit 5). In recent years TikTok has become the biggest social media platform in Belarus, with over 5.6M users<sup>10</sup>. However, only the biggest independent media on TikTok, Zerkalo, has seen meaningful subscriber growth.

Exhibit 5

**TikTok Subscription Dynamics**

Largest Belarusian independent media by TikTok subscribers of (Aug-23 to Jan-24; '000s)



Source: JX Fund Dashboard Research.

An advantage of TikTok is the algorithmic “For-You Page”, which suggests content a user is likely to enjoy – that means you can regularly consume content from an account without being subscribed. As a result, several to mid-to-large media have invested into this platform.

This has not gone unnoticed by the authorities, who in 2022 began targeting individual content creators regardless of whether they had criticized the Lukashenko regime<sup>11</sup>.

In April 2022, TikTok blogger and entrepreneur Andrei Bialiauski was detained with his minor son (later released to his grandparents). Andrei was sentenced to 24 months in prison for “insulting the president” in a closed-door indictment. Reportedly, the Main Directorate for Combating Organized Crime and Corruption (GUBOPiK) then took ownership of Bialiauski's TikTok account<sup>12</sup>.

In February 2024, Belarusian Ambassador to Russia Dmitriy Krutoi announced the imminent implementation of a merger of "extremist resources" lists as well as the list of "extremists" from both Russian and Belarusian sides, which could impact the availability of Instagram and Facebook in Belarus<sup>13</sup> (the platforms were banned in Russia after the full-scale invasion of Ukraine in 2022).

<sup>10</sup> We Are Social (January 2024), <https://datareportal.com/reports/digital-2024-Belarus>.

<sup>11</sup> Euroradio (Aug. 22, 2022), <https://euroradio.fm/ru/oblava-v-tiktok-v-belarusi-vlasti-sazhayut-dazhe-blogerov-iz-bezobidnoy-socseti>.

<sup>12</sup> Viasna (Aug. 23, 2022), <https://spring96.org/en/news/108793>.

<sup>13</sup> Belsat (Feb. 7, 2024) <https://belsat.eu/ru/news/07-02-2024-v-belarusi-mogut-zapretit-facebook-i-instagram-a-v-rossii-zakryt-granitsu>.



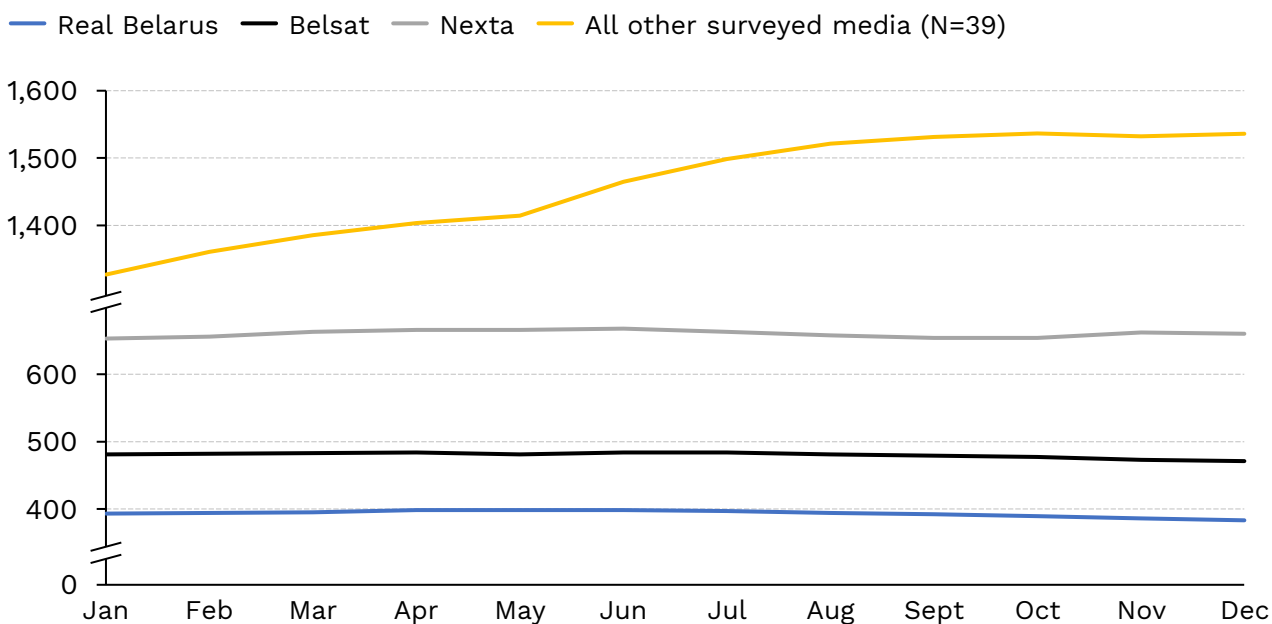
This raises questions about the future of YouTube, which has long been in the crosshairs of Russian authorities and is also widely used in Belarus (54% claim to use it for news consumption<sup>14</sup>). The platform is growing for independent media overall, especially those focused on investigative content<sup>15</sup>.

Of note, while YouTube consumption has increased (see exhibit 6), growth mostly came from channels with 10 to 100 thousand subscribers (these gained 232 thousand subscribers in 2023; channels with over 100 thousand subscribers lost 53 thousand subscribers). This is likely driven by a need for format innovation (established players struggle to keep up with content creators) and the audience’s fear of officially following media associated with “extremism” or “terrorism” (again, this favors lesser known, newer outlets).

Exhibit 6

**YouTube on the Rise**

Total YouTube subscribers of Belarusian media (2023, ‘000s)



Source: JX Fund Dashboard Research.

Given the extensive tracking by Belarusian security forces (including the use of “extremist material” designation to persecute consumers), an increasingly popular strategy used by Belarusian outlets is establishing proxy projects under new names to continue offering alternative coverage<sup>16</sup>.

Despite all that, the tops of Belarusian YouTube are flooded with pro-governmental videos. In June-September 2023, for instance, only 2 videos produced by independent media made it to the monthly top ten<sup>17</sup>.

Videos with Lukashenko’s name in the title get over 10 times more combined views<sup>18</sup> compared to the closest pro-democratic leaders (Tsikhanouskaya and Latushko). Thus, media aiming to provide visibility to alternative political forces (i.e., embracing pluralistic values) are at a constant disadvantage.

14 Information Policy (Nov. 13, 2023) <https://infopolicy.net/?p=22422>.  
 15 Media with significant investigative activity featured in the JX Fund Dashboard include the Belarusian Investigative Centre, Belarus Investigative Alliance, Belpol, Belsat, Bypol, Malanka Media, Nexta, Nasha Niva.  
 16 For security reasons, the names of such media projects are omitted.  
 17 Information Policy (Aug. 9, 2023) <https://infopolicy.net/?p=21862>.  
 18 Information Policy (Jan. 17, 2024) <https://infopolicy.net/?p=22704>.

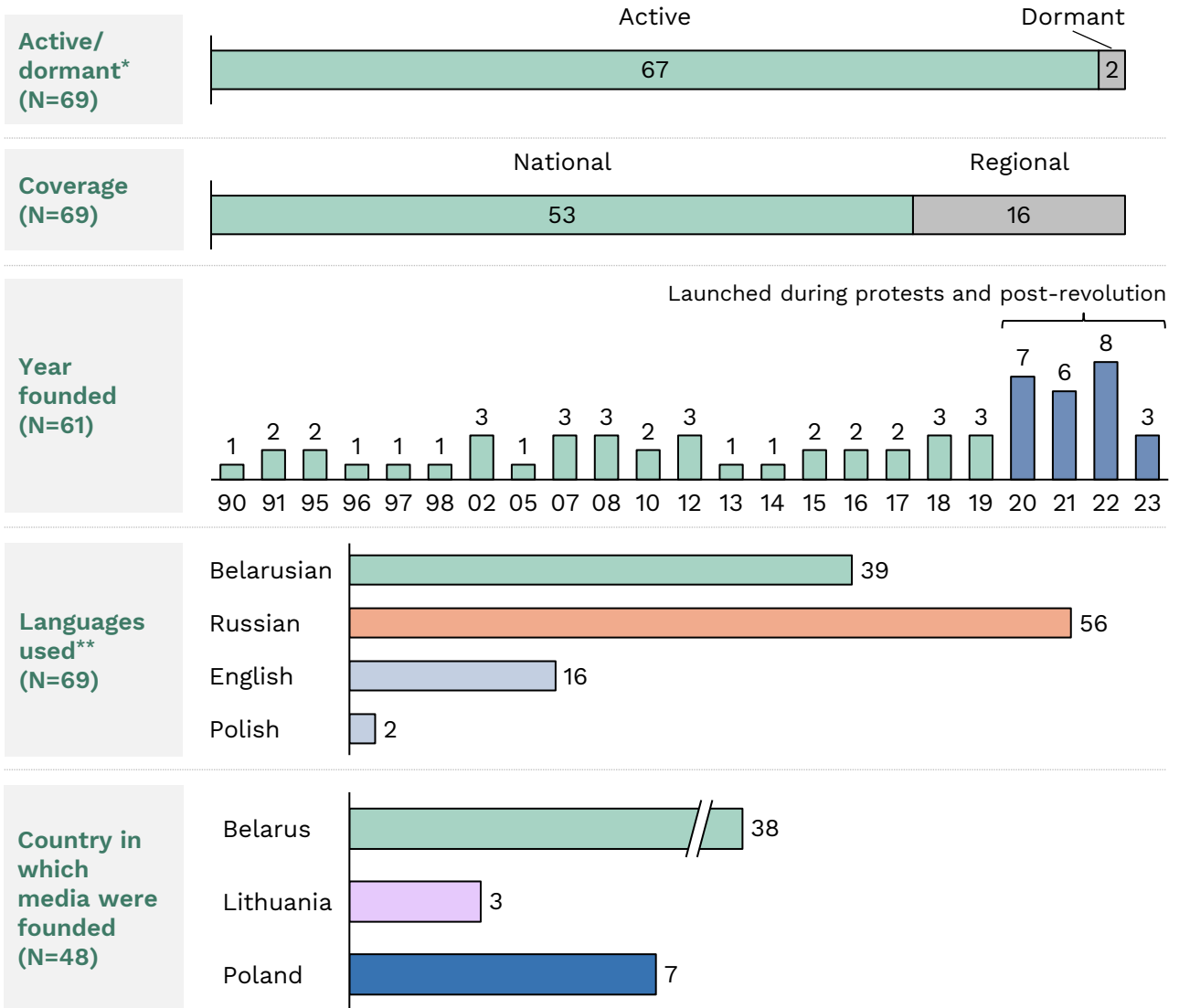
## 2b Media Facts and Figures: Origins, Date Founded and Profiles

The Belarusian independent media space has a long track record, dating back to the pre-Lukashenko era. However, it is noteworthy the post-2020 period has led to the rise of almost half of existing projects (40%) for which data was available (see exhibit 7).

Exhibit 7

### Belarusian Media in Exile at a Glance

Key descriptive metrics of Belarusian independent media in exile (as of February 2024)



\* Dormant media are defined as having exhibited no public activity over 3 months. Independent media suffer the same fragility of any start-up and are often more changes in external environment. Tracking this figure allows to monitor overall sectoral health.

\*\* The number of media is overlapping, as some outlets publish in multiple languages.

Source: JX Fund Dashboard Research; Data as of February 2024.

It is worth noting the smaller share of dormant media vs. Russian media in exile<sup>19</sup>. One hypothesis is that long-lasting repression and a base for exiled Belarusian media in Poland, have resulted in somewhat higher resiliency; it may also indicate a greater vibrancy and volatility of the Russian media space.

19 An analogous study of Russian media in exile found that 16 out of 93 surveyed media were dormant (approximately 17%), compared to 2 out of 69 for Belarus (or just under 3%). JX Fund (Dec. 5, 2023) [https://jx-fund.org/wp-content/uploads/2023/12/Sustaining\\_Independence-Current\\_State\\_of\\_Russian\\_Media\\_in\\_Exile\\_2023.pdf?x81041](https://jx-fund.org/wp-content/uploads/2023/12/Sustaining_Independence-Current_State_of_Russian_Media_in_Exile_2023.pdf?x81041).

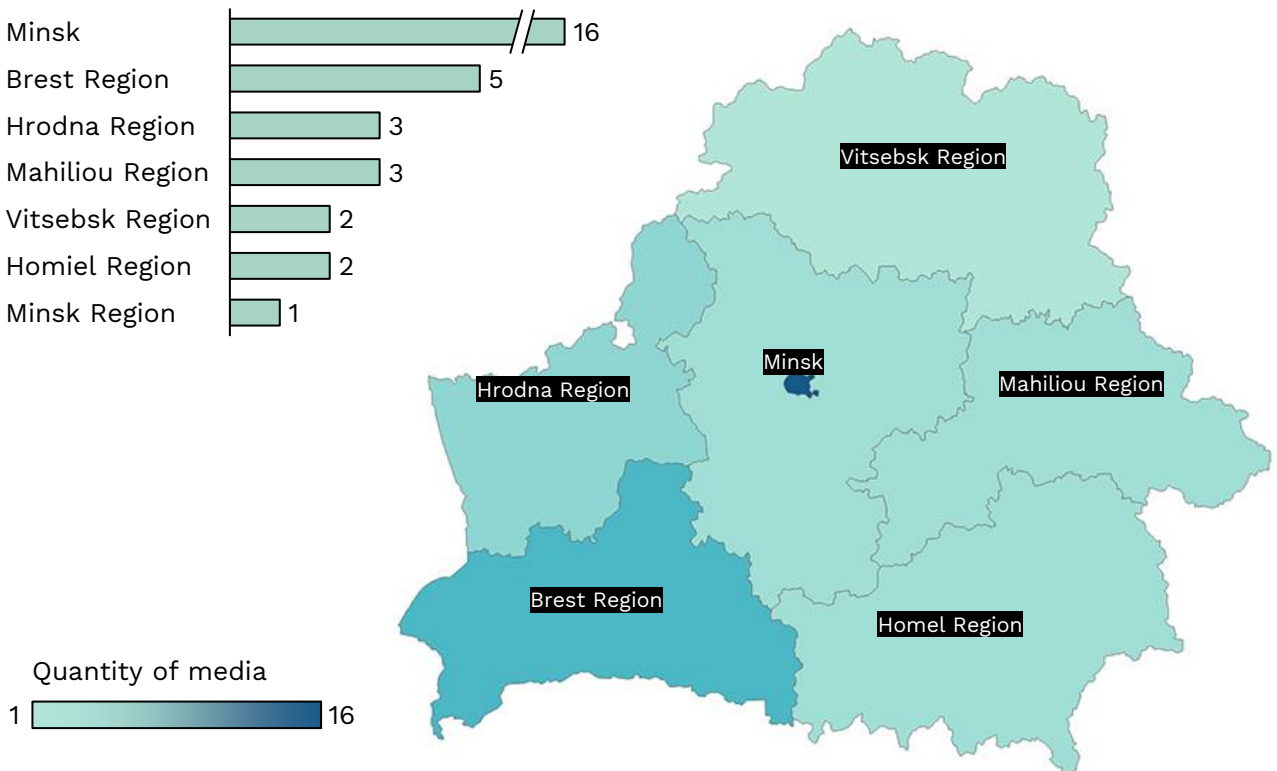
As exhibit 7 (page 9) shows, most Belarusian media focus on national coverage<sup>20</sup> rather than a regional (77% of media surveyed, or 53 out of a total 69). This is motivated both by audience demand and economics – historically, media could attract more advertisers with national coverage (and the legacy persists).

If we look at the origins of media projects included in this study (see exhibit 8), a more diverse picture emerges. Close to half of media projects for which data was available (16 out of 32) were based outside of Minsk.

Exhibit 8

### Place of Birth: Where Belarusian Media in Exile Originated From

Place where Belarusian media surveyed founded in country are from\* (N=32)



\* See previous page for an overview of the origins of media founded outside Belarus.

Source: JX Fund Dashboard Research; Data as of February 2024.

