

EXILED. EFFECTIVE. ESSENTIAL.

WHY SUPPORTING THE BELARUSIAN INDEPENDENT
MEDIA ECOSYSTEM DELIVERS OUTSIZED RETURNS FOR
DEMOCRACY AND SECURITY

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TABLE OF CONTENTS

1. Executive summary	4
2. A sector forged in crisis	7
3. Structure of Belarusian media ecosystem	8
4. Strategic role and public value	12
5. Funding realities and needs	20
6. Recommendations	23
7. Annexes	
Annex 1. Ecosystem composition and value	29
Annex 2. Explanation of ‘extremist’ statuses in Belarus	33
Annex 3. Financial needs analysis	35
Annex 4. Funding cuts in Europe	38

1. EXECUTIVE SUMMARY

Belarusian independent media (BIM), now primarily operating in exile, remain among the few functioning democratic institutions with a meaningful presence in Belarusian society. Despite years of repression, forced displacement, and financial instability, these outlets continue to produce high-impact journalism, shape public opinion, encourage democratic participation, support crisis communication, and serve as a vital conduit for preserving national identity.

This paper aims to demonstrate that the exiled Belarusian independent media sector has evolved into a highly effective, professional, and resilient ecosystem. It plays a central role in the Belarusian information space and stands as both a democratic force and a strategic asset for European regional security. The document argues that BIM should be recognized not merely as recipients of foreign aid, but as strategic partners of the European Union, integral to the EU's democracy and media development agenda. It also underscores the urgent need for sustained, long-term investment in quality media, of which BIM are a leading example.

Strategic takeaways

Belarusian media sector is a cohesive **media ecosystem**, not fragmented actors. Unlike exile media from other contexts, BIM function as a mature, interconnected ecosystem. They share infrastructure, co-produce content, and uphold consistent standards, aligning well with EU partnership models.

Exceptional domestic reach makes BIM **highly effective**. Over 70% of BIM audiences are in Belarus; up to 40% of Belarusians consume independent media weekly – all that is despite existing digital barriers, making them an exceptionally efficient channel of information flow between Belarus and the EU.

BIM play dual role: **watchdogs at home, shields for Europe**. BIM confront both internal repression and Kremlin disinformation. Their work contributes directly to the EU's goals of countering malign influence and promoting democratic resilience in the Eastern Partnership region.

BIM are fully **aligned with EMFA standards**. BIM embody the principles enshrined in the European Media Freedom Act: editorial independence, ethical journalism, self-regulation, and serving the public interest.

BIM are critical **partners for the European Neighbourhood**, BIM play a stabilising role in the EU's Eastern Neighbourhood by sustaining democratic dialogue, resisting authoritarian disinformation, and maintaining public trust under extreme pressure.

BIM strategic value is undermined by **funding instability**. Belarusian media ecosystem in exile is critically vulnerable to availability of donor funding due to disruption of business models. Without timely and predictable funding mechanisms prioritising the support for media operations, irreversible damage to this ecosystem is likely.

Recommendations

BIM should be integrated into the European Democracy Shield. As frontline actors in the information domain, BIM are well-positioned for inclusion in pilot initiatives and future implementation of the European Democracy Shield, especially its external-facing components.

Core, multi-annual support is needed. The EU and other donors and implementers should prioritise structural funding over short-term projects to empower BIM to plan strategically, innovate, and retain talent. EED, NDICI-GE or other existing instruments could be adapted for this.

Better institutional protection in host countries. BIM require improved legal, visa, and institutional protection frameworks in EU host states. These are essential to safeguard their operations and staff under cross-border pressure.

Supporting and strengthening the Belarusian independent media ecosystem in exile is a direct affirmation of the EU's credibility in defending democracy. BIM embody democratic resilience in the face of sustained authoritarian repression. Their inclusion in EU strategic programming would demonstrate a principled and long-term commitment to Belarusian civil society. Without sustained core funding, this ecosystem faces the risk of collapse, threatening to silence one of the last remaining independent voices for Belarus and dismantle a highly effective democratic institution.

2. A SECTOR FORGED IN CRISIS

An executive order¹ by US President Donald Trump to halt all foreign assistance, signed on 20 January 2025, delivered a seismic shock to BIM. Like elsewhere in the world², about half of their grant funding vanished overnight, pushing many to the brink.

This was the fifth blow of such proportions in as many years.

The first one came in 2020, when Belarus had been swept by a wave of mass protests³ in the wake of a rigged election. The dissent was ruthlessly crushed by Alaksandr Łukašenka, who has been cementing power since becoming president in 1994.

Media were at the centre of the unrest, and the second blow soon followed: mass persecution⁴. Not a single outlet was spared. Journalists and managers were jailed en masse; their companies were outlawed one by one; their families, sources, and even audience members were tyrannised by the oppressive system.

As repressions mounted, another blow landed in 2022. Russia launched a full-scale war against Ukraine, with Belarus siding with the aggressor. The resulting rapprochement further diminished hopes for change.

Even before the war, many journalists had already fled the country – the fourth blow. Some initially settled in Ukraine, only to relocate again⁵ as their chosen home country was less welcoming towards Belarusians, whose government officially sided with Ukraine's enemy.

Yet, somehow, along with packing up their lives and scraping by an existence in exile, dealing with the pain of abandoning loved ones at home and friends in jail, journalists from Belarus kept their media running.

They built⁶ a vibrant, transnational community of exiled professionals and a dynamic, unique ecosystem of media that kept the public at home informed and engaged.

3. STRUCTURE OF BELARUSIAN MEDIA ECOSYSTEM

Belarusian independent media sector in exile represents a **uniquely structured and diverse ecosystem**.

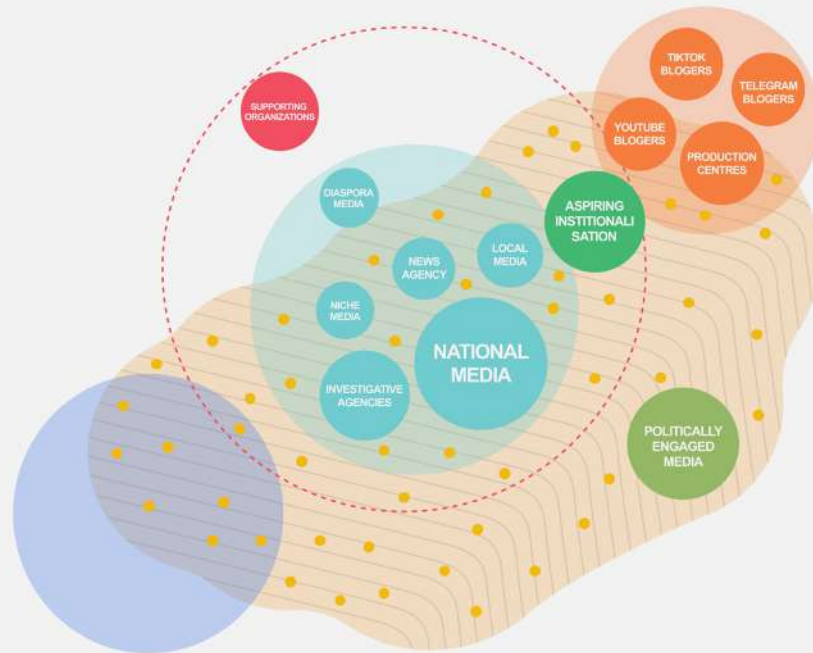
Unlike exiled media from other countries⁷, where often few major outlets survive, the Belarusian model includes around 45 media organisations of varying scale and focus that complement one another.

Diversity and complexity

The ecosystem's core includes national and local media, supplemented by niche projects, a news agency, investigative journalism centres, production and supporting organisations.

Each plays a specific role: national media shape the agenda and address broad socio-political issues; local media cover community concerns and maintain audience ties; niche media serve specialised audience segments, for example, women or the IT community. Supporting organisations function as resource hubs, offering expertise, legal advice, human rights protection, international advocacy, training, research, coordination, and policing the media for standards. (See Annex 1 for a detailed description of the ecosystem.)

Exiled BIM Ecosystem



- Media support organisations
- Joint infrastructure: physical, educational, technical, intellectual
- Institutionalised media outlets
- Types of media outlets
- Non-institutionalised content producers
- Types of non-institutionalised content producers
- Freelance journalists
- Politically engaged media
- Media aspiring to become institutionalised media outlets
- Foreign government backed media broadcasting for Belarus
- Belarusian audience inside Belarus

Source: Schematic visualisation by PCB

Ecosystem characteristics⁸

- A broad mix of types of outlets that complement one another's outputs.
- Organisations that help to develop the ecosystem as a whole (commonly referred to as a keystone⁹ or orchestrator¹⁰).
- Shared value creation and synchronisation of goals.
- Shared infrastructure and support systems (for example, co-working and production spaces, educational, security and research & development functions).
- Synergies and competitive advantages through knowledge-sharing, talent pooling, and innovation.
- Structured relationships between organisations – coexisting with competition – driven by mutual benefit.

