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RUSSIA

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Surviving the economic crisis was the main challenge for Russian media in 2009, according to the MSI panelists. "The advertising market is especially sensitive to all kinds of shock, and it was badly hit by the crisis," commented panelist Victor Muchnik, vice president of Tomsk Media Group. "By various estimates, the advertising market dropped by about 30 percent. It hit regional media outlets very hard, leaving them more vulnerable to pressure from the government and other forces. In general, the less money, the less sustainable media outlets are."

The political scene did not change significantly in 2009. Political elites continued to use affiliated media organizations as propaganda tools to advance their agendas. Self-censorship increased. Independent journalism remains only on a few television and radio channels and newspapers.

However, one positive trend of 2009 was the expansion of blogs and social networks, which have become a valued communication tool for Russians. According to panelist Elena Vartanova, dean of the Journalism Department of Moscow State University, "Traditionally in Russia, most social problems are discussed on the interpersonal level. Many public interest issues never find their way into the public discourse. The Internet enables people to expand the domain of public discussion while maintaining anonymity and avoiding physical involvement in the communication process. I think that the Internet offers an important alternative to old models of communication in the media sector."

In a new twist in 2009, individual citizens used the Internet to directly address top Russian authorities. President Dmitry Medvedev may have initiated this development, as he started his own blog and invited people to leave comments. In November 2009, police officer Aleksei Dymovsky posted an online video in which he addressed Prime Minister Vladimir Putin and brought up corruption and violations in the law enforcement system. Soon, several other police officers followed Dymovsky's example and posted their videos online.

It should be noted, however, that Dymovsky paid dearly. He was fired from the police force for libel soon after he posted his video. After that, he came to Moscow to a press conference on November 10 (the Day of Police in Russia). Although many journalists attended, most media did not cover the event, as they did not want to offend police on their professional holiday. On December 28, the prosecutor's office initiated a criminal case against Dymovsky for fraud. On January 22, 2010, Dymovsky was arrested.

Panelist Dmitry Surnin, editor-in-chief of the Moscow edition of *Moy Rayon*, said that the Internet is breeding a new political optimism among Russians. "Suddenly, there is a channel that provides an opportunity to reach authorities and others and be heard. People are getting the feeling that they actually can make an