After 2020, many Belarusian media outlets were put to the question: leave, go to prison, or become “normalized”<sup>21</sup>? The latter refers to media that decided to stay in Belarus after 2020 and instead changed their information policy accordingly – effectively a form of far-reaching self-censorship.

Looking back, there is likely an element of survivorship bias among media who rejected self-censorship and opted instead for exile. To successfully relocate, they would have relatively more resources (e.g., thanks to working with national advertisers) and an easier emigration pathway. This may be seen in the relative overrepresentation of Brest (see exhibit 8). The region has historical ties to Poland and a Polish diaspora presence<sup>22</sup>, including Karta Polaka holders, who can relocate easier to Poland – see page 20 for further details).

20 A similar study of Russian independent media found a national/regional ratio of 76% (193/46).

21 Belarusian Association of Journalists (Feb. 16, 2024), <https://baj.media/ru/normalizaciya-kak-uslovie-vyzhivaniya-chto-seychas-osveshchayut-pereformatirovannye/>.

22 International Centre for Ethnic and Linguistic Diversity Studies (Aprl. 27, 2021) <https://www.icelds.org/2021/04/27/belarus-poland-relations-minorities-caught-in-between/>.

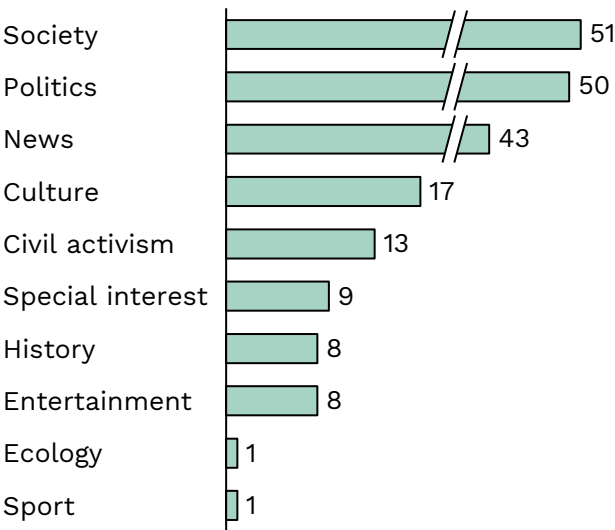
Looking at the topics and formats covered tells a similar story. Belarusian independent media tend to overwhelmingly focus on major political and social issues – coverage of niche topics is relatively limited (see exhibit 9). The choice of formats shows greater diversity, as well as a growing emphasis on explainers and investigative reporting.

Exhibit 9

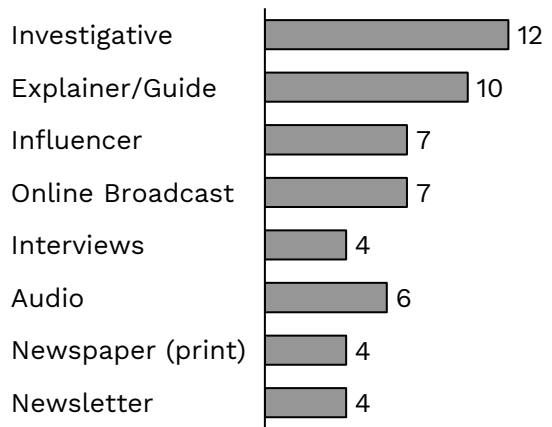
**Spotlight on Politics and Society**

Frequencies of thematic and format labels\* (N=69)

Thematic-based label frequency\*\*



Format-based label frequency\*\*\*



\*Media are fluid in their thematic focus and formats used by design. To create a best-attempt picture of the space, experts allocated a limited number of labels to each media that best characterized their priority areas of coverage or formats (e.g., having a couple of podcast episodes would probably not qualify for an “audio” label, especially if a media mostly focused on online news and video), subsequently comparing them to ensure relatively cohesive definitions. Note: a single media is expected to have multiple labels, hence the totals do not add up to 69. Note: special interest label encompasses such topics as ethnic, gender, diaspora, LGBTQ+, tech or other relatively niche topic (e.g., Devby – with tech news and target audience such as software engineers).

\*\* Labels are overlapping both from Topics and Formats since media can cover different themes in variety of formats at the same time.

\*\*\* 33 out of 69 media were identified only by Thematic labels as they did not use any format beyond online news, which is not included here due to its prevalence and lack of specificity (e.g., Vitebsk Courier, Bobruisk Online, Naviny.by).

Source: JX Fund Dashboard; Data as of February 2024.

**1a Belarus in the Shadow of Russia**

In 1999, Belarus and Russia signed a treaty establishing the Union State – a supernational organization of Belarus and Russia that became the basis for the deep integration of both countries under one umbrella<sup>23</sup>.

The integration process fell of the agenda for decades. But it was revived by Russian President Vladimir Putin in recent years (sparking protests in Minsk in 2019<sup>24</sup>), as a way to stay in power after the end of his latest term in 2024<sup>25</sup>.

Of note, prior to the 2020 vote, Lukashenko tried rallying support with anti-Russian rhetoric, blaming the Kremlin for trying to destabilize Belarus<sup>26</sup>. This activated Russian-controlled media infrastructure targeting Belarusians, mainly sites, YouTube channels, and often anonymous Telegram channels<sup>27</sup>. After the post-election crackdown (and Lukashenko’s increased reliance on Moscow), many channels switched to targeting the opposition<sup>28</sup> or simply closed down<sup>29</sup>.

Less than a month after the rigged elections, Lukashenko admitted he asked Russia to fill vacant seats left by striking or banned journalists from Belarusian state TV – this led to a change in the language used and resulted in aligned positions on most political questions in Belarusian and Russian state media<sup>30</sup>.

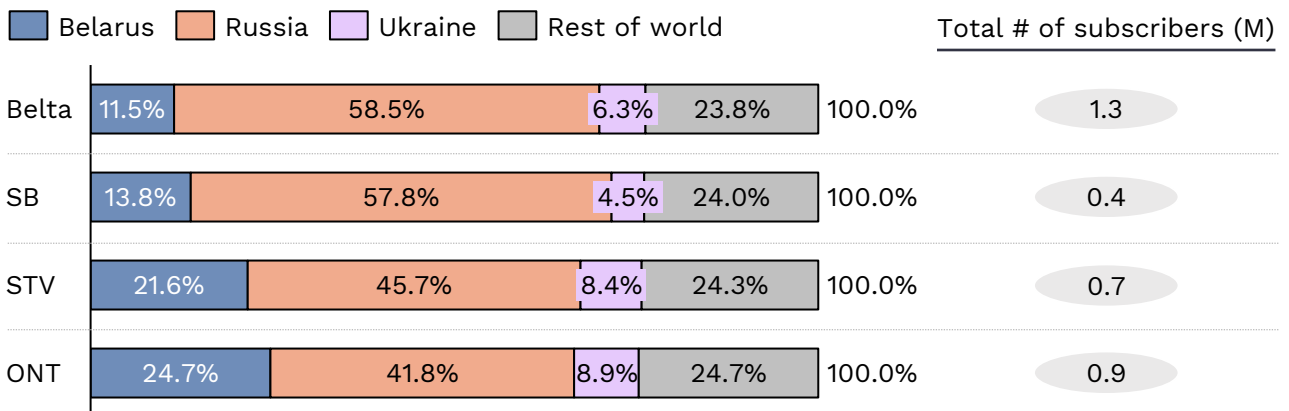
Today, the Union State integration involves the creation of joint extremist and terrorist lists of Belarus and Russia<sup>31</sup> and will soon result in the creation of a joint media holding that will align the propaganda narratives even more<sup>32</sup>.

Millions of Russians already consume Belarusian publications – particularly the YouTube channels of state media that are under the Kremlin’s influence (see exhibit 10). However, this is also the case for independent media, whose sites count many Russia-based users (see exhibit 11, next page).

Exhibit 10

**State YouTube Channels Serving Russian Audiences**

Subscriber origins for selected state Belarusian YouTube channels (data as of June 2023)



Source: Infopolicy (accessed via <https://nashaniva.com/ru/319171>).

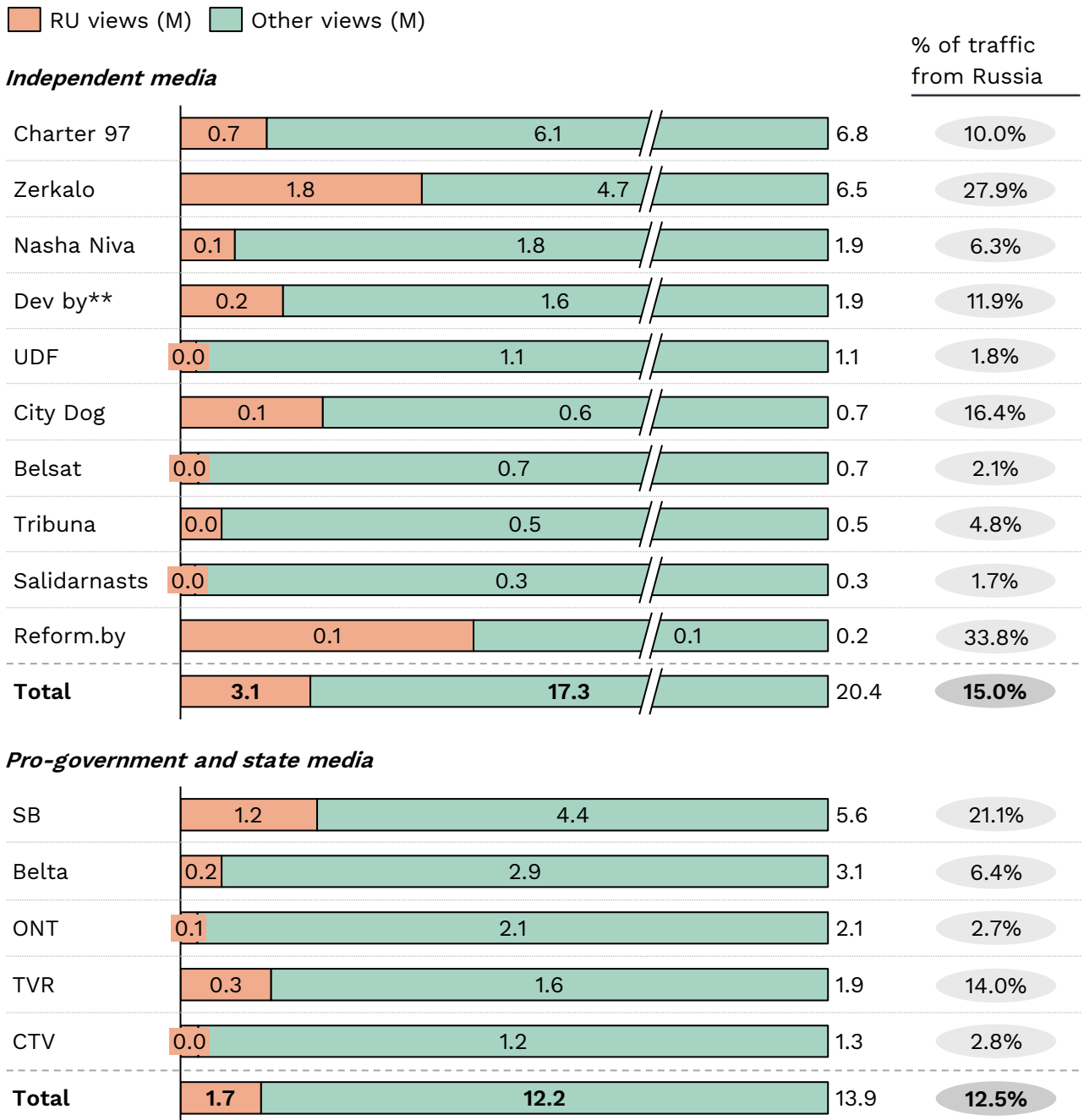
23 Soyuz (Dec. 8, 1999), <https://soyuz.by/dogovor-o-sozdanii-soyuznogo-gosudarstva>.  
 24 RBC (Dec. 07, 2019) <https://www.rbc.ru/photoreport/07/12/2019/5debab829a794775fad3823f>.  
 25 RBC (Mar. 21, 2019) <https://www.rbc.ru/politics/21/03/2019/5c933a639a794764f19e980c>.  
 26 BBC (Aug. 1, 2020) <https://www.bbc.com/russian/features-53618070>.  
 27 ISANS (Jun. 12, 2020) <https://isans.org/analysis-ru/policy-papers-ru/rossijskaya-propaganda-v-belarusi-sredstva-dostavki.html>.  
 28 Minskaya Semiboyarschina (Aug. 3, 2023) <https://t.me/boyars7/4802>.  
 29 Trykatzh (Nov. 17, 2020) <https://ibb.co/zf9C49z>.  
 30 Current Time, (Sep. 03, 2020) <https://www.currenttime.tv/a/russian-propaganda-on-belarus-tv/30816615.html>.  
 31 Meduza (Feb. 06, 2024) <https://meduza.io/news/2024/02/06/rossiya-i-belarus-planiruyut-ob-edinit-svoji-spiski-ekstremistov-utverzhaet-belorusskiy-posol>.  
 32 Nasha Niva (Jan. 26, 2024) <https://nashaniva.com/334586?lang=ru>.

To prevent Russians from reading content that counters state propaganda (particularly about the war in Ukraine), Moscow has sought to restrict access to some of the most popular sites<sup>33</sup> (note: this has not always been effective, for example “blocked” Zerkalo still gets millions of views from Russia). Pro-Kremlin actors also try to tarnish the reputations of any Western-funded outlets<sup>34</sup>.

Exhibit 11

### Website Traffic from Russia

Views from Russia\* and overall for selected independent and pro-government and state Belarusian media (millions of views; as of January 2024)



\* Only views visibly from Russia are included. The total Russia-based traffic is likely undercounted due to VPN usage.

\*\* Figures for devby.io, the site that replaced the dormant dev.by, which continues to receive a higher share of Russia-based views

Source: JX Fund Dashboard; SimilarWeb.

33 Lenta Ru, (Mar. 9, 2022). <https://lenta.ru/news/2022/03/09/zerkalo/>.

34 The recent shutdown of Radio Unet, a Polish-state-backed radio program for Belarusians, was celebrated by Russian Telegram channels like ZhS Premium – <https://twitter.com/PawelBobolowicz/status/1768967649994715351>.



Kremlin censors are especially concerned about Belarusian media debunking propaganda about the war in Ukraine or actively opposing it. An example of the latter is the Belarusian Hajun media project, which crowdsourced and published almost 1.8 thousand accounts of Russian military activity<sup>35</sup>. These were subsequently used to launch attacks on infrastructure, including railroads<sup>36</sup>, and even temporarily incapacitate a critical long-range radar aircraft<sup>37</sup>.

