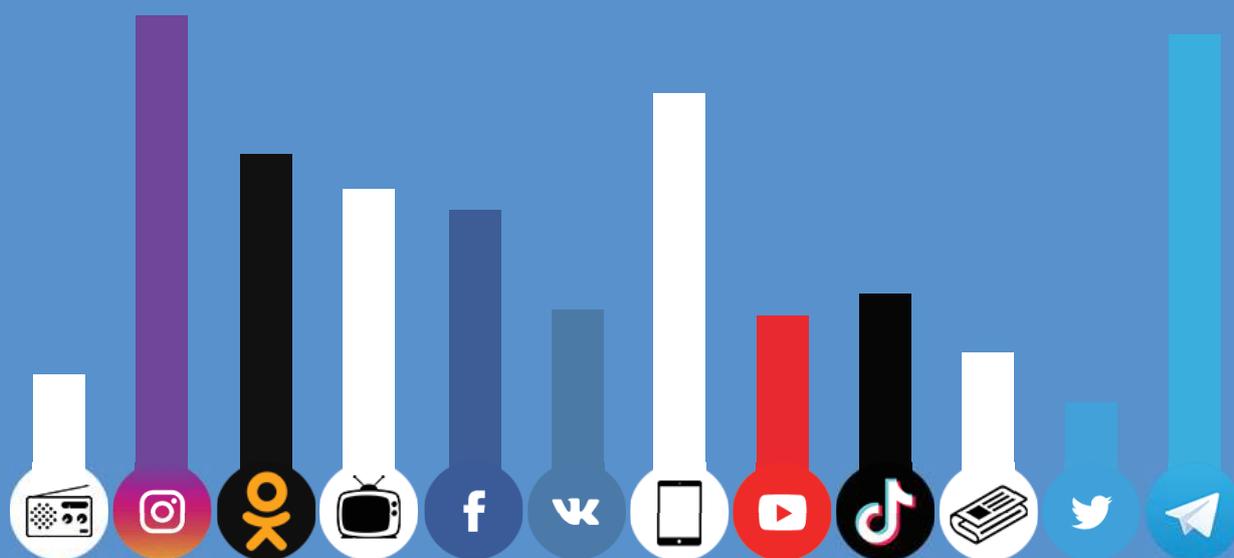

Socio-economic Impact of COVID-19 and Media Consumption among Vulnerable Communities in Central Asia

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The publication is part of the “Strengthening Resilience to Radicalisation and Disinformation in Central Asia through Independent Media (Phase II)” and was produced with the financial support of the European Union and implemented by Internews. Its contents are the sole responsibility of European Neighbourhood Council and Internews and do not necessarily reflect the views of the European Union.

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| Executive Summary |

The European Neighbourhood Council provided a European Union (EU)-funded¹ rapid analysis of dynamic information eco-systems and needs among target communities (labour migrants, refugees and stateless persons and ethnic minorities). This study was based on a quantitative data survey of approximately 2,000 respondents across vulnerable communities in Kyrgyzstan, Tajikistan, Uzbekistan and Kazakhstan. The second part of the study looks at 500 qualitative semi-structured in-depth interviews with all three vulnerable communities and 120 interviews with content producers (e.g. journalists and bloggers) across Central Asia.

The study provides a mapping of media and information consumption among each vulnerable community (labour migrants, refugees and stateless persons and ethnic minorities) during the COVID-19 pandemic, while identifying their vulnerabilities and risks of social exclusion.

Based on the qualitative and quantitative research, the ENC concluded the following findings:

“ 20% more women reported unemployment compared to men ”

FINDING: SOCIO-ECONOMIC IMPACT

- Both domestic violence and gender inequality were reported across all vulnerable communities in Central Asia. In general, 20% more women reported unemployment compared to men, particularly the number of female labour migrants with uncertain work status increased by 12% during COVID-19. In Tajikistan, only 25% of female labour migrants reported being employed.
- The economic impact of COVID-19 was most acutely felt by labour migrants (unemployment and border closure), followed by ethnic minorities who face extremely high levels of labour uncertainty. The socio-economic roots of the protests in Kyrgyzstan were clearly identified in the ENC data, as reports from labour migrants and ethnic minorities indicate the highest levels of labour uncertainty across the region. Uzbekistan, Kazakhstan and Tajikistan also report high figures, which is likely to lead to further unrest, crime, vulnerability and fundamental socio-economic change or exclusion.
- Refugees and stateless persons remain the poorest, least educated and most vulnerable, as 63% report having low income and only 1% report undergoing university education.

¹ EU-funded project “Strengthening Resilience to Radicalisation and Disinformation in Central Asia through Independent Media”.

FINDING: MEDIA TRENDS

“ Refugees and stateless persons remain the poorest, least educated and most vulnerable ”

- Social media (Instagram, Facebook, Telegram followed by Twitter) are the biggest information channels in general, but especially for youth, with preference for visual content (short videos, reels, pictures with quotes, little text). For example, in Kazakhstan and Kyrgyzstan between 50% and 63% of labour migrants and ethnic minorities report Instagram as their preferred information source.
- Labour migrants were the most covered vulnerable community among the three target groups of this study in all media across Central Asia during COVID-19. Only local media is reported to have, occasionally, addressed refugee and stateless persons and ethnic or other minority groups.
- High levels of Internet restrictions on information access are reported among vulnerable communities. At times, this correlates with Internet access, depending on connection strength. In many other cases, it however refers to blocked websites and censorship directly imposed by governments. Thirty-six percent of refugees and stateless persons reported Internet restrictions, while the figure for ethnic minorities in Tajikistan is 50% and 56% in Kazakhstan.

FINDING: COVID-19 IMPACT ON MEDIA CONSUMPTION AND COMBATING DISINFORMATION

“ High levels of Internet restrictions on information access are reported among vulnerable communities ”

- A general increase in news consumption across Central Asia, followed by disengagement and mental stress.
- There is a strong tendency among media consumers to consider online media as a source of fake news. The survey data as well as in-depth interviews suggest that the trust in traditional media, such as television and radio, correlates with distrust in online media. On the other side, it is clear that a similarly large group of respondents distrust television and radio, primarily because these two types of media are associated with government control.
- International media is cited as more reliable and accurate for COVID-19-related news compared to local news, as there is a lack of credible, independent and financially sustainable local media, particularly targeting vulnerable communities.
- Debunking disinformation became a priority as journalists and editors consolidated their sources and exposed fake news weekly on their websites/social media platforms.
- Journalists reached out to experts and specialists in different areas to educate audiences, enabling Q&A in live programmes and closer interaction in different social media platforms.
- A general awareness about fake news exists, yet serious differences regarding “what exactly fake news is” remains. Consensus about what qualifies as “fake news” is scarce (e.g. many report scepticism about COVID-19 statistics, whereas others consider the pandemic “fake”).

| Introduction |

“ it quickly became clear that the economic decline hit some more than others ”

The COVID-19 pandemic caught everyone off guard. It wreaked havoc in all parts of the world, ranging from rich and poor areas to democratic and authoritarian countries. Yet the global nature of the crisis did not spare its disproportionate impact on communities already known for social, economic or political vulnerabilities. Some countries and communities had no fiscal buffers, surviving on citizens' self-help mobilisation and scarce external aid. Others could afford large-scale stimulus packages to support individuals and businesses. In short, it quickly became clear that the economic decline hit some more than others, depending on the nature and resilience of economies, both at household and national levels. The still-unfolding dynamics of the pandemic shows the growing deficit of knowledge about how COVID-19 affects the most vulnerable communities around the world.

This report addresses the problem of paucity of research with a particular emphasis on how COVID-19 affects the most vulnerable communities and their information ecosystems. It presents the results of a half-year research study, which focuses on the impact of the global pandemic on media consumption among selected vulnerable communities in Central Asia. There are at least two ways in which the study adds value to the global knowledge-base on COVID-19. First, while health-related and economic topics are legitimately central in the context of the pandemic, the current crisis has also had a significant impact on information flows and media consumption. There is, however, limited knowledge currently available surrounding how COVID-19 and related government measures affected vulnerable communities socio-economically, and how this, in turn, impacted media trends, information consumption, and trust. Second, Central Asia has recently made headlines as a supplier of foreign fighters in Syria and attracted assistance related to combating violent extremism and radicalism. The region also continued to suffer, often lacking freedom of expression and difficult socio-economic conditions. Media consumption is critical for such processes, and is likely to be affected by the pandemic.

The central research question that the study addresses is “what is the impact of COVID-19 on media consumption among vulnerable communities of Central Asia”. Through a combination of quantitative and qualitative studies, the project developed a comprehensive assessment of a) the socio-economic challenges that these groups faced in the context of the pandemic, b) the key patterns of media consumption by these groups, and c) the critical implications of COVID-19 on access, trust and assessment of information. Based on the collected and analysed data, the report developed a set of recommendations on measures most needed to address the identified problems in a sustainable way.

The first step of the study was to identify broader topics of interest, including hypotheses and open-discussions, on how COVID-19 could impact socio-economic needs and employment. This also included information flows, access, consumption patterns and other areas like local perception, trust, health support and language. Further research deliberations similarly supported the selection of key target communities, namely vulnerable communities like ethnic minorities, labour migrants and refugees and stateless persons. Such methodological deliberations took into consideration multiple factors for selection, notably societal vulnerability and economic activity (see Chapter 1).

“ Due to the exceptional circumstances of the COVID-19 pandemic, the study adopted a tailor-made and rapid online analysis methodology ”

Methodologically, this study used a mixed-methods approach. Due to the exceptional circumstances of the COVID-19 pandemic, the study adopted a tailor-made and rapid online analysis methodology, using expert views, in-depth interviews and quantitative methods. The identification of a sound research question and objective was accomplished by relying on an extensive literature review and a series of internal and external consultations with partners, local field experts, as well as an extensive network of academics.

This novel approach, therefore, blends online research, which consists of gathering rapid data during the COVID-19 pandemic among the most “unreachable” and vulnerable communities in society through qualitative and quantitative data, as well as in-depth interviews with content producers like journalists, experts and bloggers. The iterative mixed methods research was used to develop statistically comparable inferences on a regional and national level while providing supporting data to verify the quantitative results in comparison with more detailed qualitative interviews. This method both takes advantage of large-scale empirical results, while allowing for qualitative testing of results through in-depth answers from vulnerable community interviews and content producers. This approach mainly helped to verify, supplement and/or contrast the quantitative findings with in-depth qualitative information, and vice versa.

“ The iterative mixed methods research was used to develop statistically comparable inferences on a regional and national level ”

The quantitative survey and qualitative interviews took place between 15 May and 21 August 2020, provided in multiple languages, including Russian and in each national language in Central Asia (e.g. Kazakh, Kyrgyz, Tajik, Uzbek), as well as the most frequently used languages by refugee and stateless persons across the region (e.g. Pashto, Dari, Urdu and English).

A randomised data survey (e.g. ‘yes’ or ‘no’ questionnaire) was conducted through formalised telephone interviews (CATI) in each Central Asian country, with the exception of Turkmenistan¹. The survey included a sample of 2.000 respondents, meaning 500 respondents per country. Approximately 235 labour migrant respondents and 240 ethnic minority

¹ Turkmenistan was excluded from the study due to the strict limitations which have been imposed by the national authorities upon researchers and academics wishing to conduct field research and studies inside of the country.

“ A special focus was also put on gender, specific age groups, diverse income levels and respondents in urban centers and rural settings ”

respondents were included per country, whereas the number of refugees and stateless persons respondents was below 30 for each country. This method allowed the study to develop statistically significant and representative inferences² at multiple socio-geographic levels, including inferences surrounding ethnic minorities and labour migrants, as a combined group, and specifically within each community on a regional and national level. The number of refugees and stateless persons across the region of Central Asia was considered too low in order to make statistically relevant inferences and therefore a snowball and list method was applied in order to obtain respondents. The survey focuses on the age group between 18 and 35, while a special focus was also put on gender, differentiated age brackets, diverse income levels and respondents in urban centers and rural settings. After completing all the field work, 20% of survey responses were checked for authenticity, completeness and filling correctness by telephone, while another 20% were controlled by audio. Control questionnaires were also randomly selected.

Non-randomised semi-structured in-depth interviews were also conducted with 500 respondents, each identified as target communities based on ‘snowball’ and ‘cluster’ methods. Interviews were equally distributed across each Central Asian country, with the exception of Turkmenistan. Similarly, non-randomised semi-structured ‘elite’ interviews were conducted with 120 content producers, identified as journalists, bloggers, producers and media experts. These interviews were based on ‘snowball’ and ‘cluster’ methods. Content producer interviews were distributed across each Central Asian country (30 interviews per country), with the exception of Turkmenistan, to give a more detailed expert view, including contextual information about media trends and consumption patterns related to the COVID-19 pandemic in Central Asia.

The report consists of four chapters and a conclusion with targeted recommendations. The first chapter provides a literature review concerning media consumption and vulnerable groups in Central Asia, including desk research and background information on the subject. The second chapter provides the key findings on the socio-economic impact of the COVID-19 pandemic in Central Asia. The third chapter focuses on information patterns and provides the key findings on trends and media consumption in Central Asia. The fourth chapter presents the key findings concerning the specific COVID-19 impact on media consumption and pandemic-related information trends in Central Asia. Chapters 2-4 consist of four sub-sections. The first three sub-sections discuss the findings from the study’s survey and interviews with vulnerable communities and content producers. The final section discusses the mixed-methods findings and draws preliminary and comparative conclusions for each chapter. The conclusion discusses the key findings and contains a section specifically dedicated to targeted recommendations for non-governmental organisations, governments, the international donor community and content producers.

