Organization for Security and
Co-operation in Europe
Office in Tajikistan

RESEARCH SURVEY:
Impact of the global financial crisis on the independent mass media in the Republic of Tajikistan

Research period: *May- July 2016*

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Systematization and computer processing of data: *Mr. Nabi Yusupov*

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I. INTRODUCTION:

The last 2-3 years are marked by unprecedented decline of activities within the media community in Tajikistan. Experts indicate various reasons for that; namely:

- the global economic crisis and sanctions of the West against the Russian Federation;
- pressure on the independent mass media and certain journalists by public officials;
- lack of equal conditions and fair competition between the state and the private mass media;
- lack of efficient systems for dissemination of periodicals;
- development of the Internet and social networks, which serve as new tools for dissemination of information; along with that, they subtract incomes from the traditional mass media;
- abrupt decrease of remittances from labor migrants working in the Russian Federation.

All these factors have had a catastrophic impact on the economic viability of Tajikistan's independent mass media. There is a serious threat for their existence as the "fourth power".

The data collected by the NGO "Media Consulting" in the course of analysis of private printing media reveal that during the period from April 2014 to April 2015, their incomes decreased by approximately 50 percent, whereas the circulation decreased by 30 percent (during the same period). The trend of regression is still ongoing. In other words, the declining profitability in this sector is obvious. Along with that, expenditures on the manufacturing of printing products have grown by about 35 percent.

Managers of the Tajik independent mass media have faced big financial and economic problems. The situation is getting worse – since the managers do not expect any changes in the attitude to the media; neither do they wait for a favorable legal basis, or any direct financial support. It is impossible to resolve these challenges in the nearest future.

This is not the first crisis of the kind occurring after gaining independence. During the first 5-6 years of independence, the country was prone to civil unrest, and the whole state was in crisis. Then, after the reconciliation of the warring sides and stabilization, there was a relevant economic growth, which was also obvious in the media sector. Nevertheless, all previous crises were not so wide-scale and hard for the independent press.

With the purpose of understanding the impact of the ongoing crisis on Tajikistan's independent press, the OSCE office in Tajikistan ordered a survey, which was conducted in May-June 2016. Sixty managers of domestic media organizations took part in the survey. This research report contains the results of interviews with media managers based on the analysis of their feedback.

II. MAIN PROVISIONS IN THE RESEARCH

The goal of this project is to conduct the research and analyze the impact of the economic crisis on the independent mass media. The OSCE Office in Tajikistan is the customer of this research.

The project included the following tasks:

- To interview senior media managers and collect their feedback in order to analyze the impact of the economic crisis on the independent mass media;
- To discuss the results of this research at a round table (involving representatives from the government, NGOs, the media and journalists);
- To publish results of the research along with relevant recommendations.

The target group for the research are managers and persons in charge from various independent mass media in Tajikistan – chief editors, editors, directors, heads of commercial units.

All in all, 60 persons, representatives of the media from all regions of the country took part in the survey.

III. RESEARCH METHODOLOGY

The research was conducted using the quantitative methodology, i.e. questionnaire among employees of the domestic mass media in Dushanbe, Khujand, Kulyab, Kurgan-Tube and Khorog through individual interviews "face to face". This kind of methodology is very efficient for studying the situation; it covers a large number of individuals and wide geographical areas. Apart from that, some of the managers in regions were interviewed over the telephone or online.

The quantitative methodology provides opportunities for defining the main indicators to assess the impact of the economic crisis on the independent mass media; it also helps understand the coverage, depth of intrusion and the scale of losses. There is also a necessity to reveal the extent of competence among the media managers in this issue, as well as their vision and understanding of threats, their capability to analyze and forecast; to get a notion of their knowledge and ability of taking anti-crisis measures. Elements related to behavior and attitude of each particular manager require an individual approach, taking into consideration confidentiality and anonymity, which is very essential for acquiring reliable data.

Based on the indicators received from all regions, it is possible to define the nation-wide indicators and to develop proper recommendations.

IV. TOOLS FOR RESEARCH

The main tool for the research was a questionnaire. Questions and suggested options of answers were developed on the basis of realities. Some of the questions and options of answers were suggested by participants during the pilot (testing) interviews.

Totally, after the agreement with the OSCE Office in Tajikistan, we adopted 23 questions related directly to the topic of our research, and 8 questions regarding personal data of respondents.

Respondents were familiarized with the goal of the research; they were explained that the data are confidential and anonymous (their names and contact information will not be revealed to the public).

V. REMARKS

This issue is not the first of the kind in our practice. Being an expert in this area, I can say that similar meetings and interviews at editing boards touching upon the economic situation in the mass media are rather regular. I am personally acquainted almost with all participants of the survey; many of them took part in previous similar surveys. Previously, there were very few problems with respondents. We could use results of surveys in our work or publications.

However, for the first time we faced problems with interviewees. Many of them revealed certain irritation and reluctance answering questions. It was related to certain questions and the way questions were asked; respondents considered that particular answers should not be revealed to the public. First of all, they were afraid that after the interview they might have problems with inspection bodies.

Although, in our opinion, the survey has primarily research-informative nature, and it cannot provoke any problems at all, we kept reminding the participants that the interview is anonymous and their answers will not be exposed anywhere. Nevertheless, it seemed to me that it was not sufficiently convincing for everyone, and, in our opinion, some of the respondents were not fully sincere answering our questions.

VI. PERSONAL DATA OF RESPONDENTS

Prior to considering the results of the survey, we suggest to familiarize yourself with “the common portrait” of respondents, i.e. their personal data. Based on that, you will have a clear notion on who participated in our research and how competent they are for answering our questions.

For our part, we should say that we were very thorough in selecting participants, and we tried to select those who have good reputation (implying “reputation of the medium they represent”); they are real professionals and they have proper experience in the media.

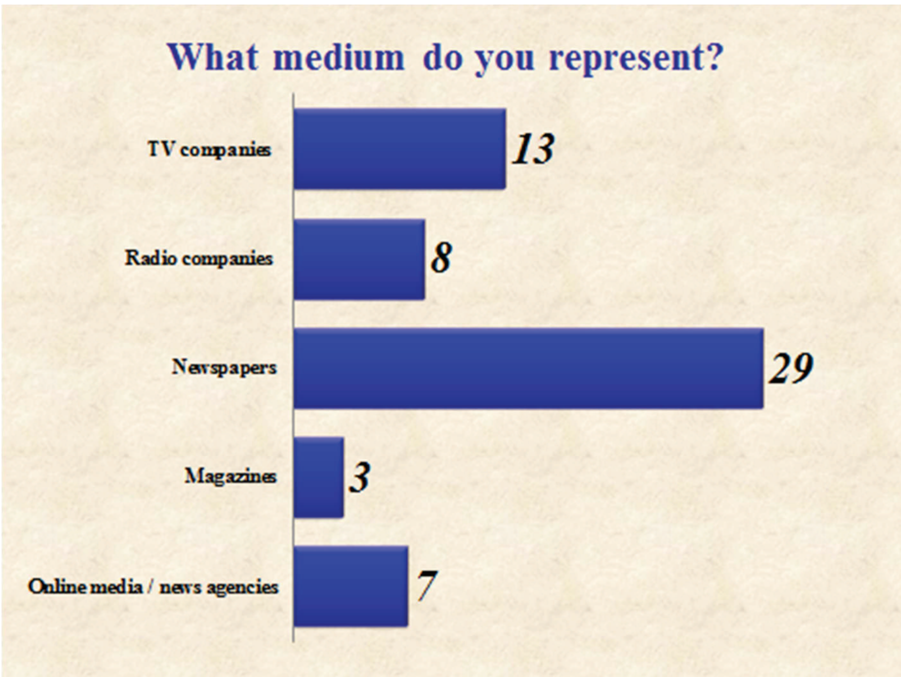
Respondents:

Who are they? What media do they represent?

According to the Diagram, most of the participants are representatives of the printing mass media – **29 newspapers and 3 magazines.**

According to the Ministry of Culture, as of 30 April 2016, 360 printing outlets (newspapers) are registered in Tajikistan; 104 of them are state-owned and 255 are private; 232 magazines (105 state-owned and 127 – private).

The second group of respondents are representatives of the electronic mass media: TV and radio stations and information agencies, or managers of the leading online media.

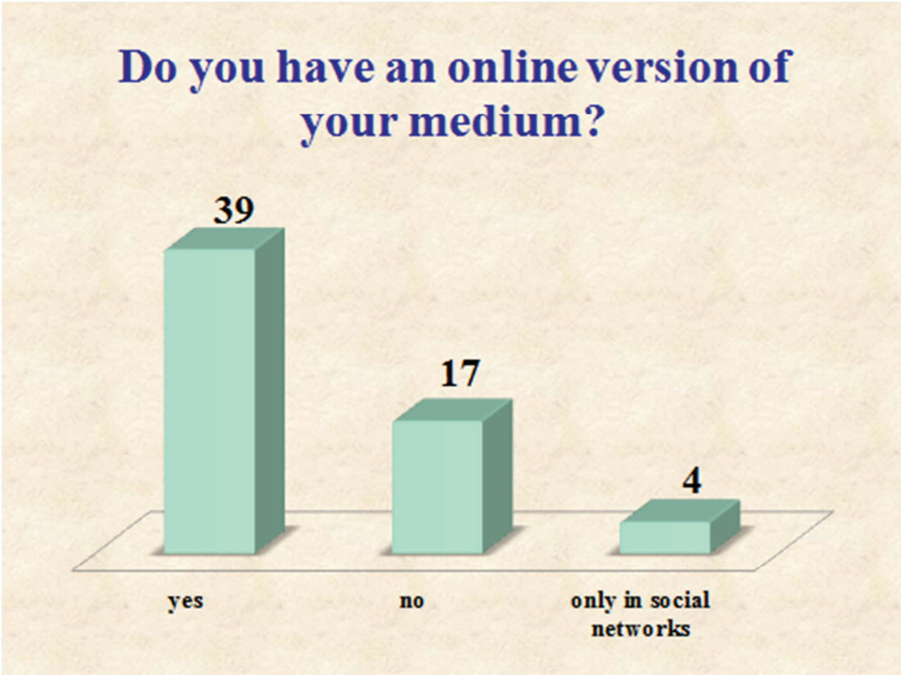


It should be noted that the number of those who read online versions of newspapers are several times bigger than those who read printed versions. Some of the online media have become stable and competent sources of information – for citizens, as well as for representatives of various state structures, international organizations and the mass media.

Nevertheless, the vast majority of online resources are afloat due to donations from their founders and they are considered “loss-making media”.

Online versions of the media:

The Internet has been gaining importance in man's life. Some people cannot imagine their existence without the Internet. Since the Internet is a source of information, it is perceived in this particular way. Moreover, the Internet is a source of instantaneous dissemination of information – with no boundaries. This is why all traditional mass media try to launch their own web sites, or at least to open their pages in social networks. This is how the matters stand among our respondents:



As you can see in this Diagram, most of the media organizations have already launched their own online versions. We have 39 of them, i.e. almost 2/3 of the total number.

The other 17 participants confessed that they do not have online versions.

Four participants said that they have their own pages in social networks.

Although the total number of online versions is impressive, many of them have no proper attention from the consumer audience. Web resources leave much to be desired (in many parameters). We have considered only few of the web sites, which are not very popular and revealed two main reasons for the lack of interest to their online versions.

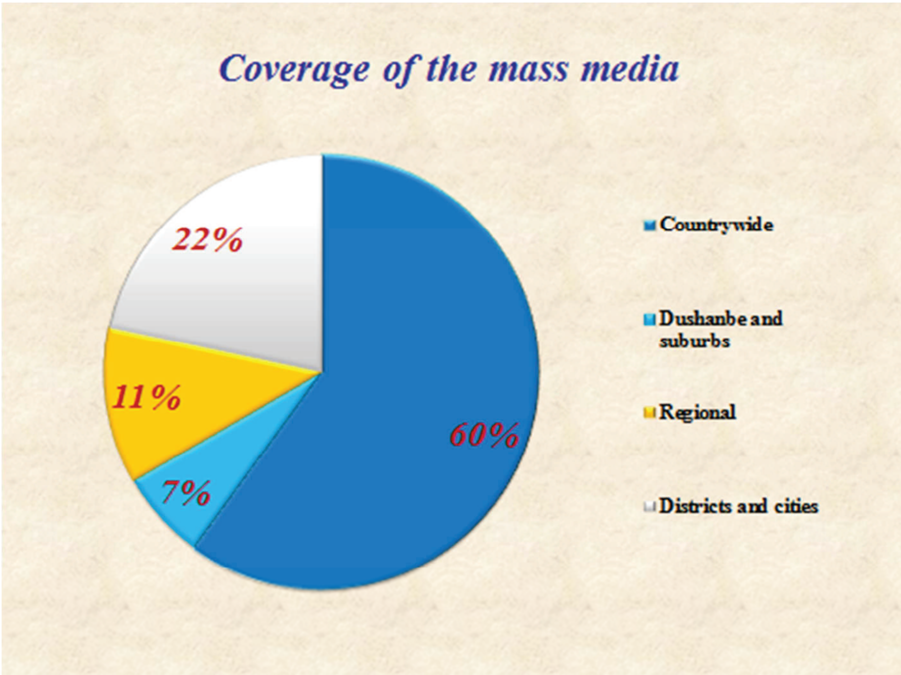
First of all, founders do not pay due attention to the development of their web resources – the budget is rather modest, and the web site is not interesting for consumers. Why does this happen?

The fact is that the web site is maintained by a person with a modest salary; and that very person is the editor, the correspondent, the corrector and the administrator of the resource. He has no staff of his own; thus, he has very limited capacities – physically, he cannot cover all important events (to collect information personally, to film, to interview, to process photo, video and audio materials), to raise funds for maintenance and refreshing contents of the web site. Usually, he spends the whole workday monitoring official and private web sites, from which he takes and processes press releases and rewrites reports written by his colleagues who work for more successful media.