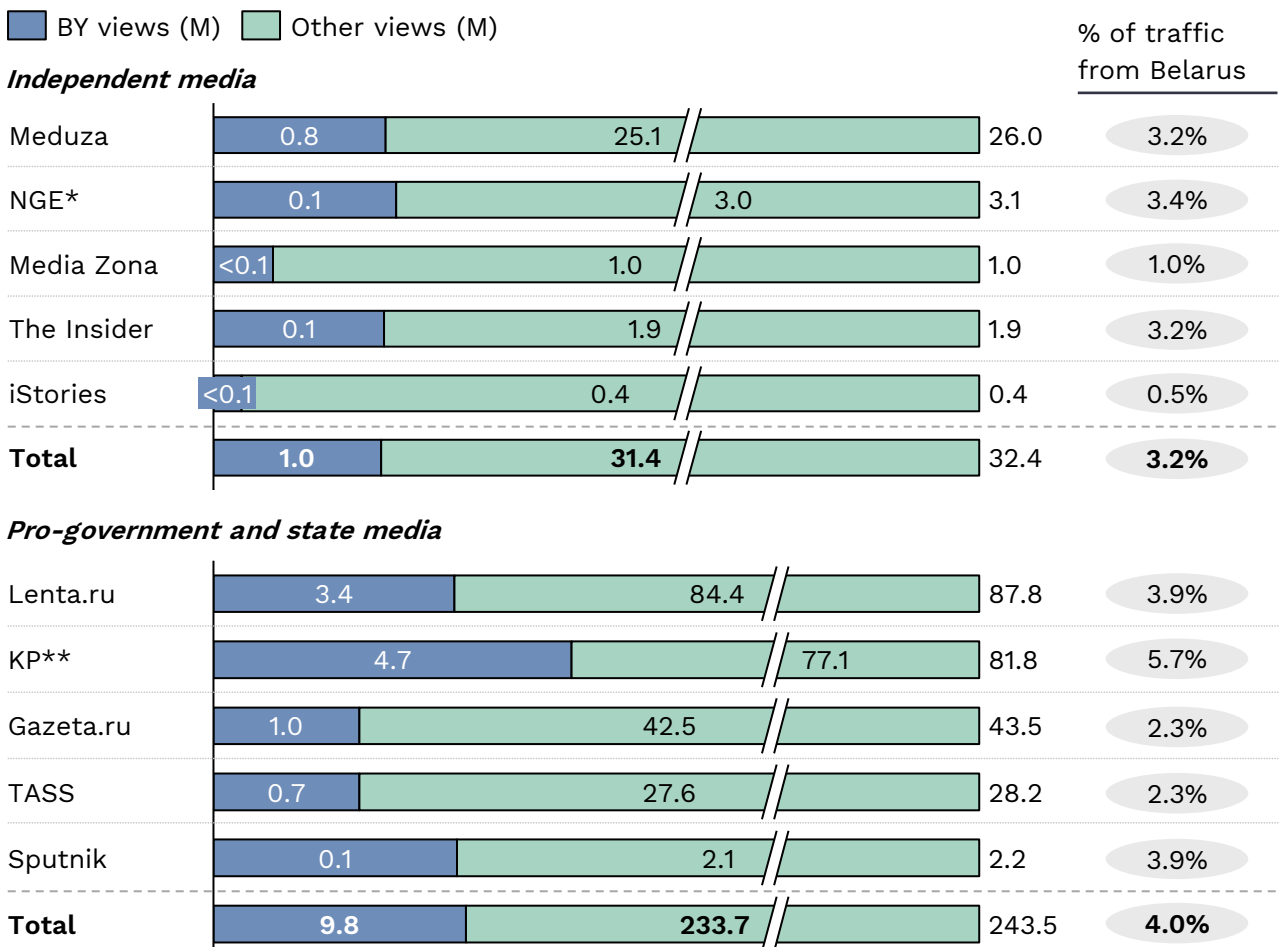
Recent surveys show 26% of Belarusians support Russia’s invasion of Ukraine<sup>38</sup>. This is close to the number of Belarusian readers of Russian propaganda outlet Komsomolskaya Pravda (with 4.7 million views from Belarus in January 2024, it had an estimated 1.9 million unique users<sup>39</sup>, or 20% of the population).

The significantly higher level of support for the war in Russia (nearly 60%<sup>40</sup> per surveys), highlights the potential risks of Moscow continuing to succeed in its mission of subverting or replacing independent voices in Belarus.

Exhibit 12

**Website Traffic from Belarus**

Views from Belarus for selected Russian media (millions of views; as of January 2024)



\* Novaya Gazeta Europe; \*\* Komsomolskaya Pravda.

Source: JX Fund Dashboard; SimilarWeb.

35 Anton Motolko (Dec. 22, 2022), <https://public.tableau.com/app/profile/anton.motolko/viz/UsingBelarusforaggressionagainstUkraine/UsingBelarusforaggressionagainstUkraine?publish=yes>.

36 Current Time (Apr. 25, 2022), <https://www.currenttime.tv/a/ohota-na-relsovyh-partizan-v-belarusi/31817605.html>.

37 Ukrayinska Pravda (Mar. 2, 2023) <https://www.pravda.com.ua/rus/news/2023/03/2/7391733/>.

38 DW (Dec. 20, 2023), <https://www.dw.com/ru/issledovanie-voynu-rossii-v-ukraine-podderzivaet-okolo-cetverti-belorusov/a-67783686>.

39 SimilarWeb (Mar. 15, 2024), [https://pro.similarweb.com/#/digitalsuite/websitewebanalysis/overview/websitewebanalysis/performance/\\*999/2024.01-2024.01?webSource=Total&key=kp.ru](https://pro.similarweb.com/#/digitalsuite/websitewebanalysis/overview/websitewebanalysis/performance/*999/2024.01-2024.01?webSource=Total&key=kp.ru).

40 Meduza (Mar. 8, 2023), <https://meduza.io/feature/2023/03/08/soglasno-oprosam-bolshinstvo-rossiyan-podderzivaet-voynu-no-v-realnosti-yarye-storonniki-agressii-mogut-byt-v-menshinstve-kak-stal-vozmozhen-takoy-paradoks>.

### 3a A Long and Painful Decline – Timeline of Media Repression

Often referred to as the “last dictatorship in Europe”, Belarus has been ruled by Alexander Lukashenko since 1994, making it the longest-standing authoritarian regime in the region.

The regime consistently manipulated elections to maintain its grip on power, and dissent was harshly punished (see exhibit 13). Since the rigged presidential election in August 2020 and start of Belarusian Revolution, however, the level of repression has reached its nadir.

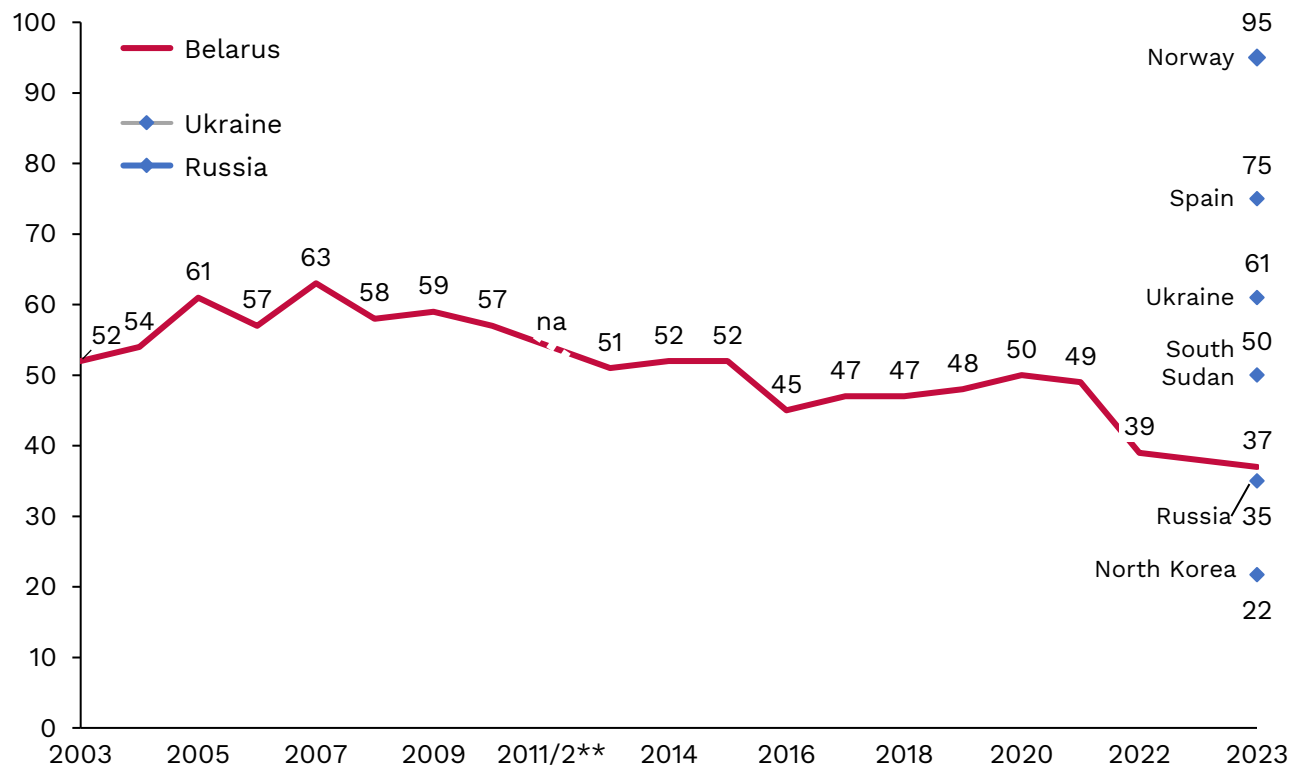
Numerous media workers have suffered from imprisonment (some even dying behind bars<sup>41</sup>), beatings and abuse, their sites have been blocked and organizations outlawed.

Attempts to bypass censorship (including creative technological solutions<sup>42</sup>) have resulted in measures shifting the burden onto news consumers – namely by prohibiting the sharing and republishing of materials that have been deemed extremist, even in private messages (see exhibit 15 on page 17 for a detailed description of administrative measures leveraged against Belarusian media).

Exhibit 13

#### Decades of Increasingly Authoritarian Rule

Reporters Without Borders Press Freedom Index for Belarus\* from 2003-2023; 0=no press freedom, 100=perfect press freedom



\*Additional countries as benchmarks; \*\*Joint rating for two years (note: due to changes in methodology, the 2011/12 result is incongruous with the general trend – it has a value of 99 – and hence disregarded).

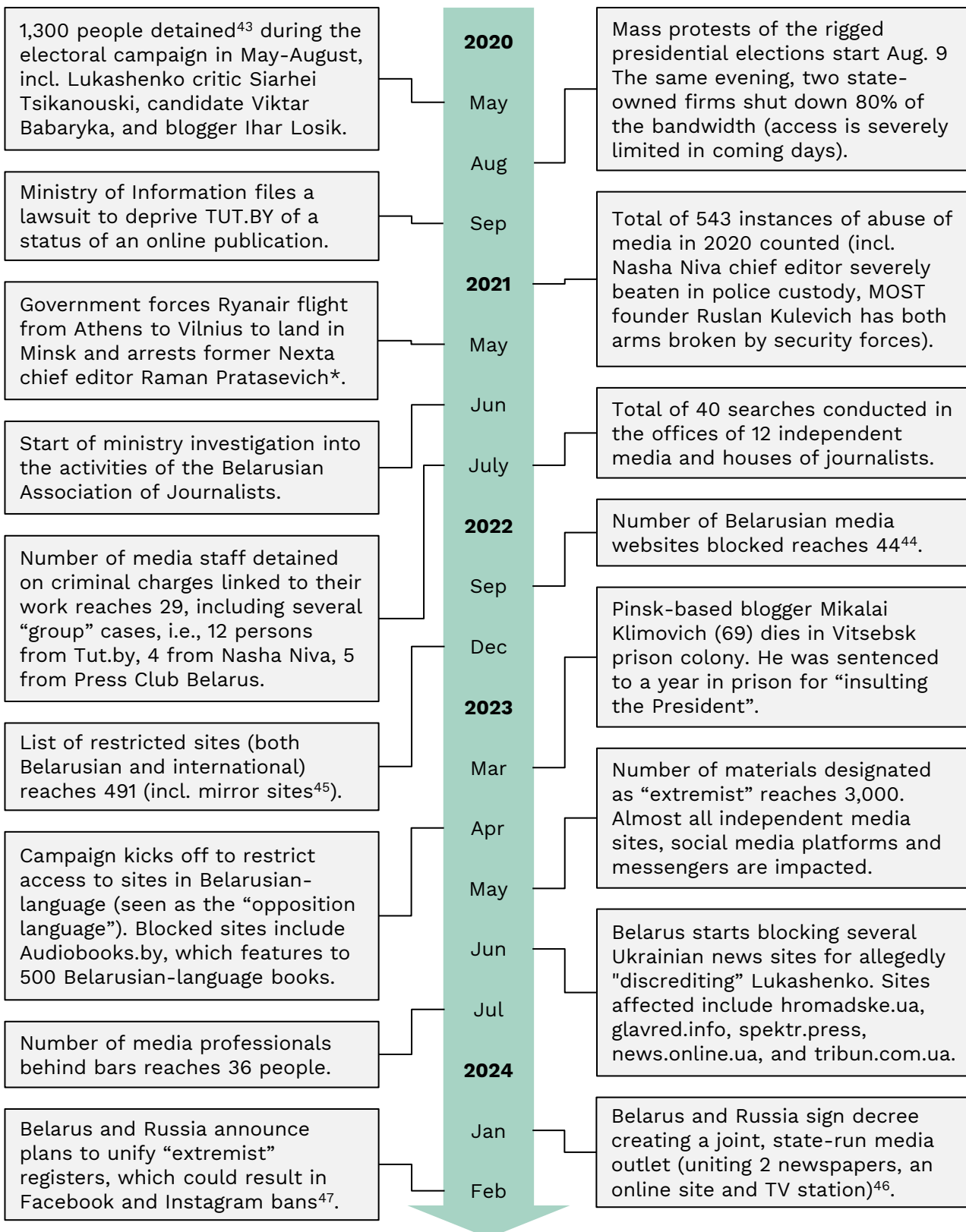
Source: Reporters without borders Press Freedom Index, 2023.

41 AP (Jan,15) <https://apnews.com/article/belarus-prisoner-death-lukashenko-crackdown-2f7909c1db4d709a801ed7af62645a8d>.

42 Belarusian media have developed and/ or collaborated with various custom-built apps and projects aimed at bypassing methods of censorship like the DNS blockades (e.g., “Samizdat Online”, a tool designed help media to stay in touch with the audience making it not less but “media resilient movement”).

## Media Pressure has Ramped Up Since 2020

Key events and milestones for Belarusian media since the 2020 revolution



\* In May 2023 Pratasevich was sentenced to eight years in prison but was later pardoned after agreeing to cooperate with the regime.

43 Human Rights Group “Viasna”.

44 Human Constanta (Oct. 28, 2022), <https://humanconstantia.org/en/review-of-the-fight-against-extremism-in-.....>

45 Freedom House (2023) [https://freedomhouse.org/country/belarus/freedom-net/2023#footnoteref7\\_3bzgg33](https://freedomhouse.org/country/belarus/freedom-net/2023#footnoteref7_3bzgg33).

46 Kyiv Independent (Jan. 30, 2024), <https://kyivindependent.com/russia-belarus-to-create-joint-state-media-outlet/>.

47 Belsat (Feb. 7, 2024) <https://belsat.eu/ru/news/07-02-2024-v-belarusi-mogut-zapretit-facebook-i-instagram-a-v-rossii-zakryt-granitsu>.

### 3b Legal Designations Used Against Media

Prior to 2020, “disobedient” media would typically see their access restricted. Since then, Lukashenko’s regime has developed many new ways to repress both independent media and their users (see exhibit 15).

Exhibit 15

#### Regulations Against Independent Media

Regulatory and administrative measures deployed against Belarusian media

Policy	Process of designation	Consequences
<p><b>Internet resource with restricted access</b></p>	<p>Designation can be triggered by: (1) Information Ministry or Attorney General finding that a media has disseminated “illegal” or “harmful” information (2) ignoring written warnings from Information Ministry (3) Court decision if the recipient of warnings can not be reached.</p>	<p>The impacted website becomes unavailable in Belarus.</p>
<p><b>Distribution of “extremist” materials</b></p>	<p>Conclusion by the Republican Commission for the evaluation of symbols, attributes and information products, which finds a presence of signs of “extremism” (Note: no independent experts are involved).</p>	<p>Administrative liability* for sharing such materials (reposting, liking, sharing in private messages).</p>
<p><b>Organizations or individuals involved in “extremist” activities or formations</b></p>	<p>Both incorporated organizations, and informal groups of people (e.g., Telegram chats) can be recognized as extremists by internal decision of the Interior Ministry or KGB. The text of decisions is not published, it is impossible to review or argue causes.</p>	<p>Criminal liability for staff and subscribers (up to 6 years of imprisonment).</p>
<p><b>Organizations involved in “terrorist” activities</b></p>	<p>Based on decision by the KGB head, his deputies, or a court decision that finds a media has called for sanctions, harm to national security, rioting, or hate speech. Pre-2020, the only source for being listed was the UN Security Council sanctions lists (it had no Belarusian nationals).</p>	<p>Up to 12 years of imprisonment for management; up to 15 years for financial or other support.</p>

\* ~€105-5,250 fine, up to 15 days of arrest and/or confiscation of the “crime tools”, e.g., “laptop”.