² The error margin is 3% for regional level inferences and 6% for national level inferences. Additionally, only randomised and statistically relevant inferences were used for the sample of ethnic minorities and labour migrants. Such inferences were only used once corroborated by qualitative interview data used in the study, which served as an additional iterative verification method to guarantee qualitative and quantitative double-verification and validity.



| Chapter 1 |

Media consumption and vulnerable groups in Central Asia: findings from desk research

“ Many media consumption studies suggest that traditional forms of media such as television, radio or press still hold some advantage over online dissemination of information ”

“ there is compelling and growing evidence that online media consumption in Central Asia is increasing substantially ”

Media consumption patterns vary across Central Asia, often depending on the location, age groups and the rural-urban dichotomy. As the region faces an unprecedented health crisis, information consumption patterns may change as a result and have damaging consequences. This chapter takes stock of the existing knowledge on the above themes. Drawing on published academic and policy-relevant research, it assesses the current knowledge on media consumption patterns among vulnerable communities and identifies gaps to be addressed. A brief overview of the region’s complex media environment helps the reader to understand the socio-economic vulnerabilities faced by vulnerable communities. These are tendentially aggravated by COVID-19, namely on info-exclusion, media manipulation or exploitation.

Central Asian media landscape

Many media consumption studies suggest that traditional forms of media such as television, radio or press still hold some advantage over online dissemination of information. This is well illustrated in Kazakhstan, Tajikistan and Uzbekistan, where television remains the most popular and widespread source of information.¹ This is equally reinforced by the fact that television is the media, which is most consistently present in all Central Asian countries, including: 94.4% of households in Kazakhstan, 97.6% of households in Uzbekistan, and 96.6% of households in Tajikistan own a television.

That said, there is compelling and growing evidence that online media consumption in Central Asia is increasing substantially. A 2019 study by the Institute for War and Peace Reporting Representative Office in Central Asia (IWPR CA) on online news consumption in Central Asia found that the use of social networks (e.g. Facebook, Vkontakte, Instagram) and instant messaging applications (e.g. Telegram, WhatsApp, Viber) was rising.²

The growing use of online media has directly impacted patterns of news consumption in the region. Despite problems with Internet connectivity and state surveillance, the IWPR CA study suggests that “local news publications are slowly adapting to the rapidly changing trends of new media”.³

1 According to recent research conducted by Internews in 2019. Summary of the research per country available in Russian at: <http://metric.tilda.ws/mediaresearchkz> (Kazakhstan), <http://metric.tilda.ws/mediaresearchtj> (Tajikistan) and <http://metric.tilda.ws/mediaresearchuz> (Uzbekistan).

2 “The total number of respondents of the online survey amounted to 4,130. The share of respondents from Kyrgyzstan was 31.5%, from Kazakhstan – 24.3%, from Uzbekistan – 23.5%, and from Tajikistan – 20.7%. Most respondents (57%) were young people of 19 to 32 years of age. The smallest group was respondents aged 43 and older”.

3 IWPR CA (2019) Online News Consumption in Central Asia. Available at: <https://school.cabar.asia/>

As a result, “news communication and sharing has become more private as instant messaging services improve their usability and algorithms”. Facebook (in Tajikistan and Uzbekistan) and Instagram (in Kazakhstan and Kyrgyzstan) are the main channels through which news is shared. As for instant messaging applications, Telegram is reported to be amongst the popular communication channels in all four countries, followed by Viber and WhatsApp.⁴

This is closely linked with the steady increase in the use of Internet to obtain information and to communicate,⁵ notably among younger generations and middle aged groups.⁶ Most commonly, the popularity of the Internet decreases as the age of the user increases in Kazakhstan, Tajikistan and Uzbekistan, according to data collected by Internews in 2019. This important research on the region’s media environment, includes an analysis of preferences and expectations of media consumers across three Central Asia countries. This finding is also indirectly supported by IWPR CA as the survey narrowed its sample to younger demographics, as 57% are under the age of 38.

“ The growing use of online media has directly impacted patterns of news consumption in the region ”

Media and trusted sources

The proliferation of online sources of information relates to the global question of trust in media. The differing levels of trust that Central Asian media consumers may feel towards diverse sources of information has been only superficially addressed in the aforementioned studies. To various degrees, they also focus on the relationship between youth, media consumption and potential radicalisation.⁷

“ the popularity of the Internet decreases as the age of the user increases ”

The correlation is made with regards to the use of online platforms by younger generations, including questions about increased vulnerability towards online radical discourses. Notably in Kyrgyzstan, experts state that the Internet availability has increased, at times allowing for youth to access more freely different types of content. Despite its positive impact, it is also noted that this may put them at risk of “becoming recipients of content distributed by terrorist organisations”. The study by Search for Common Ground notes that these organisations, for example, create tailor-made videos and messages in different languages (Uzbek, Rus-

en/books/research-online-news-consumption-in-central-asia/

4 Ibid.

5 “Internet penetration in Kazakhstan is quite high: 89.4% of respondents use the Internet, and 69.9% access the web daily from any device, mainly via mobile phones. In Uzbekistan and Tajikistan, Internet penetration is significantly lower (with 57.7% and 62.5% using the Internet, respectively). The level of active daily Internet use in Uzbekistan and Tajikistan is also lower.” (Internews, 2019).

6 Friedrich Ebert Foundation Kazakhstan (2019) Youth in Central Asia: Kazakhstan. Available at: <https://library.fes.de/pdf-files/bueros/kasachstan/13343.pdf>; Kazakhstan 2.0 (2017). The Youth of Central Asia Stay True to the Traditions. Available at: kz.expert/en/news/analitika/725_the_youth_of_central_asia_stay_true_to_the_traditions.

7 Research Institute for Islamic Studies (2019) Vulnerability and Resilience of Young People in Kyrgyzstan to Radicalization, Violence and Extremism: Analysis across Five Domains. Available at: <https://centralasiaprogram.org/wp-content/uploads/2019/02/CAP-paper-213-Emil-Nasritdinov.pdf>; Search for Common Ground (2017) Messages, images and media channels promoting youth radicalization in Kyrgyzstan. Available at: sfcg.org/wp-content/uploads/2017/05/Kyrgyzstan-radicalization-social-media-report-ENG.pdf;

“ The correlation is made with regards to the use of online platforms by younger generations, including questions about increased vulnerability towards online radical discourses ”

“ Several studies show that people trust and distrust information depending on its traditional or online nature ”

“ younger generations trust online sources more easily than older age groups ”

sian, Tajik) for online dissemination purposes. Such radical groups often choose the most popular social networks, such as YouTube, Facebook, Odnoklassniki and Vkontakte, as their main channel of communication, thereby targeting a younger age demographic.

Trust is therefore important, as there is a clear gap across the region concerning information, trust and media consumption among vulnerable communities (e.g. ethnic minorities, refugees and stateless persons, labour migrants), notably in times of crisis.

Several studies show that people trust and distrust information depending on its traditional or online nature. Yet this also differs according to circumstantial criteria, including age.⁸ Generally, experts note that official websites and credited news agencies are the most trusted in the region, while social networks like Twitter and Facebook are regarded as less credible information sources.⁹

Nevertheless, this relation to trust reveals another age pattern: younger generations trust online sources more easily than older age groups. As for traditional media, the majority of survey respondents (KZ-45.9%, UZ-63.9%, TJ-55.1%) in the 2019 Internews' study consider television to be the most trustworthy information source.

With regards to language, Russian information is far more widespread compared to information in local languages across Central Asia. This is due to the fact that most media outlets, including their headquarters, concentrate in capital cities, where news tends to be massively produced in Russian language, causing a potential exclusion gap for communities who are not fluent or prefer accessing information in local languages.

Media and disinformation

Disinformation often poses a radicalisation risk to vulnerable communities, notably among younger generations; a phenomenon which can be exacerbated by crisis and social exclusion.¹⁰ As Central Asia has suffered from recent violent extremism, several experts note that lacking levels of media illiteracy and a contracted civic space for media freedom and freedom of expression, may facilitate radical narratives,¹¹ both online and offline.¹²

⁸ See: IWPR CA (2019); Internews (2018, 2019)

⁹ Ibid.

¹⁰ International Crisis Group (2015) Syria Calling: Radicalisation in Central Asia (BRIEFING 72) Available at: <https://www.crisisgroup.org/europe-central-asia/central-asia/syria-calling-radicalisation-central-asia>

¹¹ Furstenberg, S. (2019) The state of Islamic threat in Central Asia: assessing the threat of terrorism from Central Asia. The Foreign Policy Centre. Available at: <https://fpc.org.uk/the-state-of-islamic-threat-in-central-asia-assessing-the-threat-of-terrorism-from-central-asia/>; Dialogue of Civilizations Research Institute (2019) Religious radicalism in Central Asia roundtable. Available at: doc-research.org/2019/11/religious-radicalism-central-asia/

¹² Heathershaw, J. & Montgomery, D.W. (2014) The Myth of Post-Soviet Muslim Radicalization in the Central Asian Republics. The Royal Institute of International Affairs: Chatham House. Available at: chathamhouse.org/sites/files/chathamhouse/field/field_document/20141111P_ostSovietRadicalizationHeathershawMontgomery.pdf

“ Disinformation often poses a radicalisation risk to vulnerable communities ”

This further calls for the need to increase research on language diversification by credited media outlets, as well as our understanding of information trust and consumption of different media products in vulnerable societies.

This nexus between media consumption, disinformation and radicalisation was addressed in another study by Internews in 2018 called “Information flows and Radicalization leading to violent extremism in Central Asia”.¹³ It concluded that state-controlled media coverage continued to provide inadequate coverage levels of common social problems like discrimination, inequality or poverty. In turn, such lacking levels of coverage is likely to inhibit the normalisation of public discussion surrounding these problematics and may lead to feelings of ostracization among vulnerable individuals.

Regarding the element of trust, it has regularly been observed that there may be a level of scepticism towards state-controlled media content, especially online, as restrictions to information are known among younger consumers.¹⁴ This appears to occur, despite the innate prevalence of state-controlled media and “government-approved information” across many Central Asian countries.¹⁵

Nonetheless, younger generations tend to trust online sources more easily as a general rule. Moreover, half of the participants of the 2020 Internews survey disregard any form of ownership of the media, whether private or state, as a measure of reliability or trust, whereas one third of respondents believe that ownership matters.

Media consumption and vulnerable communities

Media illiteracy remains a major problem in Central Asia and studies on radicalisation drivers¹⁶ recommend governments to promote the dissemination of educational content throughout platforms used by extremist groups. For example, experts have recommended that information should be as diversified as possible in order to effectively reach the maximum number of citizens.

In Kyrgyzstan, 78.4% of 1,200 respondents were not aware that news on social networks and the Internet is algorithmically selected in accordance with an individual’s interests.¹⁷ Such unawareness is slightly higher

13 Internews (2018) Information flows and Radicalization leading to violent extremism in Central Asia. Available at: https://internews.org/sites/default/files/2019-07/Info_flows_radicalization_CentralAsia_Eng.pdf

14 “This discrepancy might be explained by the fact that people are sensitized to the need to use information critically and that biased information was everywhere, but they are not always able to follow upon that awareness, partly due to a lack of critical thinking skills, partly due to a lack of choice, and partly due to having already internalized certain government messaging” (Internews, 2018).

15 Ibid.

16 Ibid.

17 Algorithm Watch (2020) Are Algorithms a Threat to Democracy? The Rise of Intermediaries: A Challenge for Public Discourse. Available at: <https://algorithmwatch.org/wp-content/uploads/2020/05/Governing-Platforms-communications-study-Stark-May-2020-AlgorithmWatch.pdf>

among respondents older than 52 years (86.8%) and ones between 25 and 33 years (78.3%).¹⁸ These high percentages indicate a general lack of knowledge on the functioning of online platforms among most age groups.

As for the quality of the disseminated information, since it's increasingly linked to online diffusion, the study also noted that the occurrence of disinformation in social networks and instant messengers is growing, partly due to user-generated content as well.

The same research also reported that male populations usually have better access to most information sources, thereby also showing innate levels of female exclusion. For example, the study by IWPR CA refers to an "online gender gap" in Central Asia. While few other comprehensive studies exist on this subject, experts refer to indirect indicators that demonstrate different uses of the Internet by men and women, such as the predominance of Facebook advertising targeting men, and low levels of financial literacy/access to online banking operations (e.g. transactions, online payments). The IWPR CA survey further demonstrates gender inequality by the sheer fact that only 38% of respondents were women.

In addition, IWPR CA notes that the survey may not present a fully accurate overview of the region, as it concentrated on urban centres due to the lower levels of Internet access in rural areas. It also noted its limitations with regards to accessing groups which are more difficult to access or remain less present online, including "people with low incomes or limited access to formal education".

This important research gap strongly indicates that vulnerable groups with socio-economic disadvantages (e.g. ethnic minorities, labour migrants, and refugees and stateless persons) are currently not studied properly, while potentially facing imbalanced access to information during health or any other crisis. Furthermore, it calls for the need to carefully investigate both general vulnerable communities, while simultaneously paying additional attention to the socio-economically most excluded fringes of such groups.

Media consumption in Central Asia remains a topic which merits further research and data collection. This is particularly relevant within the context of trying to understand the needs and challenges of changing employment and health environments for the most vulnerable communities. The outcomes of the 2019 Internews study provided brand new information on these topics. However, while this research offers ample evidence on media consumption patterns, it does not address two important and dynamic variables: the potential changes in media consumption during an extraordinary pandemic outbreak, such as COVID-19, and its potential link to social exclusion and radicalisation. Similarly, while the study

“ experts have recommended that information should be as diversified as possible in order to effectively reach the maximum number of citizens ”

“ This important research gap strongly indicates that vulnerable groups with socio-economic disadvantages (e.g. ethnic minorities, labour migrants, and refugees and stateless persons) are currently not studied properly ”

¹⁸ See more more of the Report on the study of the level of media literacy in the Kyrgyz Republic (Vorobyova Anna, Yeshenalieva Ainura, Rakhimov Ruslan, Usenova Begaim): <https://soros.kg/wp-content/uploads/2018/03/Otchet-po-itogam-issledovaniya-mediagramotnosti-v-KR.pdf>

“ Media consumption in Central Asia remains a topic which merits further research and data collection ”

“ The inability to find legal protection makes stateless persons one of the most vulnerable groups in Central Asia ”

covers a vast demography of respondents, a research gap manifests itself among the most vulnerable groups across the region, namely labour migrants, ethnic minorities, and refugees¹⁹ and stateless persons, all of which are considered of higher risk and vulnerability due to their socio-economic conditions.