Secondly, because of small budgets, web sites are initially developed with limited modern additional technical opportunities and devices – those meant to attract the consumer. For example, there are no possibilities to launch video materials; there is no original photo archive; search engines do not work; there is no clear distinctions between thematic sections, etc. The media, which have both a newspaper and a web site are reluctant to launch publications online – because they need to sell their printing versions first.

The factors described above are the reasons for poor competition among the vast majority of the domestic media; they are not attractive for common consumers, neither are they attractive for advertisers.

Coverage of the mass media:



The territorial coverage of the audience is important – the more viewers (listeners, readers), the stronger is the influence on the society.

However, this is important not only for a publisher/broadcaster. The coverage also has an impact on financial flows from advertisement. In turn, it has an impact on the wealth of the medium, as well as on the wellbeing of its employees.

Most of the respondents – 60 percent – noted that their medium covers the whole territory of Tajikistan, or most of the territory.

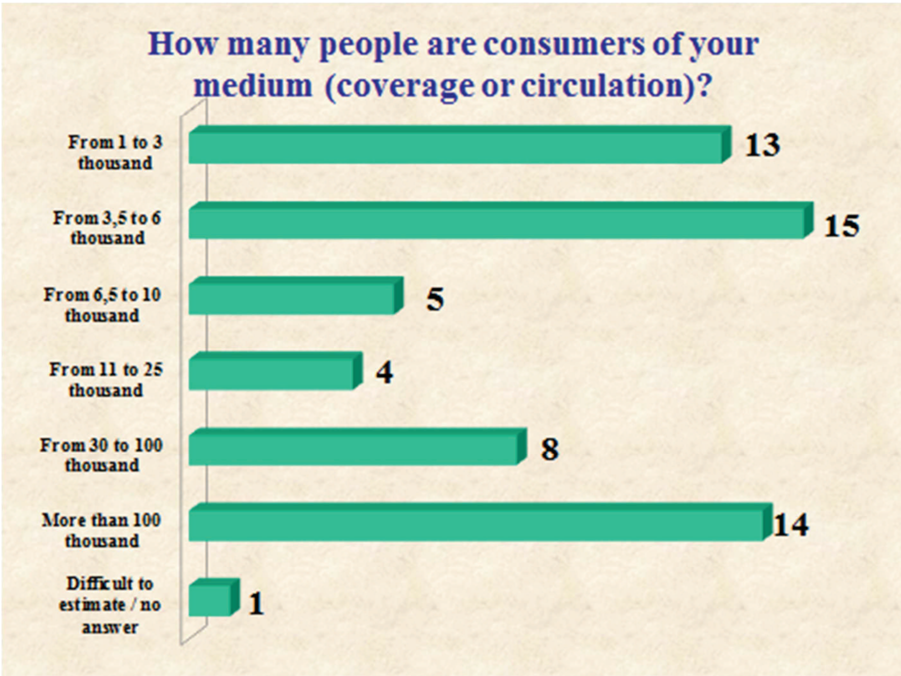
Seven percent of the media cover the capital city and its adjacent suburbs. In other words, this is the territory where the biggest segment of the consumer audience is located, as well as the main advertisement market of the country.

Eleven percent of the media have regional significance – with significant number of residents.

The remaining 22 percent said that they cover only cities and districts where they are located.

How many people are consumers of your medium (broadcasting coverage or circulation)?

The advertiser should know the number of consumers of this or that medium – in order to efficiently promote his commodity. The answer to this question is also interesting for us – not just for the sake of a participant's personal data, but to understand the impact of the economic crisis, i.e. does the number of consumers grow, or is it reducing?



The numbers in consumer audiences vary essentially. The highest percentage belongs to printing outlets; 15 of them told us that their audience (circulation) is 3,5-6 thousand copies; 13 respondents told about 1-3 thousand copies.

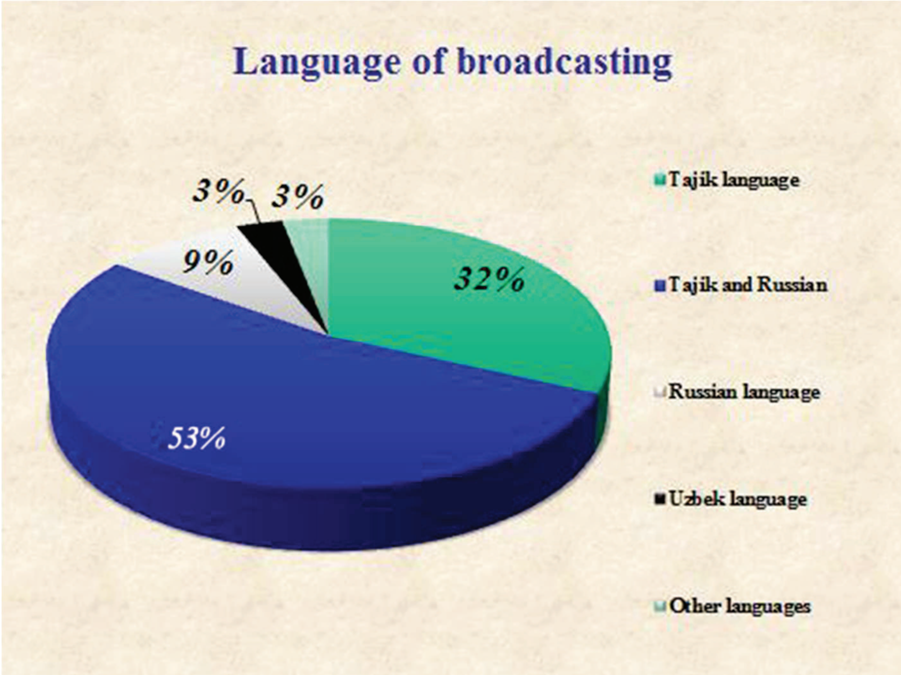
The electronic media have the second position; 14 respondents said that their audience is more than 100 thousand; 8 respondents said – from 30 to 100 thousand people; 5 respondents stated that their audience is between 6,5 and 10 thousand; and 4 said – from 11 to 25 thousand.

Language of broadcasting:

For the time being, 84 percent of the population represent the "title nation", who speak the Tajik language. The biggest diaspora in Tajikistan are Uzbeks – about 13 percent of the total population. Although year by year, there are fewer Russian-speaking people, the number of consumers of the Russian-language content remains essential. This is what we revealed considering the following Diagram.

As you can see in this slide, 53 percent of respondents noted that their medium is bilingual – Tajik and Russian. Mainly, those are electronic mass media – TV and radio stations, which have programs in two languages for their consumers.

Most of the printing and online media stated that they work in the language of the "title nation", i.e. the Tajik.



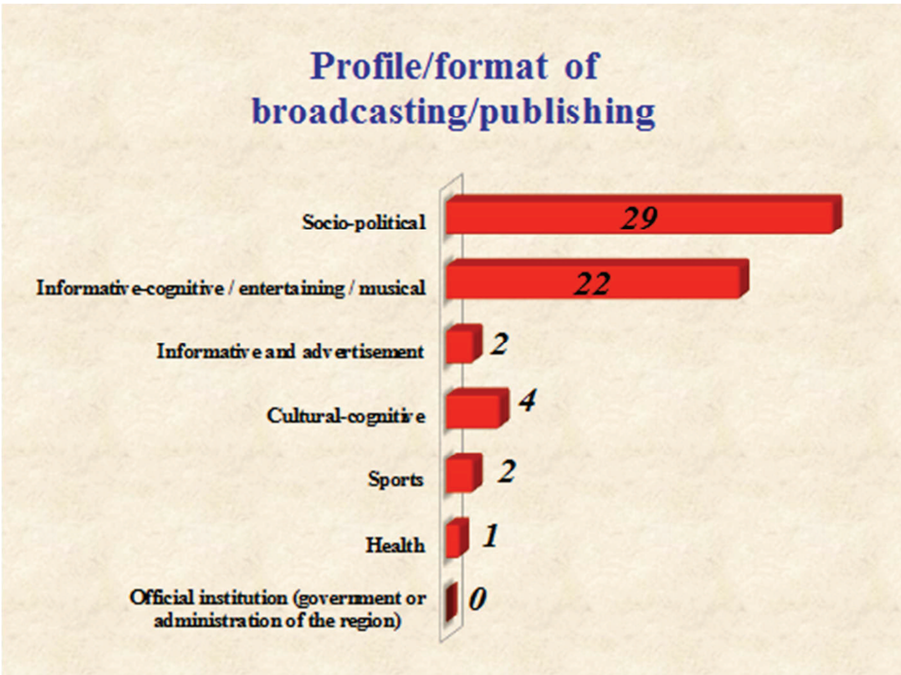
Only 9 percent of respondents said that their language of broadcasting/printing is Russian.

3 percent work in Uzbek language.

The other 3 percent indicated additional languages – English and Kyrgyz.

Profile or format of broadcasting and publishing:

The consumer selects his favorite channel/source not only because of the language he understands, but also because of his preferences and requirements, which matter to him. Those who set up a new medium follow a particular format/profile – to define the circle of those for whom the product will be manufactured, i.e. the segment of consumers.



Most of the respondents – 29, which is almost half of the total number, represented the socio-political format of the media. This is not just "by chance". According to the survey, most of the respondents represented the central mass media – who are successful, and they gained acknowledgement of their audience for covering socially important events and developments in the country.

Twenty two respondents defined their format/profile as informative, cognitive, entertaining or musical. There were various combinations, such as "informative-entertaining-musical", "informative-cognitive-entertaining", "informative-musical", etc.

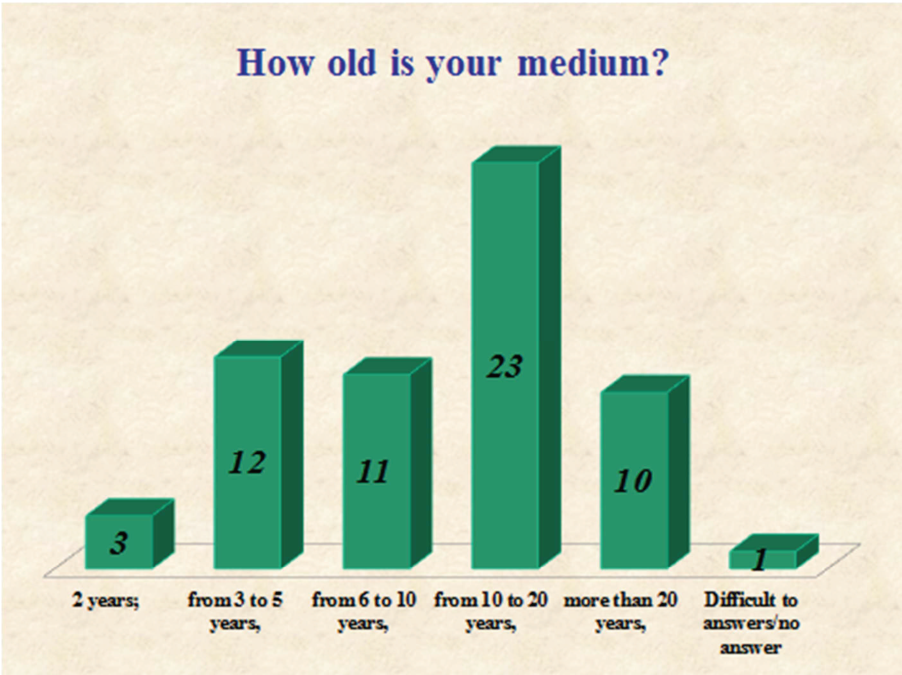
Two respondents positioned themselves as "informative-advertising". Two other introduced themselves as "sports-news" media.

Four respondents are "cultural-cognitive" media.

One of the respondents referred to medical (healthcare) thematic in his publications.

How old is your medium?

There is a common opinion that the longer a person works in this or that area, the more competent he/she is. Thus, it was important to learn – for how long the medium has been in the market. We asked the following question:



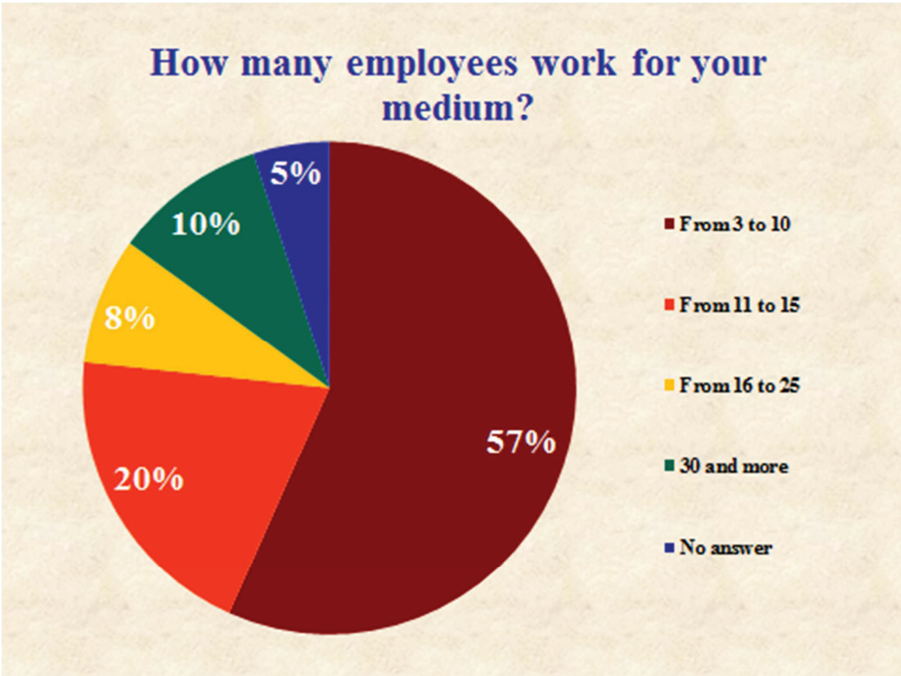
More than 1/3 of the respondents (23 persons) said that their medium has been existing for more than ten years – from 10 to 20 years. Eleven persons said that their medium has been working in the market from 6 to 10 yeas. Ten persons said that they work for the "long-livers", i.e. their media institutions were registered more than 20 years ago.