Additionally, the diversity of projects fosters healthy competition – for staff, scoops, and audience reach – while also promoting an exchange of information and expertise.

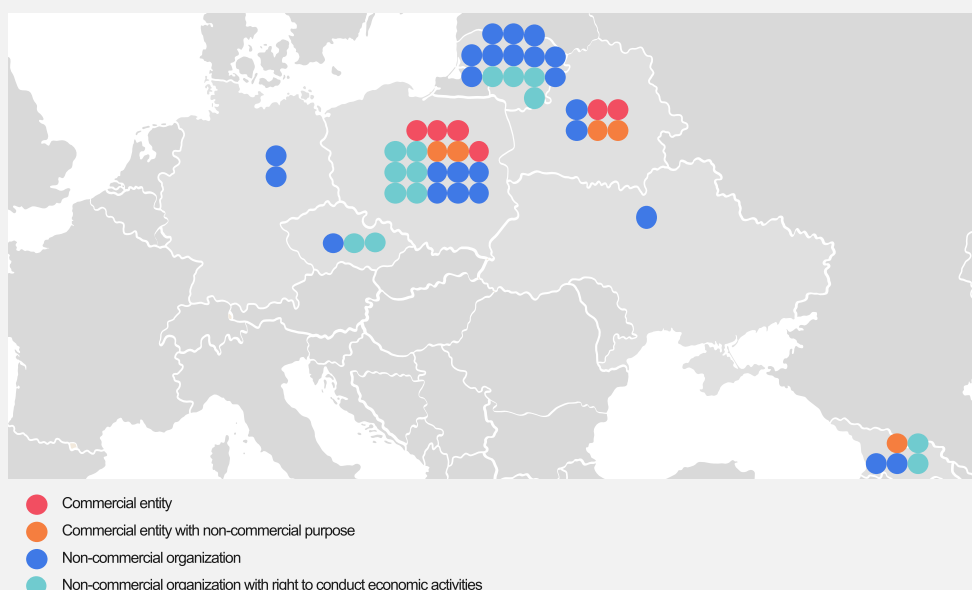
For example, local media provide data that national outlets use to build a broader picture. Specialised investigative centres contribute expertise for complex investigations.

Other forms of consolidation are emerging across the ecosystem. In one case, several small outlets unified back-office functions such as bookkeeping and administration.

Another case is Belarus Tomorrow¹¹, the first ecosystem-wide digital TV initiative. It created a shared satellite platform for participating video producers to broadcast jointly via satellite in Belarus and elsewhere.

These forms of complex organisational models are unique to BIM and are made possible by the diversity and complementarity of its players, working towards common goals.

Geographic distribution of Belarusian independent media



Source: PCB Media Analytical Lab, 2025

Most BIM have found a new base in Poland (53%) and Lithuania (41%). Only 18% retain a legal entity in Belarus. Georgia, the Czech Republic and Germany host a handful, too.

Most organisations are registered as non-commercial entities, with some authorised to engage in commercial activity. However, only five of the 34 organisations surveyed by Press Club Belarus are officially registered as mainstream media or mass media. The designation brings extra regulatory burdens in many host countries and offers little advantage, given the absence of commercial media income.

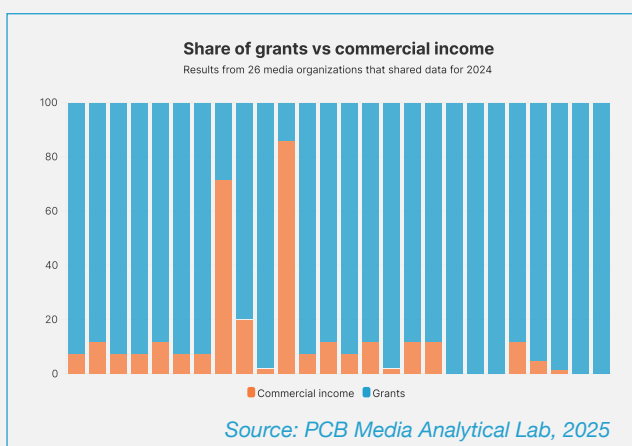
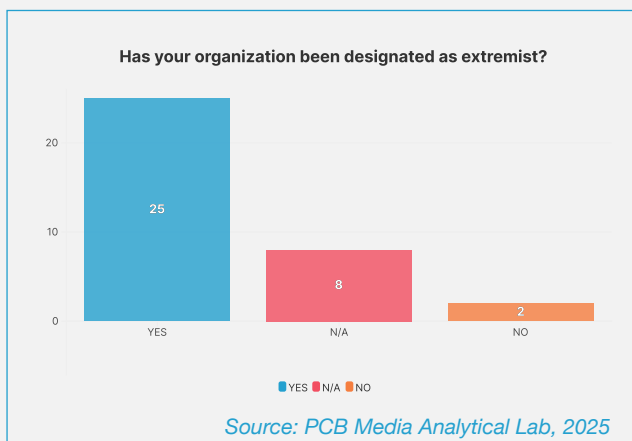
Staff locations generally mirror headquarters distribution, with one key difference: around 35% of outlets retain journalists inside Belarus despite the severe security risks faced by them and their families.

This setup strengthens sector resilience: when one outlet is targeted or faces critical issues, others continue the work, ensuring the flow of information.

The EU welcomed an estimated 700-800 staff members from the Belarusian media. In addition to the main host countries, Belarusian journalists are also based in Latvia, Spain, Italy, the United Kingdom, Romania, Switzerland, Norway, Austria, Montenegro, Belgium, Armenia, and Kazakhstan.

Traditional business models of Belarusian media have been entirely dismantled by sustained repression. The regime has criminalised access to the content of independent media in exile, making commercial engagement with domestic audiences nearly impossible.

Subscription models, advertising, and crowdfunding are now largely inaccessible, as both citizens and organisations risk criminal prosecution for supporting BIM.



Moreover, media organisations are also often forced to use unbranded communication channels on social media to avoid endangering individuals in Belarus who might face prosecution for interacting with “forbidden” content.

“We decided to reach the Belarusian audience in Belarus using guerrilla methods- creating numerous unbranded channels on various platforms that are indirectly/remotely connected to our main project”

Source: a Belarusian independent media outlet, 2025

Meanwhile, the Belarusian diaspora, estimated at around half a million, is neither large nor financially stable enough to sustain BIM.

Most BIM remain sharply focused on audiences inside Belarus, with only a few exceptions targeting the diaspora¹². At least 70% of the BIM target audience is located in Belarus¹³, according to the outlets' assessment of reach.

4. STRATEGIC ROLE AND PUBLIC VALUE

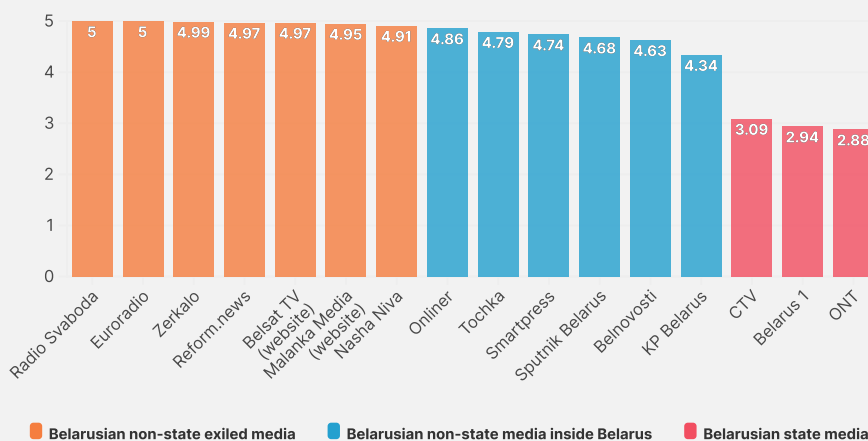
Quality journalism

Belarusian independent media act as public interest media, as defined by the Organisation for Economic Cooperation and Development (OECD)¹⁴. Their content informs and engages the public on issues affecting their lives and communities and is based on editorial independence and transparency – even in exile¹⁵. BIM in exile fully align with the European Media Freedom Act (EMFA) definition of “quality journalism” and “quality media services.” These outlets demonstrate editorial independence, serve as public watchdogs, and consistently provide trustworthy and reliable information. Their work adheres to high ethical and journalistic standards, embraces self-regulation, and is characterised by impartiality – all of which are key criteria outlined in EMFA¹⁶.