Source: Analysis on Belarusian HRD organization Human Constanta.

### 3c Media Persecution (2020-2023) in Numbers

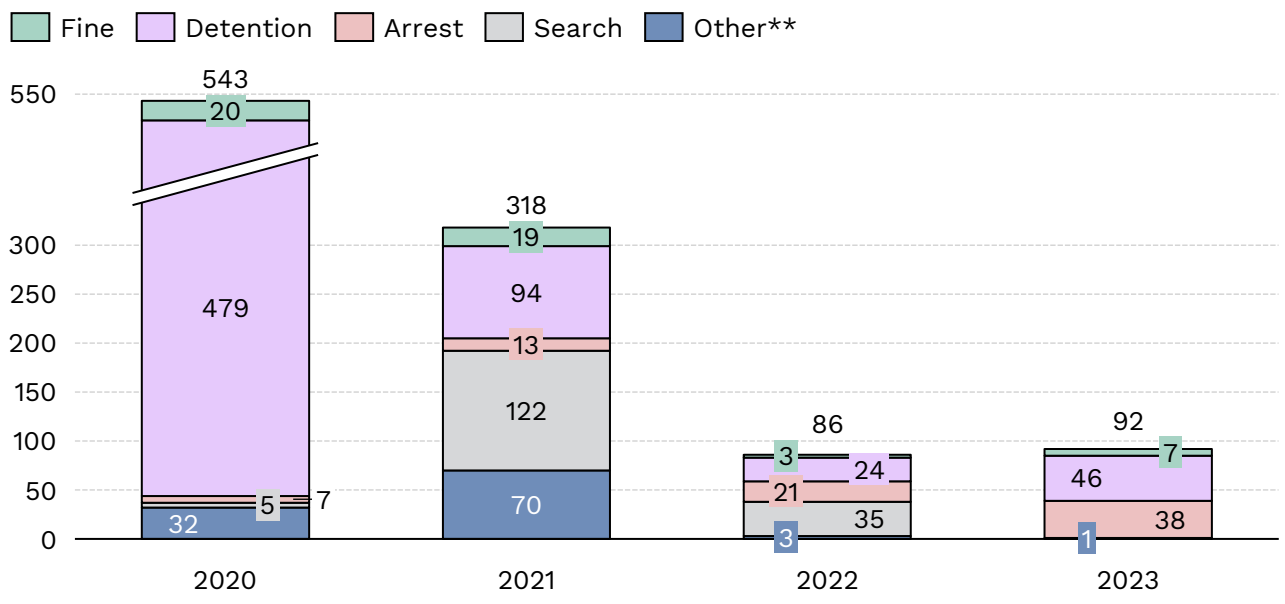
Authorities have failed to conduct thorough investigations into numerous complaints regarding mass, arbitrary detentions, use of excessive force, torture, and other mistreatment by law enforcement<sup>48</sup>.

Of note, the crackdown against media subsided in 2022-2023, not because of a change in policy, but rather because media workers had left the country or were already in prison. The persecution lasted the longest in Minsk, which had the largest media community, followed by Homel oblast.

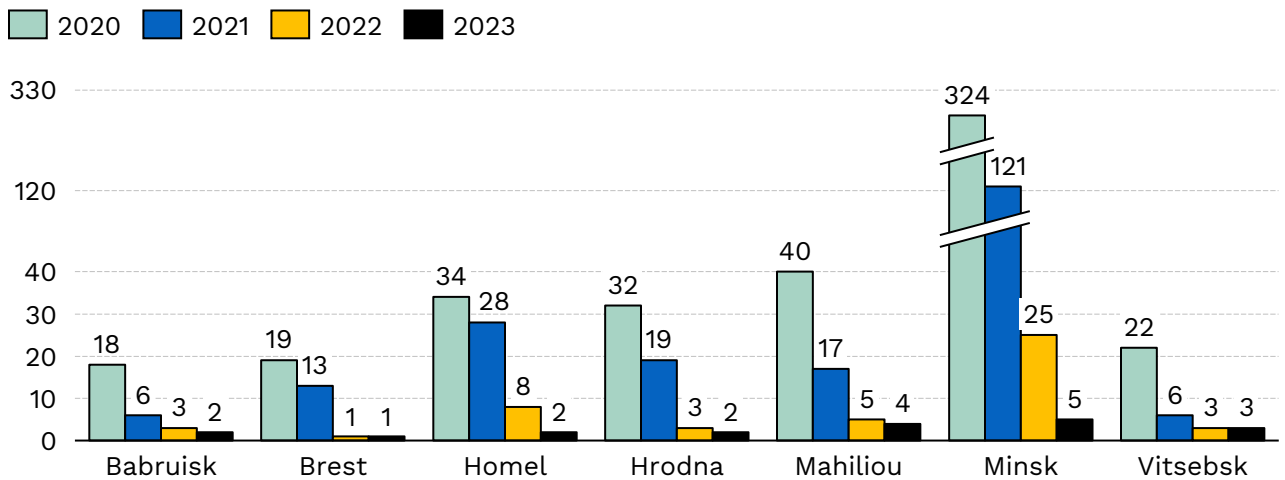
Exhibit 16

#### Tracking the Repressions

Type of repressions\* by year (2020-2023)



Number of repressions by year and region of Belarus (2020-2023)



\* Note: There are cases of "overlapping repressions", e.g., detention, then search and arrest (so these are necessarily unique incidents).  
 \*\* Other indicates attacks, reports, injured cases, warnings, confiscations, criminal cases and/ or inspection.

Source: BAJ Media Data.

48 Human Rights Watch (Jan 12, 2023) <https://www.hrw.org/news/2023/01/12/belarus-zone-repression>.

It is worth mentioning that not only journalists of independent media have suffered from reprisals for honest coverage. For example, “KP In Belarus” a Belarusian subsidiary of the Russian “Komsomolskaya Pravda” newspaper (controlled by Sergei Rudnov, under sanctions and a Putin associate<sup>49</sup>), was banned from printing in August 2020 for covering the protests objectively.

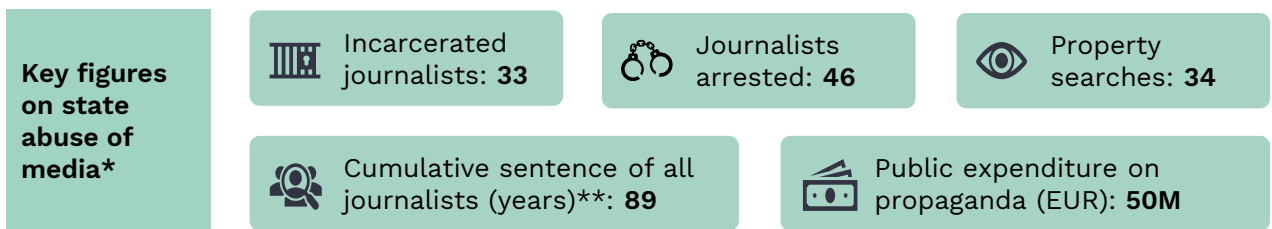
A year later, after access to the website was restricted and one of their journalists was arrested for covering the death of a KGB agent in Minsk in September 2021, leadership decided to close the KP Belarusian office<sup>50</sup>.

Belarusian independent media who decided to stay face pressure to become “normalized”, which typically entails ceasing critical coverage in the country and demonstrating loyalty (e.g., some media create blacklists and begin airing detainee penance videos<sup>51</sup>). A recent solution for those who refuse to adapt is a forceful acquisition by propaganda outlet “Minskaya Praŭda” – at least three such cases have been identified, leading to sudden changes in editorial style and new legal ownership<sup>52</sup>.

Exhibit 17

### Oppressive Administration

Regulatory and administrative measures deployed against Belarusian media



\*This figures includes former pro-regime journalists and freelancers, not just independent media.

\*\* Note: Data covering 2023.

Source: JX Fund Dashboard; BAJ Media Data; Data as of February 2024.

49 NAZK (Mar. 12, 2024), <https://sanctions.nazk.gov.ua/en/sanction-person/17402/>.

50 Forbes (Oct. 5, 2021) <https://www.forbes.ru/society/442087-komsomol-skaa-pravda-zakryla-predstavitel-stvo-v-belorussii>

51 BAJ (Feb. 16, 2024), <https://baj.media/ru/normalizaciya-kak-uslovie-vyzhivaniya-chto-seychas-osveshchayut-pereformatirovannye/>.

52 Nasha Niva (Dec. 2, 2023), <https://nashaniva.com/ru/331143/>.



## 4a Situation of Belarusian Media in Exile in Key Countries

The main exodus of Belarusian outlets happened between August 2020 and the summer of 2021, when the arrests of journalists of major media escalated. Most media found a new home in Poland and Lithuania (see exhibit 18).

Exhibit 18

### Shelter in the Storm

Visa, residency and other considerations in key Belarusian media émigré hubs

#### Poland (primary hub – Warsaw)

- The western part of Belarus shares long-lasting historical ties to Poland. As a result, around 2% of Belarusians hold “Karta Polaka” identification<sup>53</sup>, which allows them to get national Polish visas, study in Polish universities, and benefit from various discounts and other advantages. The dissatisfaction of the Belarusian government with this document is seen by the level of repression towards its holders<sup>54</sup>.
- Poland has hosted the Belarusian democratic opposition for decades, including such institutions as the “Belarusian House in Warsaw” (which supports civil society), the National Anti-Crisis Management (a de facto Council of Ministers), the Coordinating Council (a de facto Parliament). Belarusians have emigrated to Warsaw in waves (for example, after the presidential elections in 2010, many activists and politicians moved<sup>55</sup>).
- At least 300,000 Belarusians lived in Poland as of 2023. Further, Poland has granted some 70% of all EU protection documents (e.g., visas, asylum) to Belarusians since 2021 with an approval rate of about 99%<sup>56</sup>.
- Poland-based Belarusian media include Nexta, Euroradio, Charter 97, Belsat, Reform.by and Real Belarus.

#### Lithuania (primary hub – Vilnius)

- Vilnius is a historical hub for Belarusian intellectuals, many studied or worked there. Before 2020, a direct train connected both capitals several times a day, making Vilnius a shopping and leisure destination.
- Lithuania provided broad support to Belarusians after protest started in 2020 and was one of the first countries to help political refugees<sup>57,58</sup>.
- Today, Belarusians represent the most significant foreign group of Vilnius residents, accounting for more than a third of all migrants living in the capital (23,000 out of 70,000). The total amount of Belarusians in Lithuania is approximately 55,000<sup>59</sup>.
- Since Russia’s full-scale invasion of Ukraine, attitudes toward Belarusians changed dramatically. Officials increasingly call to impose sanctions on Belarusians residing in Lithuania<sup>60</sup>. Previously granted humanitarian permits are being revoked. Many Belarusian firms that moved to Lithuania just a few years ago have either left or are planning to do so<sup>61</sup>.
- At present Nasha Niva, Malanka, and several Infopoint projects are still located in Lithuania.

Source: JX Fund Dashboard Research.

53 OBM (June, 2022), <https://www.migracje.uw.edu.pl/wp-content/uploads/2022/05/CMR-WP-Gonda-Lesinska-2022-1.pdf>.

54 Tatsiana Harhalyk (DW), (Feb. 13, 2024) (<https://www.dw.com/ru/belorusy-o-karte-polaka-ne-sobiraus-otkaznyatsa-ot-svoih-kornej/a-68249017>).

55 Charter97 (Apr. 2, 2013), <https://charter97.org/be/news/2013/4/2/67412/>.

56 Belsat (Aug. 24, 2023) <https://belsat.eu/ru/news/24-08-2023-belarusov-v-polshe-uzhe-ne-menee-300-tysyach-migratsiya-uskorilas>.

57 Radio Svaboda (Mar. 5, 2021), <https://www.svoboda.org/a/31135147.html>.

58 Euroradio (Nov. 4, 2020), <https://euroradio.fm/ru/na-novom-meste-kak-zhivut-belorusy-priehavshie-v-litvu-pogumanitarnomu-koridoru>.

59 Delfi (Apr. 26, 2023), <https://www.delfi.lt/ru/news/live/ckolko-belorusov-prozhivaet-v-vilnyuse-i-skolko-skazali-chto-krym-rossiyskiy-93185907>.

60 Delfi (Aug. 7, 2023), <https://www.delfi.lt/en/politics/president-hopes-that-parliament-will-impose-tougher-restrictions-on-belarusian-citizens-94138859>.

61 LRT (Aug. 17, 2023) <https://www.lrt.lt/en/news-in-english/19/2057259/belarusian-it-firms-mull-leaving-lithuania-amid-growing-hostility>.

Both countries provided Belarusian media with state support, but the situation in Lithuania is currently deteriorating. Media who relocated there may need to move once more, creating hardships on an organizational and individual level.

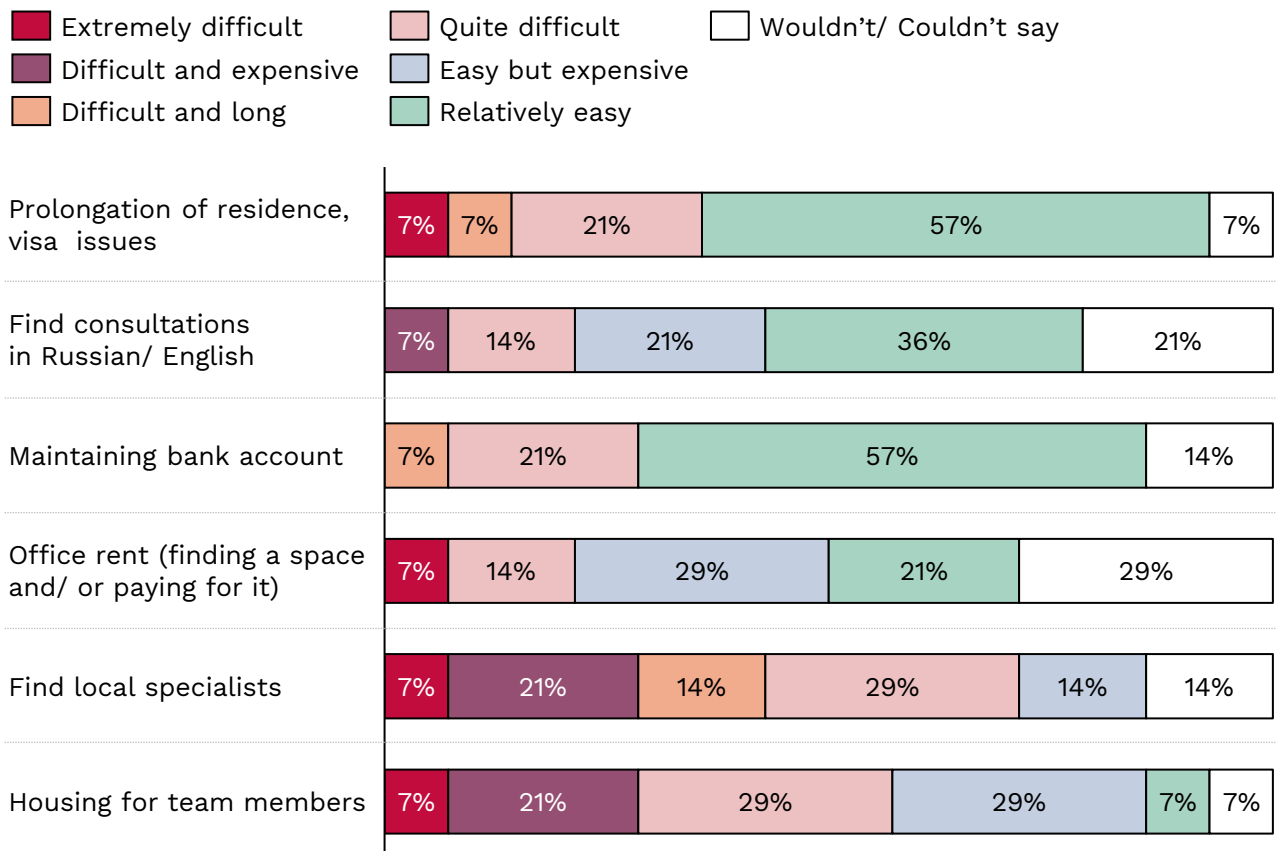
Relocation has created a number of challenges for Belarusian media, including a significant increase in operating costs. While visa and residency permits were "relatively easy" for 57% of all media surveyed, finding local specialists (e.g., different specialists, from accountants to video editors) was a challenge for 86% of media (albeit for different reasons).