Twelve persons said that their media organizations are relatively young – from 3 to 5 years; three respondents said that their media are 2 years old. One person failed to answer the question.

In other words, we can freely say that participants of the survey represented different generations of the domestic media structures – from 2 to 20 years of age.

How many employees work for your medium?

The number of employees in every particular medium depends on various aspects. It depends on the type and format of the medium, on how long it has been in the market, on the coverage of its audience, etc. Since the topic of this research is "Impact of the economic crisis on the mass media", this particular indicator could clarify the picture – how many employees for the time being remain in their media.



The answer to this question shows that most of the media – 57% – have a limited number of employees – from 3 to 10 persons. Moreover, as it follows from the previous Diagrams, 44 respondents work for the media that are from 6 to 20 years of age; and those media filled in their niches in the market long ago. Let me also remind the readers that 60 percent of the respondents have a wide coverage (broadcasting and printing) throughout the whole territory of the country. It is difficult to perform such tasks having only a dozen of employees, and, obviously, they had to reduce their staff. We will get back to this issue later.

Twenty percent of respondents noted that they have from 11 to 15 employees.

Eight percent said that they have from 16 to 26 employees; and 10 percent said that they have more than 30 workers. Five percent had difficulties answering the question.

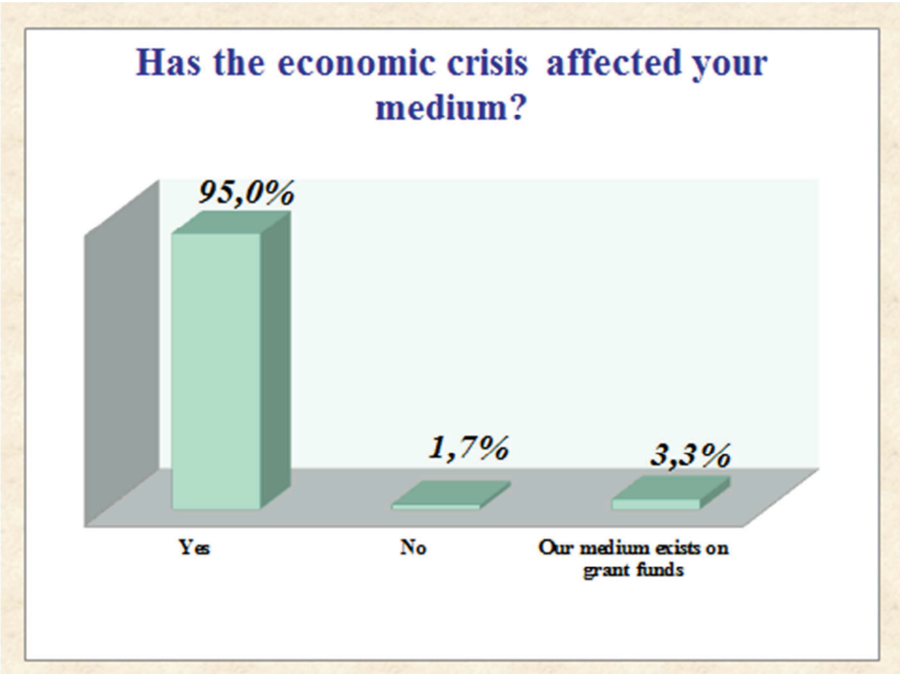
This is an approximate description of our respondents. Further you can see the results directly related to the topic of the survey.

VII. REVIEW OF THE SURVEY (IN DIAGRAMS) AND COMMENTS

Let us start the review and analysis of the comments accompanying the Diagrams developed upon the interviews with managers of the domestic media organizations. We tried to make the Diagrams understandable and explicit. Moreover, we provide comments to each Diagram explaining what stands behind this or that figure; we also consider potential reasons for emerging problems; at the end, we will give recommendations, which – in our opinion – are the most feasible in this situation.

Diagram 1

While preparing the proposal on conducting this survey, we were fully aware that the crisis had affected all spheres of the national economy, including the mass media. The results reflected in this Diagram confirmed our allegations. Ninety five percent of the respondents said “YES”, the crisis has affected my medium.



3,3 percent noted that their medium exists (fully or partially) on grant funds, and the impact of the crisis is quite palpable for them.

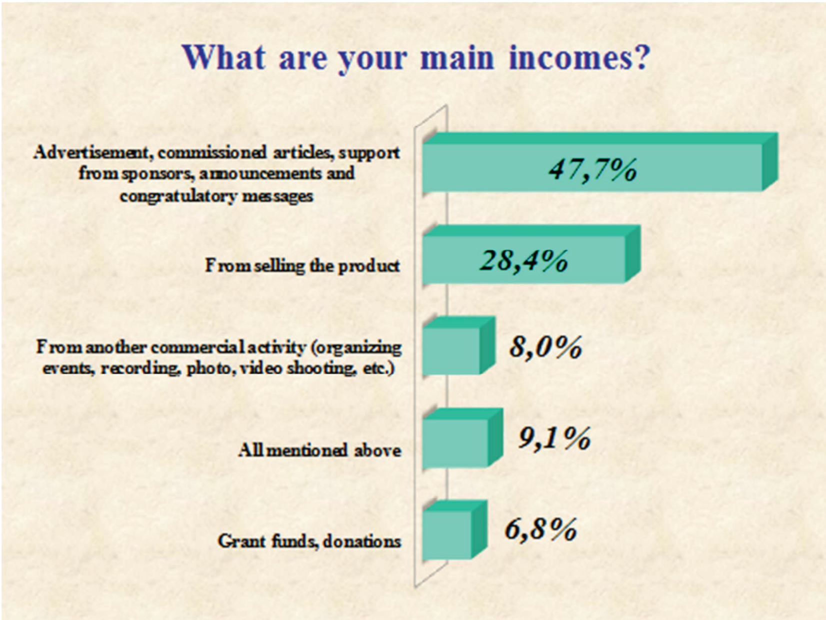
1,7% denied the impact of crisis on their activities. Those were representatives of the media that have managed to establish themselves in the market as sustainable business entities capable of resolving challenging situations. However, they are the minority among the media, as it follows from the Diagram.

In other words, we can state that we do have successful mass media in the country, but the overall situation is rather sad.

Diagram 2

The mass media can have various kinds of incomes. Everything depends on the knowledge of business and abilities to earn using available opportunities. However, as it follows from the

Diagram #2, most of the media earn money using traditional methods, i.e. from advertisement, writing and publishing articles commissioned by customers, funds from donors, announcements and congratulatory messages (paid by readers). It should be noted that not all managers have learned to earn by using methods mentioned above. Effectively, all media have incomes from advertisement and commissioned articles. However, support from sponsors, incomes from announcements and congratulatory letters are often scarce; some of the media do not have such incomes at all.



Only 28,4 percent of the media receive income from the selling of their products. We indicated in the "personal data" section that the survey covered 32 representatives of printing media (i.e. more than a half of the interviewed). Here, we also see that almost 1/3 of them have incomes from selling of their products. It means that the situation is very critical – not all of the printing media are able to earn from selling of their products. Among them, are mainly newspapers – since their main incomes are from abundant advertisements and commissioned articles rather than from the selling of their printing products.

A small percentage is the income from other activities (arranging cultural/social events, photo/video filming, etc.) – 8%. Is this good or bad? I reckon this is bad.

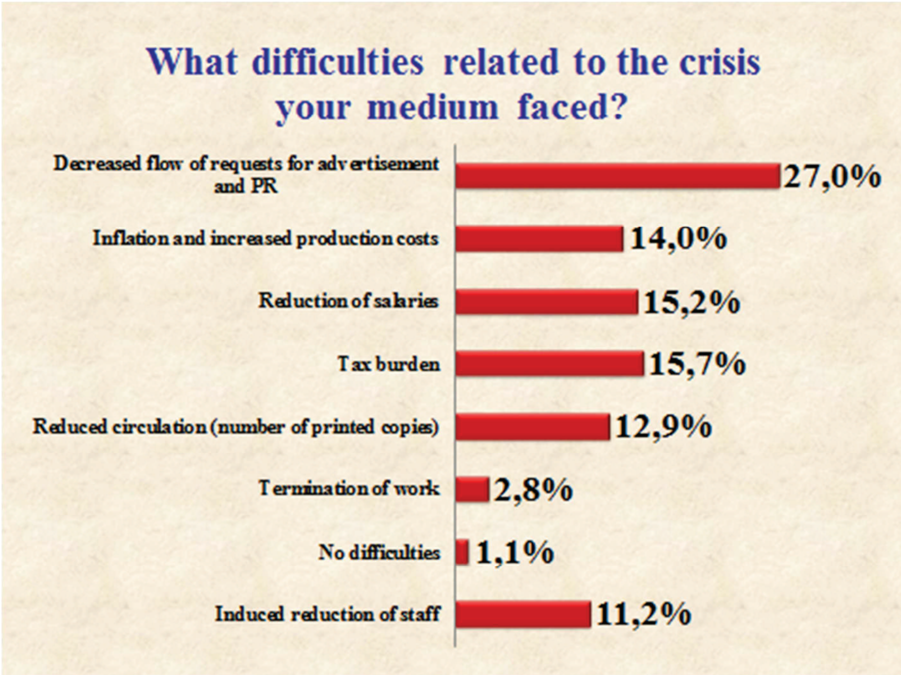
About a year and a half ago, I expressed my opinion about a great number of advertisement agencies, which make their incomes with the help of the media. Most of the incomes are the so-called "BTL" (below-the-line) – indirect advertisement through presentations, events, concerts, creative selling, exhibitions, conferences, etc. In other words, this is what we could have earned our money from, but we have no skills or we do not want to learn.

For many years, advertisement companies promote an idea among advertisers that the most effective ads are "external ads", i.e. banners, video displays, screens, etc.; or BTL. They do not speak about the traditional mass media; however, this is the segment where the media could play a leading role.

On the other hand, 9,1 percent of the respondents said "all mentioned above", which implies "success". In other words, they have learned how to earn using various options. Of course, not all of them are equally successful, but this result is not bad.

The remaining 6,8 percent of the respondents said that their medium exists on grant funds or donations from the founder.

Diagram 3



The extent of impact on the media can vary. We tried to identify all kinds of difficulties, which media managers might face, and which could have an essential impact on their work.

Answering this question, respondents could select from several options of answers. It was important to identify all aspects of impact on the medium. These are the results:

27 percent noted that their medium was affected by essential reduction of offers from advertisers and commissioned PR articles.

“Reduction and lack of salaries” and “tax burden” had a relatively equal impact on the media – 15,2 percent and 15,7 percent respectively.

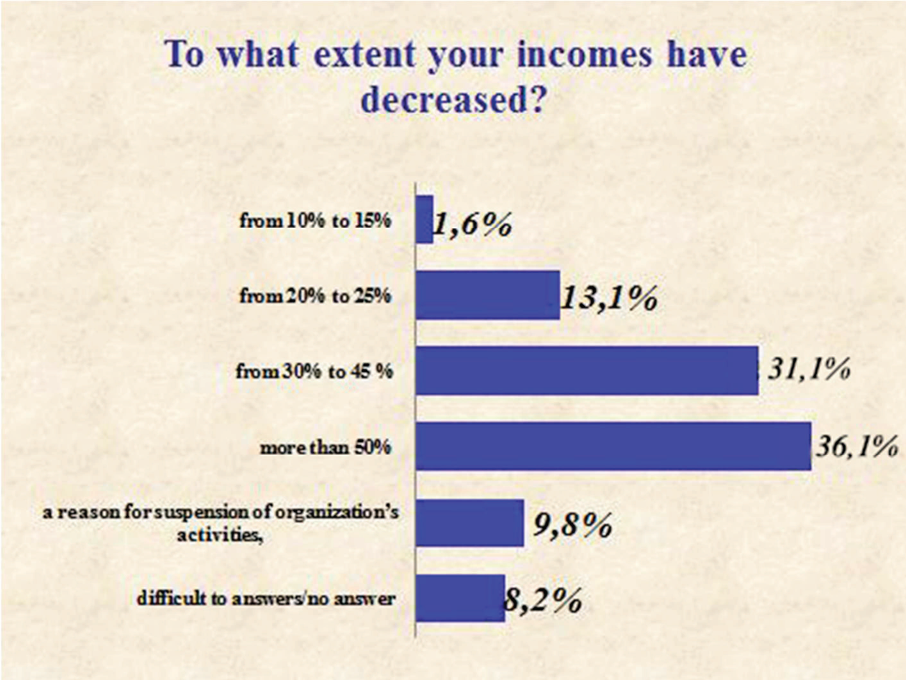
Fourteen percent of the respondents noted that the media have been affected also by the national currency inflation, which resulted in increased costs of media products.

12,9 percent of the respondents noted the reduced circulation, and 2,8 percent had to terminate their production.

The other 11,2 percent had to reduce their personnel. Only 1,1 percent said that they “have no difficulties whatsoever” for the time being.

Diagram 4

This Diagram has also outlined the scale of the impact on the media caused by the crisis. Summing up the biggest losses, we figured out that two thirds (2/3) of the survey participants noted that their losses are quite palpable.