Belarusian media in exile not only comply with the above definitions. They are, in many cases, exemplars of how journalistic integrity and public value can be preserved under conditions of repression and exile.

For example, outlets like Svaboda, Zerkalo, Nasha Niva, Reform, Malanka, Belsat and Euroradio consistently rank highest in independent quality ratings and adhere to professional standards¹⁷, while 15 leading BIM signed a joint ethics charter and established a Media Ethics Board to ensure accountability¹⁸. Their public interest role is further affirmed by prestigious awards, including the UNESCO Press Freedom Prize (2022)¹⁹, Free Media Awards (2021, 2023)²⁰, IPI-IMS World Press Freedom Hero (2021)²¹ and recognition from governments such as the USA²², UK and Canada²³.

Ranking of media outlets based on compliance with news reporting standards in 2024



Source: Media IQ, 2025

Democracy and security: a shield from information manipulation

Belarusian media in exile play an outsized role in combating disinformation from both the Minsk regime and Moscow. They consistently debunk false narratives, provide fact-based reporting on events like Russia's war in Ukraine, and expose the misleading claims pushed by state-controlled Belarusian outlets.

The Council of Europe notes that these exiled journalists “provide significant input into countering disinformation and propaganda of the Łukašenka regime” for Belarusian- and Russian-speaking audiences²⁴.

By challenging the official lies – for example, the regime's claims that 2020's pro-democracy protests were a Western “coup” or that the EU is Belarus's enemy – independent outlets offer an alternative narrative based on verified facts and broader regional and global context. Their very existence ensures media pluralism for Belarusians, who would otherwise be exposed only to the monolithic state viewpoint.

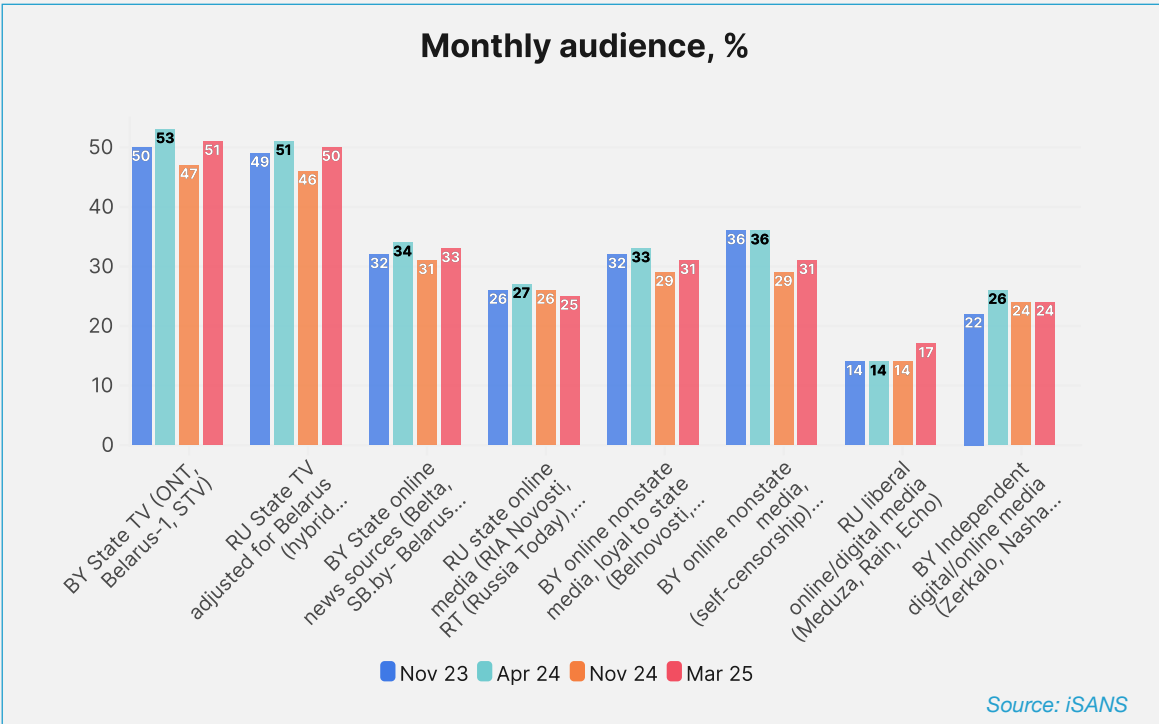
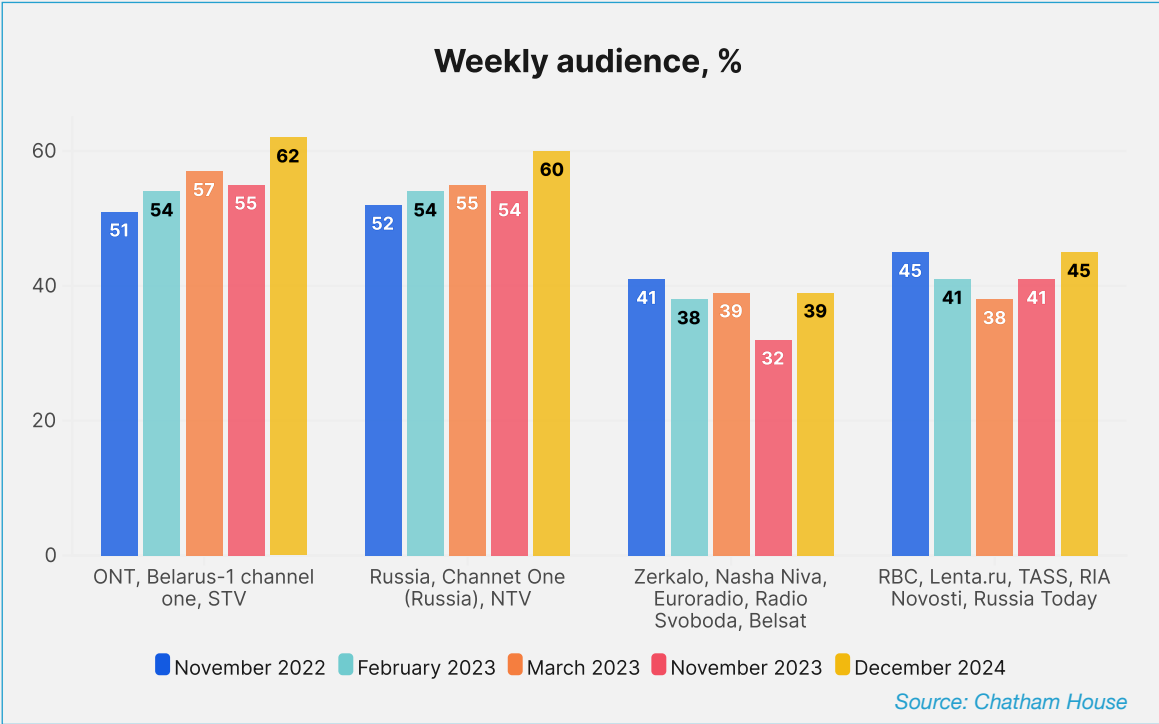
Leading experts emphasise how crucial these exiled media are in blunting authoritarian propaganda. Jerzy Pomianowski, Executive Director of the European Endowment for Democracy (EED), observed that “when we talk about countering disinformation, combating Russia's toxic influence, and resisting Russian interference, independent Belarusian media are doing tremendous work”²⁵. He noted their audience reach inside Belarus is comparable to that of all media “beyond the Kremlin's control” in Russia – a testament to their effectiveness²⁶.

Belarusian exiled outlets bolster information integrity by upholding fact-based truth amid a sea of misleading narratives and by sustaining a plurality of voices where dictatorship seeks to silence all dissent.