Central Asia continues to host one of the largest stateless communities in the world, according to the United Nations High Commissioner for Refugees (UNHCR). Since the breakup of the Soviet Union, thousands of people have been left without a nationality. Despite Central Asian countries granting passports to many stateless people during the past decades,²⁰ the UNHCR estimates a total of 116,629 persons living without nationality across the region in 2020. Uzbekistan currently hosts 97,346 stateless persons, followed by Kazakhstan with 8,386, Tajikistan with 7,151, Turkmenistan with 3,686 and Kyrgyzstan with 58.²¹

The inability to find legal protection makes stateless persons one of the most vulnerable groups in Central Asia.²² According to the Organisation for Security and Co-operation in Europe (OSCE) and the UNHCR, stateless persons experience “limited or no access to education and health care”, “heightened risk of exploitation, trafficking, and sexual and gender-based violence”, and “difficulties to enter into contracts, obtain business licenses or open bank accounts”.²³ Due to the restrictive migration laws, the official refugee community can only be found in extremely low numbers across three countries (Kazakhstan, Kyrgyzstan and Tajikistan). It is reported that their socio-economic and legal constraints are similar to the ones of stateless persons. Furthermore, this vulnerable community also faces language adversities. The majority of refugees in Central Asian countries come from Afghanistan or Syria, speaking Arabic or Pashto as their native language. This is regularly perceived as an additional hurdle, which may render them more excluded while hindering their access to information.

The 21st Central Asia Media Conference organised by the OSCE in July 2019 concluded that media diversity and pluralism are urgently needed in order to promote “locally controlled” minority media which reflects different communities’ needs.²⁴ Central Asia is a mosaic of different ethnic minorities which have little representation in traditional mass mainstream

19 The most recent data provided by UNHCR, from April 2020, refers to 3,708 refugees (588 in Kazakhstan; 333 in Kyrgyzstan; 2,357 in Tajikistan). Due to restrictive border policies, there are no state recognized refugees in Turkmenistan and Uzbekistan. Available at: reporting.unhcr.org/node/3412; twitter.com/UNHCR_Cent_Asia/status/1260869954632548353/photo/1

20 UNHCR (2020) Uzbekistan to end statelessness for 50,000 people. Available at: <https://www.unhcr.org/news/press/2020/3/5e70b9474/uzbekistan-end-statelessness-50000-people.html>

21 UNHCR (2020) Infographic on ending statelessness in Central Asia. Available at: https://www.unhcr.org/centralasia/wp-content/uploads/sites/75/2020/05/UNHCR-Statelessness_Infographic-2020-ENG-screen.pdf

22 UNHCR (2011) Statelessness in Central Asia. Available at: <https://www.unhcr.org/4dfb592e9.pdf>

23 OSCE & UNHCR (2017) Handbook on Statelessness in the OSCE Area International Standards and Good Practices. Available at: <https://www.osce.org/handbook/statelessness-in-the-OSCE-area?download=true>

24 OSCE (2019) Recommendations of the 21st regional Central Asia media conference “Media freedom and pluralism in times of digital transformation. Available at: <https://www.osce.org/event/21st-central-asian-media-conference>

media, and are usually confined to a local media context financed by ethnic associations and small private media.

Some literature on the subject indeed notes that it remains “uncertain whether minority media encourages audiences to retain ethnic values or whether they encourage integration of ethnic minorities into the surrounding dominant society, chiefly through promotion of common civic values”.²⁵ Nonetheless, as the OSCE highlighted, experts believe that the minority media’s main limitation is the “highly differentiated public sphere”, which “does not promote shared spaces and values” due to language barriers. Consequently, minorities can more easily fall into the exclusion gap referred to previously.

“ uncertain whether minority media encourages audiences to retain ethnic values or whether they encourage integration of ethnic minorities into the surrounding dominant society, chiefly through promotion of common civic values ”

Table 1: Ethnic Composition of four Central Asian countries²⁶

Kazakhstan	Kazakh 65.5%	Russians 21,5%	Uzbeks 3.0%	Ukrainians 1.8%	Uighurs 1.5%	Tatars 1.1%
Uzbekistan	Uzbek 83.8%	Tajik 4.8%	Kazakh 2.5%	Russian 2.3%	Karakalpak 2.2%	Tatars 1.5%
Tajikistan	Tajik 84.3% (includes Pamiri and Yaghnobi)	Uzbek 13.9%	other 2% includes Kyrgyz, Russian, Turkmen, Tatar, Arab			
Kyrgyzstan	Kyrgyz 73.5%	Uzbek 14.7%	Russian 5.5%	Dungan 1.1%	Other 5.5% of the more representative minorities include Turks, Tajik, Uighur, Kazakh, among others in smaller percentages.	

A vast literature on tensions between Central Asian minorities exists,²⁷ notably due well documented clashes in the region, one example being the southern regions of Kyrgyzstan in July 2010.²⁸ Some studies on this subject show that ethnic Uzbeks, who are citizens of the Kyrgyz Republic, at times become strangers to both Uzbekistan and their homeland, due to degrees of exclusion.²⁹ This context reflects clearly the vulnerability to which ethnic minorities can be exposed to on the basis of discrimination and a lacking sense of belonging. The case of Tajikistan demonstrates how language is also a pertinent component of the problem. The complex ethnic hostilities in part remain a sensitive issue in Tajikistan since the civil war. While the government has advanced legislation to ensure minority rights, experts note that the political agenda still ignores the needs of such different groups. The largest minority of Uzbek-speaking citizens is largely under-represented in state institutions, something also remains common among other minorities. All these groups face difficulties with Tajik language proficiency, lacking also institutional information and education in their own native language, which reinforces their vulnerability within Tajik society.

25 Fernando, O. (2011) “Ethnic Minorities and the Media in Central Asia” in *After the Czars and Commissars Journalism in Authoritarian Post-Soviet Central Asia*. Freedman. E. & Shafer. R. (eds), pp. 161-183.

26 According to the World FactBook developed by the Central Intelligence Agency of the USA, last updated as of 2019, and the National Statistical Committee of the Kyrgyz Republic.

27 Fumagalli, M. (2007) Framing ethnic minority mobilisation in Central Asia: The cases of Uzbeks in Kyrgyzstan and Tajikistan. *Europe Asia Studies* 59(4). pp.567-590

28 OHCHR (2018) Kyrgyzstan: Ethnic minorities need equal treatment, says senior UN official; salutes Central Asian rights defenders. Available at: <https://www.ohchr.org/en/NewsEvents/Pages/DisplayNews.aspx?NewsID=23109&LangID=E>

29 Grazhdanskaya initsiativa Internet-politiki (2019) Segmentation of the target audience to determine preventive measures to online violent propaganda extremism in Kyrgyzstan. Available at: Internetpolicy.kg/wp-content/uploads/2019/06/Ru_SegmentationExerciseReport_FinalDraft_May2019.pdf

COVID-19, social exclusion and new risks

“ experts note that the political agenda still ignores the needs of such different groups ”

Since the beginning of the COVID-19 outbreak, Human Rights Watch (HRW) has reported that all governments have limited access to information about the spread of the virus, while enacting arbitrary restrictions, which target journalists, healthcare providers, and activists. Tajik authorities, for example, have prevented the circulation of information on COVID-19, censoring and disrupting some media's outlets' coverage of the pandemic in the country. In almost all Central Asian countries there have been reports of citizens and healthcare workers being arrested for disseminating “false information” on the poor quality of medical supplies. The government has also been accused of shutting down social media accounts which post or report about the pandemic. In Turkmenistan, the repression around the release of COVID-19-related information has been particularly punitive, as the government has prevented any pandemic related content to be published on national and private media outlets. While authorities conducted some public awareness campaigns on preventive measures in hospitals and schools, HRW reports cases of medical workers being forced into nondisclosure agreements, against threats of dismissal and criminal charges.

As the pandemic is being contained gradually, the region has become more susceptible to the propagation of false information. This is likely to affect the most vulnerable groups, including their access to quality and reliable information on health. As a consequence, the literature shows that there continues to be lacking data on the impact of the crisis on various vulnerable groups and their consumption of media health related information more specifically.

The UN agencies and other international actors identify refugees, persons lacking legal representation such as stateless persons, and ethnic minorities as the most precarious groups in the occurrence of a pandemic. In addition, Central Asia's problematic context for labour migrants are no exception to this rule, as this community faces unprecedented economic and social hardship due to the pandemic's presumed impact on migration and employment, due to border closures and quarantine periods.

“ As the pandemic is being contained gradually, the region has become more susceptible to the propagation of false information ”

According to IOM reports and consultations with field-experts, millions of Central Asian labour migrants has become more fragmented and exposed due to the sudden loss of income linked to the pandemic³⁰. The families of numerous workers who seasonally migrate to Russia are dependent on frequent remittances, which originate from better employment opportunities on Russian fields and factories. Due to the COVID-19 outbreak, a significant portion of temporary workers from Central Asia have been forced to leave Russia and return home. As restrictions have been gradually imposed, these communities face a lot of uncertainty, which is further exacerbated by false or lacking information sources.

³⁰ <https://www.iom.int/photo-stories/labour-migration-central-asia-russia>

Recent news reports have brought attention to Russian media which has regularly been portraying labour migrants, who didn't manage to return with COVID-19 repatriations, as criminal perpetrators. This, in turn, has negatively promoted unsubstantiated "xenophobic rhetoric" and further stigmatisation of labour migrant communities.

This may have lasting negative effects for labour migrants, considering the continued restrictions on work. As underlined by several experts, migrant remittances constitute an very important source of stable income for Central Asian economies. A break in economic activity may push already precarious communities into further vulnerability and make them easy targets for recruiting and disinformation campaigns led by radical religious organisations like the Islamic State (IS).³¹ Several studies have shown how these groups are particularly exposed to extremist and violent narratives. This is partly due to their disadvantageous economic situation, coupled with social isolation and scarce human connections in their hosting communities across Russia and Central Asia. In turn, many migrant workers are reported to fall victim to recruitment groups who take advantage of these weaknesses and resentment towards 'mainstream society' in general.³²

Intraregional labour migration in Central Asia takes place more frequently from neighbouring countries to Kazakhstan, but also to South Korea.³³ This often happens under illegal circumstances, which facilitates the development of legal voids in which labour migrants become more vulnerable. Labour migrants are often portrayed as "criminals, transgressors of laws and order or the more benign representations of them as uneducated, unskilled, unaware of their rights, willing to work at any price under conditions of slavery"³⁴. South Kazakhstan has the highest share of labour migrants from Uzbekistan. When it comes to Kyrgyz and Tajik labour migrants, Russia is the favoured destination for 1 million and 1,15 million people.³⁵ Many of these labour migrants are reported to come from the Osh province, according to testimonies in the Radio Free Europe/Radio Liberty's (RFE/RL) documentary project "Not In Our Name". According to the International Organisation for Migration (IOM), the majority of migrants come from the Khatlon region (Kurghan Teppa area) in Tajikistan.³⁶

“ This is partly due to their disadvantageous economic situation, coupled with social isolation and scarce human connections in their hosting communities across Russia and Central Asia ”

31 Royal United Services Institute (2018) Understanding the Factors Contributing to Radicalisation Among Central Asian Labour Migrants in Russia. RUSI Occasional Paper. Available at: <https://www.sfcg.org/violent-extremism-central-asian-migrant-workers-russia/>; Heathershaw, J. & Lemon, E. (2017) How can we explain radicalisation among Central Asia's migrants? Available at: <https://www.opendemocracy.net/en/odr/can-we-explain-radicalisation-among-central-asia-s-migrants/>.

32 "Central Asians who support or are interested in ISIL appear to mostly be young migrant labourers who have little or no background in Islam as a religion but embrace Islam as an identity that offers solidarity, a sense of belonging and an explanation for economic hardship and discrimination that they experience." Tucker, N. (2015) Islamic State Messaging to Central Asians Migrant Workers in Russia', CERIA Brief No. 6, George Washington University. Available at: <https://app.box.com/s/bw0q8p80wfbn7brg2wyczzusx2p8ljhn>

33 Eurasianet (2019) From Samarkand to Seoul: Central Asian migrants in South Korea. Available at: <https://eurasianet.org/from-samarkand-to-seoul-central-asian-migrants-in-south-korea>

34 Davé, B. (2014) Keeping labour mobility informal: the lack of legality of Central Asian migrants in Kazakhstan. Central Asian Survey. 33(3). pp.346-359.

35 IOM (2020) https://publications.iom.int/system/files/pdf/tajik_migrants_report_15jan.pdf https://www.ucentralasia.org/Content/Downloads/UCA-IPPA-WP-39%20International%20Labour%20Migration_ENG.pdf

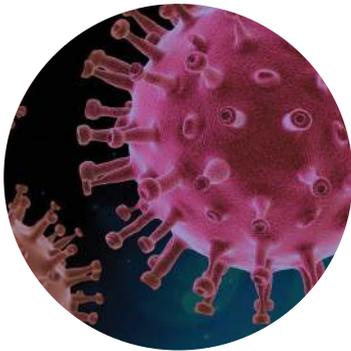
36 There are also rural districts from which the majority of the male population leaves to work abroad. These are the Isfara, Kanibadam, Asht, Aini, Penjikent and Shakhristan districts of the Sughd

People living in the Districts under Republican Subordination (RRP) are also strongly represented in labour migration.

The above assumptions arise from an extensive literature review. It assumes that the context of the 2020 health crisis will disproportionately affect vulnerable communities, including labour migrants. It also assumes that they may face an information vacuum, while being susceptible to misleading sources of information and other socio-economic challenges. It exposes a void in the wider research and shows our limited understanding of how vulnerable communities are socio-economically affected, and how their media patterns may change during crises, including the COVID-19 pandemic.