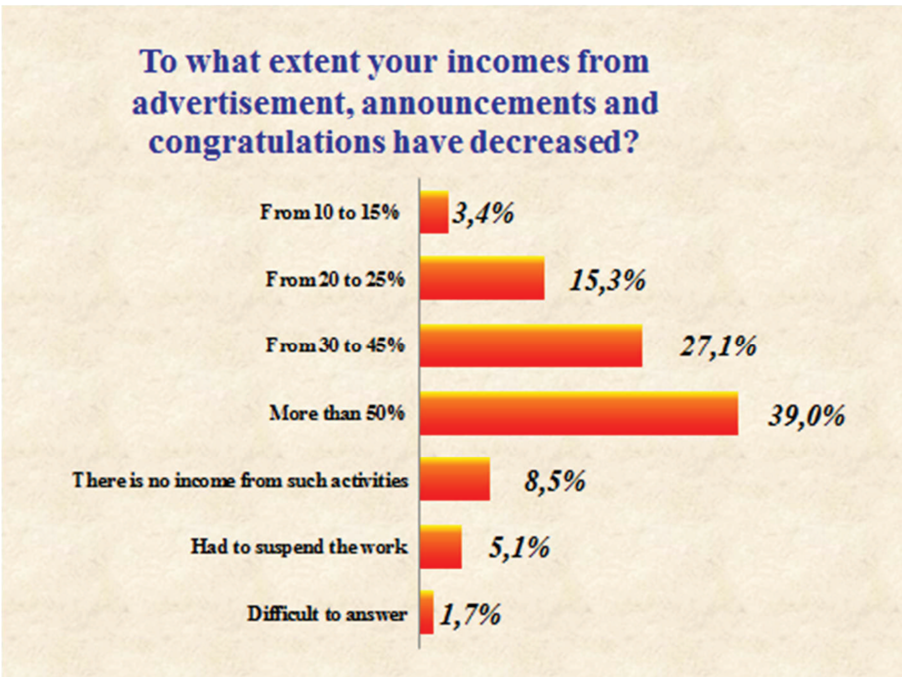


31.1% reported that their profitability decreased by 30-45% and 36.1% indicated that profitability has fallen more than 50%.

Also, 13.1% pointed out that the drop in their income reached 20-25%, which is also a high percentage. And for the 9.8%,this became a cause for temporary or permanent suspension of the organization's activities.

1.6% of respondents indicated the smallest percentage loss - from 10% to 15% of the revenues. As for, 8.2%, they did not answer the question.

Diagram 5



Further on, the questions are designed in a way to show the situation in terms of incomes in every particular case. The first question: “To what extent your incomes from advertisement, announcements and congratulations have decreased?” Here, almost 2/3 of the respondents also indicated negative results.

To be more precise: 39 percent of the respondents said that the incomes dropped by more than 50 percent; 27,1 percent – by 30-45 percent.

15,3 percent of respondents said that their incomes from advertisement, announcements and congratulations have dropped by 20-25%. The lowest number of the respondents – 3,4 percent said that their incomes from advertisement and commercial activities have dropped by 10-15 percent.

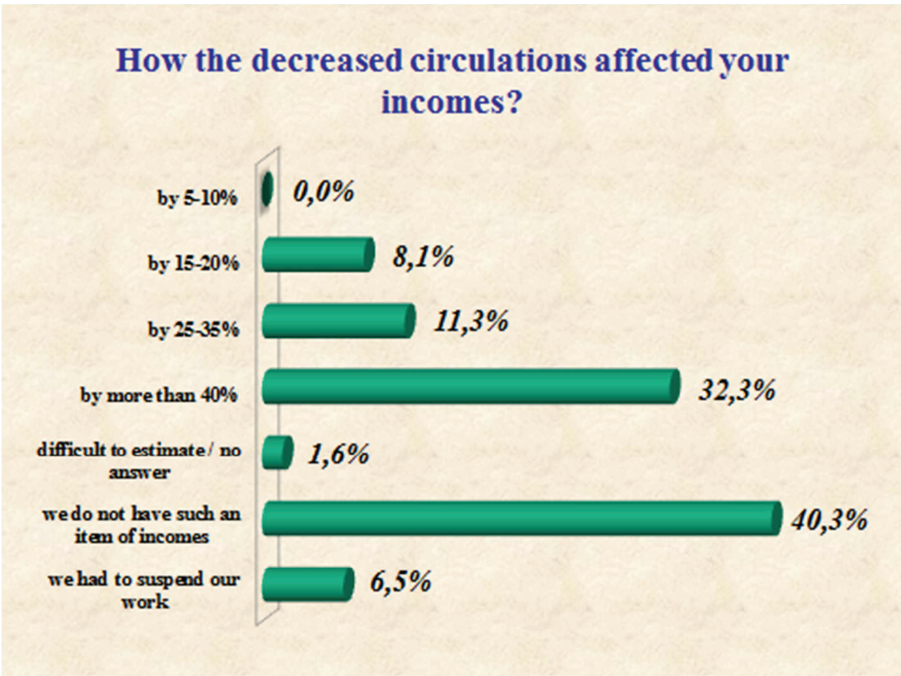
5,1percent said that this factor is one of the reasons for suspending their activities. And 8,5 percent said that they have never had such an item of incomes.

The rest 1,7 percent had difficulties answering this question.

Diagram 6

The most affected by the economic crisis are printing outlets – since their content had worsened, and the circulation got smaller. Thus, we designed a special question for them: “To what extent your income decreased because of the smaller circulation?” The answers have confirmed our allegations.

More than 40 percent of managers, among whom are representatives of TV, radio stations and online media, immediately stated that they do not have “such an item of incomes”.



Thirty two percent of respondents said that their circulations have dropped by more than 40 percent. 11,3 percent said that the circulations decreased by 25-35 percent. And 8,1 percent of respondents are confident that the circulations have decreased by 15-20 times.

Those for whom the decrease of circulation was one of the reasons of “induced suspension of work” constitute 6,5 percent.

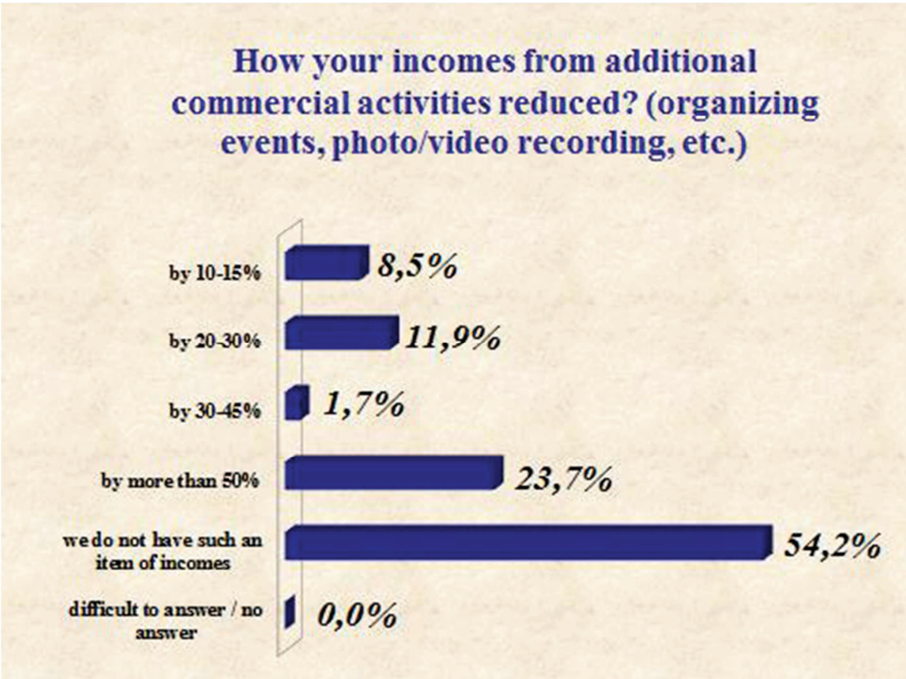
This Diagram shows that the problem of decreased circulations has affected virtually all printing mass media – newspapers and magazines. None of the respondents said that the medium avoided the decrease of circulation. On the contrary – some of them noted that the trend keeps going and perspectives are rather gloom.

Diagram 7

Getting back to the Diagram #2, and the question: “To what extent your incomes from other commercial activities decreased? (organizing events, recording, photo, video shooting, etc.) As we wrote above, such media organizations are very few. Respectively, it cannot be considered “a stable income”. What would be the results if we pose it as a separate question?

Most of the respondents – 54 percent – do not have such an item of incomes at all. The rest of them have the following situation:

- Almost one third of respondents (23,7 percent) said that this income segment has decreased by 50 percent.
- 11,9 percent of the media have a decrease by 20-30 percent.
- 8,5 percent of respondents have a decline of additional incomes by 10-15 percent.



In other words, even those who have gained skills of attracting funds cannot brag that “everything’s all right” with that in their media. On the contrary – the impact is quite palpable for their organization’s “pocket”.

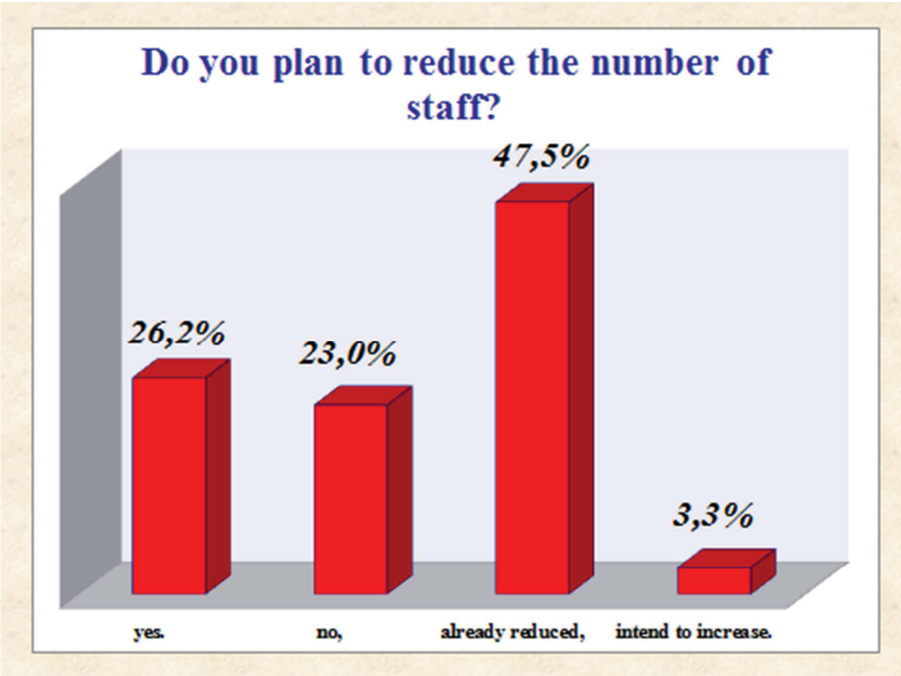
Diagram 8

The topic of "losses on all items of incomes" entailed another logical question: "Wouldn't such essential reductions of incomes lead to reduction of staff?"

There is only one answer: "Of course!" This is clearly seen in the next Diagram (#8). Almost half of the respondents – 47,5 percent – said that they have already reduced their personnel. Another 26,2 percent are going to do the same.

A significant number of respondents – 23 percent – said that they are not going to reduce their staff. Most of them added: "We cannot keep reducing the staff". (i.e. there must be some people to perform the duties).

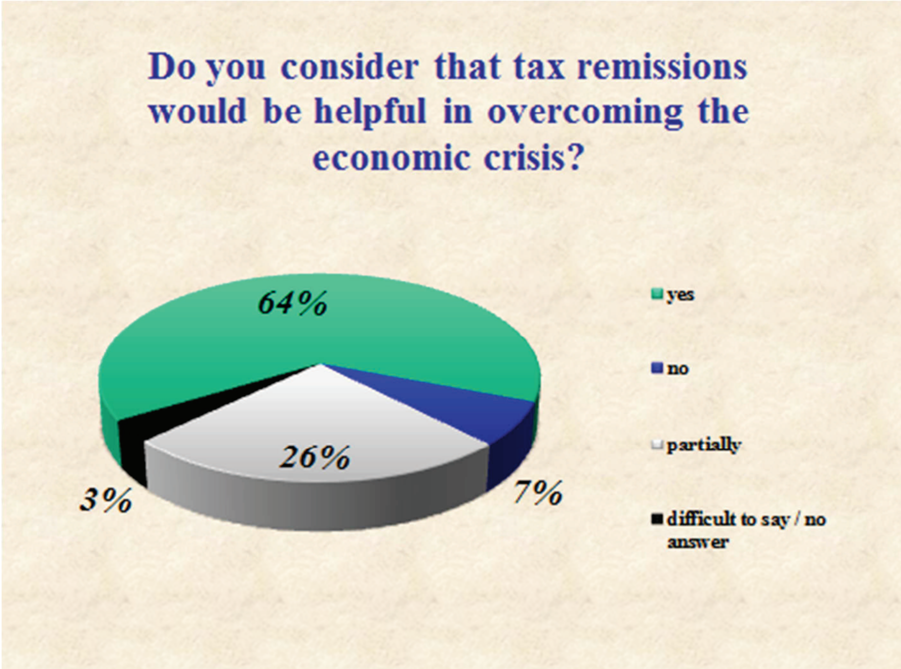
Only 3,3 percent of respondents optimistically said that they are going to hire additional specialists for their media.



As we can see, the situation leaves much to be desired; and it has entailed mass reduction of media professionals. We can allege that some of them will join their compatriots, labor migrants working abroad; some of them will try to find job in a foreign state or foreign media; others will be looking for employment opportunities in a "non-media" sphere.