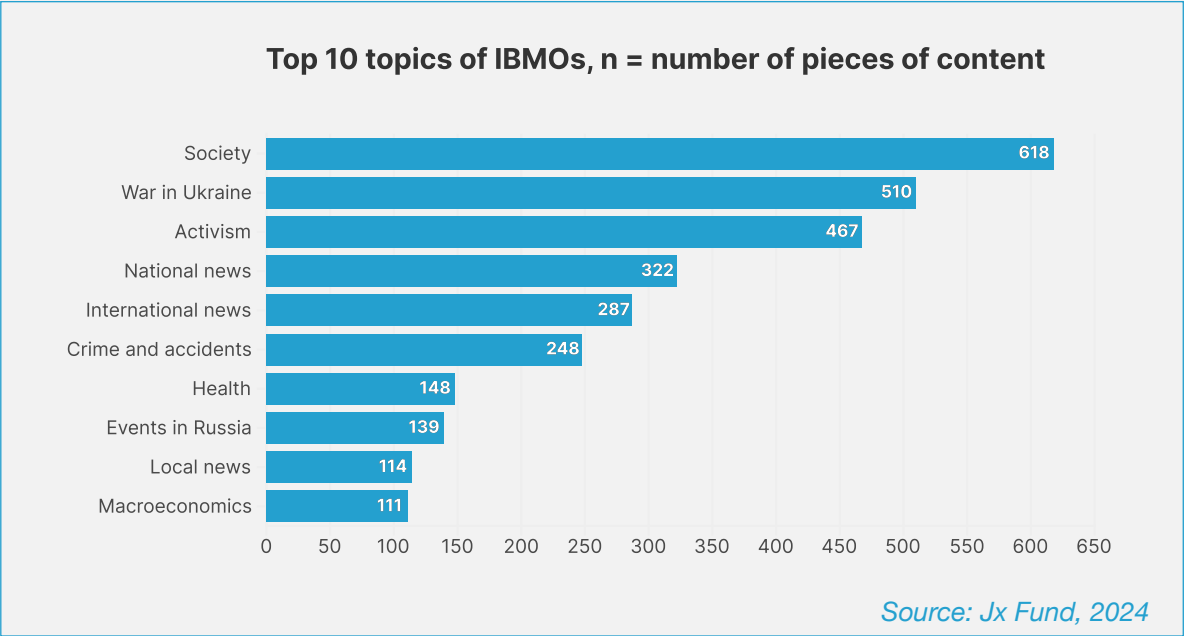
This positions them as a vital force for both domestic and regional security and stability – areas the EU now considers under key threat. “Foreign information manipulation and interference is a major security threat to the EU,” said²⁷ Kaja Kallas, High Representative for Foreign Affairs and Security Policy and Vice-President of the European Commission. “We must not underestimate the power that this has over us or the intentions of those behind it.”

In Belarus, BIM have contributed to shaping public opinion on Russia's war against Ukraine by providing factual information that diverges with state narratives.

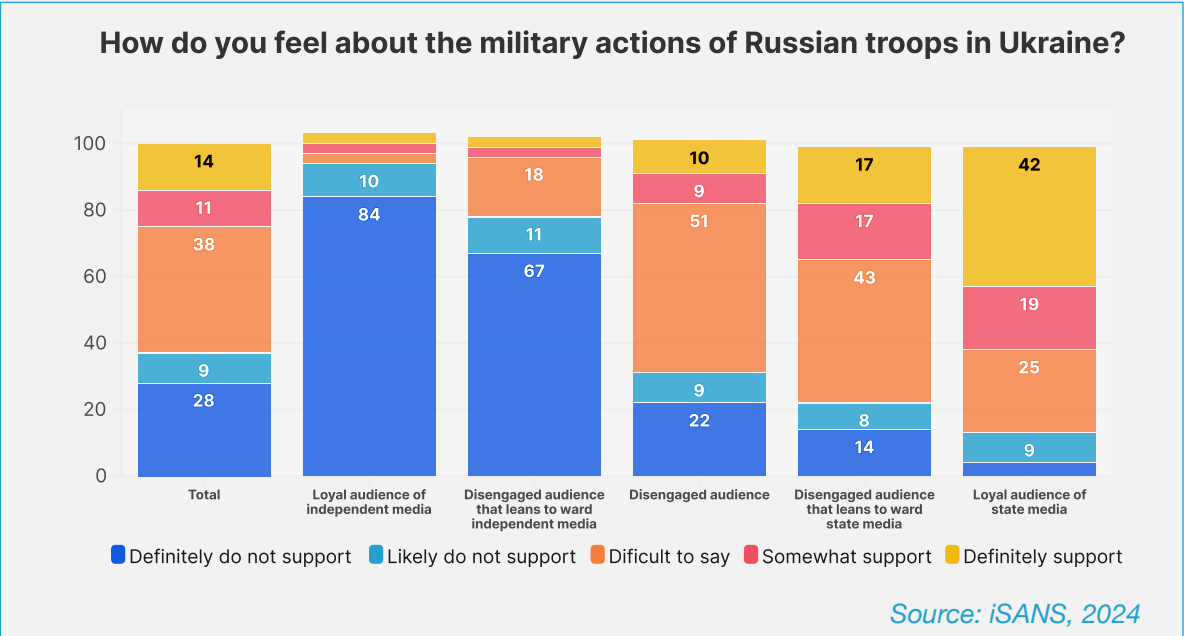
In 2024, between a quarter and 39% of Belarusian residents used BIM, according to various surveys.



In the same year, news and analysis of social issues and the war in Ukraine dominated the independent media agenda.



Consumers of independent media in Belarus are overwhelmingly critical of the war in Ukraine, with 94% opposed. By contrast, 61% of regular state media audiences fully or partially support Russia’s military aggression.



All of the above evidence shows that the work of Belarus's independent media in exile aligns closely with the values and goals of the European Democracy Shield (EDS) – the EU's forthcoming initiative to reinforce democracy against malign interference. The European Commission conceived the EDS as a coordinated effort to address “foreign interference, disinformation, and other threats to democratic processes.”²⁸ In other words, it targets the very hybrid information warfare that the Kremlin and its ally in Minsk have been waging. By exposing propaganda and providing factual reporting, Belarusian exile outlets actively advance this mission. They fortify the information space against hostile manipulation, embodying the democratic value of free expression that EDS vows to uphold²⁹. Belarusian exile media help inoculate not only Belarusian society but also Europe's Eastern flank against authoritarian influence – precisely the kind of resilience the EDS seeks to spread across the continent.

Holding the government to account

Belarus presents a paradox: although independent media and journalists are officially banned, their stories continue to force government responses.

For instance, when journalist Viktor Mališeŭski exposed electoral code violations by media personalities loyal to Alaksandr Łukašenka, they were removed from their roles as television hosts on state TV³⁰.

BIM investigations – for example, exposing a secret Russian filtration camp in Belarus³¹, labour exploitation of political prisoners by a German politician³², and schemes to circumvent international sanctions³³ – have had far-reaching effects beyond Belarus, challenging state narratives and triggering global scrutiny and policy responses³⁴.

Such cases underscore the vital role of independent journalism in holding power to account. They also illustrate how journalism intersects with civic engagement: BIM outlets rely heavily on user-generated content and community-sourced tips.

A Press Club Belarus study found that 87% of media outlets use reader-supplied information in their reporting, with 19% producing between 30 and 50 such stories each month³⁵.

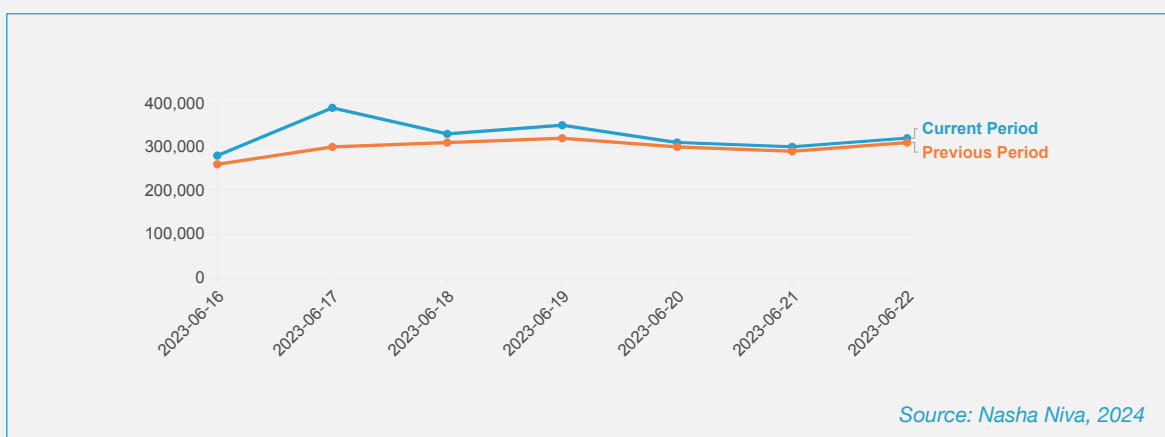
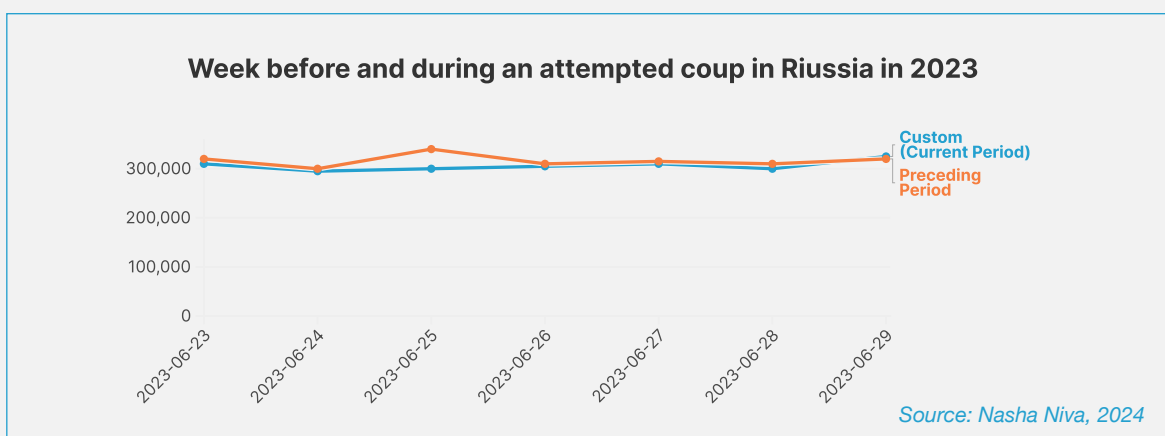
This reflects not only the continued closeness of exiled BIM to their audiences at home but also their role as a vital outlet for public participation – helping citizens exercise civic agency even under authoritarian rule.