RUSSIA AT A GLANCE

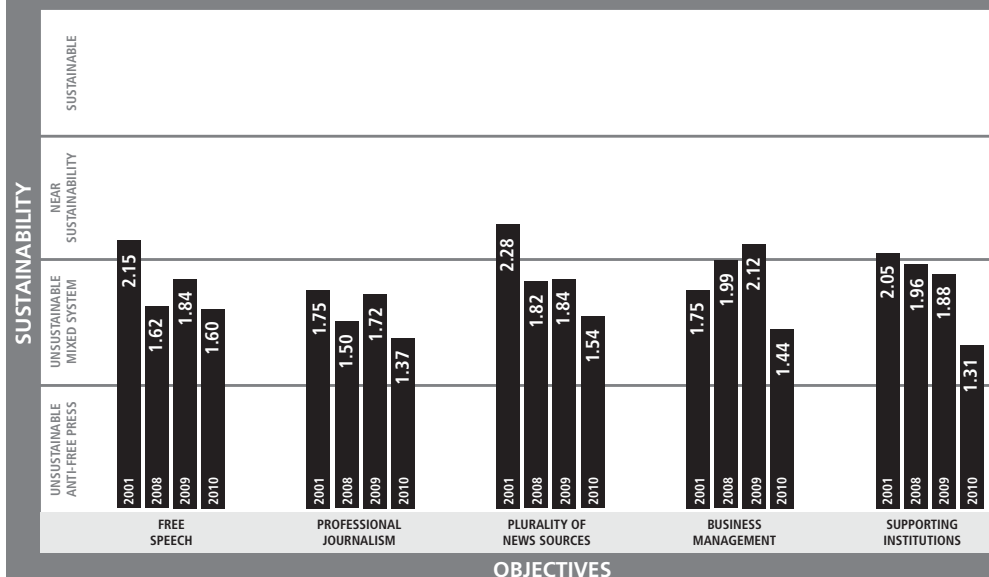
GENERAL

- > **Population:** 140,041,247 (July 2009 est., *CIA World Factbook*)
- > **Capital city:** Moscow
- > **Ethnic groups (percent of population):** Russian 79.8%, Tatar 3.8%, Ukrainian 2%, Bashkir 1.2%, Chuvash 1.1%, other or unspecified 12.1% (2002 census, *CIA World Factbook*)
- > **Religions (percent of population):** Orthodox 86.5%, Muslim 10%, Armenian-Grygoryans 0.8%, Pagan 0.5%, Lutheran 0.3%, Buddhist 0.25%, Jewish 0.15% (2002 census, *CIA World Factbook*)
- > **Languages (percent of population):** Russian, many minority languages
- > **GNI (2008-Atlas):** \$1.364 trillion (World Bank Development Indicators, 2009)
- > **GNI per capita (2008-PPP):** \$15,630 (World Bank Development Indicators, 2009)
- > **Literacy rate:** 99.4% (male: 99.7%, female: 99.2% (2002 census, *CIA World Factbook*)
- > **President or top authority:** President Dmitriy Anatolyevich Medvedev (since May 7, 2008)

MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, television stations:** Print: 27,425 newspapers, 20,433 magazines (Federal Agency of Press and Mass Communications, 2009); Radio and **Television Stations:** Formal statistics are not available, but the country has dozens of broadcast television channels, hundreds of radio stations, and even more cable, satellite, and Internet television channels. The research company Comcon measured 185 cable and satellite television channels.
- > **Newspaper circulation statistics:** 7.8 billion total newspaper copies, 1.9 billion total magazine copies (Federal Agency of Press and Mass Communications, 2009)
- > **Broadcast ratings:** top three television stations: Channel One (18.1%), Rossiya (17.9%), NTV (13.7 %) (TNS Gallup Media)
- > **News agencies:** ITAR-TASS (state), RIA Novosti (state), Interfax (private)
- > **Annual advertising revenue in media sector:** \$8.91 billion (Association of Communication Agencies of Russia, 2008)
- > **Internet usage:** 45,250,000 (2008 est., *CIA World Factbook*)

MEDIA SUSTAINABILITY INDEX: RUSSIA



Annual scores for 2002 through 2006/2007 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

Unsustainable, Anti-Free Press (0-1):

Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2):

Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3):

Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4):

Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

impact by sharing their opinion and voice. So far, it is still an illusion of freedom, but it is a nice illusion. And it is an important new development," he said.

Even with their excitement over new media, the panelists still had a gloomy outlook on the Russian media sector this year. The overall score and scores for all objectives fell compared to the previous year, and were even below the 2001 baseline.

OBJECTIVE 1: FREEDOM OF SPEECH

Russia Objective Score: 1.60

The Russian constitution guarantees freedom of speech, but neither society at large nor the majority of media members value free speech. "Our media are still linked to the vertical, hierarchical model of communication; themes for discussion are selected not based on their significance for the broader public, but based on political agendas developed by elites. The media's agenda continues to be established from the top," Vartanova said.

A considerable portion of the Russian population believes that the state should control free speech in media. According to a 2008 survey by the Russian Public Opinion Research Center, 58 percent of Russians favor the idea of state censorship of media, while only 24 percent are opposed. The same data indicates significant generational differences: Younger people who were educated after the fall of Soviet system favor censorship notably less than older generations. In the 18 to 24 age group, 48 percent of respondents said that they favor censorship and 32 percent are against it, while in the 60 and above age group, 64 percent of respondents are for censorship and only 13 percent are against.

This year, the score for Objective 1 again received a noticeably reduced score. The reduction in score came primarily as a result of lower evaluations of indicators 2 (fair licensing of broadcast media), 3 (market entry), 6 (libel laws), and 7 (freedom of information); these were barely offset by a higher score in indicator 9 (unrestricted entry to the journalism profession). Most of the indicators scored relatively close to the overall objective score, although indicators 2 and 4 (crimes against journalists) fell more than half a point below, and indicators 8 (access to international news) and 9 were the highest, exceeding the overall score by more than a point.

Most panelists said that Russia meets the indicator aspects of legal and social protections of free speech minimally at best. Surnin acknowledged Russia's solid media laws and the constitutional protections of access to information, but said that they are not well enforced. "There are legal mechanisms,

and they even work to some extent, but very selectively... [and] officials have a lot of ways to circumvent these laws."

Fedor Kravchenko, managing partner of the Media Lawyers Collegium, said that there is no political will to enforce legal provisions protecting free speech. "In my opinion, this year the state's stance against freedom of speech has become more apparent," he said.

In 2009, the Russian Duma (federal legislative body) continued discussing amendments to the existing media law. Panelist Andrei Allakhverdov, editor-in-chief of the Foundation for Independent Radio Broadcasting, revealed that in February, his foundation managed to organize Russia's first-ever meeting between representatives of radio stations and members of the Duma.