This study will attempt to fulfil the need for more detailed research, including qualitative and quantitative data, among the three aforementioned target communities, namely labour migrants, ethnic minorities and refugees and stateless persons. It simultaneously looks at how sub-categories mentioned in the literature review (e.g. example gender, age, income, urban/rural) also merit further investigation as sub-categories of vulnerability. It aims at complementing existing research through extensive quantitative data surveying and in-depth online interviews in order to provide a broad understanding and mapping of each country's media landscape, socio-economic challenges and expert views on new information, consumption and content production during the COVID-19 pandemic.

region bordering Uzbekistan; the Bokhtar, Vakhsh and, to a lesser extent, Farkhor districts of the Khatlon region, as well as the Lenin, Kofarnikhon and Varzob areas in the RRP.



| Chapter 2 |

Socio-economic impact of COVID-19 in Central Asia

Refugees and stateless persons, ethnic minorities and labour migrants face extremely high levels of socio-economic impacts as a result of COVID-19. These were measured through mixed-methods research with qualitative and quantitative input, including short term and long term socio-economic impacts and input from content producers. The following three sections present the findings, followed by a final discussion section with cross comparison points.

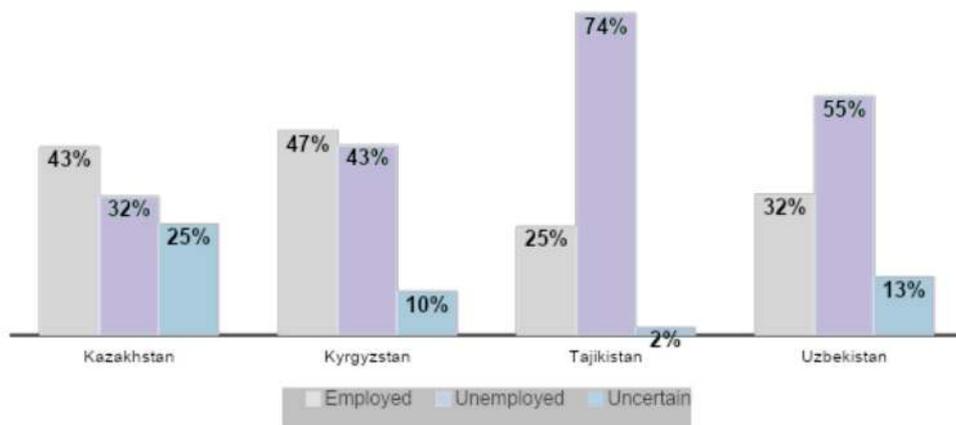
Findings from the survey: vulnerable communities

The quantitative data reveal both short term and long term impacts across all four Central Asian countries.

The short-term economic impacts are best understood with regards to shifting levels of employment, income and uncertainty during the quarantine period, which lasted between March/April 2020 and May/June 2020 for most countries in Central Asia.

During the quarantine period, 48% of refugees and stateless persons did not work, while 13% had undetermined labour status across Central Asia. As a result, only 39% of refugees and stateless persons had employment status during the quarantine period.

Diagram 1. Reported employment status of ethnic minorities in Central Asia during the quarantine period (below)



Ethnic minorities faced the highest levels of economic impact during the quarantine, with divisions emerging amongst different countries. In Tajikistan and Uzbekistan, the unemployment rates amongst ethnic minorities were reported to be extremely high at 74% and 55% respectively. In Kyrgyzstan ethnic minorities also reported high unemployment levels at 43%, whereas Kazakhstan saw the lowest reported unemployment among ethnic minorities at 32%.

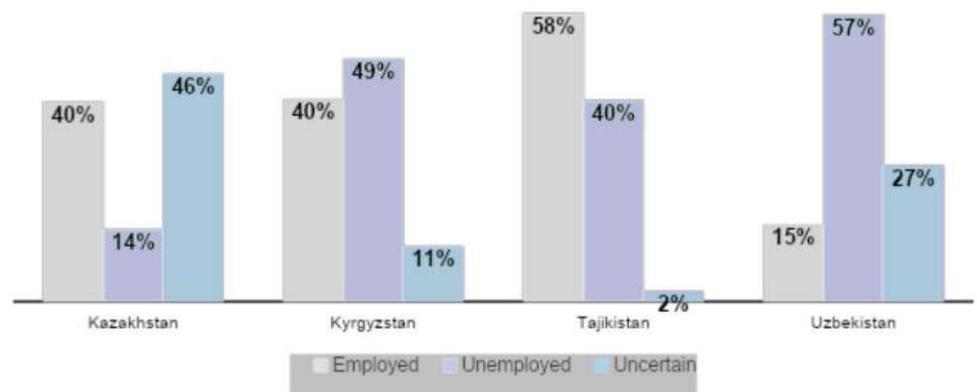
“ The short-term economic impacts are best understood with regards to shifting levels of employment, income and uncertainty during the quarantine period ”

“ During the quarantine period, 48% of refugees and stateless persons did not work, while 13% had undetermined labour status across Central Asia ”

“ In Tajikistan and Uzbekistan, the unemployment rates amongst ethnic minorities were reported to be extremely high at 74% and 55% respectively ”

Labour migrants consistently faced very high levels of economic impact during the quarantine. In Uzbekistan and Kyrgyzstan, levels of unemployment amongst labour migrants were 57% and 49%. In addition to unemployment, reported levels of labour uncertainty were also high in Uzbekistan (27%) and Kyrgyzstan (11%). Labour migrants in Tajikistan reported a slightly lower unemployment level at 40%. The lowest levels of unemployment were measured in Kazakhstan at 14%, yet this is due to the fact that 46% of labour migrants reported labour uncertainty instead.

Diagram 2. Reported employment status of labour migrants in Central Asia during the quarantine period (below)



The long-term economic impacts will continue to reveal themselves as time goes by. Their most immediate consequences can already be measured economically and socially in the immediate aftermath of the quarantine, defined as the period after May/June 2020 for Kazakhstan, Kyrgyzstan and Uzbekistan.

“ In Uzbekistan and Kyrgyzstan, levels of unemployment amongst labour migrants were 57% and 49% ”

In the aftermath of the quarantine, a slight improvement was reported amongst refugees and stateless persons across Central Asia. Whereas reported levels of unemployment were 48% during the quarantine, the levels of unemployment dropped to 40% in August 2020. The levels of labour uncertainty however increased from 13% to 15% for the same target group.

Very slight improvements in employment also took place among ethnic minorities in Central Asia after the quarantine, with the notable exception of Kyrgyzstan. Among ethnic minorities in Tajikistan the levels of unemployment at the end of the quarantine was reported at 63%¹. In the immediate aftermath of the quarantine, the reported levels of unemployment remained very high among ethnic minorities in Uzbekistan at 49%, while reported levels were 28% in Kazakhstan. Labour uncertainty levels increased in Kazakhstan, while overall reported unemployment among ethnic minorities in Kyrgyzstan increased to 48% (from 43%) after the end of the quarantine period.

¹ This steep decline can be explained due to surveying in Tajikistan taking place towards the end of the quarantine period, during which economic activity remained very suppressed.

“ Kyrgyzstan saw an increase in unemployment for labour migrants after the quarantine period, with unemployment and uncertainty levels increasing from 60% to 70% in less than 4 months ”

Labour migrants faced slight improvements across most Central Asian countries after the quarantine period, with the exception of Kyrgyzstan. In Uzbekistan and Tajikistan, reported levels of unemployment amongst labour migrants fell by 3% in both countries, while the overall unemployment and uncertainty levels in Kazakhstan dropped from 60% to 54%. In contrast to the other countries, Kyrgyzstan saw an increase in unemployment for labour migrants after the quarantine period, with unemployment and uncertainty levels increasing from 60% to 70% in less than 4 months. Despite the slight improvement in Kazakhstan and Uzbekistan, it should realistically be noted that the level of labour uncertainty and unemployment continues to be unsustainably high at an average of 62% across the four Central Asian countries. The lowest levels of reported unemployment during the quarantine period were measured in Kazakhstan at 14%, yet this is due to the fact that 46% of labour migrants reported a sharp rise in labour uncertainty instead.

The above show the negative effects of COVID-19 among three defined vulnerable communities: refugees and stateless persons, ethnic minorities and labour migrants. It is however noteworthy to note that the negative effects of COVID-19 are further amplified once subdivisions of vulnerability are introduced, including gender, urban-rural divisions, socio-economic status and age brackets.

Age vulnerability is observed more among older age groups, as opposed to the demographic group ranging from 18 to 25. For example, most labour migrants over the age of 31 from Kazakhstan reported 26% higher labour uncertainty in comparison to 18 to 25 year olds. In Tajikistan, ethnic minorities between 26 and 30 reported low incomes 54% of the time, which is double the amount reported by the age group between 18 and 25.

Both labour migrants and ethnic minorities in urban centers qualified as more vulnerable in terms of employment status compared to their counterparts living in rural settings. Twelve percent more labour migrants living in rural areas across Central Asia reported employment status, as opposed to urban labour migrant residents. In Uzbekistan, ethnic minorities living in rural areas were 19% more likely to be employed compared to their urban counterparts.

Refugees and stateless persons remain the poorest, least educated and most vulnerable: 63% have low income and only 6% have high income. Thirty-eight percent of the interviewed refugees and stateless persons have professional or vocational levels of education, whereas only 1% of the interviewed refugees and stateless persons have academic degrees.

Gender inequality continues to divide and exacerbate vulnerabilities across all countries and target groups. In general, 20% more women reported unemployment compared to men across all groups and countries. This pattern increased during and after the quarantine, particularly affecting women. In Tajikistan, only 25% of women migrants were employed, which is drastically lower than the national average. Across Central Asia,

the number of female labour migrants with uncertain work status increased by 12% throughout the pandemic.

Findings from interviews: vulnerable communities

Qualitative in-depth interviews with vulnerable communities reveal three key ways in which the COVID-19 pandemic affected everyday lives. The first, and most important, impact of the pandemic is economic. Due to the government restrictions introduced in late March across most Central Asian countries and Russia, many respondents lost their jobs, either temporarily or permanently. Many were given no certainty with regards to employment. Growing food prices also posed a significant problem, according to numerous respondents. The economic impact of the pandemic has been most acutely felt by labour migrants. This group included Central Asians who had worked outside of the country before the COVID-19 pandemic. In addition to closed businesses and rising prices, labour migrants faced the hurdle of closed borders, which largely prevented them from returning to host countries such as Russia, South Korea and other labour destinations.

“ So, one big change that happened in my life [after COVID-19] is that I am now in debt very much. (Tajikistan, female, refugee, 25 years old) ”

Now everything has changed with us, everything has become difficult. Now I have borrowed a lot of money, I have to pay the rent, I am now in debt. So, one big change that happened in my life [after COVID-19] is that I am now in debt very much. (Tajikistan, female, refugee, 25 years old)

Ethnic minorities and refugees and stateless persons appear to have suffered comparatively less from the economic and financial crisis. In the case of ethnic minorities, some respondents cited working from home, while resuming their work after several weeks of lockdown. In contrast, many refugees and stateless persons were generally in a difficult situation before COVID-19, which may explain their relatively lower negative perception of the pandemic. It should nonetheless be noted that the most extreme instances of reported economic problems were found among refugees and stateless persons. For example, some refugees and stateless persons stated that their situation was so dire that they could not afford to buy vegetables for their daily meals. This information is also corroborated by NGOs who mentioned that some refugees and stateless persons did not own mobile phones, preventing them from doing online interviews or connecting to the Internet to read the news.

While most interviews note that the financial situation was worsening, a few of them reported received governmental support. Those who had received any form of support benefited from the help from mahalla committees² (in Uzbekistan), international or local NGOs or volunteers (in

² Mahalla refers to a neighborhood, overlapping with the boundaries of smaller villages or parts of larger settlements such as towns. Mahalla committee, in turn, reflects the government's efforts to delegate some local self-governance issues to appointed chairpersons of committees. Thus, it is a semi-formalized unit of local self-government in Uzbekistan. Mahalla committees cover areas with a population of about 2,000 residents on average. See more: Canada: Immigration and Refugee Board of Canada (2004) Uzbekistan: Role of “mahalla” in Uzbek society; whether mahalla are involved in extortion; state protection. Available at: <https://www.refworld.org/docid/41501c6f23.html>.

Kyrgyzstan), or relatives (across all countries). The support was received mostly in the form of food, and in some rare cases in cash. The government assistance was mainly mentioned in Kazakhstan, where people could apply and receive 42,500 tenge (about \$200) for two months. It is noteworthy that respondents tended to downplay the issue, either having little expectations of help or relativising by saying that the whole world was facing similar problems.

“ The second impact of COVID-19 is related to mental health. Respondents report feeling further excluded in their communities. This observation is most evident among refugees and stateless persons ”

The second impact of COVID-19 is related to mental health. Respondents report feeling further excluded in their communities. This observation is most evident among refugees and stateless persons. This community is already disadvantaged due to its legal status, lack of language skills and a weak sense of belongingness to the local community. The social distancing requirements are reported to have made the situation worse. Another reported COVID-19 impact was described as a general sense of panic, followed by detachment. Many respondents stated that they deliberately stopped following COVID-19-related news because of this information's general sense of negativity which could risk causing a nervous breakdown.

The third impact of COVID-19 concerns social relations. Two observations stand out in particular. First, the pandemic confirmed the importance of family in Central Asia. Family members and close relatives often provided help to people in need. Many respondents revealed that the lockdown measures forced them to spend more time with their children, often doing household chores. Second, some respondents noted a greater feeling of national unity. Respondents noted that COVID-19 posed a common threat to all and had a uniting effect, particularly on inter-ethnic relations. The latter was particularly evident in interviews with ethnic minorities in Uzbekistan.

Importantly, few respondents brought up the problem of physical health, e.g., the direct threat of the COVID-19 virus. This is apparently related to the fact that interviews were conducted in May-June, while the biggest jump in new cases and deaths was recorded in July.