Information lifeline in times of crises

BIM in exile serves as a vital lifeline for regular communication with society – especially during times of crisis.

In Ukraine, during the first year of Russia's full-scale war in 2022, demand for impartial, reliable information surged. Traffic to some independent media outlets exploded by 300%³⁶. Additionally, trust in the media, in general, grew significantly, from 32% to 57%, reversing a long-standing downward trend.

There is evidence that Belarusians exhibit similar media behaviour. For example, during the week of an attempted state coup in Russia, traffic to Nasha Niva surged by 125% compared to the previous week



In the event of an emergency or escalation in Belarus or the region, maintaining these communication channels becomes strategically vital. When official sources may be compromised or used to manipulate public opinion, it is BIM that provide objective and timely information

Preserving Belarusian identity

BIM make a weighty contribution towards preserving Belarusian identity and culture, which is especially important amid the regime's ongoing Russification policy and rapprochement with Russia³⁷.

The share of outlets covering cultural content rose from 68% in 2024 to 72% in early 2025³⁸, reflecting sustained interest in identity-related topics and growing news fatigue – a worldwide trend³⁹.

Also, BIM's persistence in using the Belarusian language stands in sharp contrast with the state policy of Russification. In education, for example, only 9% of children now receive instruction in Belarusian, down from around 40% in 1994⁴⁰.

About 97% of media outlets use the Belarusian language, but only around 29% of their content is produced or translated into Belarusian.

By supporting the Belarusian language and culture, BIM help preserve national agency and the right to self-determination, as well as offering a quiet form of resistance to the regime's imposed norms through practising the national language.

Moreover, a strong sense of Belarusian agency also serves as a natural barrier to the spread of the "Russkiy mir"⁴¹ ideology and narratives about the unity of Russian-speaking peoples⁴².

Belarusian perspective on key issues

BIM offer a unique perspective – not just in what they cover, but in how they interpret global events through a Belarusian lens. One example is the 2025 Munich Security Conference, held in February.

While liberal political figures from both Belarus and Russia spoke at the event, Russian media in exile focused⁴³ on Yulia Navalnaya.

BIM, by contrast, analysed⁴⁴ the speeches of United Transitional Cabinet leaders Sviatlana Tsikhanouskaya and Vadzim Kabanchuk.

This contrast underscores a key point: Russian independent media cannot replace BIM.

Belarusian independent media play an essential role in amplifying Belarusian voices and strengthening the nation's sense of political agency and representation. Their continued presence ensures that the Belarusian people are not only informed but also seen and heard in shaping their future.

Strong connection with Belarusian audience

While both Belarus and Russia have independent media operating in exile, the impact and context of these sectors differ significantly.

On the Russian-language internet, pro-Kremlin outlets continue to dominate in reach and influence, outpacing liberal and independent media by a wide margin⁴⁵. Research suggests that only between 3.7%⁴⁶ and 7%⁴⁷ of the Russian population regularly consumes independent media content.

Although engaging these audiences remains important, particularly given Russia's large population of 143.8 million, the overall impact of independent media in shifting public opinion away from Kremlin narratives has, thus far, been limited.

Polls also show that at least a quarter of the population regularly consumes independent media content⁴⁹. (For context, Belarus's population is around 9 million.)

This means that the Belarusian independent media sector, though primarily operating from exile, has maintained a deep connection with its audience and continues to play a significant role in shaping public discourse. Its coherence, shared democratic orientation, and ability to respond to the needs of Belarusian society make it a unique and influential force for upholding democratic values.

Remarkably, Belarusian independent outlets have retained a massive following back home, underscoring public trust in their reporting. A 2024 study found that the five largest exile-run Belarusian news sites amassed over 17 million visits in December 2023, with users spending an average of more than 10 minutes per visit⁴⁸.

5. FUNDING REALITIES AND NEEDS

The sector's total 2024 budget was circa **26 million euros**, covering editorial and operating costs, support organisations, implementing bodies, and the significant cost of life in exile. (See Annex 1 for details).

In early 2025, many BIM outlets were pushed to the brink as the new US administration cut foreign aid.

According to a Press Club Belarus survey in early 2025, 40 – 60% of funding for various outlets came from US sources.

BIM's total budget is only a fraction of what is spent on state-approved media.

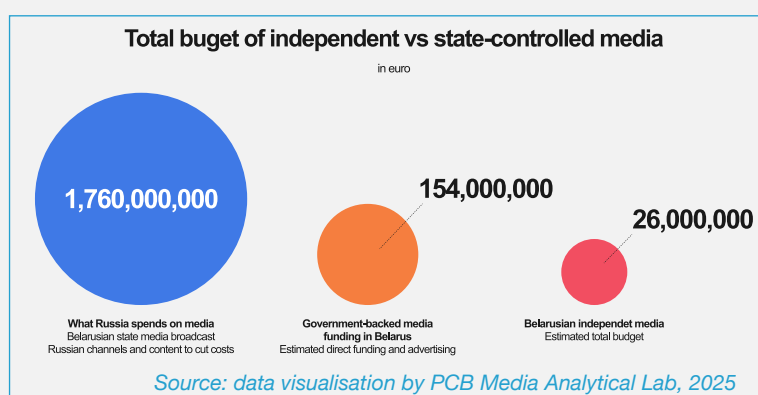
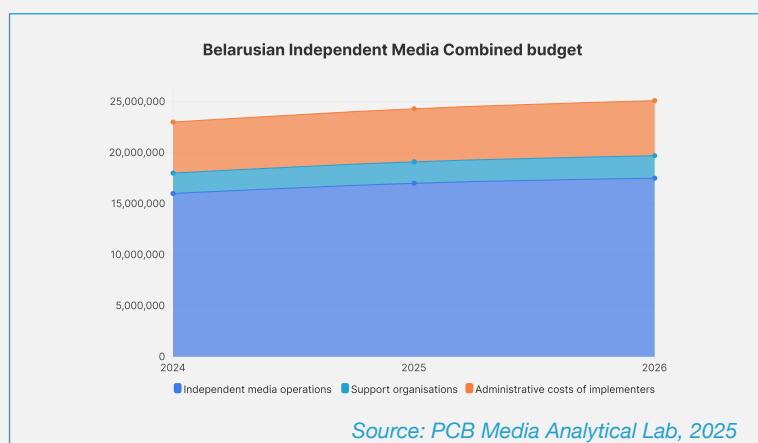
The government-sponsored portion of funding alone was nearly twice that amount, or 51 million euros⁵⁰ in 2023, the latest figure available. This number grows every year.

Unlike independent media, which are heavily restricted and criminally prosecuted for their commercial activities⁵¹, state media benefit from substantial advertising and other revenue streams. (See Annex 2 for details of extremist statuses in Belarus).

While data on these sources of funding is practically non-existent, there is evidence that the advertising market for state media has returned to its pre-2020 level. According to some estimates⁵², it was 103 million euros in 2024.

State-controlled media also get a significant chunk of their content from Russia, often simply broadcasting entire propaganda-filled channels on the territory of Belarus. This arrangement reduces their costs considerably.