Anna Koshman, executive director of the Alliance of Independent Regional Publishers, brought up the ongoing discussions of the draft law on access to insider information. If adopted as it is currently written, the law would effectively block access to all kinds of business information, so business-focused media have campaigned actively against the law.

In 2009, the Duma enacted a law guaranteeing all state television and radio stations equal coverage of each parliamentary party's activities. According to panelist Andrei Richter, a professor at Moscow State University and one of the country's leading media law specialists, the main problem with the law is that it guarantees equal coverage only of parties' operations, not their political agendas. And on the local level, the law applies only to parties present in the national Duma, rather than to all parties present in regional and local legislative bodies.¹

Vartanova cited the court decision against the youth reality show *Dom 2*, on TNT television channel. The show features a group of young people living in a house and trying to "build their love," as TNT describes it. Plaintiffs lobbied for the show's cancellation out of concerns over decency. In the end, the courts struck a compromise decision—to keep the show on the air, but to restrict it to late hours. Vartanova said that this court decision created an important precedent. "We used to have two parallel trends: One, that there is freedom of speech and we can show whatever we want; another, to prohibit and expel everything. A new kind of interaction between audiences, authorities, and media is trying to emerge—one that respects both the interests of people who are interested in certain types of content and the interests of those who may be harmed by this content."

¹ Richter, A. "Without Extra Discussions," in *MediaTrends*, Issue 3, November, 2009. Journalism Department of Moscow State University. p. 6.

A majority of panelists said that in 2009, Russia only marginally met the requirements of the indicator on broadcast media licensing. Although Russia has regulations aimed at ensuring that licensing of broadcast media is fair, competitive, and apolitical, in practice, license competition commissions boldly favor state television companies. "If VGTRK [All-Russian State Television and Radio Broadcasting Company] participates in the competition, it just does not make any sense for others to participate," Kravchenko said. It is quite common for VGTRK to hold more than two licenses for considerably overlapping areas, though such licensing is explicitly prohibited by the regulations.

The criteria used to extend and withdraw licenses are not transparent. "The licensing process can be used—and is actually used—as an effective means of applying pressure on a company," Muchnik said.

If a license applicant wants to challenge a decision, theoretically it could file a court case. But the panelists were not aware of any formal complaints, and an individual media outlet would face serious risks by going to court. The outlet would be suing an agency that regulates its license, and because licensing rules are unclear, it would risk its existing license in the process. The prospects to win such a case are not particularly high, given that the courts are not independent, and court expenses would surely be substantial. The outlet would be standing on its own as well, given that Russia has no associations ready to fight with the state to protect the licensing rights of media outlets.

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

In 2009, the government called for a temporary moratorium on issuing new broadcasting licenses while it decided which channels would be included in the first multiplex—a set of digital channels. Vartanova counted the decision to switch to digital television this year as one of the most important developments in the media sector.

Opinions varied considerably on the indicator evaluating the fairness of market entry and tax structure for media. Most panelists said that they believe that market entry conditions and tax structure for media outlets are comparable to other industries. Each media enterprise has to register with the Federal Service for the Oversight of Communications, Information Technology, and Mass Communications, but the registration procedure is easy and the fee is affordable. For example, the fee to register a national newspaper is RUB 2000 (less than \$70) and the fee to register a regional or local newspaper is RUB 1000 (\$35). However, entry into the television market might be restricted by the availability of frequencies.

Mikhail Melnikov, an analyst for the Center for Journalism in Extreme Situations, said that the tax structure for the media is completely unfair. While media outlets are not burdened with taxes heavier than for other businesses, they do not receive any special tax breaks (such as no value-added tax on newsprint, advertising, technical equipment, etc.). Melnikov argued that the media should have no taxes because its product (information) is different from the products of other industries and is strategically important for the country, so it should have no restrictions—even in the form of taxes. Several other panelists said that they gave a low score to this indicator because independent media outlets are suffering from unfair competition with state-owned media. The latter receive funding from the state that cover their operational expenses, but are still allowed to compete in the advertising market.

Most panelists said that in 2009, Russia minimally at best met the criteria for the indicator regarding crimes against journalists. According to the Glasnost Defense Foundation, in 2009, eight media professionals were murdered in Russia.² The national media reacted to two of these cases—the January murder of Anastasia Baburova, a journalist from *Novaya Gazeta*, in Moscow; and the July killing of Natalia Estemirova, a human rights activist and contributor to *Novaya Gazeta*, in Chechnya. The two cases received national coverage because those journalists were affiliated with the national *Novaya Gazeta*, which is based in Moscow and is well connected with other Moscow-based media.