“ Journalists often reported producing more people-centred stories, especially about the labour migrant community. The level of reporting about labour migrants in national and local media was more frequent compared to any other vulnerable community in the region ”

Findings from interviews with content producers

Qualitative in-depth interviews with content producers reveal an increased demand among vulnerable communities for access to vital information (e.g. socio-economic support packages, health, travel restrictions) through different types of media platforms. The fact that labour migrants were regularly covered by media platforms, allows us to assume that the socio-economic impact of the COVID-19 pandemic for this target group was very high. It also shows the level of interaction among labour migrants and content producers. Journalists often reported producing more people-centred stories, especially about the labour migrant community. The level of reporting about labour migrants in national and local media was more frequent compared to any other vulnerable community in the region. In addition, it should be noted that the vast majority of media

outlets covered developments in Russia related to migration legislation, travel restrictions and other relevant information for seasonal workers from Central Asia.

Migrants are a big audience because they need to check news everyday, they watch my news on Instagram. People from Moscow and other Russian locations. Migrants are very interested in what's happening back home and what changes for them. (Tajikistan, female, online media)

An important change which also occurred during this period is access to funding. Independent media outlets across Central Asia raised concerns about the difficulties they face in securing funding due to the limited advertisement market and the economic crisis related to COVID-19. It was regularly reported that limited access to funding combined with legislation that blocks foreign financial support will eventually lead to the closing of several media outlets. The lack of media plurality may impact not only vulnerable communities, but equally affect the general population at large in terms of access to impartial and accurate information.

Two topics which received substantial media coverage across all four countries during the pandemic was the rise in domestic violence, followed by the digital exclusion of women in terms of access to information.

We spoke a lot about domestic violence and gender issues. There was a drastic rise. People came to our editorial office and spoke about their daily basic issues. We always found a way to help them to be heard. (Tajikistan, male, radio)

“ the crisis triggered a reported increase in the interaction between content producers and audiences through social media ”

It should be noted that positive developments also occurred during the COVID-19 pandemic. For example, the crisis triggered a reported increase in the interaction between content producers and audiences through social media, including citizens' feedback and interaction through phone calls to newsrooms. The purpose was reported to be either to request information with regards to COVID-19 socio-economic support and/or to raise awareness about their needs and challenges through personal stories.

Journalists realised that journalism is a powerful tool that can bring changes, especially during the pandemic. We talked about bad things that were going and the government had to pay attention. (Uzbekistan, female, online media)

Wrapping-up: socio-economic impact of COVID-19 in Central Asia

All research methods applied in this study collectively indicate that the least educated, poorest and most vulnerable communities across Central Asia continue to suffer the harshest consequences as a result of the

COVID-19 pandemic. Refugees and stateless persons remain the most vulnerable community across the region, while suffering disproportionately compared to any other community. Whereas ethnic minorities and labour migrants also face serious socio-economic consequences, it should be noted that refugees and stateless persons receive substantially less media coverage. Ethnic minorities and especially labour migrants were well-represented across most media outlets (including social media) during the COVID-19 pandemic, despite facing very serious economic impacts.

The quantitative data reported unemployment rates which could destabilize the socio-political fabric and lead to unrest in several countries. Further in-depth analysis through qualitative interviews show that little government economic support was provided for vulnerable communities. Similarly, an important finding remains that mental health effects of economic and political crises loom at large. In terms of gender, the interviews with content producers show a broad coverage of issues including domestic violence, while the qualitative data indicates that the subject of gender is more complex. A less covered news story remains that the levels of gender inequality are related to levels of vulnerability, meaning that women suffer proportionately more depending on their level of income, education, and whether they belong to vulnerable communities. One of the most extreme cases is found in Tajikistan where the reported levels of unemployment among women from vulnerable communities are disproportionately higher than standard female unemployment levels.³

“ women suffer proportionately more depending on their level of income, education, and whether they belong to vulnerable communities ”

Practically no media attention was given to the fact that urban vulnerable communities may face more difficulties than their rural counterparts during COVID-19. Interviews suggest that pre-conceptions about “rural poverty” may distort opinions about the reality of urban poverty among vulnerable communities. Interviews with content producers however noted other serious set-backs and difficulties faced by media and news outlets in Central Asia during COVID-19. They reported that the economic impacts of the pandemic were felt in terms of decreased funding towards free and impartial media, while also mentioning that restrictions by governments were regularly being instilled upon independent media groups and outlets.

³ World Bank (2020) Unemployment, female (% of female labor force) (national estimate). Available at: https://data.worldbank.org/indicator/SL.UEM.TOTL.FE.NE.ZS?locations=TJ&most_recent_value_desc=false



| Chapter 3 |

Trends and patterns of media consumption in Central Asia

Refugees and stateless persons, ethnic minorities and labour migrants consume media and information with results that show clear patterns and trends. These were measured through mixed-methods research with qualitative and quantitative input, including input from content producers. The following three sections present the findings, followed by a final discussion section with cross comparison points.

Findings from the survey: vulnerable communities

The quantitative data shows refugees and stateless persons, ethnic minorities and labour migrants reporting significant trends concerning their media consumption, preference of media platforms, language and access to information or restrictions.

In terms of media consumption, the high reliance amongst all target groups on social media and television, in contrast with people-to-people contact and newspapers or radio is very indicative that vulnerable communities are equally impacted by the changing digital media landscape. The divide between the use of television and social media is primarily age-based, with older people using television more than younger people.

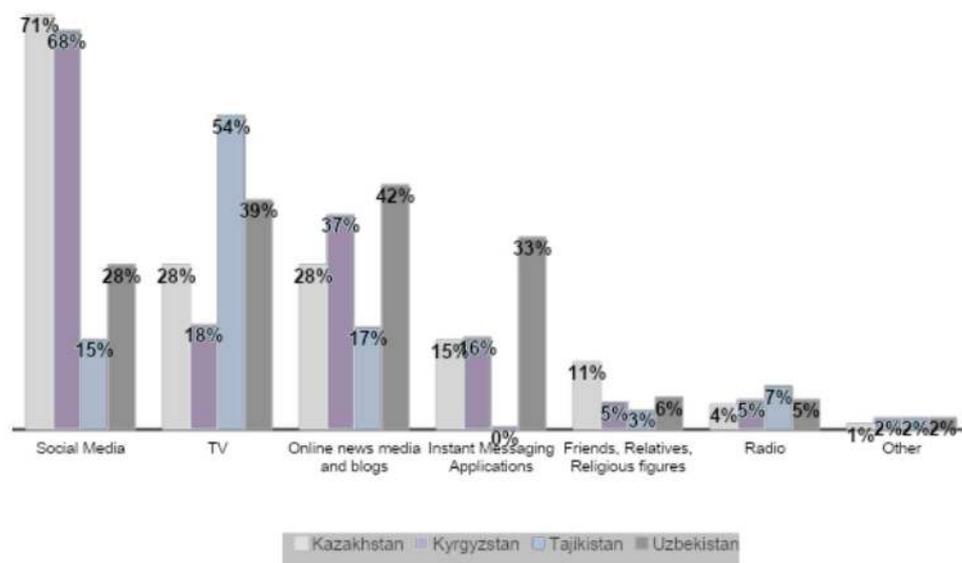
Across Central Asia, 57% of stateless persons report that television is their main source of information, whereas 43% use social media, 20% online news media and blogs, and 18% instant messaging applications to access information and news. Only 5% gain information through relatives, religious figures or friends, while 4% listen to the radio and 1% read newspapers.

Ethnic minorities across Central Asia primarily use social media (46%) to access information, followed by online news and blogs (33.5%) and television (33%). The highest use of social media is reported in Kazakhstan (69%) and Kyrgyzstan (52%) while television use ranks highest in Tajikistan (52%). In Uzbekistan the use of instant messaging applications is extremely popular among ethnic minorities (55%), while moderately popular among labour migrants (33%).

“ vulnerable communities are equally impacted by the changing digital media landscape ”

“ Only 5% gain information through relatives, religious figures or friends, while 4% listen to the radio and 1% read newspapers ”

Diagram 3. Reported main source of information for labour migrants in Central Asia (below)

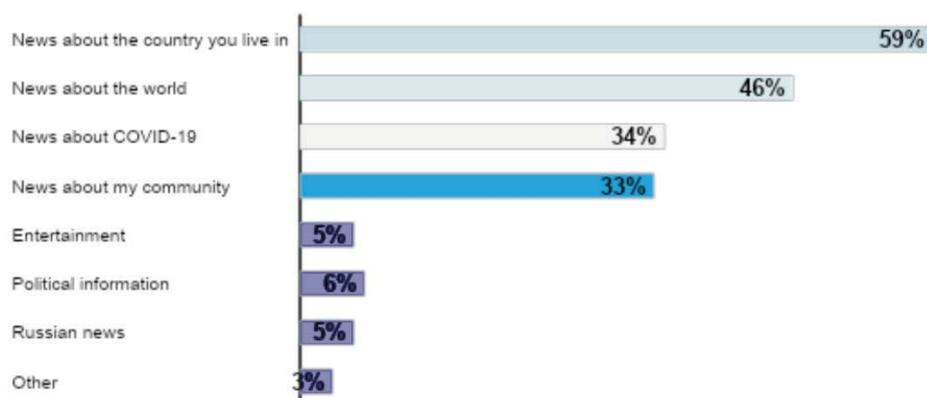


“ a much higher number of labour migrants consume information through social media in Kazakhstan (71%) and Kyrgyzstan (68%) compared to Tajikistan (15%) and Uzbekistan (28%) ”

Labour migrants across Central Asia report similar use of social media (45.5%) to access information, as well as online news and blogs (31%) and television (35%). The noticeable differences are based on countries for labour migrants, since a much higher number of labour migrants consume information through social media in Kazakhstan (71%) and Kyrgyzstan (68%) compared to Tajikistan (15%) and Uzbekistan (28%). In Kazakhstan the number of labour migrants using television to consume information is also substantially higher at 28%, compared to only 17% of ethnic minorities in Kazakhstan. Among all vulnerable target groups, a persistent trend is observed: very low levels of reliance on radio, newspapers and/or people-to-people contact for information consumption.

Regarding the platforms used to access news and information by the three target groups, the following findings were reported.

Diagram 4. Reported type of information received among refugees and stateless persons in Central Asia (below)



Across Central Asia, refugees and stateless persons reported the highest use of Instagram (24%) followed by the Afghan television channel Tulu

“ Fifty-nine percent are interested in receiving news about their country of residence, while 46% reported an interest in world news. Only 5% reported an interest in Russian news and 6% reported an interest in political information ”

“ In Uzbekistan, the preferred source of news was reported as Telegram by a majority of ethnic minorities (50%) and a sizable minority of labour migrants (29%) ”

Television (14%) and WhatsApp (12%). Fifty-nine percent are interested in receiving news about their country of residence, while 46% reported an interest in world news. Only 5% reported an interest in Russian news and 6% reported an interest in political information. Thirty-three percent reported an interest in receiving news about their community, while 34% are interested in COVID-19-related news.

Ethnic minorities (60%) and labour migrants (63%) in Kazakhstan reported extremely high use of Instagram, while in Kyrgyzstan Instagram was also very popular among ethnic minorities (50%) and labour migrants (61%). In Uzbekistan, the preferred source of news was reported as Telegram by a majority of ethnic minorities (50%) and a sizable minority of labour migrants (29%). The second most popular source of news among labour migrants (26%) in Uzbekistan is Kun.uz.

Ethnic minorities of Kyrgyzstan (50%), Kazakhstan (53%) and Uzbekistan (68%) are interested in getting information about their country of residence. Ninety-eight percent of labour migrants of Tajikistan search for information about their community. Similarly, 63% of labour migrants in Kazakhstan, 57% of labour migrants in Uzbekistan and 43% of labour migrants in Kyrgyzstan are interested in getting news about their country of residence, while 42% of labour migrants of Kyrgyzstan noted an interest in getting world news. Ninety-eight percent of labour migrants of Tajikistan are interested in receiving information about their specific community.

In terms of social networks and messenger applications, the findings confirm an overwhelming use of Instagram and Vkontakte among refugees and stateless persons, ethnic minorities and labour migrants across Central Asia.

The most popular social network among refugees and stateless persons across Central Asia is Instagram (53%), followed by Vkontakte (36%), Facebook (28%) and Odnoklassniki (17%). Eleven percent reported not using social media.

The most popular social network among ethnic minorities in Central Asia is Instagram (65.5%), followed by Vkontakte (46%). In Kazakhstan (83%) and Kyrgyzstan (78%) the overall majority of ethnic minorities reported using Instagram. Noticeable differences were reported across social media sites and countries, as 63% of ethnic minorities in Uzbekistan report using Facebook, while all other countries had a reported use of Facebook below 30%. In Tajikistan 89% of ethnic minorities reported using Vkontakte, while only 52% use it in Kazakhstan, 18% in Kyrgyzstan and 25% in Uzbekistan.

The most popular social media network among labour migrants in Central Asia is also Instagram, with 85% using this social media in Kazakhstan and 84% in Kyrgyzstan. Tajikistan (97%) also reported an extremely high use of Vkontakte among labour migrants, while 46% of labour migrants

in Uzbekistan reported not using social media networks, while instead preferring messaging applications. Unusually high levels of twitter use among labour migrants was also reported in Uzbekistan at 43%.

Seventy-three percent of refugees and stateless persons in Central Asia use WhatsApp as their preferred messenger application, followed by 43% for Telegram, and 7% for Moi Mir and Viber.

The most popular messenger applications among ethnic minorities and labour migrants in Central Asia are relatively similar. Both target groups prefer WhatsApp in all countries, ranging between 81% and 97%, while over 90% of both target groups in Uzbekistan prefer Telegram. In Tajikistan, both target groups reported 'Other messenger applications' as their second most preferred option, meaning that new or changing messenger applications are being used significantly, which this survey could not account for.