Importantly, over a third said this was expensive – a common issue for exiled media who eventually can no longer count on fellow exiles to take on specialized roles and need to rely on the receiving country’s labour market. Housing was also a challenge – 50% found this item to be expensive and 86% found it challenging for different reasons.

Exhibit 19

**Exile Turbulations**

Relocation challenges of Belarusian media in exile (survey, N=14)



Source: Media survey.

## 4b Media Management Challenges

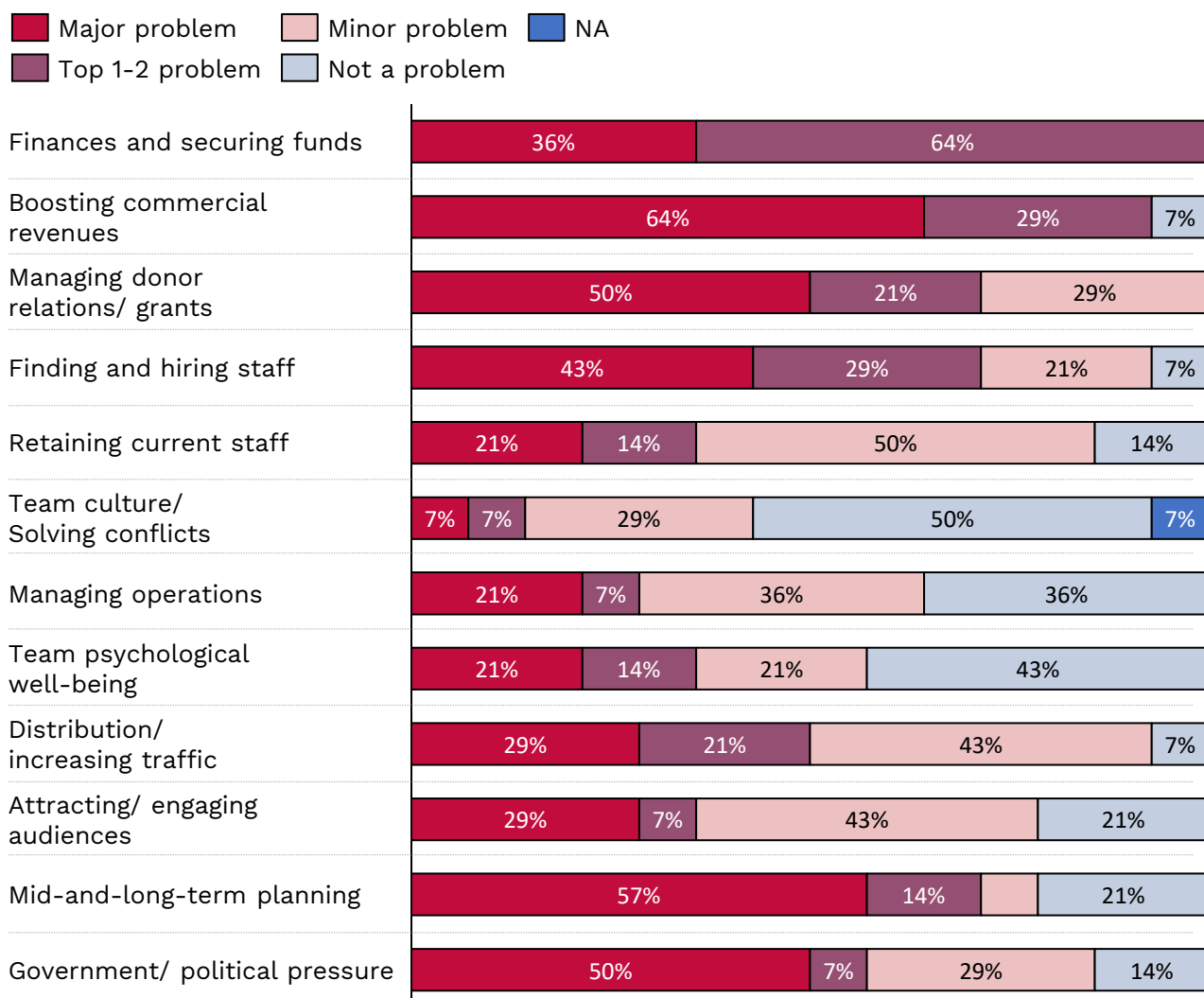
Running a media organization is already challenging under the best of circumstances, but exiled media face an especially difficult uphill battle. An overview of these (see exhibit 20) unsurprisingly shows that finances – both in terms of securing resources to sustain ongoing operations (overwhelmingly grants) and in terms of generating commercial revenue – are the biggest headaches for media managers.

What may be more surprising is just how difficult it is to plan when the bulk of team is still “sitting on suitcases”, unclear about the future will bring. Mid-term and long-term strategic planning was identified as a major problem by 57% of surveyed media. Many media (and individuals) struggle to adopt psychologically to the new reality and hence are unable to plan ways to deal with it.

Exhibit 20

### The Unenviable Reality of Managing an Exiled Media

Media management challenges of Belarusian media in exile (survey, N=14)



Source: Media survey.

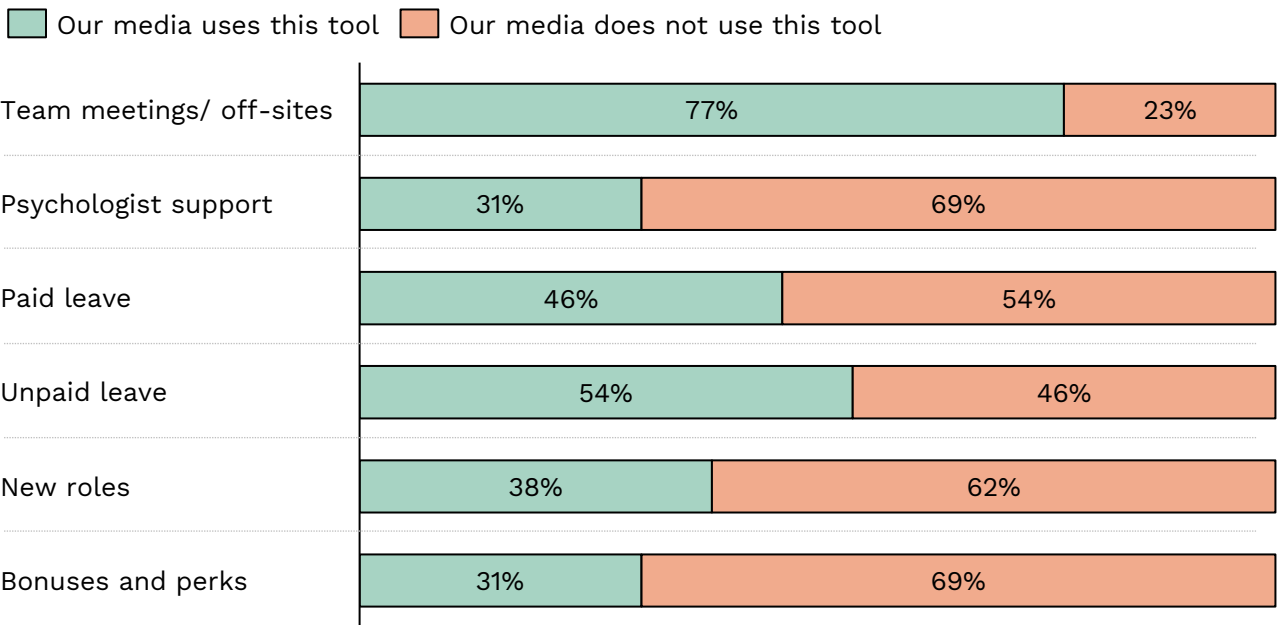
Mental health, burnout and overall team well-being are also challenging issues for media in exile. According to survey responses, 69% of all surveyed media outlets do not offer psychological consultations for their teams, nor do they provide paid leaves or adjustments for new roles in certain circumstances (see exhibit 21).

Close to half of surveyed media did not use any solutions to manage team well-being other than off-sites or team gatherings. Further, just under half or 46% of all surveyed media ensure paid leaves for their team members, while 31% can provide bonuses and perks.

Exhibit 21

### Managing Personnel Problems

Solutions used by Belarusian independent media in exile (survey, N=13)



Source: Media survey.

## 4c Finding and Retaining People

Team management for independent media in exile is exceedingly difficult. While securing competitive compensation packages is the most obvious issue, with 92% of media surveyed saying it was a very serious or serious problem (see exhibit 22), the issue actually goes significantly deeper.

The transient nature of exiled media means they typically lack a clear vision for the future. Taken together with limited financial incentives, a stressful job and colleagues who are often dealing with trauma, this hardly makes for an appealing place to work. Hence, unsurprisingly, this makes finding and retaining people are the next biggest issues – two thirds of media said this was a very serious or serious problem.

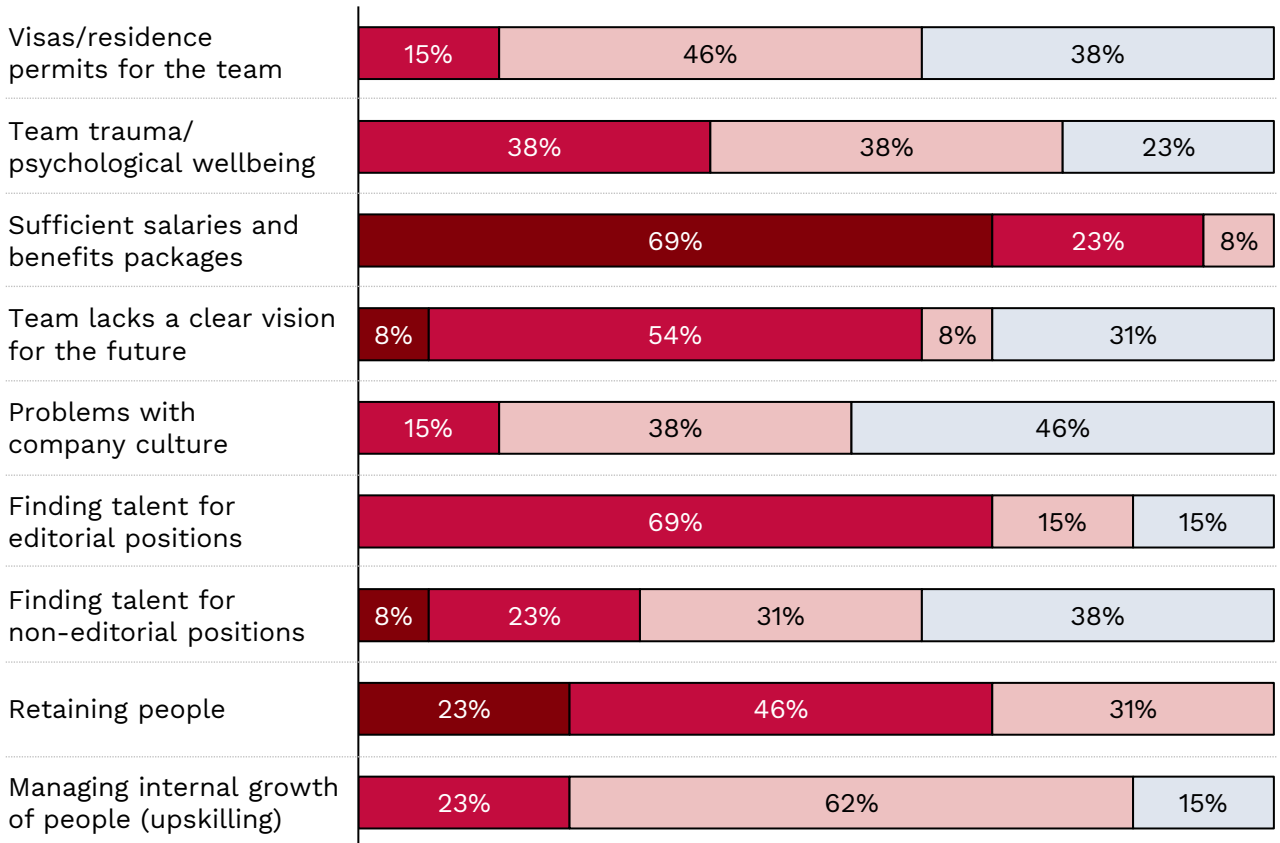
All this puts a heavy burden on managers of exiled media, most of whom carry out the work for ideological and values-based reasons but lack the formal training in managing teams in high-stress environments.

Exhibit 22

### Navigating HR Challenges

HR and personnel problems of Belarusian media in exile (survey, N=13)\*

- Very serious problem
- Quite serious problem
- Occasional issue
- Not a serious issue



\* Note: Focus on employees in the receiving country, not the country of origin.

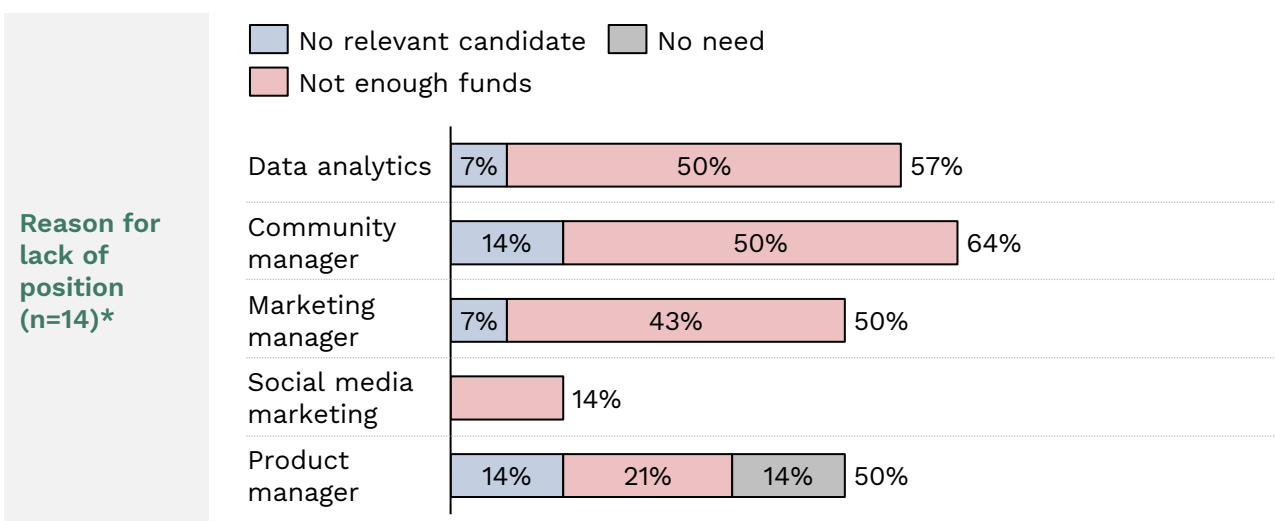
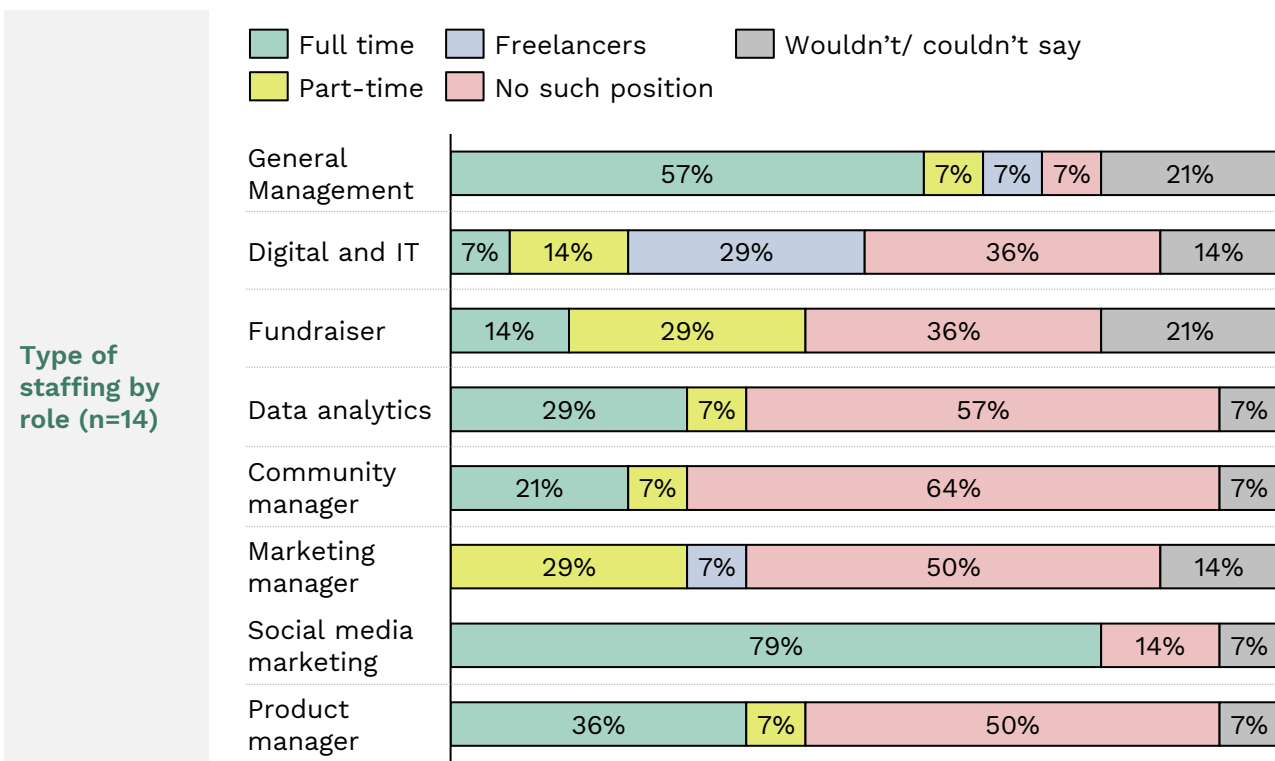
Source: Media Survey.