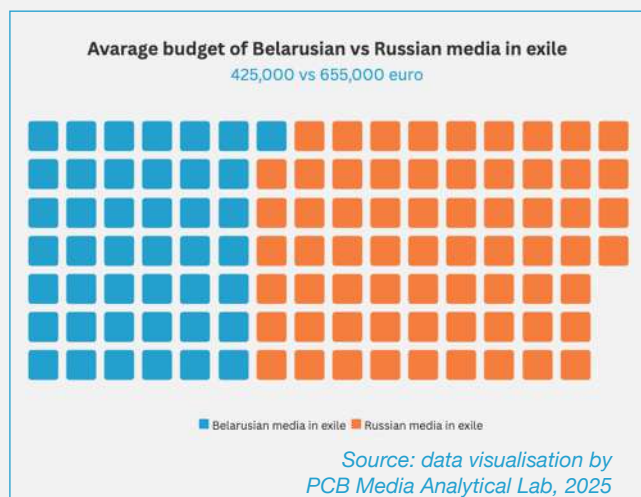
The Kremlin spends⁵³ \$1.9 billion (1.76 billion euros) on media per year, but there is no research available on what part of this funding trickles down to Belarus.



Belarusian media budget sizes

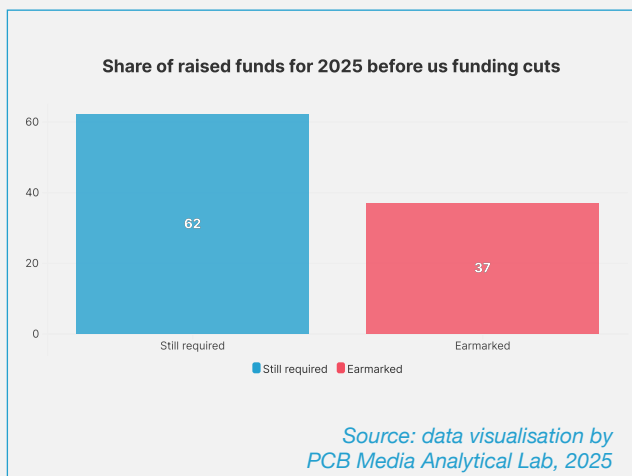
The budgets of various media outlets vary significantly. The largest cluster of 25 smaller outlets has annual budgets ranging from 38,400 to 125,000 euros, while the largest outlet operates with a budget of 3 million euros (see Annex 3).

The average BIM budget is 425,000 euros – substantially lower than that of an average Russian exile outlet, based on 2023 data⁵⁴, the latest available for the Russian media in exile.



However, only part of the required funding had been secured from donors at the start of the year.

BIM faced a collective funding gap of 10 million euros – entering the year in severe financial uncertainty even before the US funding cuts.



Funding raised varied widely by media type. For instance, local outlets had secured only 14.5% of the required financing, reflecting more limited fundraising capacity and skills

Project funding vs core funding

Project funding vs core funding

The suspension of US funding resulted in the near-total loss of institutional (core) support. Core funding supports administrative costs, key staff salaries, and basic operations. While European donors prefer project-based grants, US foundations have been more willing to provide vital institutional support essential for survival in exile.

The fundamental difference between core support and project funding is the flexibility and comprehensive nature of the former. Institutional support enables organisations to manoeuvre quickly, redistribute resources, respond to unforeseen challenges, and continue paying salaries while producing news and content on a daily basis. When core support disappeared, many projects came under threat.

Remaining project funding also has key limitations that make it difficult to rely on in times of crisis, for instance:

- Have rigid requirements for outputs and deadlines.
- Cover only a portion of operational and staff-related costs.
- Require significant effort for administration and reporting, which is an additional burden when outlets are forced to cut staff.

Some types of organisations, for example, local media outlets, remain more vulnerable than others when funding is restricted to project-based grants. According to Press Club Belarus research, national outlets ran an average of 8.4 projects in 2024, compared with just 3.75 for local outlets.

Dwindling European funding

After US funding was suspended, the media sector also began hearing of cuts from European donors – partly due to rising defence spending and shrinking development budgets⁵⁵. (See Annex 4).

Several factors contributed to this decline. Firstly, with defence spending rising due to the war in Ukraine, European countries are reviewing their international aid budgets – prioritising military and humanitarian support over other areas. Secondly, competition for remaining European grants has intensified. Russian exile media, also affected by US cuts, are actively fundraising in Europe to deliver content to Russian-speaking audiences. Thirdly, some European donors are now prioritising efforts to counter Chinese influence and boost information security across Europe⁵⁶.

6. RECOMMENDATIONS

Global political threats and technological disruption are widely seen by the media industry⁵⁷ as “existential”⁵⁸ and “catastrophic”⁵⁹. This underscores the urgent need for policymakers, donors, implementers, and media actors to constantly research, innovate, and upgrade their capabilities as part of the current zeitgeist to meet the challenges.

US funding cuts and other subsequent financial shocks have added urgency and a new layer of complexity to an already critical set of challenges.

Belarusian media live in a state of constant disruption – both a blessing and a curse. It has made them resilient, but they also remain vulnerable, and there is always a risk that the current or next crisis is one too many. Fortunately, research shows there are clear ways to prevent this breaking point.

The following are concrete recommendations to strengthen resilience and ensure sustainability.

For policymakers

Ensuring diverse and sustainable funding mechanisms for BIM, recognising it as a public service and a part of a broader democratic “shield”.

Creating and expanding direct, long-term support mechanisms for BIM, such as EED, NDICI-GE, and others, including the merging ones. Ensuring emergency funding is accessible and adaptable.

Ensuring the integration of BIM in the European Democracy Shield (EDS). BIM are well-positioned for inclusion in pilot initiatives and future implementation of the European Democracy Shield, especially its external-facing components.

Ensuring the availability of institutional (core) funding, which better suits the media sector’s need for continuity and long-term audience trust and prioritising institutional (core) funding for media outlets over capacity-building funds.

Providing targeted support for journalists in exile as a vulnerable group.

Promoting and implementing policies to protect both domestic and exiled journalists and their family members at national and local levels.

Facilitating the adoption of resettlement and adaptation programmes for exiled journalists.

Treating support for domestic and exiled media as an urgent priority to safeguard the sector and its trusted actors.

Expanding the pool of implementers capable of delivering media support based on their knowledge of the sector’s needs.

Streamlining and simplifying funding procedures.

Safeguarding media support amid rising defence spending.

Recognising independent media as a crucial communication channel for conveying timely, accurate, and trusted information, amplifying security efforts and strengthening information security in the region, as well as societal resilience in times of crisis.

For donors and implementers

Responding to the urgent call by the Global Fund for Media Development⁶⁰ to increase and streamline funding for independent media.

Unrestricting existing grants to allow greater flexibility in how funds are used.

Establishing emergency budget lines to support public-interest media. Increasing the volume of funding and its flexibility to scale up support for journalism organisations and independent media.

Streamlining administrative requirements for support to lower transaction costs.

Improving coordination among private foundations, donor agencies, and governments.

Modernising project design approach.

Ensuring that all project designs take into account the actual requirements of the media, which differ from those of other types of non-profit organisations. Projects should be designed in close partnership with the media entities to ensure they accurately reflect their needs.

Prioritising audience engagement and loyalty metrics and requirements over audience growth requirements in projects, where possible, to reflect real-world disruptions and obstacles in the media sector (for example, severe limitations to working in exile, existential-level technological and other threats⁶¹).

Creating projects that ensure continuity and enable the core function of journalism, i.e. informing the audience based on journalistic standards and ethics.

Structuring support mechanisms to ensure support for the entire Belarusian media ecosystem.

Supporting an ecosystem that fosters resilience through content diversity, audience competition, and innovation – enabling it to break through restrictions and digital barriers to reach its audience.

Investing in long-term support to ensure the ecosystem is ready to fulfil its role when political change comes to Belarus.

For the Belarusian media ecosystem

Studying and analysing the ecosystem and inner processes and trends, harnessing its strengths for growth.

Examining how the Belarusian media ecosystem functions, its audience impact, and the unique roles of each actor; using insights to strengthen both individual and collective performance.

Exploring and implementing new models of cooperation and collaboration to enhance efficiency by leveraging shared insights and knowledge.

Where feasible, sharing resources for:

- content production and distribution
- automation to boost operational efficiency
- technological solutions to bypass barriers and firewalls
- joint education and upskilling
- collaborative R&D
- cost reduction through the sharing of financial and administrative functions.

Strengthening advocacy and fundraising efforts, both individually and collectively as an ecosystem.

Better communicating the ecosystem's unique value, effectiveness, and advantages to both individual and collective stakeholders.

Expanding beyond traditional funding models; researching and pursuing both public and private alternatives.

For individual media outlets

Strengthening and communicating unique value proposition

Clearly defining what makes an outlet distinctive and why the audience should engage with it. Regularly reviewing and refining this proposition to reflect evolving audience expectations.

Understanding own position within the broader media ecosystem. Identifying the niche, mapping key partners, competitors, and allies, and forging strategic collaborations to boost impact, operational efficiency, and opportunities for innovation.

Reinforcing Belarus-centric perspective

Framing content, including coverage of global affairs, through the lens of Belarus's long-term national interests. This enhances editorial distinctiveness and deepens audience relevance.