Fifty-six percent of the interviewed refugees and stateless persons use mobile Internet. Seventy-one percent of ethnic minorities in Kazakhstan and 75% of minorities in Uzbekistan use both types of the Internet, while 60% of minorities in Kyrgyzstan and 83% of minorities in Tajikistan use mobile Internet. Fifty-three percent of labor migrants in Kazakhstan and 50% of migrants in Uzbekistan use both types of the Internet for receiving information, while 95% of Tajik labour migrants and 73% of Kyrgyz labour migrants use mobile types of Internet.

The findings above should be seen through an additional lens of gender, income, age and rural-urban divides when it comes to understanding media preferences and platforms. For example, ethnic minorities in rural areas (49%) and migrants living in rural areas (41%) use television as their main source of information. Low income respondents from ethnic minorities and labour migrants target groups indicated television as the main source of information in 42% of cases, which remains substantially higher than the average. Instagram is the main social network used among the surveyed youth in Uzbekistan aged 18-25 years and 26-30 years. Seventy-seven percent of the age group between 18 and 25 aged use this media platform, while the number decreases to 63% when observing responses from age groups between 26 and 30.

Concerning gender, it is noticeable that 37% of surveyed men were interested in community news, which is substantially higher (19% increase) than the level of interest in community news among women. Men surveyed more often use the mobile type of Internet (60%), while women regularly use both types of Internet (52%). Ethnic minorities in urban environments are 36% more often using both types of Internet for information. Interviewed ethnic minority women in Tajikistan prefer to read news in Tajik (42%), while the same target group in Tajikistan for men substantially prefer to read news in Russian instead (40%).

In terms of Internet restrictions, the following findings were particularly

“ The findings above should be seen through an additional lens of gender, income, age and rural-urban divides when it comes to understanding media preferences and platforms ”

“ Low income respondents from ethnic minorities and labour migrants target groups indicated television as the main source of information in 42% of cases, which remains substantially higher than the average ”

“ 37% of surveyed men were interested in community news, which is substantially higher (19% increase) than the level of interest in community news among women ”

relevant. Thirty-six percent of the interviewed refugees and stateless persons reported Internet restrictions in their country of residence, while 56% of the interviewed ethnic minorities of Kazakhstan and 50% of ethnic minorities of Tajikistan indicated that they experienced restrictions in access during online search for information. Interestingly, migrant workers from Kazakhstan in the 31-35 age group are 18% more often restricted by Internet sites than labour migrants in the 26-30 age group.

“ 57% prefer to watch the news in Kyrgyz, while 58% listen to the news in Kyrgyz and 60% read the news in Kyrgyz ”

In terms of language, the preferences for information consumption amongst target groups consistently favours the Russian language, with the exception of Tajikistan and Uzbekistan. An exception however can be seen when taking into account income levels. For example, the Kyrgyz language is the main language for receiving news among surveyed labour migrants in Kyrgyzstan with reported low-income levels. In this specific case, 57% prefer to watch the news in Kyrgyz, while 58% listen to the news in Kyrgyz and 60% read the news in Kyrgyz. When stratifying gender and language in general, the percentage of interviewed women who know English is 15% higher than men.

Findings from interviews with vulnerable communities

Overall, respondents of in-depth interviews mentioned a variety of media preferences, including traditional media (e.g. television, radio, newspapers) as well as online media (e.g. websites, social media, messaging services). A priority was however clearly given to two sources: television and the Internet. Radio and newspapers are mentioned much less, while respondents' answers suggest that three main trends in terms of media consumption across Central Asia.

“ there is a clear discrepancy between two groups: those who prefer television and those who prefer online media sources ”

Firstly, there is a clear discrepancy between two groups: those who prefer television and those who prefer online media sources. One dividing line appears to be age, which is a significant finding. Across all Central Asian countries, older demographic groups are noted to rely more on the television generally. This is partly explained as a result of their technical skills (e.g. unable to operate mobile phones or computers), and partly because they are much more familiar with television information.

I think that information in television and newspapers is provided in a 'softer' form. The youth who use the Internet, they can watch not only news, but let's say, live broadcasts. There, the situation is presented as it really is. So, young people learn more than the elderly population, I think. (Kazakhstan, female, 32 years old)

Another dividing line is the question of trust. The proponents of television and Internet both have strong views about which type of media is more trustworthy. The distrust in online media is fueled by the perception that creating news is too easy, and there is no one ensuring the reliability of what appears on the Internet. In turn, those who do not trust television information argue that this type of media is in the hands of the government, which may deliberately distort information, such as the number of

COVID-19 cases. Trust in television appears to be far higher in Uzbekistan and Kazakhstan in comparison to Kyrgyzstan and Tajikistan.

Secondly, there is a significant proliferation of online media in Central Asia. Even those who prefer television information tend to mention Internet-based sources and respondents report using a variety of online media. The first group is messaging services. Telegram is mentioned most frequently, particularly in Uzbekistan. Respondents from Kyrgyzstan and Tajikistan regularly mention WhatsApp, Viber and Skype. The second group of online media is social media. This includes Facebook and Instagram (both of which are mentioned more regularly), and Vkontakte, which is mostly mentioned in Kazakhstan. Finally, websites are discussed as well, including mostly local news agencies as well as international ones, such as CNN, BBC, Google's news-generating service as well as more specialised COVID-19-related websites like the John Hopkins Coronavirus Resource Center.

Thirdly, ethnic minorities mostly report that they do not have access to local media or information in their local languages, with the exception of Russians. It should however be noted that many respondents did not mention this as a problem for two reasons. This is because ethnic minorities as well as refugees and stateless persons often speak either the main local Central Asian language or Russian, which is sufficient for news consumption. Russian language proficiency appears to be particularly widespread and sufficient for most respondents of all target groups. Internet access has also allowed people to access news in various languages more easily. As a result, it can be noted that Afghan refugees watch television channels in Afghanistan via the Internet, and similarly Turkish, Persian and other media are consumed by respective groups via the Internet. The above findings nonetheless suggests that there is clearly a void in terms of local news in local/native languages amongst most ethnic minorities and refugees and stateless persons.

“ there is clearly a void in terms of local news in local/native languages amongst most ethnic minorities and refugees and stateless persons ”

Findings from interviews with content producers

Based on the in-depth interviews with content producers, it is clear that there is an overall proliferation of online media outlets across the region. This further suggests that, despite existing government restrictions, the restrictive measures against online media have been somewhat relaxed. It also suggests that online media is becoming increasingly popular, especially among youths. Additionally, such new media outlets remain the only platforms where freelance journalists can publish their content.

In all four target countries, social media is reported to be the biggest source of information for youths. In turn, it is increasingly prioritised by journalists in order to increase their visibility and outreach.

Instagram, YouTube, Facebook, Twitter, and TikTok are among the most popular social media platforms in the region, especially among youths. Media outlets use videos, stories on Instagram, live stream videos, pic-

“ Media outlets use videos, stories on Instagram, live stream videos, pictures with quotes and short text stories to gain traction, especially among younger groups ”

“ Communication applications such as WhatsApp, Odnoklassniki and Telegram are used for dissemination purposes by journalists ”

“ At times, a geographic-linguistic nexus exists, in which Russian language news prevails in urban centres, while local language media is more common in rural settings. English and local/native minority languages targeting ethnic groups are rarely used ”

tures with quotes and short text stories to gain traction, especially among younger groups.

We had to shift more to online ways, COVID-19 encouraged this. We started doing more short videos and visual content on Instagram and Telegram. Our audience prefers to read less and interact more through comments and likes. (Kyrgyzstan, female, press)

Communication applications such as WhatsApp, Odnoklassniki and Telegram are used for dissemination purposes by journalists in order to gain feedback and interact with their audiences.

In terms of media restrictions, it is reported to be difficult to gain information and engage with government officials in all four countries. There is a tendency among government officials to sue and prosecute journalists, especially when the latter investigate cases of corruption or when the reported content is considered to be nationally sensitive (e.g. inter-ethnic tensions, religion, COVID-19). Kyrgyzstan has relatively limited censorship and remains an exception to the rule. However, the new draft law “On the manipulation of information” (adopted in June by the Kyrgyz parliament on its third reading) is likely to allow authorities to block websites deemed to contain inaccurate information, with no need for a court ruling.¹ In Kazakhstan, Uzbekistan and Tajikistan, journalists working for state-controlled media continue to struggle with access to information. Public authorities in all three countries do not cooperate easily with journalists and often hinder information flows and the release of data, which is in the public interest.

A majority of news and information is in Russian, or in one of the local national languages. At times, a geographic-linguistic nexus exists, in which Russian language news prevails in urban centres, while local language media is more common in rural settings. English and local/native minority languages targeting ethnic groups are rarely used.

Those who don't speak Russian, they are mostly in the countryside, so I do not have access to local minorities because of the fact that I'm writing in Russian. (Uzbekistan, male, online media)

The most noticeable difference in terms of media consumption is age. Press, radio and television is largely favoured by elderly people, most of whom report to still trust traditional media outlets. However, the press is quickly losing ground to television and online media outlets, as the digital era is incentivising new trends in reporting. Younger generations rely mostly on social media and instant messenger applications for information and news.

¹ IPWR (2020) Internet Censorship Looms in Kyrgyzstan. Available at: <https://iwpr.net/global-voices/internet-censorship-looms-kyrgyzstan>.

Wrapping-up: Trends and patterns of media consumption in Central Asia

The findings from the qualitative and quantitative interviews conducted across the region reveals that there is a preference towards online media and television across Central Asia. All research methods indicate that television remains popular among elderly people whereas youths rely on online media, including social media and instant messaging applications to access information. Overall, it is clear that radio, newspapers and people-to-people information exchanges remain limited.

In relation to content consumption, the quantitative data highlights the lack of interest towards news from Russia among all target groups, which is also supported by evidence from the in-depth interviews with content producers. Similarly, there is a high percentage of news consumption about their country of residence or their local community. Surprisingly, COVID-19-related news does not score high among vulnerable communities, which is believed to be because of the general negativity and anxiety triggered by the topic.

The widespread and growing use of online media is highlighted repeatedly across each target group. Social media outlets like Instagram and Vkontakte (especially for refugees and stateless persons and ethnic minorities) and instant messaging applications such as Telegram (Uzbekistan) and WhatsApp (Kazakhstan, Kyrgyzstan, Tajikistan) hold the lion's share among all target groups. Both types of online media (social media and instant messaging application) are equally important for content producers and consumers, since they allow for audiences to provide feedback, while journalists reach wider audiences.

“ The use of social media and instant messaging applications, coupled with the fact that most refugees and stateless persons, ethnic minorities and labour migrants use mobile Internet, indicates a shift towards mobile friendly news content ”

The use of social media and instant messaging applications, coupled with the fact that most refugees and stateless persons, ethnic minorities and labour migrants use mobile Internet, indicates a shift towards mobile friendly news content. In-depth interviews with content producers similarly indicate that online media outlets are following this trend by promoting their work through the most popular social media and instant messaging applications.

Despite the fact that the quantitative data and the in-depth interviews with content producers identify a linguistic gap with Russian being the lingua franca, the qualitative data suggests that the level of Russian language skills among vulnerable groups is sufficient. It is nonetheless clear from the data that a linguistic gap exists, which is most prominent in Uzbekistan and Tajikistan.



| Chapter 4 |

The COVID-19 impact on media consumption

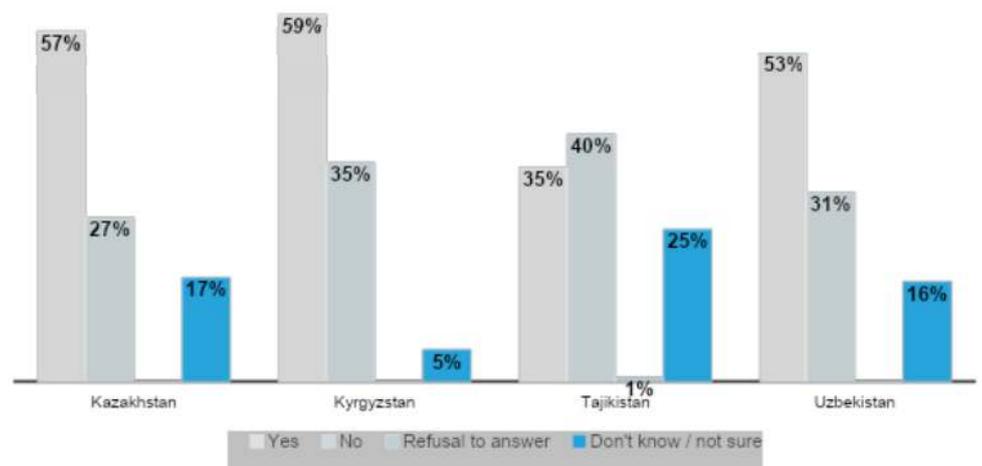
Media consumption and trust among refugees and stateless persons, ethnic minorities and labour migrants are impacted as a result of COVID-19. These were measured through mixed-methods research with qualitative and quantitative input, including short term and long term socio-economic impacts and input from content producers. The following three sections present the findings, followed by a final discussion section with cross comparison points.

Findings from the survey: vulnerable communities

The quantitative data shows both significant similarities and dissimilarities in terms of target groups’ media consumption and trust in information during COVID-19 across all four Central Asian countries.

Generally, all target groups reported high levels of trust in Internet information during the COVID-19 pandemic. Among ethnic minorities, the level of trust in Internet information was highest in Uzbekistan at 55% and lowest in Kazakhstan at 41%. Interestingly, both ethnic minorities in Kazakhstan (25%) and Uzbekistan (23%) report high levels of uncertainty (e.g. “Don’t know/not sure”) when asked whether they trust Internet information.

Diagram 5. Reported level of trust in Internet information among labour migrants in Central Asia (below)



Among labour migrants, the trend is slightly different, as the average level of trust in Internet information during COVID-19 across the region is higher, while levels of uncertainty are lower with the exception of Tajikistan at 25%. For example, in Kazakhstan 57% of labour migrants trust Internet

information, while the highest level of trust is reported in Kyrgyzstan at 59%. Overall, women labour migrants showed much higher levels of trust for online information at 63% compared to men and the general average of 51%.