Exhibit 23

### Teams Composition

# of team members working by employment type and roles (N=12)

	Distribution of employees (total)	Average per media	% of total	
<b>Employment type (n=11)</b>	Full time	152	12.7	53%
	Part-time	33	3.0	11%
	Freelancers	102	8.5	36%
	Total	287	24.2	100%



Source: Media Survey.



## 4d Changing Consumer Preferences

Since 2020 both Belarusian independent media and audiences have experienced a volatile environment in terms of content distribution. Changes to censorship practices and consumer preferences led to deep shifts – for example, while Telegram initially boomed in the early days of the Revolution (see exhibit 3, page 6), subsequent scrutiny by security forces has scared many users.

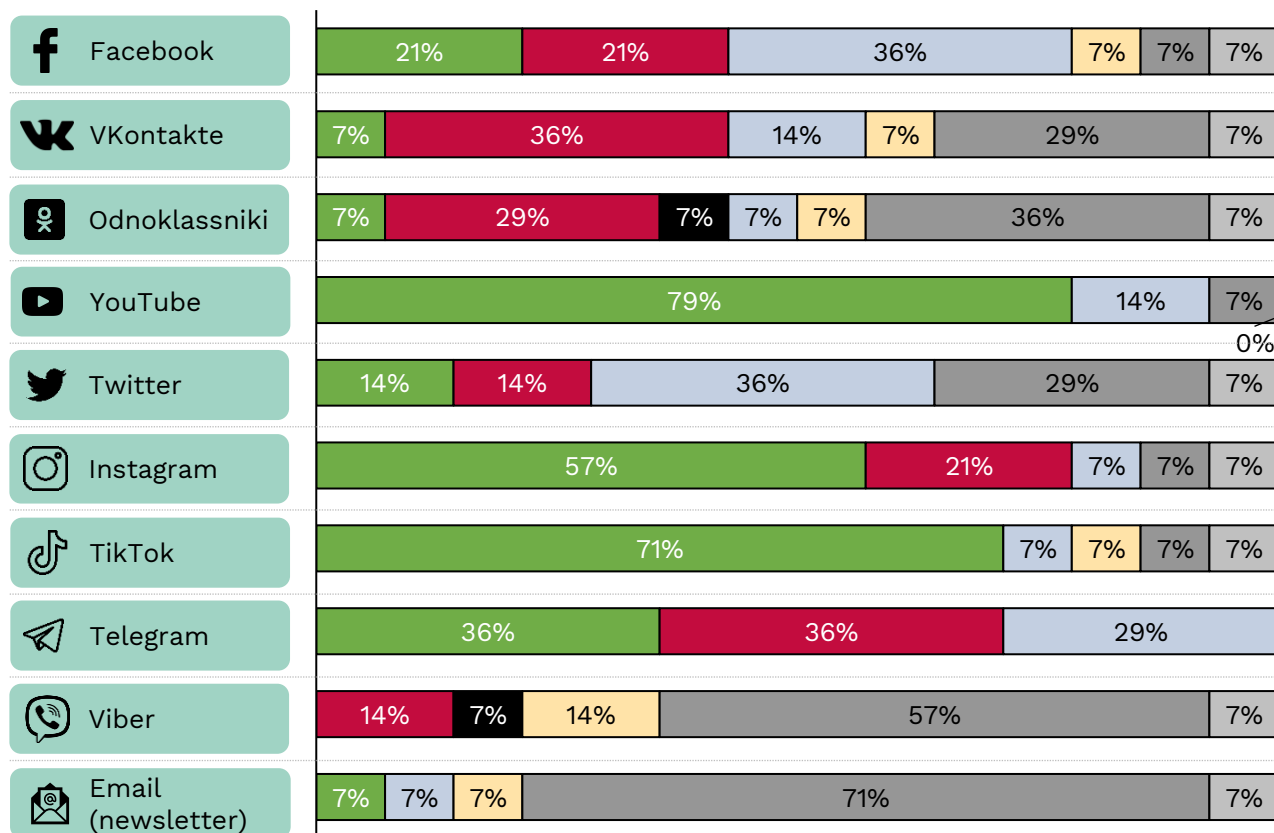
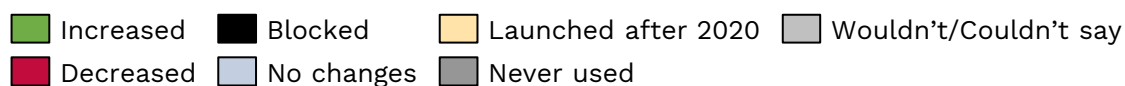
The biggest growth has been experienced by video and image focused channels: YouTube, TikTok and Instagram (see exhibit 24). Driven by algorithmic content suggestions (particularly TikTok’s highly personalized “For You Page”), these do not require people to be subscribers to easily consume content. However, they tend to be more expensive to produce.

These changes will likely continue, putting a burden on media in terms of additional costs and demand for specialized know-how.

Exhibit 24

### Volatility Among Channels of Distribution

Changes to traffic to different channels since 2020 (% of media; N=13)



Note: Additional questions were asked about Signal, WhatsApp, and LinkedIn, but surveyed media said they were not widely used or not meaningful

Source: Media Survey.

## 4e Prospects on Funding and Sustainability

Finances are arguably the single biggest challenge for Belarusian media in exile, ahead of even finding and retaining staff. Few outlets had experience with commercial revenues pre-2020 and the situation has only deteriorated since.

Among the challenges is the inability to work with Belarusian advertisers, a loss of access to Russian platforms (e.g., before 2022, many used Yandex advertising platforms) and a relatively small population abroad that is able to send regular donations.

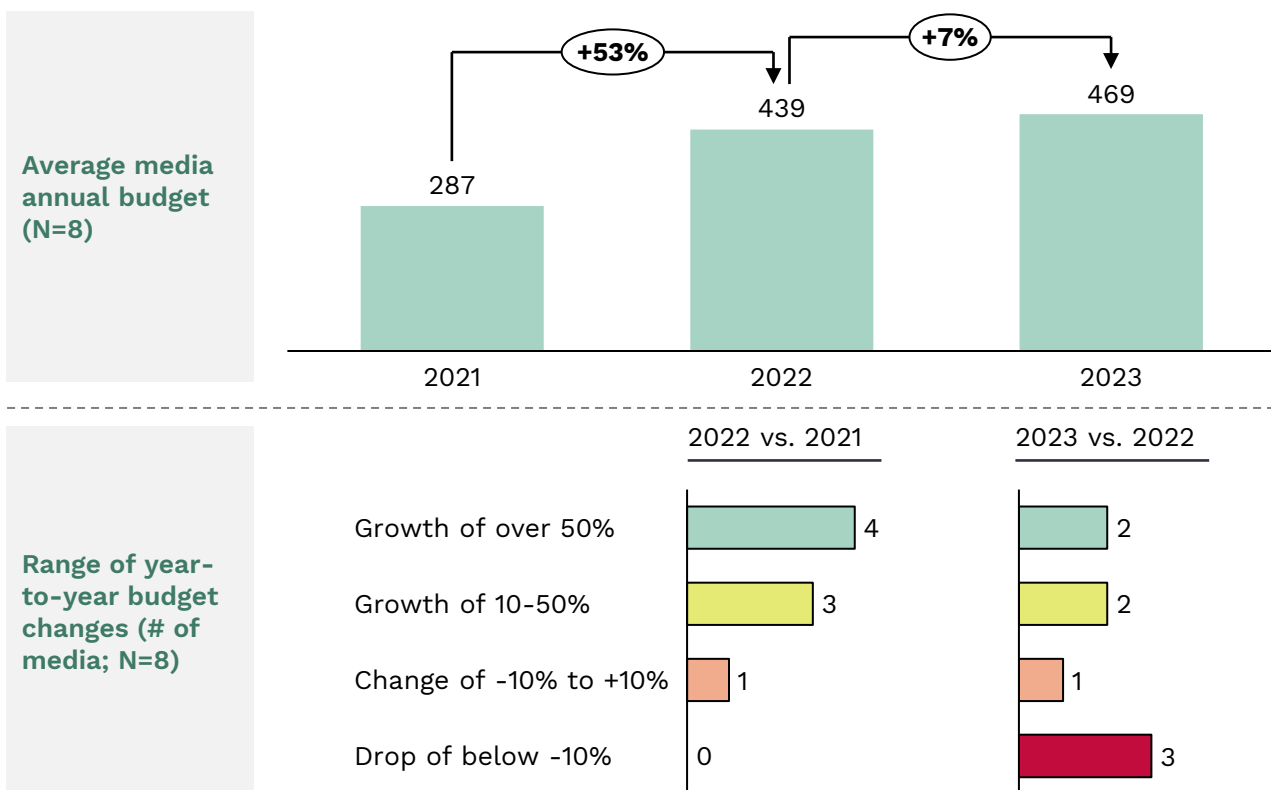
As a result, the sector is intensely donor dependent, which means budgets can swing widely from year to year. An overview of 8 media budgets submitted shows that while the sector in general grew in 2022, last year it experienced a bifurcation – some media continued to substantially expand their budgets while other saw painful contractions.

Belsat, a dominant presence in the Belarusian exiled media space<sup>62</sup> due to the size of its budget (see exhibit 26), is also illustrative of this trend. After seeing steady growth for a decade, its budget spiked after the 2020 revolution and crashed in 2024, amid an overhaul of funding for the Polish public broadcaster<sup>63</sup>.

Exhibit 25

### Rising Costs: How Budgets are Evolving

Budget changes during 2021-2023 (Euros ‘000, N=8)

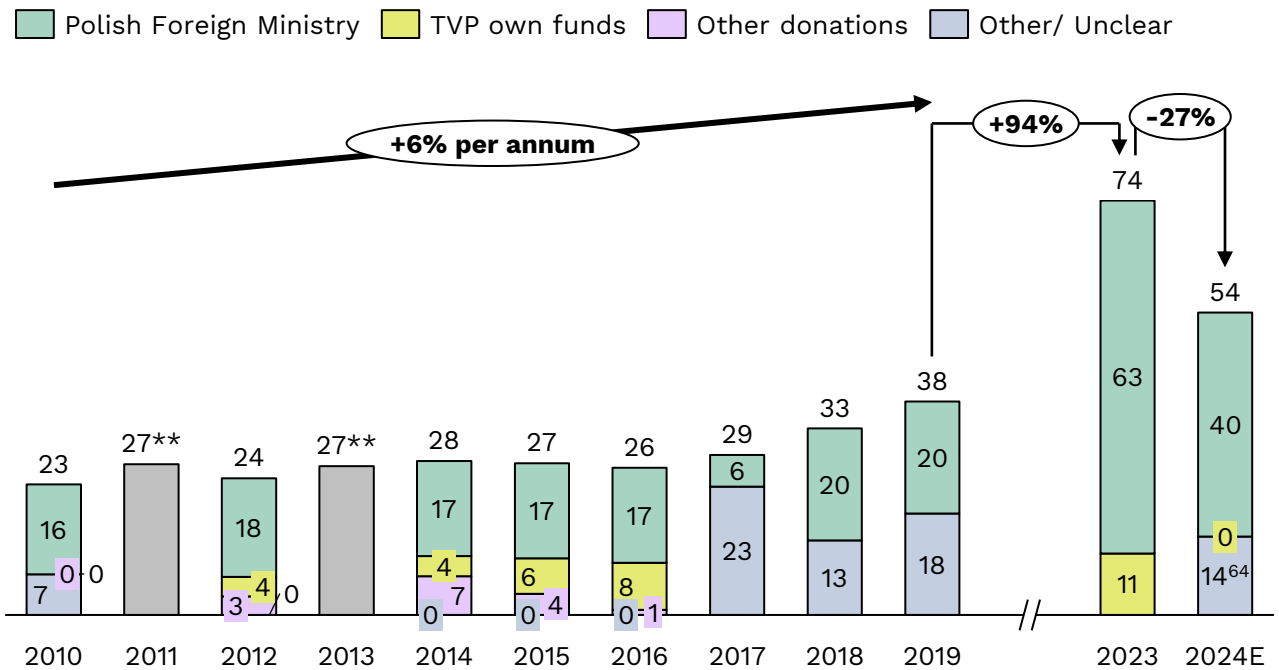


Source: Media Survey.

62 Belsat's dependence on Polish state funds make it closer to a state media, like Radio Free Europe, rather than an exiled media (see page 34 for further details). However, it has been included due to the unique role it plays in the exiled Belarusian media ecosystem and its founding, operations, and grant fundraising which are reminiscent of pure-played exiled outlets.  
 63 Wirtualne Media (Feb. 7, 2024), <https://www.wirtualnemedial.pl/arttykul/bielsat-belsat-bialorus-juliusz-braun-bogdan-zdrojewski-list-telewizja-polska-likwidacja-problemy-koniec>.

### Belsat Budget: An Unsustainable Spike

Evolution of Belsat’s budget since 2010\* (millions of PLN)



\* Data is inconsistent and not publicly accessible for all years, especially 2020-2022.  
 \*\* No breakdown available and/ or flaws in data provided.

Source: TVP (Polish Public Broadcaster) financial reporting (accessed via Demagog fact-checking organization: <https://demagog.org.pl/wypowiedzi/ile-pieniedzy-rocznie-polski-rzad-przeznacza-na-tv-bielsat/>).

Belsat plays a role beyond simply being the biggest media organization – many of the smaller media included in this report are staffed with people who first learned how to work as journalists or media managers there. Furthermore, Belsat also de facto created an independent Belarusian media market, by buying video productions (i.e., documentaries and investigations) from smaller organizations. Declining funds from the Polish state reduces the overall available resources in the Belarusian exiled media ecosystem – further putting pressure on remaining donors.

It is worth noting that despite having operated in exile for a longer period of time than Russian peers, Belarusian independent media in exile are more dependent on donations. While Russian media on average managed to secure over 20% of their budgets from non-grant sources<sup>65</sup> already in 2022, Belarusian media were still below 15% in 2023 (see exhibit 27).