Developing strong editorial voices and recognised expert contributors to credibly compete with Russian narratives, particularly in domains like international affairs, science, and culture.

Deepening audience understanding and building meaningful relationships

Investing in audience research to gain real-time insights into their needs, behaviours, and preferences. Using these insights to guide editorial choices and strategic priorities.

Building community by consistently analysing user data in-depth and fostering direct, lasting relationships with the audience.

Engaging the audiences in two-way communication to better demonstrate value, collecting feedback, and co-creating more relevant content and services.

Placing technology and innovation at the heart of strategy

Developing internal expertise in digital tools to enhance workflow, securing audience engagement, and improving user experience.

Fostering a culture of experimentation. Giving your team the space, tools, and encouragement to innovate and make it an expectation, not an exception.

Allocating dedicated resources to technology and innovation. These are not auxiliary functions, but core investments critical to long-term sustainability.

Institutionalising monetisation experiments

Assigning clear responsibility for developing and testing revenue strategies. Encouraging creativity and empowering staff to think entrepreneurially, even when immediate returns are unlikely.

Sharing lessons learned and adopting insights from peer organisations to accelerate progress and avoid common pitfalls.

7. ANNEXES

Annex 1. Ecosystem composition and value

Definition of an ‘ecosystem’

Belarusian independent media (mostly in exile) form a unique interconnected system that displays multiple characteristics of an ecosystem, as defined by American business strategist James Moore,⁶² who is widely credited as the originator and evangelist of the concept:

“An economic community supported by a foundation of interacting organisations and individuals – the organisms of the business world. The economic community produces goods and services of value to customers, who are themselves members of the ecosystem.”

According to Moore, an ecosystem:

- Has member organisms that include suppliers, lead producers, competitors, and other stakeholders.
- Over time, they co-evolve their capabilities and roles.
- They tend to align themselves with the directions set by one or more central players (often referred to as “orchestrators” of the ecosystem).
- The entities holding leadership roles may change over time. Still, the community values the function of ecosystem leader because it enables members to move toward shared visions, aligning their investments and finding mutually supportive roles.

The rationale for co-evolution stems from the system’s embedding in a specific environment. This means that every representative within the system is required to occupy a niche that will be tested by the arrival of new «species».

To overcome that, members of the ecosystem need to explore the territory aggressively, as well as form symbiotic relationships with customers, suppliers, and even competitors.

Belarusian media ecosystem

The Belarusian media ecosystem is a network-like structure comprising individuals and media entities of varying sizes and scope. The ecosystem includes up to 45 media outlets, media development organisations, hundreds of freelancers, and other stakeholders.

The network thrives on shared ideals such as truth, professional standards, democratic values, and the agency of the Belarusian people. These core values enable the system to stay cohesive, even when confronted with political pressures and geographical distances.

Some media outlets act as suppliers for others: for example, a news agency supplies other network members with news, smaller local outlets provide content used by larger ones for aggregation and further development, and investigative outlets use them for leads. In turn, investigative outlets rely on bigger players for the distribution of content to broader audiences.

While the system does not have a formal orchestrator, media development organisations within the ecosystem cover many functions that are typical of this role: coordinating and aligning various actors to achieve common objectives, facilitating interactions, and bringing in and managing resources and expertise to create higher value.

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Value proposition

Each media outlet in the ecosystem offers a unique value proposition (UVP), answering the question: “Why should the audience choose me over someone else?” The UVP highlights distinct advantages that competitors often cannot replicate, helping outlets cut through the noise, reach their audience, and build a recognisable identity, editorial stance, and emotional connection.

The complexity of the exiled independent media ecosystem enables the formation of a joint, multi-layered UVP that meets the varied needs of the Belarusian public. Its blend of differentiation and complementarity creates a rich media product that no single actor could deliver on their own.

Coopetition and co-evolution

The relationship among ecosystem members is characterised by coopetition⁶³. This strategy combines competitive and cooperative elements, enabling the entire system to create more value than the sum of its parts.

While outlets compete for audience attention and trust, as well as funding and scoops, they also cooperate in areas such as education, the exchange of ideas and resources, audience and sector research, technological and cybersecurity innovation, and advocacy. This cooperative relationship drives innovation, new formats, creative distribution, and deeper audience engagement.

One of the ecosystem’s most vital qualities is its ability to co-evolve adaptively: the absence of rigid hierarchies allows for flexible allocation of resources and attention based on current needs, while the guidance of orchestrators provides direction.

The ecosystem has developed a mechanism of informal synchronisation: Newsrooms align around shared information cycles, coordinate coverage of key issues, and exchange ideas and sources.

Role in the information space

Within Belarus’s broader information space, the media ecosystem in exile plays a unique role: it serves as a guardian of professional standards, Belarusian agency, and collective memory, continuing to inform, explain, document, and maintain connections among Belarusians.

Collectively, this robust system can compete with other media players in Belarus, including state media who continue to control TV broadcasting, private self-censoring media that remain in the country, Russian TV channels that are an integral part of the landscape, other digital information channels, and independent content producers.

Description of ecosystem members

The table below is designed to illustrate the functioning of the Belarusian independent media ecosystem. Rather than detailing each outlet's unique value proposition, it highlights the broader role and significance of each media type. The examples are selective and intended to be illustrative, not exhaustive.

Ecosystem members				
Type of organisation	Examples	Role	Value for the audiences	Value for the ecosystem
National media	Zerkalo (zerkalo.io), Nasha Niva (nashaniva.com), Euroradio (euroradio.fm), Solidarnost (gazetaby.com), Reformation (reform.news), etc	Inform the public on a broad range of topics and shape the national agenda. Serve as lead producers in the ecosystem.	Cover an extensive range of topics. Add context to events in Belarus from the perspective of democratic values. Define key issues for public attention. Actively expand their presence on social media, messaging apps, and video platforms.	Target broad audiences. Aggregate and curate content from others, expanding their exposure. Drive the public discourse agenda. Often serve as the first point of contact for international partners and external audiences.
Local media	Brestskaya gazeta (b-g.by), Hrodna.Life, Flagshtok (flagshtok.info), etc	Give visibility to small towns and regions, maintain a local focus, and cover issues and topics that fall outside the national agenda.	Make active use of open source intelligence (OSINT) and user-generated content (UGC) in their reporting. In exile, they face distinct challenges - foremost among them is staying connected with local communities from afar, which requires innovative approaches and unconventional reporting methods.	Serve as an informational bridge between the centre and the periphery, often becoming sources of exclusive stories for national newsrooms.
News agency	Pozirk (pozirk.online)	Serves a system-forming function by producing the bulk of raw news.	Sets the pace of the news cycle and acts as an information logistics hub. Produces news and analysis for clients inside and outside of Belarus who need impartial information about the country.	Generates news content for exiled media, serving as the primary source for subsequent reporting and analysis. Operates by subscription.

Ecosystem members

Type of organisation	Examples	Role	Value for the audiences	Value for the ecosystem
Niche media	Dev.by, Beloruss i Rynok (belmarket.by) Soika (soika.io) Tribuna (by.tribuna.com), (citydog.io), etc.	Target specific audience segments with professional, age-related, or thematic content.	Form a close relationship with their audiences. Cover a wide range of interests that would otherwise remain unserved: women and youth, economy, sports, lifestyle, and industry-specific news and research.	Serve as important sources of expertise, context and analysis for general-audience publications. Are often more effective at conveying values-based narratives to disengaged or unaffiliated audiences.
Investigative agencies	Belarusian Investigative Centre (investigatebel.org), Bureau Media (bureaumedia.io), etc.	Narrowly specialize in uncovering matters of public interest that various individuals or organisations seek to hide.	Independently search for and document information on critically important processes in Belarus that are often omitted from public discourse. Leaders in fact-checking. Operate at the intersection of journalism, analysis, and human rights.	Produce in-depth reporting that requires distribution through bigger media channels. To ensure a broader reach for their investigations, they form partnerships with national media outlets.
Freelance journalists		A critically important component that contributes to exiled and Belarus-based media. Sometimes, they operate inside Belarus despite risks.	Have a broad skillbase to report and present stories: they write news, conduct interviews, film, edit, gather data, manage social media, etc. Provide valuable on-the-ground reporting from Belarus, maintaining a direct connection with the country and the audience. Their presence on the ground ensures a connection between exiled media and home audiences.	Often work for newsrooms daily – functioning as de facto staff without formal employment. This arrangement allows media to have the flexibility they need, given the predominance of project-based grant funding, which only allows for the full employment of the core team.
Supporting organisations	Press Club Belarus (press-club.pro), Belarusian Association of Journalists (baj.media), etc.	Link individual players into a resilient network as de-facto orchestrators of the ecosystem.	Utilise their expertise and strategic vision to enhance long-term media development. Provide audience research and standards policing, both key to media development. Play a key role in advocating for the entire ecosystem to ensure its survival and flourishing. Act as a coordinator for the ecosystem and external actors, improving consistency of policy and support.	Evolved in exile to become resource and infrastructure hubs. Support physical infrastructure: co-working spaces, studios, equipment, shared services. Provide research, education, mentorship, legal and consultancy services and other forms of non-tangible support. Act as a mediator in the community.