All target groups were also asked about the use of information from state-controlled media and the trust they attribute to such information.

“ in Kazakhstan 57% of labour migrants trust Internet information, while the highest level of trust is reported in Kyrgyzstan at 59%. Overall, women labour migrants showed much higher levels of trust for online information at 63% compared to men and the general average of 51% ”

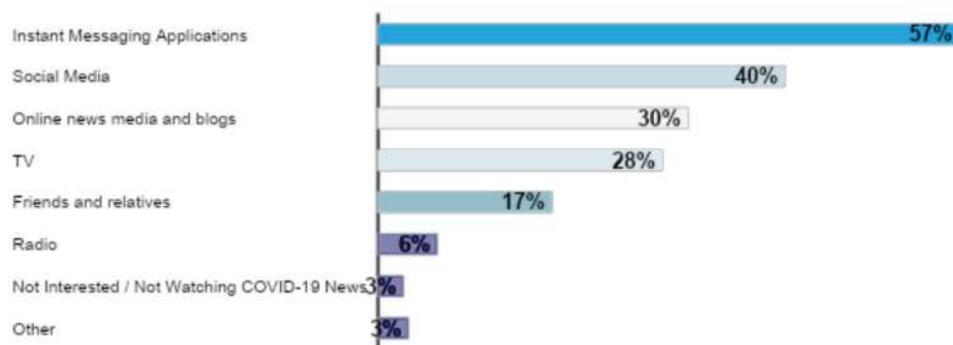
Sixty-three percent of refugees and stateless persons across the region reported that they receive information from state-controlled media, while the average use of state-controlled news amongst ethnic minorities across the region is 55%. Uzbekistan (64%) and Kazakhstan (61%) reported the highest use of state-controlled media amongst ethnic minorities, while a majority of ethnic minorities from Tajikistan (55%) and Kyrgyzstan (52%) reported not using state-controlled media. Ethnic minorities across the region reported very high levels of trust in state-controlled media, ranging between 66% in Kazakhstan and 79% in Uzbekistan. The average level of trust amongst ethnic minorities who reported to use state-controlled media across the region is reported to be 73%.

Labour migrants reported a slightly higher use of state-controlled media across the region at 59%, with 67% of labour migrants in Kazakhstan confirming the use of state-controlled media, followed by Uzbekistan (61%) and Kyrgyzstan (60%). Tajikistan was the only country that reported a slight majority of labour migrants who said that they did not use state-controlled media at 51%. Labour migrants across the region also reported very high levels of trust in state-controlled media, ranging between 68% in Kazakhstan and 86% in Uzbekistan. The average level of trust among labour migrants in state-controlled media across the region is reported at 77%, while the average level of trust among labour migrants in Internet information is reported at 51%.

“ both labour migrants and ethnic minorities overwhelmingly obtain information on COVID-19 from social media, online news media and blogs ”

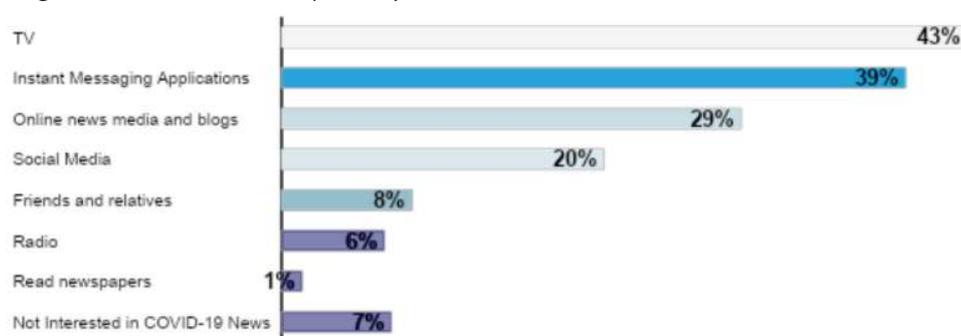
When asked specifically about how target groups obtain sources of information concerning the COVID-19 pandemic, both ethnic minorities and labour migrants answered similarly across Kazakhstan and Kyrgyzstan. In both countries, both labour migrants and ethnic minorities overwhelmingly obtain information on COVID-19 from social media, online news media and blogs. In the case of Uzbekistan and Tajikistan, noticeable differences exist between labour migrants and ethnic minorities in terms of how they access COVID-19 information.

Diagram 6. Reported sources of information on COVID-19 among ethnic minorities in Uzbekistan (below)



“ 57% of ethnic minorities use instant messaging in Uzbekistan to obtain COVID-19 information, whereas 43% of labour migrants in Uzbekistan use television to gain information about COVID-19 ”

Diagram 7. Reported sources of information on COVID-19 among labour migrants in Uzbekistan (below)



“ The preference for radio and television is dramatically increased (60%+) when only rural migrants and ethnic minorities are included across the region ”

For example, in Uzbekistan, 57% of ethnic minorities use instant messaging in Uzbekistan to obtain COVID-19 information, whereas 43% of labour migrants in Uzbekistan use television to gain information about COVID-19. A far smaller number of labour migrants in Uzbekistan (39%) use instant messaging to gain information about COVID-19. In terms of relying on relatives, the comparative figures in Uzbekistan clearly show that labour migrants are far less likely to count on friends and relatives, presumably due to distance, compared to ethnic minorities. In Tajikistan, the overwhelming majority of both labour migrants and ethnic minorities access COVID-19 information through radio and television. The preference for radio and television is dramatically increased (60%+) when only rural migrants and ethnic minorities are included across the region.

Levels of interest in getting information about COVID-19 from state-controlled news was reported as relatively high among both labour migrants and ethnic minorities, which coincides with previous results about the use of state-controlled media for information. In Kazakhstan (61%), Tajikistan (71%) and Uzbekistan (78%) most ethnic minority respondents wished to get information about COVID-19 from state-controlled media. In Kyrgyzstan, a majority (55%) of ethnic minorities said that they did not want more information about COVID-19 from state-controlled news sources. Labour migrants in all countries showed similar, yet higher, interest in getting information about COVID-19 from state-controlled news, while Kyrgyzstan continues to be an outlier with approximately half of surveyed labour migrants respondents saying that they did not want information from led news on the COVID-19 pandemic.

Findings from interviews with vulnerable communities

“ the general policy of “stay at home/work from home” substantially impacted people’s usual communication channels, increasing their media consumption ”

The single biggest impact of the COVID-19 crisis on information trends is the increase in people’s overall news consumption. This observation was particularly evident during the first months of the pandemic, as interviewees reported a strong interest concerning news information regarding safety measures, medication and COVID-19 statistics. Two factors appear to have been crucial for the development of this trend. Firstly, the novel nature of the pandemic and levels of fatality drastically heightened people’s need for new information. Secondly, the general policy of “stay at home/work from home” substantially impacted people’s usual communication channels, increasing their media consumption.

While the increased news consumption appears to have been a general trend, two nuances merit attention. Firstly, the increased news consumption correlated with the higher use of new media (e.g. online sources of information). Respondents who spoke about increased news consumption often also mentioned Telegram, WhatsApp and social networks as sources of news.

[Before COVID-19] I was not signed up to news pages about news in the city. I read what I came across. [Now] I subscribed to Instagram pages about the situation in the city. After COVID-19 appeared, I started following the news. (Kyrgyzstan, female, ethnic minority, 22 years old)

Secondly, the drastic increase in news consumption was often reported as being followed by a reversal in consumption. Respondents spoke about fatigue of COVID-19-related news several weeks after the start of the pandemic. This trend confirms other international studies that similarly found that the initial increase was often followed by a slowdown in consumption of media. Comscore reported 43.5 billion “digital visits” in February, followed by 64.3 billion visits in April, leading to 56.9 billion by the end of July.¹

Well, basically yes, [COVID-19] changed the way of reading the news. Since I mainly drew information from the Internet, now it turns out that every website shoves me information about the coronavirus. It’s already beginning to bother me. I simply unsubscribed from some publishers. Because there is too much news about the coronavirus. The same news, everything is about it. The information about the coronavirus just whips up hysteria. (Kazakhstan, male, labour migrant, 32 years old)

The second major impact of the COVID-19 pandemic on media consumption appears to be a heightened awareness about the unreliability

¹ Comscore (2020) Revisited: Media Consumption during the Coronavirus Pandemic. Available at: <https://www.comscore.com/Insights/Blog/Revisited-Media-Consumption-during-the-Coronavirus-Pandemic>

“ very few demonstrated knowledge about fact-checking websites ”

of news (e.g. “fake news”). This applies both to the phenomenon of fake news and to many respondents’ reported levels of distrust in official statistics. In discussing fake news, respondents mostly spoke of online media. Many respondents from Kyrgyzstan and Tajikistan spoke about the untrustworthiness of COVID-19 statistics released by national governments. Interestingly, interpretations differed on this subject. Some respondents argued that the government statistics downplayed the scope of the problem, whereas others suggested that the government was inflating the statistics, in order to attract more external aid.

The proliferation of fake news and distrust in official statistics leads to another question: how did respondents address this problem? This study’s interviews did not reveal a single approach as to how respondents dealt with fake or false information. Some respondents spoke about relying on “intuition”, while very few demonstrated knowledge about fact-checking websites. Others mentioned that they relied on international media, including BBC and CNN, for reliable information about the COVID-19 pandemic. Others also mentioned that they relied on specialized websites on COVID-19, including the World Health Organisation’s website.

[About COVID-19] to be sure what I am doing is correct, I should not rely on social media, I should not rely on anybody’s word, but I should relate to an authentic website” (Tajikistan, female, refugee, 26 years old)

The interviews reveal an increasing demand for media outlets to produce non-news types of information. This change is reported to be a consequence of news fatigue as a result of the pandemic. More humorous content, self-development resources, cooking-related materials were mentioned among categories of information, which were in high demand among respondents.

Finally, the COVID-19 pandemic helped some respondents realize the mobilization potential of social media. While many were critical of fake news (or “WhatsApp spam” as one put it) across online media, one respondent recalled that it was in Telegram where doctors created groups to offer advice for those who were not able to receive medical help from hospitals.

Findings from interviews with content producers

In terms of content production, the COVID-19 pandemic continues to make headlines. With the exception of Tajikistan, news stories across all four target countries have focused primarily on the pandemic since March 2020. The case of Tajikistan is exceptional due to the fact that it was only in late April that Tajik authorities officially confirmed the first COVID-19 cases in the country.²

² The Diplomat (2020) Tajikistan Finally confirms first case of COVID-19. 20 April [online] Available at: <https://thediplomat.com/2020/04/zero-to-15-tajikistan-finally-confirms-first-cases-of-COVID-19/>

“ The magnitude of COVID-19 coverage caused widespread anxiety and fear, but eventually the audience showed a loss of interest ”

Aside from Tajikistan, it should be noted that journalists from Kazakhstan, Kyrgyzstan, and Uzbekistan widely reported on COVID-19, while providing information about governmental actions to counter the pandemic, including statistics of the infected/deceased, quarantine details, sanitary instructions and relief packages. Both traditional media and online news reported on levels of government and international aid, including guidelines on how to access them.

The magnitude of COVID-19 coverage caused widespread anxiety and fear, but eventually the audience showed a loss of interest.

I increased my Telegram channel content to show how COVID-19 was impacting the population, statistics, etc. and during the first lockdown my subscribers grew very fast because people were interested. Then after June people stopped paying that much attention because they wanted to go on with their normal life. (Kazakhstan, female, television/radio)

The COVID-19 pandemic triggered an increase in interaction between content producers and audiences of traditional media (e.g. radio, television and press) through social media, but also through phone calls to newsrooms in order to request further information with regards to COVID-19 or to raise awareness about their needs and challenges.

We had a special hotline number that all kinds of vulnerable communities used to reach us and talk to experts, lawyers, seeking advice. (Tajikistan, male, radio)

The labour migrants' community were the most popular vulnerable target group, which received elevated levels of media coverage throughout the pandemic. This was particularly noticeable during the last months of the quarantine and media coverage included information related to the situation at the border, stranded migrants, unemployment, legal rights, and repatriation from Russia.

However, there appears to be a lack of 'media engagement' with ethnic minorities and refugees and stateless persons. This phenomenon can be partially explained by the fact that the vast majority of media outlets publish their content in Russian or in one of the national languages across Central Asia. It is also explained as a result of lacking media reporting in languages like Urdu, Pashto, Dari, and other local languages. There is wide consensus among interviewed journalists and content producers who highlight that this is an interesting linguistic gap, which deserved to be filled. They often explain this phenomenon as being linked to the high levels of refugees and stateless persons across the region. Similarly, this finding is important with regards to minority areas where many predominantly speak the minority language, and may feel more comfortable in other languages than Russian.

Helping to prevent the diffusion of disinformation and fake news has become a priority for many content producers. Media outlets reached out to experts and specialists in different fields to help them raise awareness and educate their audiences, enabling for example Q&A sessions with listeners or viewers, while also developing new forms of interaction with media consumers. Several content producers published ‘myth-busting’ stories, mostly targeting false information which is being spread through WhatsApp groups.

The problem with blogging and the increase in bloggers is that a lot of them are uneducated young individuals that do not always know what they are talking about. It's a problem for journalists. (Uzbekistan, female, online media)

“ A number of content producers mentioned the risk that vulnerable communities become targets for radicalisation due to job insecurity, social exclusion and new forms of extremist content ”

A number of content producers mentioned the risk that vulnerable communities become targets for radicalisation due to job insecurity, social exclusion and new forms of extremist content (e.g. targeting/baiting). This COVID-19-related risk can also be related to language difficulties and the status of refugees and stateless persons, or other vulnerable communities’ lack of information access and media literacy.