It is further worth noting that this figure is influenced by two outliers with relatively high-performing advertising operations and other commercial activities. A total 6 out of 9 media surveyed were over 90% reliant on grants, of which 4 were 95% or more dependent on philanthropic financing. At such levels, media are unable to form any safety margin in case of delays or reductions in donor funding – making them incredibly vulnerable.

64 Although own funds from TVP were fully cut for Belsat, the Polish Ministry of Foreign Affairs later announced an additional 14 million PLN from the budget of TVP World would be transferred to Belsat. Press PL (Mar 11, 2024), [https://www.press.pl/tresc/80863,szefowa-tv-bielsat\\_-msz-obcial-nam-budzet-prawie-o-polowe\\_-\\_takiej-dziury-nie-uda-sie-zalatac---](https://www.press.pl/tresc/80863,szefowa-tv-bielsat_-msz-obcial-nam-budzet-prawie-o-polowe_-_takiej-dziury-nie-uda-sie-zalatac---)

65 JX Fund (Nov., 2023), [https://jx-fund.org/wp-content/uploads/2023/12/Sustaining\\_Independence-Current\\_State\\_of\\_Russian\\_Media\\_in\\_Exile\\_2023.pdf?x81041](https://jx-fund.org/wp-content/uploads/2023/12/Sustaining_Independence-Current_State_of_Russian_Media_in_Exile_2023.pdf?x81041)

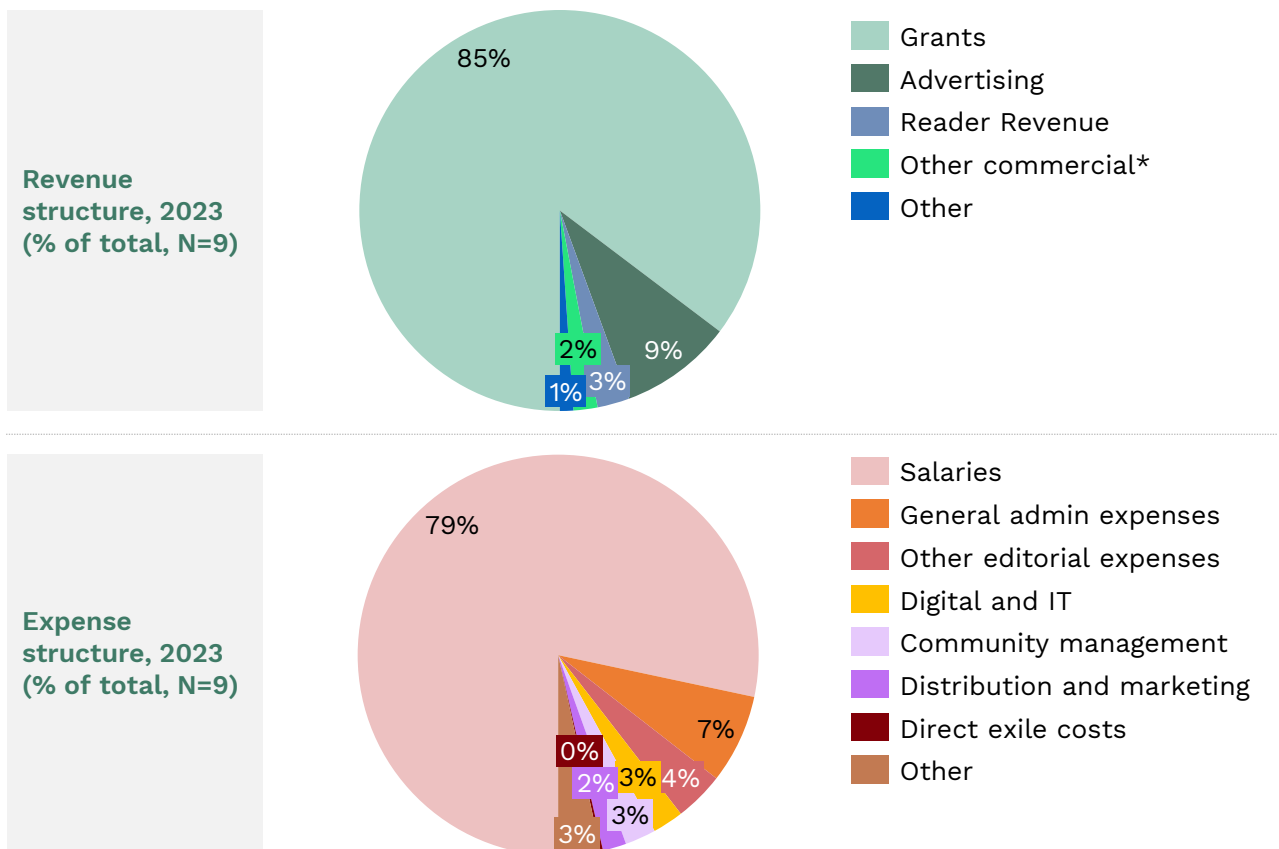
One of the main differences between Russian and Belarusian media in exile were the contributions from readers – the former managed to cover 11% of their budgets from their community, while the latter were below 3%.

The Russian diaspora globally is a lot wealthier and more numerous than the Belarusian one, which makes developing reader revenue a lot more challenging. Moreover, it is likely that some of donations received by Russian outlets in 2022 were the result of shock due to events during that year – reader support is often emotionally driven. However, it is also worth noting that Belarusian media have an advantage – those based in Poland and registered as non-profits can use fairly unique legislation that allows taxpayers to donate 1.5% of their taxes to a charity of their choice (otherwise the state decides for them). This is something that has been effectively used by Polish media<sup>66</sup> to raise funds and with over 300,000 Belarusians living in the country, could offer a sustainable and renewable source of funding. A similar legislation works in Lithuania and allows to donate 1.2% of taxes to non-profits.<sup>67</sup>

Exhibit 27

### Donor Dependency: Budget Breakdown

2023 budget structure of Belarusian independent media in exile (% of total, N=9)



\* Sale of content (syndication)

Source: Media Survey.

66 Polish taxpayers can donate 1.5% of their income tax, creating an opportunity for media. Investigative outlet Oko.press, for example, regularly secures a quarter or more of its expenses in this way (<https://oko.press/15procent>)  
 67 Republic of Lithuania Law on charity and sponsorship (4 June 1993 No I-172) <https://e-seimasx.lrs.lt/portal/legalAct/lt/TAD/94a65423d1f311ed9b3c9397e1236c2a?jfwid=if708nypu>

## 5 Charting the Path Ahead

Belarus was the fourth biggest recipients of OECD international media aid in 2010-2019<sup>68</sup> (more recent data, especially post-2020, is difficult to obtain, notably due to security reasons). But it was the highest per capita among the top recipient countries.

Given the increased pressure on donors globally (driven by global instability, not least the war in neighboring Ukraine) and the growth of exile media globally (including a much larger Russian exile community), it will be challenging for the Belarusian media community in exile to maintain a high level of donor funding.

Efforts to increase monetization and reader support in Poland and Lithuania (both of which have functioning commercial media markets) can cover a small portion of media costs. Poland has seen a rise in commercially focused media ventures targeting Ukrainian and Russian-speakers<sup>69</sup>, highlighting advertiser interest in these groups. Further, reader support can be channeled via previously mentioned tax donations.

Exhibit 28

### Top Global Media Aid Recipients

Biggest recipients of OECD member media aid

Media assistance (2010-2019, millions of USD)	Annualized cost (millions of USD)	Total aid per capita*, USD	
Sri Lanka	142.1	14.2	6.78
Ukraine	110.6	11.1	2.45
Africa (regional)	107.7	10.8	na
Belarus	91.2	9.1	9.64
Europe (regional)	86.4	8.6	na
Pakistan	80.3	8.0	0.38
Indonesia	77.5	7.7	0.30
Middle East (regional)	76.7	7.7	na
Myanmar	75.2	7.5	1.46
Afghanistan	74.7	7.5	2.21

\* Total support divided by the mid-period (2015) population of the country in question.

Source: Data provided to the OECD by Development Assistance Committee members; Statistical analysis by Coral Milburn-Curtis. See full report at <https://www.cima.ned.org/publication/are-donors-taking-the-journalism-crisis-seriously/>; World Bank (population data).

68 CIMA (Feb. 7, 2024), <https://www.cima.ned.org/publication/are-donors-taking-the-journalism-crisis-seriously/>

69 Immigration from Ukraine, Belarus and other post-Soviet countries has led to the launch of various commercial media (e.g., [www.ukrayina.pl](http://www.ukrayina.pl), [www.nashapolscha.pl](http://www.nashapolscha.pl)). New arrivals are promising consumers, providing an incentive for advertisers

Such efforts, however, are far from being sufficient on their own and Belarusian media will likely face one of two options: expand the pool of donors beyond the media ecosystem or consolidate the media space to subsist on a lower level of annual donations.

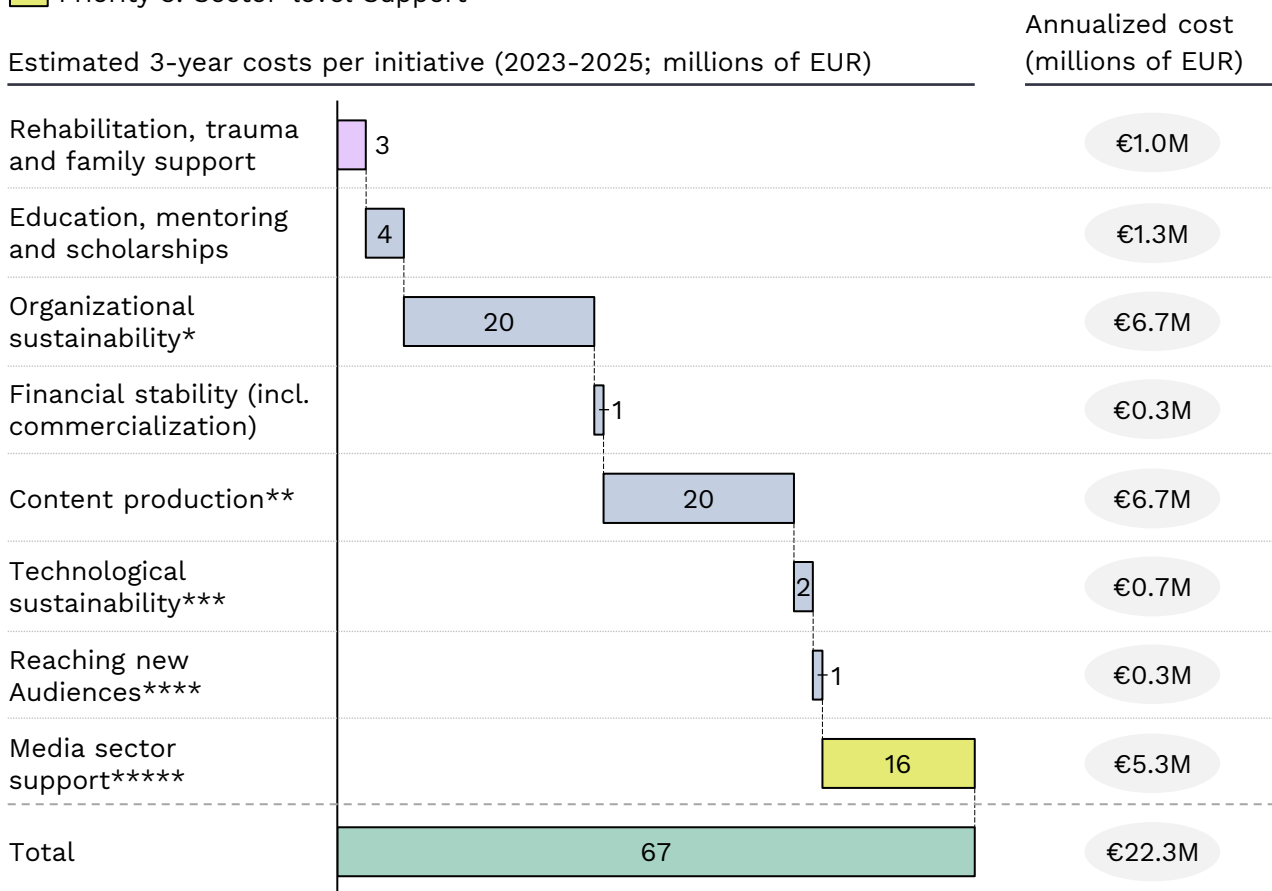
The strategic plan for 2023-2025 for the Belarusian independent media sector in exile (see exhibit 29), developed by the Belarusian Association of Journalists, foresees annual support of about 22.3 million euros per year – which is more than 2.6 times higher than the annual support identified by CIMA researchers in 2010-2019.

Exhibit 29

### Estimating the Overall Sector Needs

Summary of needs assessment and strategic plans for Belarusian media (2023-2025)

- Priority 1: Individual Support and Recovery
- Priority 2: Institutional Support and Capacity
- Priority 3: Sector-level Support



\* Includes support for media to develop medium- and long-term plans, core-funding for large outlets, and funding to improve tracking of local rules in receiving countries/ due diligence compliance.  
 \*\* Includes funds for content innovation (new formats), funding content that provides a vision for “future Belarus”, funding of investigative journalism and fact-checking, countering disinformation and improved compliance with standards.  
 \*\*\* Includes cybersecurity and updating key systems.  
 \*\*\*\* Creating content for underserved audiences, developing solutions to increase reach, lobbying Big Tech, funds to develop consultancy that can transfer media knowledge to other sectors and developing a national digital public broadcasting framework.  
 \*\*\*\*\* General sectoral support to improve lobbying, implement best practices, support media monitoring, support media hubs that can improve distribution, improve impact and influence measuring, improve audience analysis, coalition building and Big Tech lobbying.

Source: United Resistance Headquarters, Office of Sviatlana Tsikhanouskaya, Coordination Council of Belarus, DG-NEN, BAJ

Although the figures from the 2010s may have some omissions (they do not include private foundations), and have not been adjusted for inflation, they still provide a perspective on the scale of the challenge faced by donors and independent Belarusian media in exile.

Also worrying is the fact that half of the funding comes from a single donor – the Polish state (primarily the Ministry of Foreign Affairs). Even relatively minor changes to their donations (say, 5%), result in large media looking for emergency funding and subsequently smaller projects feeling a whiplash effect that can become an existential threat.

Exhibit 30

**Prospects for the Future**

	<u>Financial overview</u>	<u>Operational consequences</u>
<p><b>Managed consolidation and commercialization</b></p>	<ul style="list-style-type: none"> <li>• Alignment of top-3 to 4 donors, ideally on a multi-year perspective to secure funding for 20-30 key media projects (if needed, structure cuts across the sector).</li> <li>• Increase funds for commercialization (increase from ~1.5% in current strategic roadmap to at least 10%).</li> <li>• Emphasis on reader personal tax donations for media in Poland – goal is to cover at least 10% of annual budget within 2 years.</li> </ul>	<ul style="list-style-type: none"> <li>• Key media survive, freeing up smaller donors and private foundations to support smaller/ niche media projects.</li> <li>• Serious effort to develop commercial teams.</li> <li>• Media become dependent on serving the diaspora in Poland – the biggest Belarusian hub outside Belarus.</li> </ul>
<p><b>Unmanaged consolidation</b></p>	<ul style="list-style-type: none"> <li>• No alignment or significant consolidation – policy continues as currently.</li> <li>• No changes to practices or emphasis on commercialization.</li> </ul>	<ul style="list-style-type: none"> <li>• Major media face cash crunch which causes rush to save them; increased.</li> <li>• Media unable to raise money during crunch face deep cuts – some spiral into vicious cycle and close down.</li> <li>• Loss of journalism know-how and staff that cannot be easily replaced.</li> <li>• No benefits for audiences.</li> </ul>

## 6a Appendix I: Approach and methodology

Disclaimer: Experience has sadly shown that data about Belarusian media is quickly found and abused by the country's security services. Even relative to other authoritarian regimes, Belarus is a uniquely dangerous actor. As a result, the information presented in this report has had to strike a balance between openness and preserving the security of media workers.

The present report employs a mixed-methods research approach, integrating perspectives from various sources and frameworks to offer a comprehensive overview of the current state of Belarusian media in exile.