Diagram 9

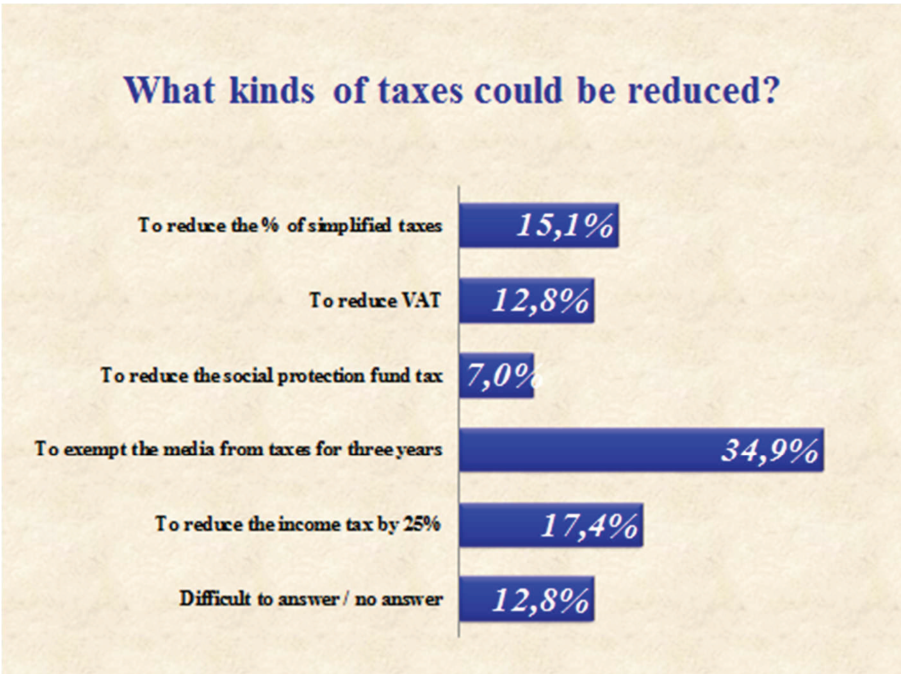
Presenting the Diagram #9, I would like to stress that many of our managers have problems with financial literacy. For example, asking the question "Do you consider that tax remissions would be helpful in overcoming the economic crisis?", I myself had to go through brief estimates and explain the affect of the tax burden on the medium. However, after the explanations, respondents could easily figure out how to respond. Probably, this is the reason why 90 percent of the managers answered that tax remissions, one way or another, would be helpful in relieving the affect of crisis on their organization. As we can see in the Diagram #9, 64 percent said "yes" and 26 percent said "partially". Summing up these two groups, we get 90 percent.



Seven percent of the respondents said that the impact is insignificant, and 3 percent failed to answer the question.

Diagram 10

The next question was: “What kinds of taxes could be reduced?”; and the question itself was quite logical. Here, I would stress again that many respondents revealed superficial knowledge of accountancy. The Diagram #10 shows that 12,8 percent of respondents had difficulties answering this question.



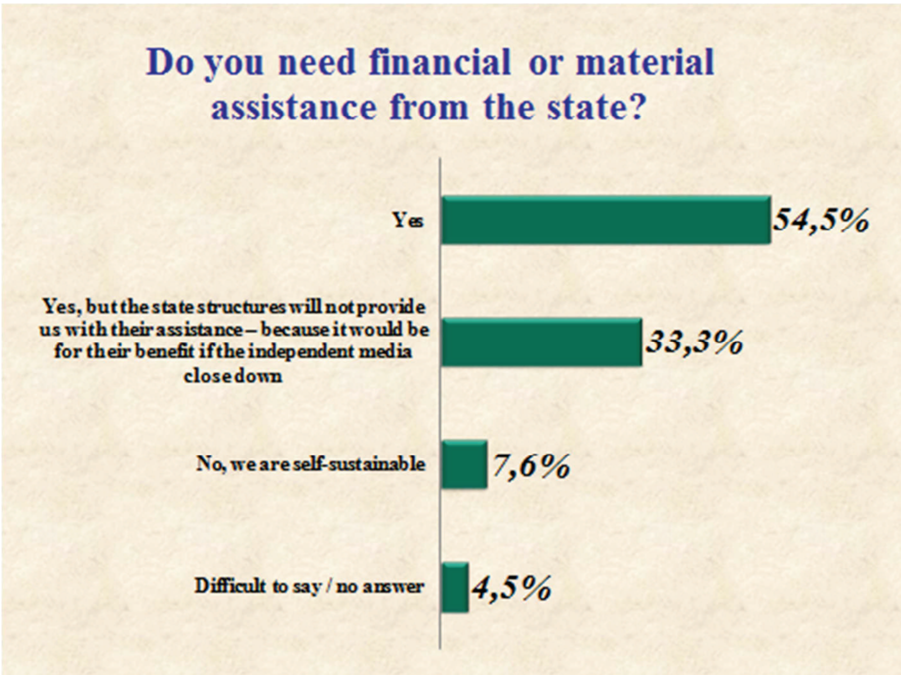
Regarding the other results, the most obvious observation is that 34,9 percent of the respondents suggested to exempt the mass media from all taxes for three years (until the crisis is over – expecting that the incomes would become stable). Here is the argument: the media are useful for development of the society, and their activities could not be identified as "activities of common commercial companies" (those trading or manufacturing essential commodities, i.e. food or POL (petroleum, oil, lubricants)".

The other respondents preferred to "change" only some of the tax articles. For example, 17,4 percent consider that the income value tax – 25 percent of the total income – is high. The other 15,1 percent of the respondents consider that even the "simplified tax" is incredibly high. And 12,8 percent of respondents consider that the 18-percent VAT is rather high – since in the neighboring states of Kazakhstan and Kyrgyzstan it constitutes only 10 percent.

The other 7 percent of the respondents are not in consent with the 25-percent social protection fund tax, and they suggested to decrease it as well.

Diagram 11

In this situation, it is clear that the mass media would hardly overcome the crisis relying upon their own capacities; some of the media would hardly cope with this at all. This is why we suggested the following question: "Do you need financial or material assistance from the state?"



More than a half of the respondents – 54 percent – confidently said "yes". One third of the respondents – 33,3 percent – also said "yes", but with a remark: "the state structures will not provide us with their assistance – because it would be for their benefit if the independent media close down".

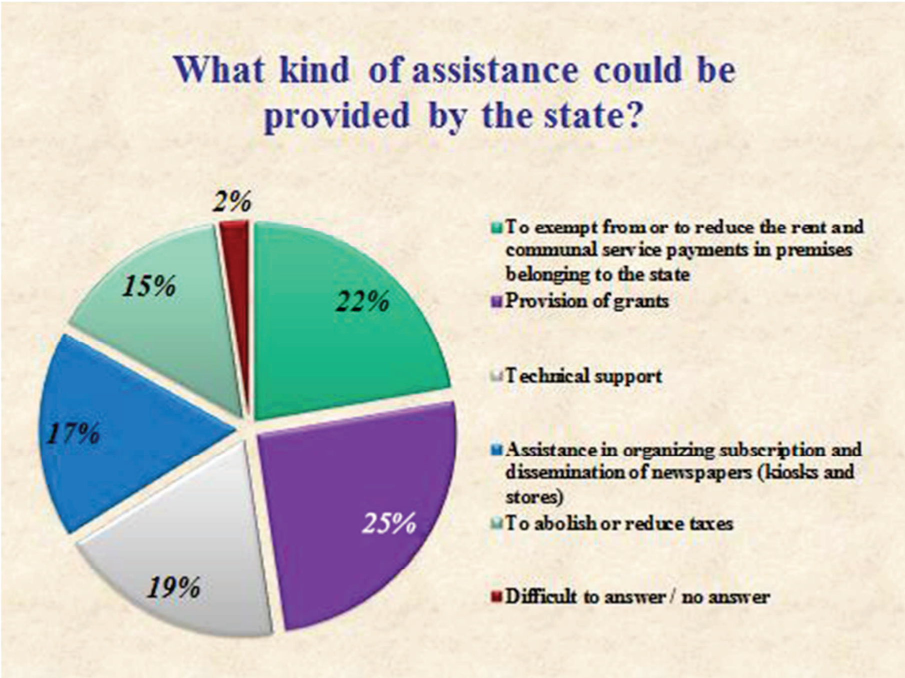
The other 7,6 percent said: "we are self-sustainable", and the remaining 4,5 percent – "difficult to say / no answer".

In other words, assistance from the state would be very needful, but not all of the media managers are confident that it could come from that side.

Diagram 12

Nevertheless, we suggested to define “what kind of assistance could be provided by the state?”

Twenty two percent of respondents said that they would wish exemption from or reduction of the rent and communal service payments in premises belonging to the state. The other 25 percent see “salvation” in grants.



Nineteen percent of respondents need technical support (paper, films, plates, cameras, mixing desks, automobiles, etc.) Seventeen percent would like to receive assistance in subscription and dissemination of newspapers (kiosks and stores).

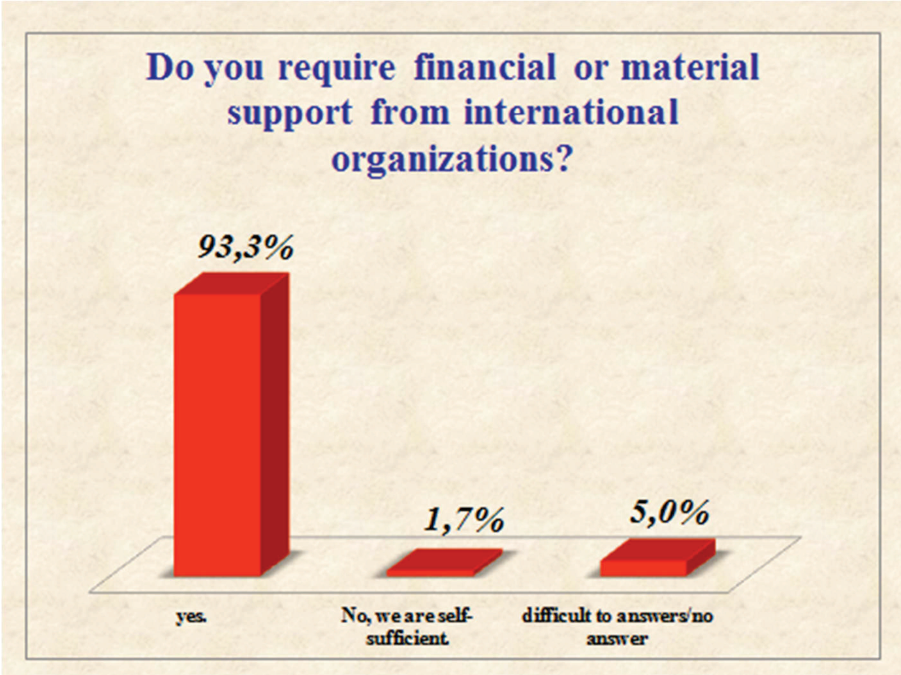
Fifteen percent consider that it would be relevant to abolish or reduce taxes.

In previous surveys, we also had similar results, but the wishes of media professionals always remained “only wishes”, which would be ignored or would not reach the proper addressee.

Diagram 13

Having learned how badly the media community need support from state bodies, we asked a question about the feasibility of financial or material assistance – from international organizations. We did not have reasons for clarifying what exactly they need, and the options for answers were simple: “yes”, “no”, and “difficult to answer / no answer”. The Diagram #13 shows that the vast majority said “yes” (93,3 percent).

During the years of independence, international organizations and diplomatic agencies have provided the Tajik media with plenty of assistance. That was in grants, in technical equipment for the electronic media, multi media equipment, educational programs and study tours. For example, recently, for the third time, the OSCE Office in Tajikistan has provided technical assistance in the form of printing paper for socio-political outlets (newspapers).



Only a small part of the mass media are ready to reject assistance from international organizations – 1,7 percent of respondents who said "we are self-sustainable". The other 5 percent had difficulties answering this question.

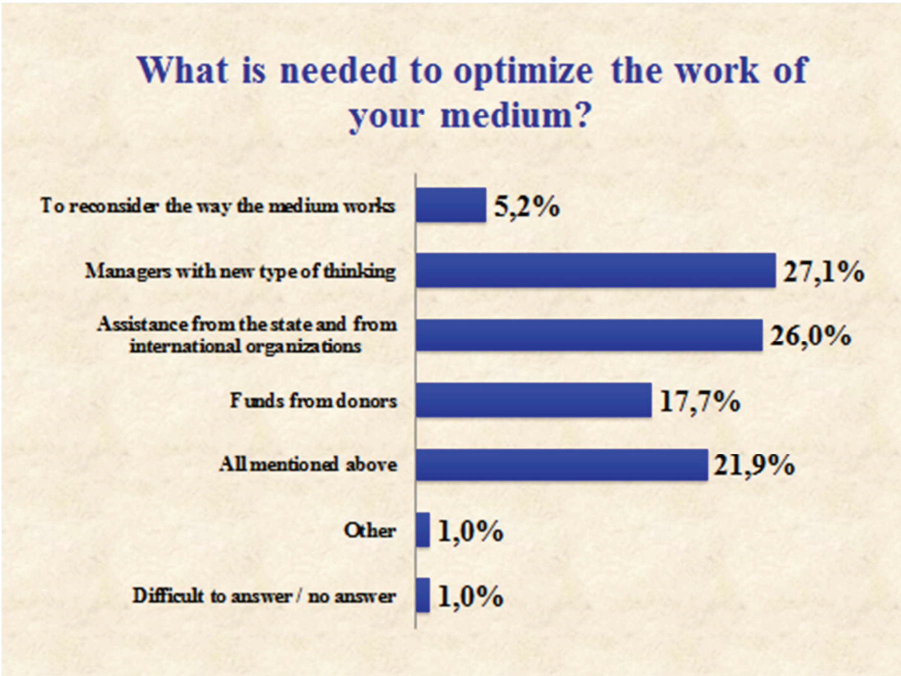
Diagram 14

What kind of assistance should be provided by international organizations? Most of the respondents are waiting for the same kind of assistance, which they expect from the state, i.e. grants (41 percent). The second biggest segment is expecting technical support (paper, films, plates, video cameras, mixing desks, automobiles, etc.)