Annex 2. Explanation of ‘extremist’ statuses in Belarus

Belarus’s “anti-extremism” framework is based on the 2007 law On Countering Extremism⁶⁴. It defines what qualifies as extremism, designates the authorities responsible for fighting it, and outlines enforcement measures.

These measures include labelling materials or organisations as extremist, issuing warnings, banning groups and outlets, targeting funding and other forms of support linked to the “extremist” activity and people engaging in them in all ways accessible to the state, from intimidation to obstruction of business activities to criminal prosecution.

The label of “extremist” can be applied not only to media outlets but also to individual journalists and specific stories. The Interior Ministry maintains and regularly updates a public list of designated organisations, individuals, and materials on its official website⁶⁵.

Labelling media outlets and journalists as “extremist” effectively criminalizes not only their professional work but also any access to independent information by citizens and any form of support of journalists and media by the public.

This law and its broad application against the public has drawn widespread international condemnation for violating multiple fundamental human rights⁶⁶, including freedom of expression, freedom of speech and freedom of the press.

Definitions of 'extremist' statuses

Type	Legal definition	Explanation
Extremist formation	<p>"An "extremist formation" is defined as a group of citizens that engages in extremist activity, supports such activity in any other way, acknowledges the possibility of engaging in such activity as part of its operations, or finances extremist activity, and has been designated as extremist by a decision of the Ministry of Internal Affairs or the State Security Committee."</p>	<p>The status is imposed without a court decision by the Interior Ministry or the State Security Service (KGB). It is widely used against independent media and human rights organisations, exposing both their staff and audiences to the risk of criminal prosecution simply for interacting with their content. The designation has a profoundly repressive and silencing effect on society.</p>
Extremist organisation	<p>"An extremist organisation is an organisation that engages in extremist activity, supports such activity in any form, acknowledges the possibility of engaging in such activity as part of its operations, or finances extremist activity, and has been officially designated as extremist by a court decision that has entered into legal force."</p>	<p>Unlike an "extremist formation," the status of an "extremist organisation" can only be assigned by a court. In practice, however, both designations are routinely used to target independent media and civil society organisations.</p>
Extremist materials	<p>"Extremist materials" refer to symbols and insignia, informational products (including printed, audio, audio-visual-, and other messages and/or materials, posters, portraits, banners, and other visual propaganda, as well as advertising materials) intended for public display, use, or distribution – or already distributed in any way – for the purpose of promoting or encouraging extremist activity, and officially recognized as extremist by a court decision."</p>	<p>This is a list of media outlets and informational materials. Creation and distribution of this content are subject to administrative penalties. It functions as a tool of censorship, restricting citizens' access to independent information.</p>

Annex 3. Financial needs analysis

From 18 January to 3 February 2025, Press Club Belarus surveyed 34 media projects, asking respondents: “Estimate your total financial needs for 2025 (in euros).” Financial data was provided by eight local media, 15 national media, one production centre, and two support organisations, totalling 26 media projects.

Methodology for financial needs assessment

To build a financial model for the sector, we:

- Included only national and regional media.
- Supplemented missing responses with expert estimates based on median values within clusters.
- Excluded support organisations from clustering.
- Assigned the production centre with a 260,000-euro budget to Cluster 2. Others were excluded due to missing data.

Clustering methodology

We used the K-means clustering method to segment media projects based on their financial needs. The elbow method helped determine the optimal number of clusters – four for media organisations and one for support organisations.

Media projects were grouped into five clusters:

Cluster 1: Small budgets (includes all local and some national media)

Cluster 2: Medium budgets (several national media and one production centre)

Cluster 3: Large budgets among national media

Cluster 4: One major media project (3 million euro)

Data processing and assumptions

Not all organisations provided data. We assumed most missing responses fell into Cluster 1 and used its median budget to estimate needs. In total, 42 media projects were assessed – 26 based on submitted data and 16 via projections. This figure likely **underrepresents actual needs** if missing data relates to higher-budget clusters.

Estimated combined budget of media outlets

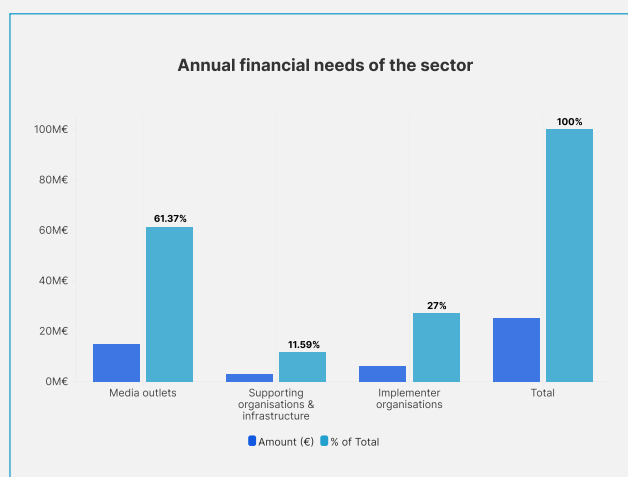
Cluster	Count	Min (€)	Max (€)	Average (€)	Median (€)	Sum (€)	% of Total
1	25	38,400	125,000	82,608	85,000	2,065,200	14.47%
2	7	200,000	550,000	377,500	385,000	2,525,000	17.70%
3	7	800,000	1,600,000	1,185,714	1,200,000	8,300,000	58.19%
4	1	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	21.04%
Total	40					15,890,200	100%

The analysis shows that BIM outlets will require a minimum of 16 million euro in 2025. Actual needs of media outlets may be higher if missing data corresponds to higher-budget clusters.

Total sector budget calculation

We estimate that the total required budget for the independent media sector – defined as the combined needs of the media ecosystem and implementing organisations – is 25.89 million euros, rounded to **26 million euros**.

In calculating total financial needs, we assumed that average implementer fees fall within the historical range of 25–30%, using 27% as the baseline



Supporting organisations and infrastructure

- Include budgets of three key supporting organisations for Belarusian independent media (mostly in exile).
- Include expenses for educational programs, research, technical support, consultancy and education.
- Based on historical financial reports of these organisations and 2025 forecasts.

Implementer organisations

- The fees are based on historical data for international implementing organisations.
- They range from 25 to 30% on average.
- They include project management, monitoring and evaluation based on the requirements of back donors, and audit and compliance management.
- Some implementers account for the specific needs of media in exile.

Methodological limitations

Several factors may affect the accuracy of this assessment:

- Some media organisations may have withheld data for security or confidentiality reasons.
- Security-related and in-country reporting costs may be underestimated.
- Currency fluctuations could impact euro-based calculations.
- Political instability may alter funding needs and spending structures.

Given these limitations, the 26 million euro estimate should be considered a realistic minimum required to ensure the ecosystem's effective operation in 2025.

Annex 4. Funding cuts in Europe

Funding cuts in Europe that affect media support

Country	Reduction	%	Additional Information
United Kingdom	Cut from 0.5% to 0.3% of GNI	40% (The Guardian)	The Prime Minister pledged to raise defence spending to 2.5% of GDP by 2027, financed by cutting development assistance ⁶⁸ .
France	\$2.2 billion in 2025	37% (Forbes), 11% (overall) ⁶⁹	Unprecedented 17% reduction in development assistance expenditure
Netherlands	\$326M (2025), \$543M (2026), \$2.6B (2027)	30% (Forbes)	Funds redirected to projects “directly serving Dutch interests” ⁷⁰ .
Belgium	–	25% over 5 years (Forbes)	–
Finland	–	25% by 2027	–
Germany	\$1.8 billion	8%	\$4 billion cut in 2024; 2025 budget reduces development spending by two ministries by 9% (\$1.8 billion)
Sweden	Cut from \$5.4B to \$5.1B	–	Planned for 2026 – 2028
Italy	Cut from \$6.6B to \$6B (2023)	–	Restored to \$6.5B in 2024, still below the UN target.
Switzerland	110M CHF + 321M (2026 – 2028)	–	Funds redirected to military needs
Norway	–	–	Plans to maintain development assistance budget at \$4.8B.
Spain	–	–	Maintains development assistance at the 2023 level (\$3.9B); one of the few donors likely to increase funding.

Source: PCB Media Analytical Lab, 2025

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