The primary data sources used were open-source historical data (with ongoing updates) on such topics as overall audience reach performance (including the dynamics of views and audience engagement across social media, website analytics, and messaging platforms), data provided by the media themselves (interviews; staffing and budgetary data), and working with researchers on data generation (e.g., labeling media activity).

In this report, we used the most common versions of names and toponyms transliterated from Belarusian (without using Latinka, a widely disliked guideline favored by the government) to improve searchability by English speakers unfamiliar with the subject. In some cases, we adhered to the officials' names the official level (e.g., Aleksandr Lukashenko, Dmitriy Krutoi).

Exhibit 31

### Approach to Data Gathering

#### Open-source gathering

- Open-source data gathering was a primary input for the dashboard, covering a broad range of topics: media distribution, description, status vis-à-vis legal designation, and various operational metrics;
- Sources include media websites, social media channels, SimilarWeb, SocialBlade, TGStat as well as industry research and publications.

#### Media data integration

- Selected media provided budget and staff structure data and agreed to interviews to develop a more detailed picture of the sector. Different types of media were selected to improve representativeness;
- Media selection aims to be as comprehensive as possible – including all potential independent media. However, it is worth noting that already dormant media are difficult to identify retroactively, creating survivorship bias in the sample.

#### Data generation

- Researchers assessed individual media and added labels based on their primary thematic areas of coverage and formats used. There was a limit of three primary labels (used for comparison of media) to ensure the most relevant features of an outlet were assessed.

#### Composite metrics

- The totality of available data within the dashboard was used to develop composite indices and benchmarks that were and can be used to compare media performance, help define trends as well as look for outliers that could be the result of data issues and submit them for verification and validation by researchers.



The definition of exiled independent media is a subject of discussion. This is a relatively recent phenomenon – historically it was difficult to find technical solutions that would allow non-state groups to broadcast into a territory that was not accessible to them, and thus reach audiences in the country of origin (unlike, say, for journalists who serve émigré groups in “diaspora” publications).

Adding to the complexity is the fact that the concept of media itself has been challenged in recent years, notably by the rise of content creators or satirical shows that deliver news-related content in a way that counteracts growing news fatigue. Furthermore, exiled media can remain unregistered or have a fluid concept for years after relocation.

To reflect the issues above, this study takes an open approach to defining exiled independent media – while entities should exhibit many of the features of such organizations (see exhibit 32), media that partially fall into these buckets are still considered.

Exhibit 32

### Defining Exiled Independent Media

Logical structure and illustrative questions used to define exiled independent media

		Example questions
<b>Exiled</b>	<b>Ties to country of origin</b>	Did a related organization exist in the country of origin? Is a portion of leadership from the country of origin?
	<b>Target audience</b>	Does the target audience reside in country of origin? Is the coverage relevant to the country of origin?
	<b>Status/repressions</b>	Was this media targeted by administrative or other repressive measures in the country of origin?
	<b>State policy</b>	Does the country of origin limit media freedom? Are administrative measures* used against media?
<b>Independent</b>	<b>Editorial standards</b>	Does this media adhere to the Munich declaration? Does the organization adhere to editorial principles?
	<b>Funding</b>	Is this media funded from mainly non-state funds? Is the media financially independent of PEPs?
	<b>Rejection of extremism</b>	Has this media called for extremism/ abuse of people from a given group (e.g., on religious grounds)?**
<b>Media</b>	<b>Journalistic approach</b>	Does it cover socially and politically important topics? Is it primarily an activist organization?***
	<b>Organizational structure</b>	Is this a single individual or a team? Does it have a mission/ identity larger than 1 individual?

\* E.g., “extremist” or “terrorist designation.

\*\* A negative answer is called for to define the entity as an exiled independent media.

## 6b Appendix II: Exiled Media Dashboard – Concept Overview

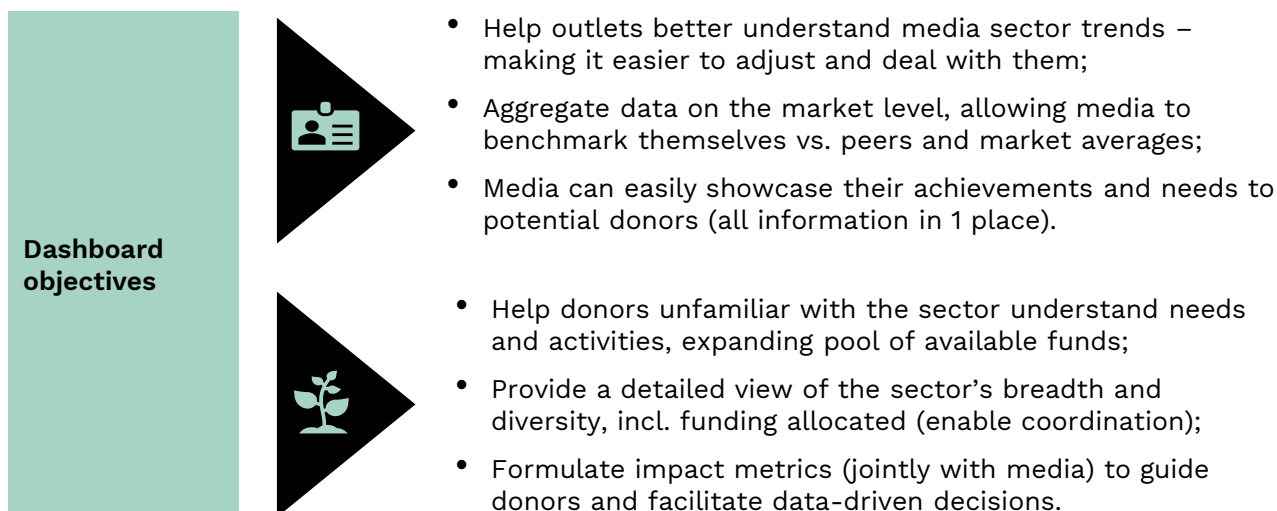
Media in exile play a key role in informing the world about what is happening in some of the world’s most oppressive regimes. They counter propaganda and disinformation and sustain a sense of community within authoritarian regimes and those that have fled to freedom.

To support their continued existence and operations, JX Fund together with The Fix Research & Advisory created a database of information that is needed to understand the situation and needs of media. The dashboard is targeted to verified media professionals, donors and policy-makers.

The project is currently in development, with limited access. As a priority, we are looking for partners ready to enter data-sharing discussions, in order to improve the quality and depth of information provided by the dashboard.

Exhibit 33

### Exiled Media Dashboard: Key Objectives and Features



## 6c Appendix III: Case Study - NEXTA

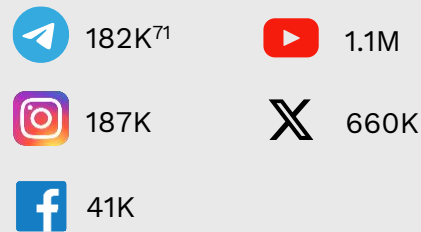
**Ownership:** Independent.

**Founded:** 2015.

**Formats:** Social media, Interviews Investigative, Explainers.

**Main areas of coverage:** Social, Politics, News.

**Social media subscriptions<sup>70</sup> ('000s):**



### History of the media

In 2015, Stsiapan Putsila first launched Nexta on YouTube. Its first video was titled “No choice” and addressed the 2015 presidential elections in Belarus. However, the channel initially focused on musical content, later incorporating additional entertainment and informational content.

Starting from 2018, the Telegram channel began featuring exclusive and timely information, including leaks from the Belarusian Ministry of Internal Affairs.

In October 2019, Nexta released a documentary film "Lukashenko: Criminal Materials," which gained significant traction but was deemed extremist by the Republican expert commission in early November 2019.

During the 2020 unrest, Nexta became a pivotal media platform, covering and coordinating Belarusian protests. Videos from Belarusian streets that streamed on its Telegram channel, while investigations into the Belarusian authorities were posted on YouTube.

All this also increased risks for the editorial team. As a result, the Polish government assigned a police unit to protect the office of the media<sup>72</sup>. Later, the media repositioned itself and started publishing materials for the entire Russian-speaking audience of the post-Soviet space.

In 2021, Belarusian fighter planes forced the landing of a Ryanair flight between Athens and Vilnius, that was carrying then Nexta chief editor Raman Pratasevich\*, arresting the latter (he was sentenced to 8 years, but later pardoned after agreeing to collaborate). In 2022, the media was designated as a terrorist organization.

### Main challenges<sup>73</sup>

Financial support to maintain day-to-day operations, developing new revenue streams, professional trainings for reducing knowledge gap, applications and procedures for donor support, short-term and long-term strategy, political censorship in Belarus.

### Plans for maintaining the audience and content distribution<sup>73</sup>

*“Our audience is growing. We will keep producing interesting content”.*

<sup>70</sup> Nexta social media accounts (Data as of Dec. 2023).

<sup>71</sup> Data for Nexta TV; Nexta Live, which focuses on international audiences, has approximately 1.0M Telegram subscribers.

<sup>72</sup> Izvestiya (May 27, 2021), <https://iz.ru/1170239/2021-05-27/sozdatel-telegram-kanala-nexta-poprosil-polshu-o-zashchite>.

<sup>73</sup> Based on answers from the media survey.

## 6c Appendix III: Case Study - Malanka



**Ownership:** Independent.

**Founded:** 2020.

**Formats:** Online broadcasting, podcasts, Interviews.

**Main areas of coverage:** Social, Politics, News, Minorities, Human rights, Ecology, Entertainment.

**Social media subscriptions<sup>74</sup> ('000s):**



2K



119K<sup>75</sup>



7K



91K



2K

### History of the media

Malanka media emerged in 2020 against the backdrop of Belarusian protest events. Its goal was to establish a modern alternative television platform that would offer people a break from traditional broadcasting.

YouTube became the primary platform where the project began airing regular live streams and recordings featuring original segments and invited guests.

In 2023, the Malanka media was classified as an extremist organization.

Additional projects of Malanka media include “Belarus Tomorrow”, the first Belarusian streaming platform; Zubr Media; Youtube channels “Malanka Live”, “Woman wants”, “Malanka kids” and a custom-build anti-censorship mobile app.

### Main challenges<sup>76</sup>

Financial support to maintain day-to-day operations, developing new revenue streams, applications and procedures for donor support, hiring employees, operational, team mental health, audience and traffic growth, short-term and long-term strategy, political censorship in Belarus.

### Plans for maintaining the audience and content distribution<sup>75</sup>

*“We’ve brought on board a marketing/PR specialist to analyze our operations and content distribution strategy. Based on the analysis, we’ll craft a strategy that we’ll follow in the upcoming months. Also, we are planning to initiate satellite broadcasting (test launch on January 23), during which we will introduce an hourly program in English covering the Belarusian agenda. Furthermore, we aim to establish a streaming platform for all independent Belarusian media outlets producing video content”.*

<sup>74</sup> Malanka Media social media accounts (Data as of Dec. 2023).

<sup>75</sup> Figures for the main channel only.

<sup>76</sup> Based on answers from the media survey.

## 6c Appendix III: Case Study – Hrodna Life



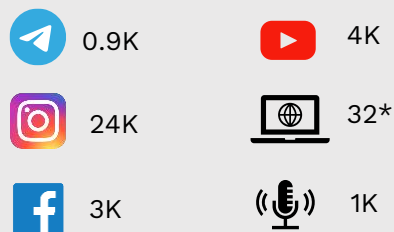
**Ownership:** Independent.

**Founded:** 2016.

**Formats:** Online media, online broadcasting, podcasts.

**Main areas of coverage:** Social, Politics, News, History, Culture, Human rights, Entertainment.

**Social media subscriptions<sup>77</sup> ('000s):**



### History of the media

The project was initiated by the team behind the "Your Style" publication, which made a rebranding in 2012. The editorial team encountered political persecution due to its coverage of the 2020 elections and protest events. In January 2021, an active phase of persecution commenced, which included the arrest of the Editor-in-Chief and the confiscation of the editorial equipment.

Throughout 2021-2022, the media's social networks and website were labeled as extremist materials, leading to the dissolution of the legal entity. In November 2022, the Belarusian KGB declared Hrodna.life an extremist organization. Despite this, the editorial team continues its operations abroad.

### Main challenges<sup>78</sup>

*"The biggest problem is not knowing what lies ahead, making planning impossible and leaving us unsure about tomorrow. If we knew we had a budget for the existing team in the next 6-12 months, we could start thinking about trying new things, exploring new directions, and bringing in new team members".*

### Plans for maintaining the audience and content distribution<sup>77</sup>

*"Our primary audience - 25-45 years people interested in the history of Hrodna, deeply attached to their city. They are active citizens, engaged in following the socio-political agenda".*

*"We're going to find different ways to operate within our current circumstances. In today's scenario, it's not just about growing but also about keeping our current audience. We're really keen on having a full-time community manager if we can afford it".*

<sup>77</sup> Hrodna Life social media accounts (Data as of Dec. 2023).

<sup>78</sup> Based on answers from the media survey.

## 6c Appendix III: Case Study – Tribuna



**Ownership:** Independent.

**Founded:** 2010.

**Formats:** Online broadcasting, online media.

**Main areas of coverage:** Sport, Politics, News.

**Social media subscriptions<sup>79</sup> ('000s):**



7K



25K



32K



475K\*



25K



13K

\* Monthly website visitors

### History of the media

The leading Belarusian sports media covers news in the sports industry as well as political events from a sports perspective. The audience of Tribuna.com in Belarus exceeds one million people per month, with over 4 million people using international website and mobile applications monthly.

Significantly, Tribuna has remained popular even among people inside Belarus who do not support democratic changes long after the editorial team expressed their dedication to democratic values and support of pro-democratic athletes in 2020.

This is how they described themselves: *“Since 2010, we’ve been delivering daily sports coverage, adhering to Western editorial standards and the principles of independent journalism. Additionally, we provide a platform for expressing opinions and discussing sports for all fans and representatives of the sports industry”*.

Additional projects: Mobile app and YouTube channel dedicated to Belarusian football.

### Main challenges<sup>80</sup>

Financial support to maintain day-to-day operations, developing new revenue streams, applications and procedures for donor support, hiring and keeping existing personnel, operational, short-term and long-term strategy.

### Plans for maintaining the audience and content distribution<sup>80</sup>























*“The main focus will be on unblocked platforms: YouTube, Instagram, TikTok. There’s also a significant emphasis on vertical videos”*.

<sup>79</sup> Tribuna social media accounts (Data as of Dec. 2023).

<sup>80</sup> Based on answers from the media survey.

## 6d Appendix IV: Comparative figures (Belarusian vs. global media)

### Comparison of Selected Belarusian vs. Global Media (January 2024)

	Number of average time spent on site (seconds)	Pages/ visit	Bounce rate	Monthly visits
 Zerkalo	612	4.5	33%	6.5M
 Reform.by	495	2.9	62%	0.2M
 Charter 97	462	6.7	36%	6.7M
 Le Monde	414	3.6	65%	133.6M
 Delfi Lithuania	374	4.9	37%	33.4M
 Novaya Gazeta Europe	324	2.3	56%	3.1M
 Nasha Niva	298	3.5	37%	1.9M
 Telegraph	256	2.9	58%	79.7M
 Le Figaro	251	3.0	63%	137.0M
 Spiegel	218	2.4	54%	79.5M
 The Insider	217	2.2	66%	1.9M
 El Mundo	217	3.2	54%	162.8M
 Wyborcza	213	2.9	54%	35.7M
 Financial Times	194	2.5	60%	34.5M
 Meduza	172	2.6	57%	26.0
 The Times	165	2.3	65%	31.7M
 Rzeczpospolita	142	2.8	69%	22.8M
 Sueddeutsche	140	2.8	64%	41.9M
 Correctiv	115	2.7	59%	5.7M
 Bellingcat	80	2.3	67%	0.4M
 Media Zona	76	2.3	71%	1.0M
 Tribuna*	2,486	1.9	67%	0.5M

\* Given Tribuna's focus on sports and different features (e.g., live scores), it is not directly comparable to news centric media

Source: JX Fund Dashboard Research, SimilarWeb

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