One fourth of the media managers (24 percent) also see the necessity of organizing educational courses. Three percent want “something else”, and two percent failed to answer the question.

Diagram 15

The current situation cannot be ignored within the medium. This is why we suggested the respondents to analyze the situation and chose some options to resolve it. The next question was: “What is needed to optimize the work of your medium?”



Most of the respondents – 27,1 percent – chose “managers with new type of thinking”. Twenty six percent are confident that they cannot cope with the situation without assistance from the state or from international organizations.

17,1 percent also consider that they need funds from sponsors – from “patrons of arts”. And 5,2 percent said that they need to reconsider/rearrange the way they work, and then, to look for weaknesses.

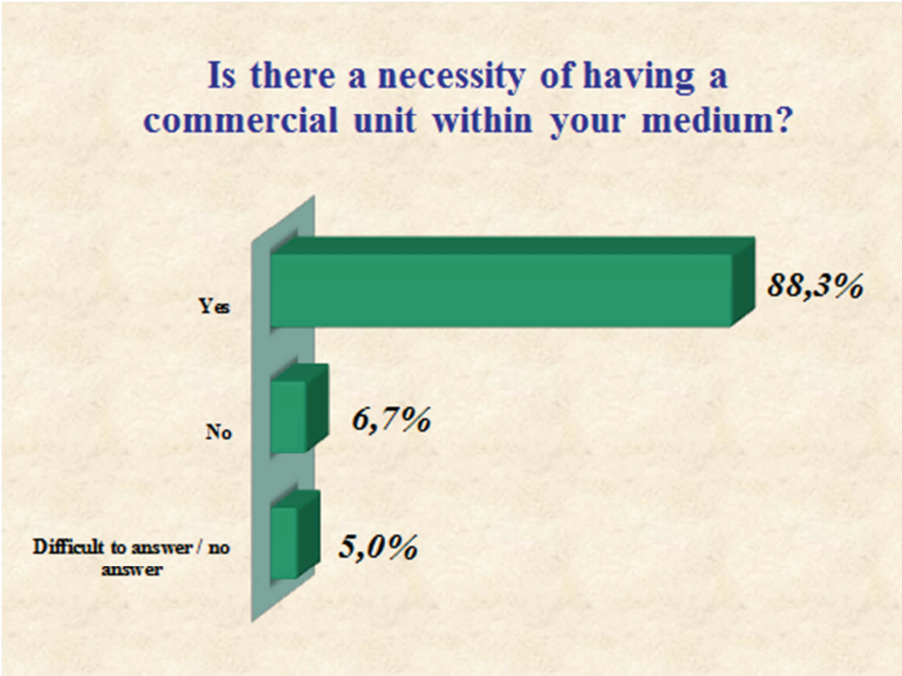
Almost one-fifth of the respondents – 21,9 percent – consider that the assistance should be comprehensive, and they chose “all options mentioned above”. One percent said “we need something else”, and one percent failed to answer the question.

One way or another, the answers imply that most of the media are not able to exist and develop without a serious external support.

Diagram 16

We have said dozens of times that the wealth of the contemporary media depends on their ability to earn. The times of information vacuum – when people did not have enough newspapers, radio and TV stations – have gone long ago. Rivalry has abruptly grown in the new millennium, and one cannot rely upon incomes from circulation, announcements and congratulating letters; it would be just insane to rely on that. Understanding this, many media open specific units in charge of attracting advertisement. However, does everybody understand the need of having such units?

This was the next question: “Is there a necessity of having a commercial unit within your medium?”



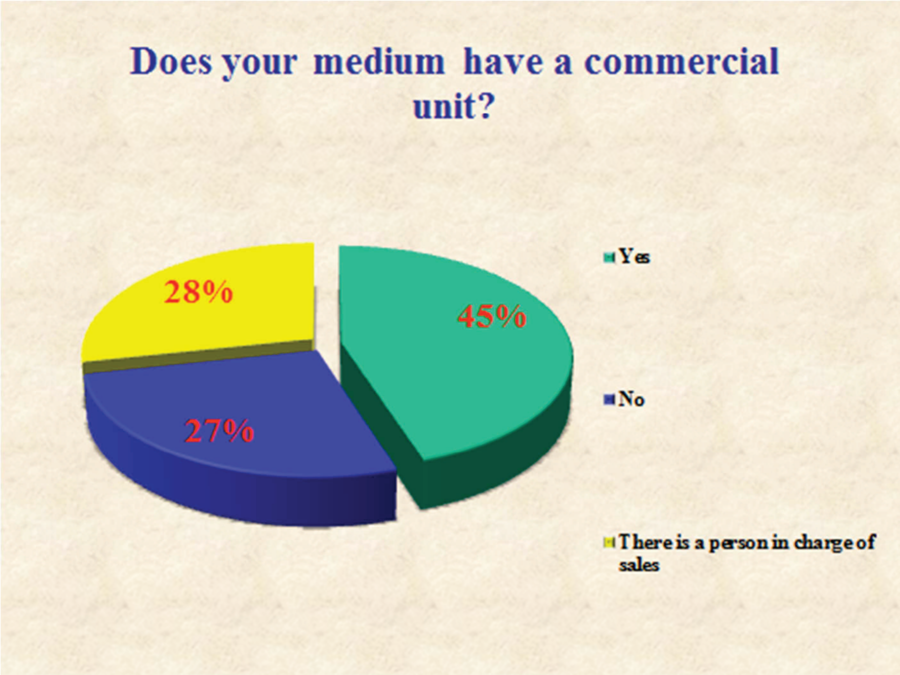
Based on the received answers, only 88,3 percent of respondents consider that the commercial unit is vitally important for the medium. The number of respondents is big, but we see some respondents still think that their media can exist without the marketing and sales services. There are 6,7 percent of them, and the other 5 percent failed to answer this question.

Diagram 17

It is important to realize the necessity of having a commercial unit; on the other hand, you should be capable of creating such a unit within your medium – which implies “desire and skills”.

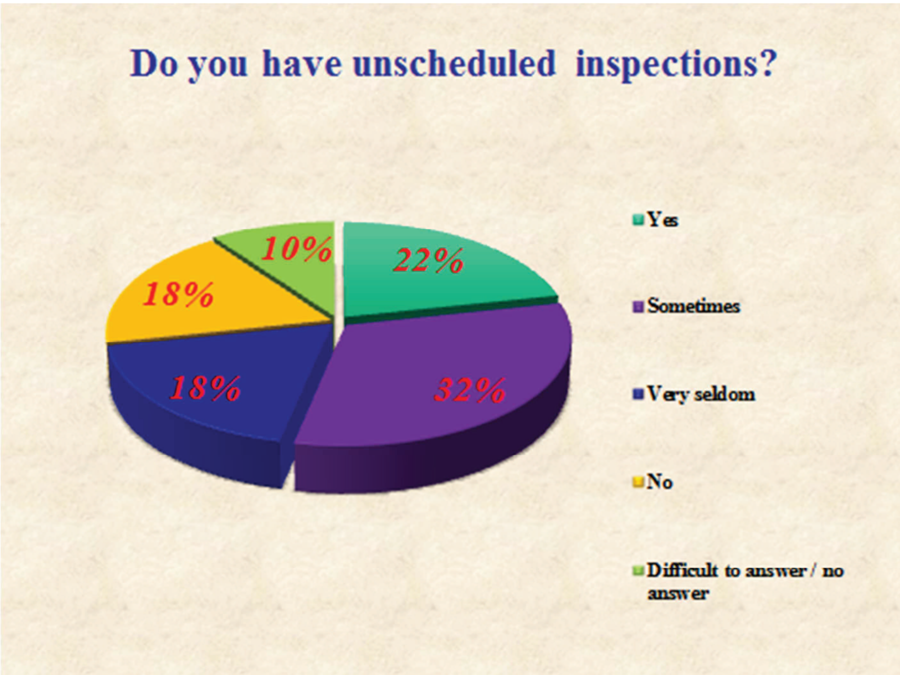
It turned out that the majority of media managers – 45 percent – have created such units or sales services. But this is two times lower than the number of professionals who understand that the sales services are needed. In other words, managers do have the understanding of having these services, but only half of them have implemented this.

Twenty eight percent of respondents said that they have an employee dealing with commercial issues. It is difficult to judge how effective is the work of that person. Very often, while hiring such individuals, the manager pays attention to “personal adherence to the boss” rather than professional skills. Usually, that is a manager’s close relative who has vague understanding of the media sphere, superficial knowledge of management, marketing and the media business.



The other 27 percent of respondents said that they have no commercial units in their media structures. i.e. in the current critical situation, these media are the most vulnerable.

Diagram 18



Another "additional" problem is numerous unscheduled (unexpected) inspections. Officials from various organizations – tax bodies, anti-monopoly agency, sanitary-epidemic station, utility services, fire-fighting service, etc. – often created impediments to the media, conducting unscheduled inspections and extorting bribes. This is why we decided also to ask how the matters stand now: "Do you have unscheduled inspections, and what impact they have on your medium?"

More than 2/3 of the respondents answered affirmatively – yes, inspections occur. Although 22 percent said simply “yes”, whereas the other 32 percent clarified that inspections happen “sometimes”; and 18 percent said “very seldom”.

Ten percent had difficulties answering this questions; some said, “no, we had no inspections”.

We do not have any statistical data from surveys conducted previously. Judging by the answers of our respondents, we see that inspections are not as frequent as they used to be before.

Diagram 19

According to the respondents, the negative impact of such inspections on the media’s activities has also weakened. Only 28,3 percent noted that inspections have strong impact on their work. The same number of respondents (28,3 percent) said, “yes, but not essentially”.

31,7 percent said that inspections have no impact on their organization’s activities.

In other words, on the one hand, there is a trend towards weakening of impact from inspections; on the other hand, more than a half of media managers experience certain discomfort from inspections.

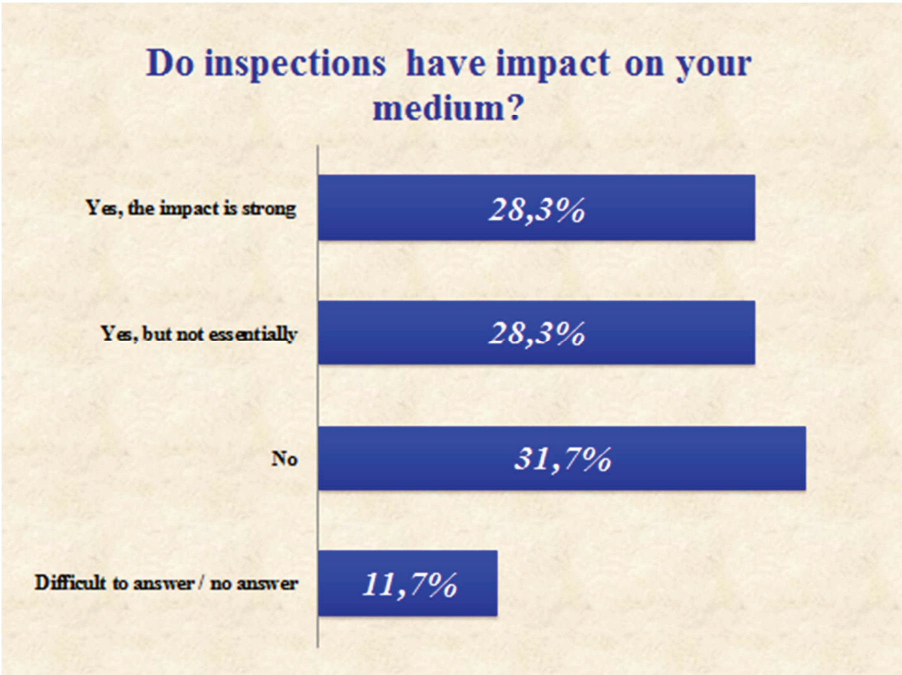
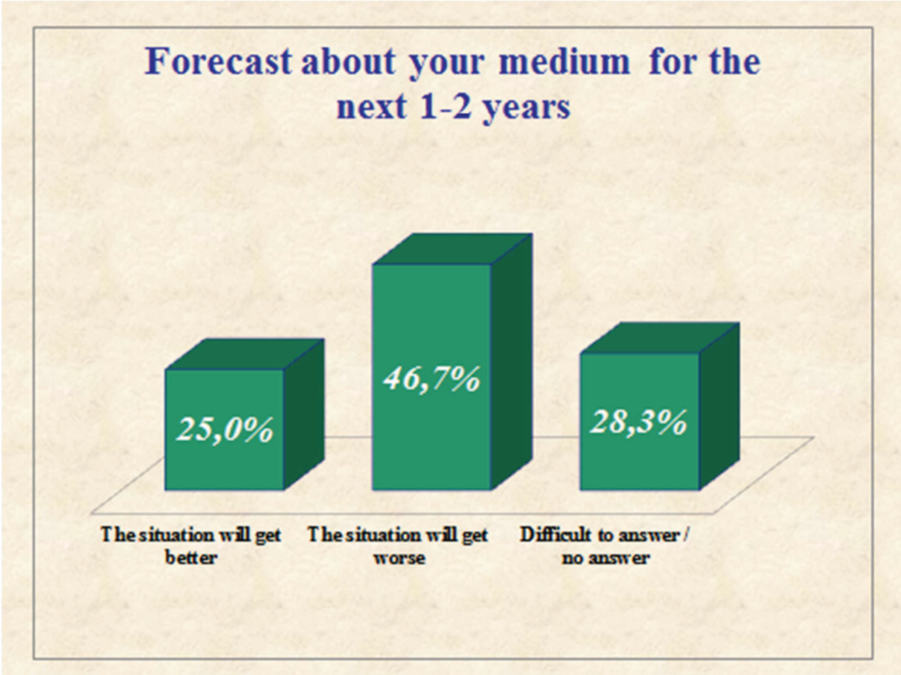