The current situation is not as bad as it has been in the past; however, I saw lots of stories talking about the rising tendency in radicalisation. Labour migrants being unemployed who came from Russia is a complex case here in the country. The level of violence and aggressiveness increased in the last few months. It's very likely that some groups here and in Russia might financially support these migrants and attract them into their communities for specific purposes. (Uzbekistan, female, online media)

“ During COVID-19, high levels of concern were reported among content producers with regards to fake news ”

During COVID-19, high levels of concern were reported among content producers with regards to fake news. Most media outlets resort to traditional fact-checking mechanisms by cross-checking two or three sources and in several cases quoting official or governmental sources. Independent media outlets on the other hand are trying to reach out to the original source and use online instruments to check the reliability of news. With regards to updating their audiences on COVID-19-related news, journalists rely on international sources such as the World Health Organisation and the John Hopkins Coronavirus Resource Center. Additionally, journalists and editors counter disinformation by consolidating their sources and thereby try to expose fake news on their respective websites and social media platforms.

As it was mentioned several times in the previous chapters, COVID-19 triggered an increase in interaction between content producers and audiences through feedback and comments on social media. This was also reported by several content producers as a method to measure the impact of their content. It was less frequently mentioned that journalists rely on Google analytics or other data-programs for impact assessment.

It is worth noting that content producers primarily communicated and provided information to labour migrants across all four countries by using WhatsApp and Odnoklassniki communication applications.

Wrapping-up: COVID-19 impact on media consumption in Central Asia

How has the COVID-19 pandemic affected media consumption in Central Asia? The three sections discussed above shed light on different aspects of the question. Three trends can be mentioned as key points, based on the qualitative and quantitative data.

“ Both consumers and producers of media content reported a significant hike in news related to COVID-19, followed by a gradual disengagement ”

The first common trend is an increased consumption of news. Central Asians heavily relied on news updates for information about health instructions, contagion statistics and new government measures. Both consumers and producers of media content reported a significant hike in news related to COVID-19, followed by a gradual disengagement. Given the fact that COVID-19 continues to be a public health problem, the demand for information about the pandemic is likely to remain high and the general growth of public interest in news will probably remain higher compared to before COVID-19.

The second finding worth highlighting is the link between the type of media and people's perception of trustworthy information. There is a strong tendency among media consumers to consider online media as a source of fake news. The survey data as well as in-depth interviews suggest that the trust in traditional media, such as television and radio, correlates with distrust in online media. On the other side, it is clear that a similarly large group of respondents distrust television and radio, primarily because these two types of media are associated with government control. A significant group is also occupied by respondents who consider “conventional” online media, such as established news websites, as more trustworthy than both traditional media and social networks and messaging services. It is therefore increasingly difficult to maintain a dichotomy of traditional and new online media, since the landscape is transforming dynamically and increasingly divided. Online media cannot alone be categorised as one form of media, but must be subdivided into other groups in order to better understand perceptions of trust.

“ there is no consensus on what makes news “fake” and how to best distinguish between false and accurate information ”

A final observation primarily concerns policymakers and content producers. The COVID-19 crisis exposed the problem of fake news proliferation and both the quantitative and qualitative data of this study points in this direction. However, while there is a broad recognition of the problem among consumers and producers of media, there is no consensus on what makes news “fake” and how to best distinguish between false and accurate information. Content producers are well aware of techniques, such as fact-checking or cross-checking information. Responses from consumers, however, suggest that the above techniques, while necessary, are far from sufficient. False information regularly makes its way through different media outlets, including online messaging services and social media that are difficult to oversee compared to websites, television or newspapers. Furthermore, respondents often have opposite views on how to define fake news, while media audiences are increasingly polarised. It is therefore a major challenge for both governments and media producers to effectively address the problem of fake news, information manipulation and distrust in the media.



| Conclusion |

“ the pandemic affected Internet access levels greatly ”

“ most vulnerable ones (e.g. refugees and stateless persons) generally remain excluded from media narratives during the pandemic ”

“ definitions of ‘fake news’ continue to be vague ”

“ the key hypothesis about gender being deeply affected across all target communities is entirely confirmed ”

This report helps to navigate the complex socio-economic and information impact of the COVID-19 pandemic. Critically, it raises many questions about how the most vulnerable segments of Central Asian society respond to a global pandemic, both in terms of their economic challenges, information needs and patterns of media consumption. In its quest towards a comprehensive overview, the study bases its findings on rigorous qualitative and quantitative research methods, allowing both the reader to gather statistical information, supplemented with detailed in-depth interviews from pools of vulnerable communities, as well as experts and content producers.

Essentially the research provides a set of key findings which confirm the hypothesis that economic crises first and foremost affect the most vulnerable. These range from classical socio-economic challenges to trust levels, information access and media needs or consumption. While social media use continues to grow in accordance with age and socio-economic income levels, it's noteworthy to mention that the pandemic affected Internet access levels greatly, followed by varying levels of trust in COVID-19-related news. When looking at the media overall, the conclusion remains that some vulnerable communities have received representative media coverage (e.g. labour migrants) while the most vulnerable ones (e.g. refugees and stateless persons) generally remain excluded from media narratives during the pandemic. With regards to the findings related to disinformation, the conclusion remains indecisive, as a consensus around definitions of ‘fake news’ continue to be vague or unattainable among media consumers in opposition to media or content producers. Finally, the key hypothesis about gender being deeply affected across all target communities is entirely confirmed, as reported levels of domestic violence, female unemployment and information differences are very present throughout the study.

These findings remain crucial for policy makers, academics and experts to support their decision making process in Central Asia, particularly during and in the aftermath of the COVID-19 pandemic. Importantly, the report supplies mixed-methods research findings and conclusive recommendations during a period of political turmoil in certain Central Asian republics (e.g. Kyrgyzstan), while other Central Asian countries continue to struggle with enormous socio-economic impacts of the crisis and a rapidly changing media and information landscape.



| Recommendations |

“ This report’s recommendations are therefore developed within a context of urgency ”

“ The recommendations should be used by policy-makers and experts as a data-driven guideline in order to support their decision-making and funding instruments in the near to medium-term future ”

The context of recommendations is crucial in order to properly reflect the underlying sense of urgency which is related to COVID-19’s impact on media, information consumption and the socio-economic fabric in Central Asia. It should therefore be stressed that the short to long term implications for vulnerable communities loom large, and include immediate consequences such as declining levels of social security, as well as lacking awareness about healthcare. Due to the socio-economic crisis, the existing literature and this study’s findings show a potential risk of social exclusion, crime, social unrest and radicalisation. The impact on the general population should also not be overlooked, since the COVID-19 pandemic is not exclusively impacting vulnerable communities. More generally, it is likely that the overall populations across Central Asia stand to face a stark rise in unemployment, followed by increased populism, “fear-based rhetoric” and forms of xenophobic stigmatisation. Such developments can be accompanied in the longer run by lower levels of intra-regional cooperation.

This report’s recommendations are therefore developed within a context of urgency. They are based on findings from the in-depth interviews and surveys discussed above, while taking into account the fact that the risks occurring from not addressing the recommendations may be detrimental. This should be understood both from a socio-political perspective and in terms of regional and national stability. The lack of clarity and coordination of COVID-19-related information is likely to feed the population’s distrust in governments, while the level of general social grievance will grow if the population, and vulnerable communities such as labour migrants, ethnic minorities or stateless persons, continue to feel left alone to survive and address COVID-related problems. Furthermore, the lack or poor quality of access to information on the part of vulnerable communities will create a fertile ground for actors keen to use the pandemic to radicalize most vulnerable parts of society.

The recommendations should be used by policy-makers and experts as a data-driven guideline in order to support their decision-making and funding instruments in the near to medium-term future. This report therefore believes it important that the recommendations help develop concrete and policy-implemented methods to ensure access to high-quality and trustable information on COVID-19 and related government measures for the population, including such vulnerable groups as labour migrants, ethnic minorities, refugees and stateless persons. Furthermore, they should help to minimize risks of disinformation of vulnerable communities on COVID-19-related topics that may feed any potential of radicalization, while simultaneously support societies grow more resilient in the longer-term in order to preserve an open, diverse, representative and information

climate, despite COVID-19's negative impact on the overall socio-economic climate and information eco-systems among vulnerable communities across the region.

With regards to labour migrants, a centralized online platform as a source of verified information on critical issues specific to their situation should be regarded as beneficial, including updated travel advisory, updated news on policy measures from governments of respective host countries, updates from diaspora groups in host countries, information about local job agencies. Similarly, ethnic minorities will benefit from content producers' efforts to bring more of verified and appealing media content in the languages of ethnic minorities. While online news sources make up the deficit of information on COVID-19 in general, there is still a need for local news to be available in national languages. Refugees and stateless persons will benefit from a thorough needs assessment to identify most vulnerable groups among them that may be in a critical situation. This is important due to the fact that these groups do not enjoy vast networks of friends or relatives in host countries.

Based on the above quantitative and qualitative research, analysis and cross-comparisons, the report supports the following targeted recommendations:

Non-governmental organisations in Central Asia

- Develop or revise communication strategies to ensure greater awareness of population about activities related to COVID-19 (information campaigns, aid distribution etc.).
- Design programmes and projects aiming at supporting people whose work and life routines were negatively affected by the pandemic, including socio-economic and mental health impacts. Increased volunteering programmes are needed for these efforts.
- Increase exchange of information with International Organisations (IOs) based in the region, particularly with regards to media consumption and the needs of the most vulnerable communities and women.
- Increase exchange of information with media outlets (state-run and independent media), as this report's findings show content producer gaps for vulnerable communities.
- Provide support to international researchers and journalists in terms of accessing sensitive information (e.g. reaching out to vulnerable communities).
- Facilitate meetings/act as intermediaries among researchers/journalists and vulnerable communities, especially among minorities and refugees as this builds trust and increases exchanges and knowledge about their needs and challenges.
- Participation in interdisciplinary training projects along with journalists from different countries in the region, thereby promoting inter-

regional cooperation and COVID-19 information sharing among journalists and civic activists.

- Support programmes that give access or train civil society in Internet privacy and VPN's. Provide support to monitor Internet restrictions in Uzbekistan, Tajikistan and Kazakhstan to give feedback and support advocacy against new restrictive measures, as they were reported as high by vulnerable communities.

Governments of Central Asian states

- Improve communication strategy on informing the population on COVID-19 and related issues, with particular focus on raising popular trust in the government information and ensuring maximum clarity of messages.
- Design special communication strategy on informing the public on government measures to support households, private businesses as well as on allocation of external aid/assistance that the government has been receiving.
- Create a special task force to examine and prepare policy proposals to support labour migrants trapped by the pandemic-related travel restrictions.
- Propose temporary economic incentives to all Internet providing companies in the country to maximize the access of population to quality Internet connection both for education and news awareness purposes during the pandemic.
- Increase access to information; provide interviews and access to data for journalists and researchers when needed.
- Collaboration with IOs with regards to sensitive data (reaching out to refugees and stateless persons, access their contact details etc.).
- Relax (if not ban entirely) Internet restrictions.
- Hold closed-door consultations with civil society and media representatives in order to discuss and find ways to address sensitive issues such as radicalisation, tensions among ethnic minorities, etc.
- Promote national/local institutional campaigns on media/digital literacy aimed at raising awareness against fake news/disinformation.
- Increase representation of minorities in public institutions and ensure state communication in all relevant languages (e.g. Kyrgyz, Uzbek, Kazakh and Tajik).

International donor community in Central Asia

- Provide every possible support to the governments and non-governmental actors in implementing recommendations provided above.

- Provide support to both government and civil society in their efforts to improve media and information access of the population, while coordinating the COVID-related assistance and transparency between the biggest donor agencies such as the United Nations, the European Union, the World Bank, the International Monetary Fund, the Asian Development Bank and others.
- Allocate funds for more regional projects that involve training (physical and virtual) and exchanges for journalists (including journalists from state-run media outlets and civil society representatives (including GONGOs) on a) fact-checking, b) fundraising (especially for independent media outlets) c) disinformation and d) reporting on PVE or other sensitive topics (e.g. refugees, religion, ethnic tensions, etc.) in line with the EU Connectivity Strategy that places emphasis on people-to-people exchanges.
- Fund research-based data collection with regards to vulnerable communities and their needs and challenges at a regional and national level.
- Facilitate dialogue and cooperation among government officials, NGOs and independent media in their effort to provide accurate and science based-news to their audience and combat disinformation.
- Donor communities should consider supporting the voiceless and most vulnerable communities, particularly in terms of vocational training and education.
- Donor communities should consider supporting the hardest struck and vulnerable communities, notably labour migrants and ethnic minorities.
- The EU should take into consideration for its upcoming political dialogue meetings the levels of Internet restrictions reported by vulnerable communities across Central Asia.

Content producers

- Maximize opportunities for different ethnic groups to access COVID-19-related information in their native languages.
- Develop coordinated approach among key content producers on measures to minimize proliferation of fake news and maximize consistency of verified information on COVID-19 and policy measures related to the pandemic. Participation in training on fact-checking that go beyond the official sources are needed, and so is increased fundraising for media to survive beyond advertisement revenues.
- Focus on producing more content tailored for people whose daily life and routine were changed by COVID-19. The key audiences include people forced to work from home, people who are mentally overwhelmed from COVID-19-related information, children studying online from home, parents spending much more time with children than before.

- Consider producing content in languages other than Russian and the national language. Lacking languages include Urdu, Pashto, Dari, and internal Central Asian languages within the region.
- A number of content producers see a risk associated with COVID-19 and vulnerable communities becoming targets for radicalisation due to job insecurity, poverty and social exclusion and new forms of extremist content, even if little has been researched/confirmed about the link. Further information, projects and research is needed in this area (Emphasis on producing science-based news content).
- Instagram (1st) and Vkontakte (2nd) are the most popular social networks among vulnerable communities in all four countries. Training young journalists on honing their social media content production skills, namely on online media literacy and skills against fake news and user generated content.
- Cooperating with local NGOs in terms of reaching out to vulnerable communities, giving voice to refugees and stateless persons, minorities and other vulnerable groups and thus raising awareness about these groups among citizens, donor organisations and government officials.



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