Diagram 20

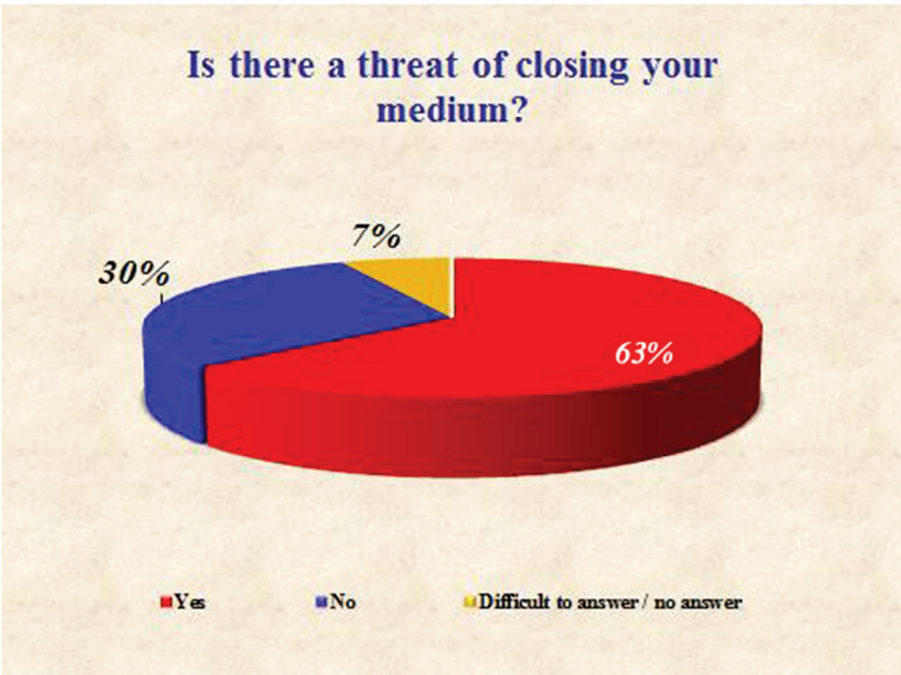
It is difficult to make forecasts about the situation; it is even more difficult to make forecasts in such country as ours – it has not fully recuperated from the civil war, and cannot stabilize its economy. The country borders on the unquiet Afghanistan, and it is very prone to various economic cataclysms.



Probably, this is the reason why 28,3 percent of respondents had difficulties answering the question. The other respondents had diametrically opposite opinions.

Most of the media managers (46,7 percent) made a negative forecast about the destiny of their organization for the next 1-2 years, alleging that the situation can get worse. The other 25 percent are optimistic – they hope that the situation will improve.

Diagram 21



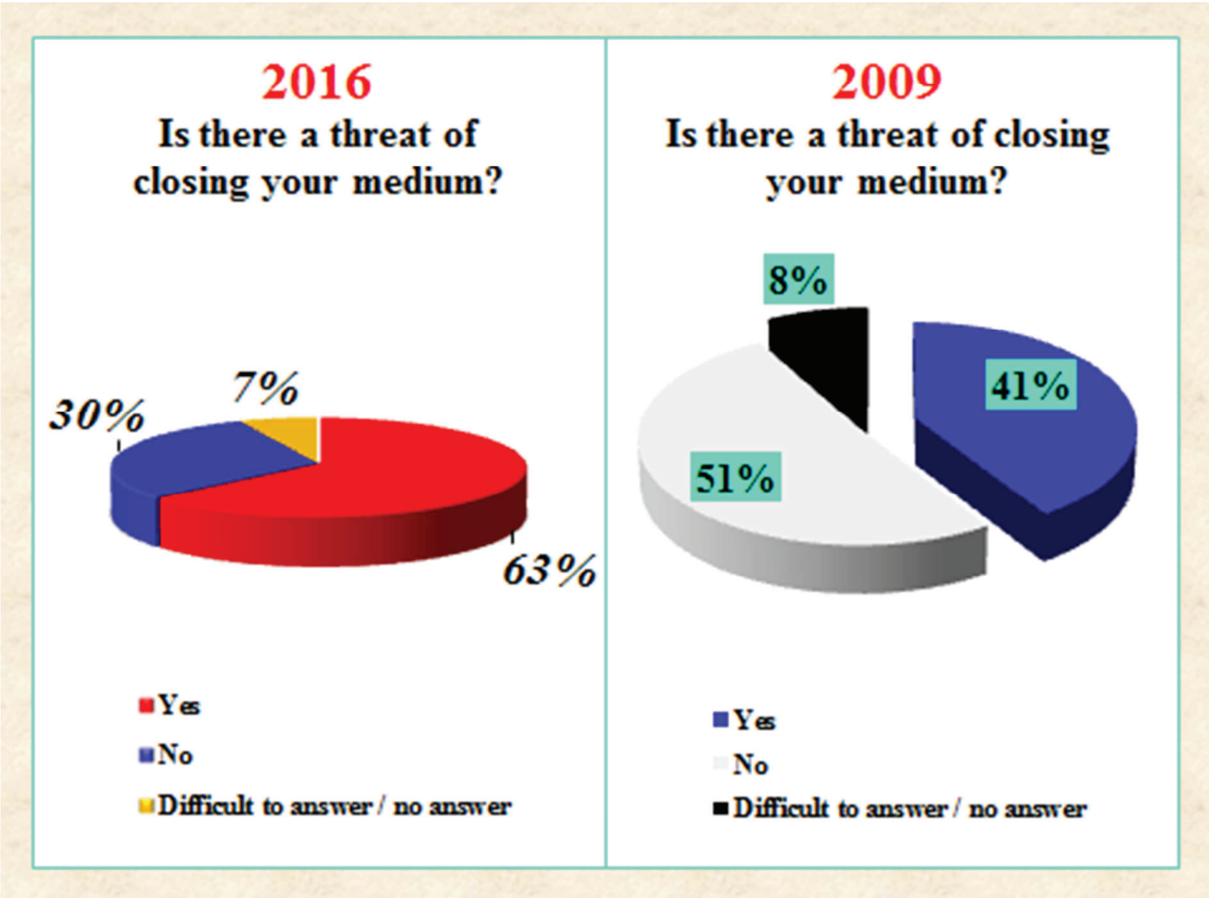
Many of our colleagues noted that information is not “the most essential commodity”; thus, the threat of closing this or that medium solely because of financial reasons has always existed. In times of crises, this threat increases manifold. So, what is this threat for the time being?

As we can see from the analysis of this answer, 63 percent of respondents do not exclude such a threat for their medium. This is a big number, and its significance grows essentially because of the fact that 67 percent of the respondents (according to their personal data) represent the media covering the capital city, Dushanbe and the whole country.

Only 30 percent of the participants are confident that there is no threat of closing their media. The other 7 percent failed to answer this question.

In 2009, we conducted a survey on the topic of economic crisis. Then, in 2008-2009, the financial crisis affected the whole world. In that survey, we posed the same question as in the Diagram #21. It was interesting to learn how the situation has changed since then.

The difference proved to be significant, and we decided to expose these two Diagrams – so that you could also have a look and make your own conclusions.



Comment is needless. We can only state that the situation has deteriorated.

Diagram 22

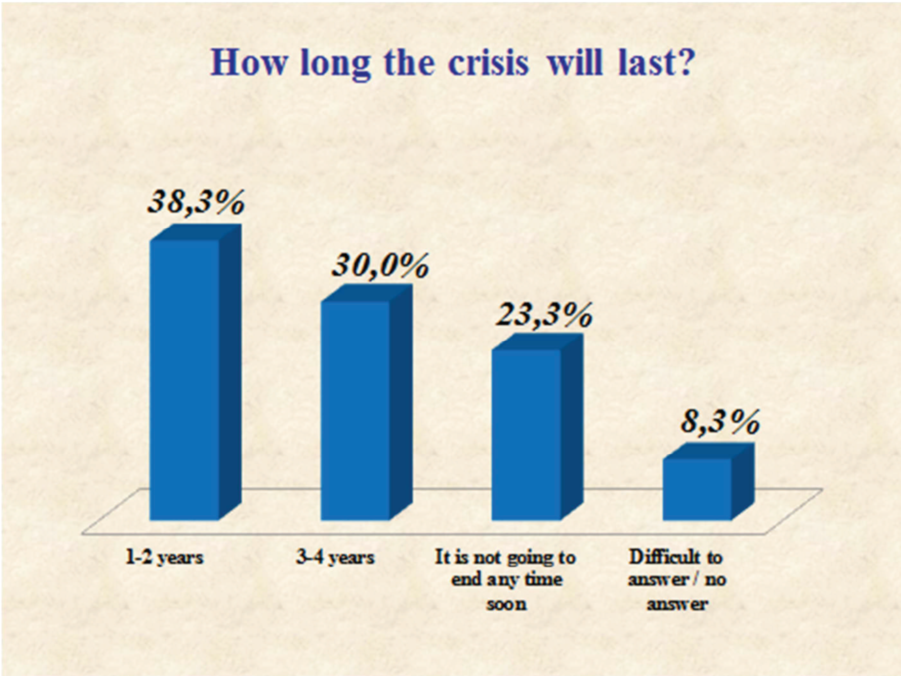
One way or another, every manager tries to plan his actions several steps ahead, i.e. he tries to make a forecast. And this forecast covers not only the interior matters of the medium, but also considers external factors, which can have an impact on professional and entrepreneurial activities.

This is why we decided to ask: “In your opinion, how long the economic crisis will last?”

Most of the respondents (38,3 percent) think that it will last not more than 1-2 years.

However, the other 30 percent of respondents are not that optimistic. Their forecast: 3-4 years.

The other 23,3 percent are confident that the economic crisis will be protracted, and one should not expect its “quick completion”.

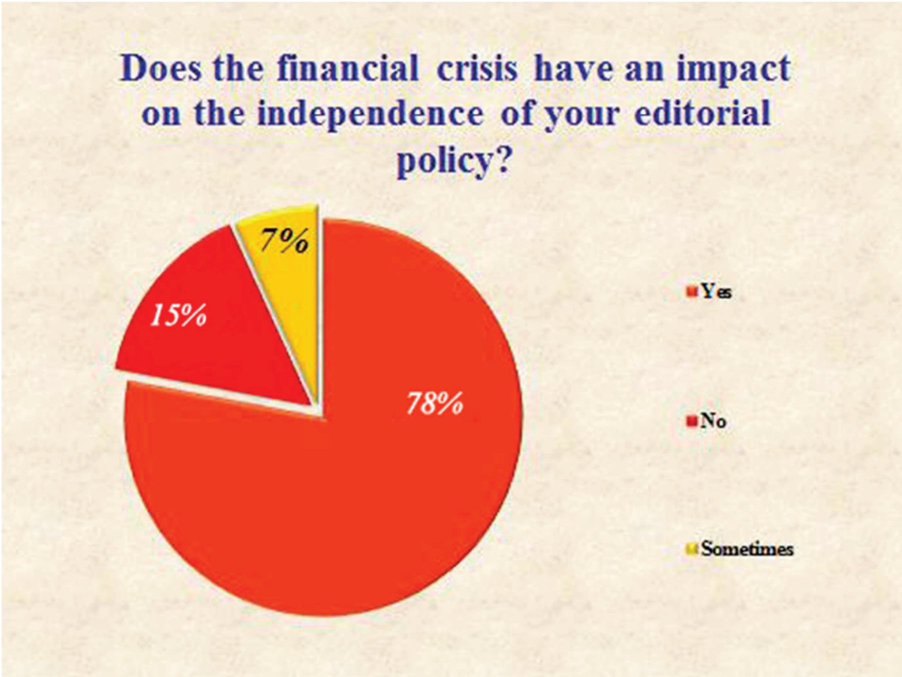


Based on the answers, we can make a conclusion that this particular economic crisis is the most challenging compared to all previous trials for the Tajik media. The crisis began in 2014, but the most optimistic forecast is “1-2 years”. If the forecasts of the pessimists come true, judging by the previous results, not too many media would remain afloat, and their closure is inevitable.

Diagram 23

The final question in this survey: “Does the financial crisis have an impact on the independence of your editorial policy?” In other words, can the medium, which has a sound editorial policy, a principal stance or specific preferences in covering this or that topic, “trade-off” (agree on a compromise) if it has faced serious financial difficulties? Can it restrain from commercial orders from organizations or individuals, which/whom it would not have dealt with previously; or, otherwise – would the medium offer its services to those who do not belong to their target audience, or to the organizations, which it previously criticized for some reasons?

Answers are not specifically surprising; neither are they cheerful. It is clear that one needs to feed his family and take care of his organization; thus, he has to trade-off or reconsider some interests. However, it turned out that there are so many of those who are eager to do this – 78 percent of participants of this survey! If the situation keeps deteriorating, many media would become controllable by these or those state or commercial structures.



Seven percent of the respondents answered “sometimes”.

There are very few of those who think that the financial crisis cannot influence the editorial policy; only 15 percent of media managers said “no”.

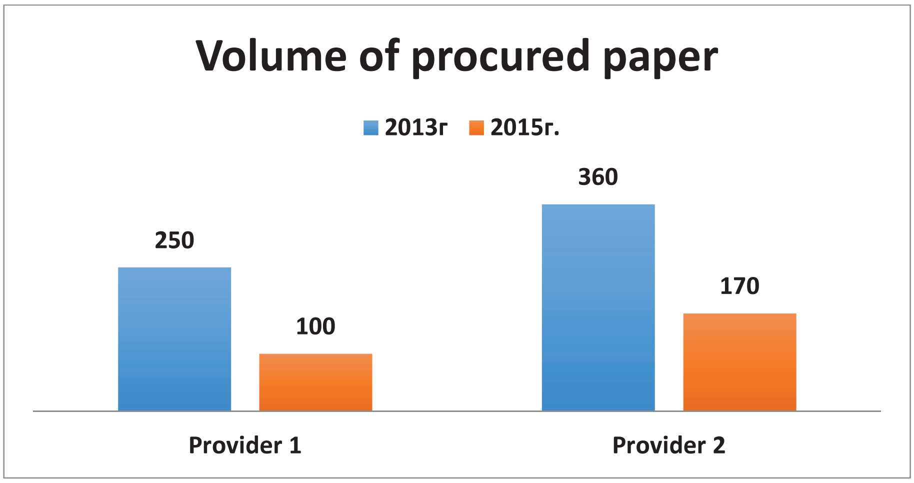
VIII. CONCLUSIONS

Conclusions are different, and they are not applicable to all types of the media to the same extent. Briefly, it would look like this:

- ✓ The electronic media cope with the crisis much easier that the other media. Their situation is not very critical; some of them are rather successful;
- ✓ Internet outlets. Most of them are doing rather badly; the crisis has had a negative impact on them, but many are waiting for new horizons and opportunities to open before them;
- ✓ In the last 13-14 years, the printing media have shown stable growth and success, but now, the situation leaves much to be desired. In these circumstances, the media cannot exist and work in the way they used to exist and work – it is critically dangerous.

Let me start from the latter, i.e. from the printing media. Most of the periodicals will cease to exist. The problems emerged long ago; no integrated approach was applied to find the solution; and the situation has been deteriorating year by year. In the last 2-3 years, we have lost dozens of printing outlets. At present, we see that the circulation has reduced by 15-40 percent.

For example, this Diagram shows the volumes of procurement of paper by two big suppliers in 2013-2015. The Diagram shows that the delivery of paper for newspapers has decreased more than twofold.



The data were presented to us by the suppliers at the end of 2015*

The reasons for deteriorated feasibility of the printing media are the following:

a) Most of the media failed to organize their work as a proper business structure.

b) Many of the media suffer from the lack of full absence of professional managers and journalists.

c) The media content does not meet requirements of the audience.

d) Lack of efficient system of dissemination. No initiatives to attract new readers.

e) Absence of efficient commercial units and poor work on attraction of advertisers.

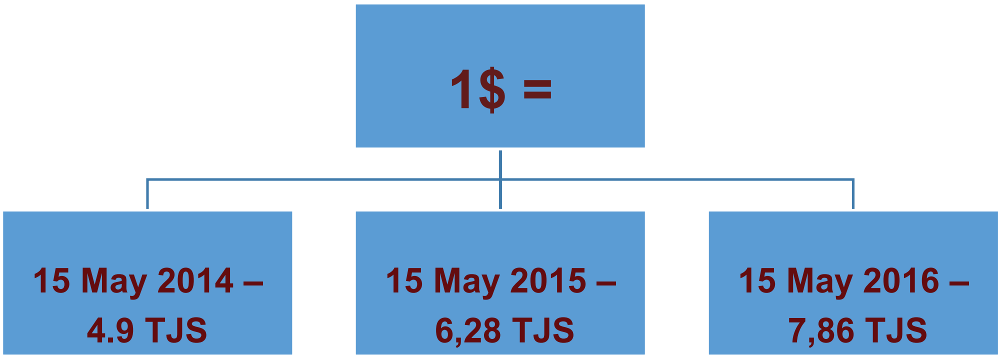
f) Lack of desire to learn and introduce new mechanisms of promotion.

g) Unequal conditions in competition between independent and state mass media.

I outlined shortcomings typical for the printing media, but some of them are also relevant for other types of the media – online and electronic.

Situation in the electronic media, by and large, is much better compared to the printing media. Most of them have commercial units, and they have learned how to sell their broadcasting time efficiently and to earn from concurrent commercial activities. The main and obvious threats for their existence are mostly factors, which they cannot control – namely, the economic crisis that has affected the whole economy, reduced flows of advertisement because of the shrinking budgets of advertisers, and the devaluation of the national currency.

Referring to the devaluation, I would provide you with the data taken from the official web site of the National Bank of Tajikistan:



Comment is needless.

The electronic media also have shortcomings similar to those the printing media have. However, according to the respondents, their negative impact is much smaller.

Online media are a relatively new phenomenon in Tajikistan's media market. However, in terms of the number of consumers, certain web sites are bigger than their own "hard copy" circulations. In recent years, the number of Internet consumers has grown essentially.

According to the Association of Internet Service Providers, in **2010**, the Internet audience would hardly exceed **200 thousand** individuals.

According to the same source, in December 2015, the audience has grown to **3,8 million**, which is 19 times bigger!

It might seem that here we have new opportunities, and the online media could get a lot of profit. However, having received such a powerful audience, media managers failed to earn much – because they do not have proper skills of providing information services. Very few of them are using new opportunities successfully, getting profit from that.

Another important conclusion that we made during the survey of online and printing media is the denial of existing problems. Lack of understanding and negligence in terms of timely resolution of problems have caused the common decay in the sector. Without a proper analysis of all of these points, the issue of feasibility – or even the issue of further existence – of the information agencies or printing outlets becomes very dubious.

The organizational structure of work within the media is studied poorly; this is why it is arranged inappropriately, with a lack of due attention. In most of the cases, mistakes are typical, and they are committed by managers. For example, the lack of precise structure, managerial experience, assessment and application of available human and material resources, limited capacities of the media, limited access to consumers, absence of a stable source funding, outdated products (both the form and the content)… All these cannot be a basis for successful organization of media business.

IX. RECOMMENDATIONS

Based on what has been said above, we revealed the following problematic aspects in the mass media, and developed recommendations, which could be taken into consideration or applied in media organizations:

- **Professional personnel.** In recent years, we have been seeing abrupt outflow of professionals from the domestic independent mass media. Although, there is a shortage not only among journalists. There is a lack of skilled specialists capable of adapting the media to modern conditions of collecting and disseminating information, as well as building efficient media structures. Regrettably, most of the media have not ever paid due attention to this issue.

Immediate measures must be taken to return employees and to prevent their further outflow. Managers should take good care of their specialists and newcomers. Proper arrangements should be undertaken for upbringing of new generation of workers who graduate from universities with a desire to work, but not having proper skills.

- **Content.** The content is not properly elaborated; neither it is attractive; and mostly, it is monotonous – which leads to dissatisfaction of consumers. It refers mainly to the printing media. There is a crisis of ideas in the process of preparation and presentation of the information product.

Despite the tough competition, the electronic media still cannot adjust production and presentation of high-quality original content. This is mostly an economic reason – it depends on a properly built team and stable inflow of funds in the medium. We should also stress the failure to implement the Plan of Actions under the Program of adaptation of Tajikistan's economy in regard to its membership in WTO (Resolution of the Government #691, 31 October 2014), which prescribes abolition of licensing requirements for production of audio and video products. Two years have passed since the adoption of that document; however, the bodies in charge and the parliament have not fulfilled the requirements.

Besides that, it would be preferable to conduct an integral questionnaire survey among the media and ascertain preferences of the audience. The results of the survey would improve the content and comply with customers' expectations.

Attitude to the content should be changed; the content should be diversified; it should become exclusive to some extent; a creative approach and multi-media opportunities should be applied.

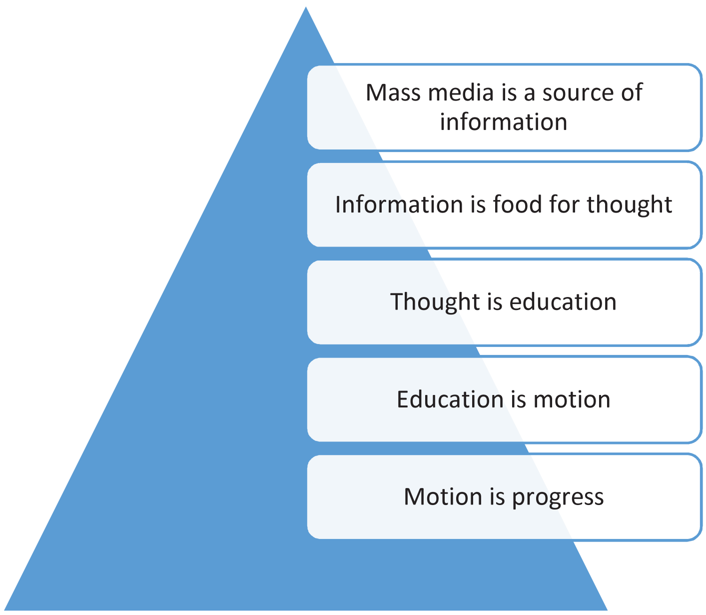
Otherwise, if you "let it go", we will lose our own media rather soon. People do not like "consumerist" journalism of poor quality. Such an option is pernicious for the media.

- **High level of expenditures.** The level of expenditures for maintaining the media is extremely high. Practically, Tajikistan does not manufacture anything, and the main commodities are imported. The goods are bought for hard currency, which implies that media manufacturers must constantly increase the cost of their products.

This issue requires thorough consideration, possibly, with support of media NGOs and the state. For example, the state or commercial organizations could organize integrated supply of consumable materials for the printing media on lower prices. The authorities could also consider possibilities of exempting the media from rent of premises and printing facilities located in state buildings, and to reduce payment for communal services.

➢ **Tax burden.** As it was mentioned above, most of the media organizations suffer from a heavy tax burden. Assistance is needed from international organizations and media NGOs who could jointly lobby the issue of tax remissions or temporary suspension of taxes for 2-3 years.

It is not likely that in this period of crisis the mass media would bring any essential income to the state treasury; however, their participation in social life is very strong. As any other civil society institution, the media contribute to development and improvement of the society. The scheme is extremely simple: the mass media is the source of information; information is food for thought; thought is education; education is motion; motion is progress.



Thus, the tax exemptions could become one of the most essential elements of development and progress of the society and the country.

➢ **Commercial unit.** If the founders of a medium are interested in feasibility of their organization, it is vitally important to set up a commercial unit. Besides that, employees should be hired on a competitive basis, with a clear system of motivation and investments in education for all members of the unit.

It is also necessary to introduce and maintain a database on the sales of broadcasting time and advertisement space. Most of the media do not have this. Maintenance and analysis of indicators is not burdensome, but it is efficient for planning and commercial activities of the medium.

It is also important to look for new ways of concurrent commercial activities, e.g. photo and video recording BTL (below-the-line – indirect advertisement through presentations, events, concerts, creative sales, exhibitions, conferences, etc.).

All mentioned above could be conducted concurrently with the main journalistic activities, covering events on the medium’s own equipment and tools, at the same time, attracting good funds, which could be invested in future development.

➢ **System of dissemination.** The time has come to look for new ways of improving the system of dissemination. Regrettably, too many failures happened in the past, and too few useful efforts have been undertaken. Nevertheless, it is necessary to work on creation of an original dissemination service, or try to set up such structure jointly with another medium, so that it would be accountable to all stakeholders in equal extent. It is necessary to study and implement the experience of other printing media, possibly, from neighboring countries.

And more – with the mediation of media associations and international organizations, we need to abandon the practice of forced subscription on state periodicals – because this contradicts the rules of fair competition in the media market.

- **Upbringing/education and expanding the audience.** Cooperation is needed among all types of the mass media, regardless of the form of property, as well as active promotion of reading as such among the people. Here is the argument: reading is a sound way of avoiding the destiny of a guest worker. Profile state institutions and representatives of the civil society can be involved in this for better efficiency – to promote the culture of reading among the young generation through public meetings, events and contests for schoolchildren and university students. We should not expect an immediate result, but in perspective, readers will be more selective, which will allow newspapers and magazines to increase their circulation; the same concerns a more qualitative selection of web sites.

- **Assistance from diplomatic missions and donor agencies.** We are aware that in the last years, donor organizations have essentially reduced their grant budgets. It is not absolutely clear whether it is justified or not. However, it would be worthwhile to approach these organizations under mediation of media NGOs with a proposition to increase the donor inflows in order to help the media acquire financial stability.

Besides that, the media should attract attention of the organizations mentioned above and explain them that many of their assignments would be conducive in terms of visibility of their own activities. Such assignments could be performed by media organizations, without any mediators, i.e. advertisement and PR agencies.

- **Consulting assistance.** Consulting assistance for the media is definitely necessary. It should not be limited by two or three-day workshops conducted once a year, but in a more comprehensive and operative form. The media keep working in an old-fashioned manner – because the knowledge of managers and employees is very limited and, in many respects, archaic. The time has come to apply new methods of management and modern forms of journalism.

It should be noted that at this stage it is impossible to receive consulting assistance without mediation by international organizations and foreign embassies. The independent mass media cannot resolve this issue individually.

IX. ACRONYMS AND ABBREVIATIONS

- The media (medium) – the mass media
- NGO – non-governmental organization
- VAT – value added tax
- POL – petroleum, oil, lubricants
- OSCE Office in Tajikistan – Organization for Security and Cooperation in Europe, Office in Tajikistan
- WTO – World Trade Organization
- PR (Public Relations) – technologies for creation and introduction of an image of a certain object (idea, commodity, service, person, organization, company, brand, etc.) within competitive socio-economic and political systems. In a wider meaning, this is "the management of public opinion".
- BTL (below-the-line) – indirect advertisement through presentations, events, concerts, creative sales, exhibitions, conferences, etc.
- etc. – etcetera; and so on.
- i.e. – id est (Latin)

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