² As of December 15, 2009. See www.gdf.ru/murdered_journalists

These and other crimes against journalists were not prosecuted vigorously. Some panelists attribute this to Russia's poorly functioning law enforcement system. For example, in February 2009, the defendants in journalist Anna Politkovskaya's murder were acquitted by the jury board, which cited shoddy evidence collection by state investigators. "In this country, other murders are also poorly investigated," Surnin said. "And given that journalists are usually murdered on order, such murders are carefully planned and thus more difficult to investigate. This is not driven by prejudice against journalists, but rather our law enforcement system's ineffectiveness."

Panelists confirmed that law enforcement officers still tend to look only for the people who physically commit the crimes against journalists, without exploring who else might be behind the attacks.

In 2009, the Glasnost Defense Foundation registered 55 attacks on journalists³—less than in previous years, but many at the hands of law enforcement officers. Boris Timoshenko, head of monitoring at the foundation, noted that the degree of violence against journalists has been decreasing recently, but law enforcement officers still frequently target journalists. Stanislav Glukhov, a publisher from Khabarovsk, described an incident in which a police officer insulted and physically abused a RNT television reporter who was recording video of police arresting two women protesters in front of Khabarovsk Kray Administration. After the case generated publicity, the officer was reprimanded lightly, though the law provides for criminal penalties for preventing journalists from doing their job. But generally speaking, the public does not react strongly to attacks on journalists.

Russia has no laws that explicitly grant any preferences for state media, but in practice, state media enjoy many privileges. They receive funding from the state budget, they benefit from better rent and printing fees, and they receive preferential access to official information. Worst of all, according to the panelists, they are allowed to compete unfairly with independent outlets in the advertising market. State media outlets often sell advertising at very low prices—a practice that severely hurts private media outlets. In addition, noted Koshman, "One of our editors told me that state media publish advertising that is prohibited by law or violates anti-monopoly regulations, because nobody monitors them."

The government has no exact concept for the role of state media outlets, Koshman added. "If they take so much budget money, what should they do [in return]? There is no clear definition of their functions. Even regional governors often do not know how to handle their low-quality subordinate media outlets that are high maintenance financially."

³ As of December 15, 2009. See www.gdf.ru/attacks_on_journalists

Most panelists said that Russia was far from meeting many aspects of the libel-related indicator in 2009. In Russia, libel is a criminal offense. According to Article 129 of the criminal code, dissemination of libel in the mass media can be penalized by a fine, community service, arrest, or a prison sentence of up to three years. Glukhov, editor-in-chief of *Khabarovskiy Express*, received a one-year sentence for an article about a member of the regional legislature that contained information that was proven wrong in court. Glukhov was put on probation instead of serving a prison sentence. He said that once a criminal action is brought against a journalist, investigators can search and seize his or her belongings, e.g. computers, and restrict traveling.

The civil code contains articles dealing with defamation as well. Offended parties must prove malice, but public officials are not held to higher standards. Courts often make decisions in favor of officials despite the evidence. Elena Temicheva, program coordinator of the Agency for Social Information, mentioned the landmark case lodged by Moscow's mayor, Yury Luzhkov, against *Kommersant*. *Kommersant* published an article by politician Boris Nemtsov that contained facts contested by the mayor. For the first time ever in this country, the court ordered a special investigation of the facts presented in this article. The investigation concluded without finding proof of the facts that Nemtsov provided, and Nemtsov and *Kommersant* lost their case. The court ordered each of them to pay RUB 500,000 (\$16,675) to Luzhkov in compensation. (Initially, Luzhkov requested RUB 7.5 million [\$250,125] in damages.) However, Temicheva's point was that it was surprisingly positive that the court ordered any investigation at all.

Russian law guarantees all journalists access to public information, but in practice, this information is not available readily. In 2009, the Glasnost Defense Foundation registered 290 cases denying journalists access to information, up slightly from previous years.⁴ Koshman gave an example of the independent publishing house Inform-Polis, the largest media company in Ulan-Ude, which was denied access to the press conference held when Russia's president visited the city in 2009. Journalists complained and won apologies from public officials, including members of the president's administration, but the apology came too late—they had already missed the opportunity to cover the event.

"I cannot call Russia a completely closed society," Surnin commented. "But the situation has two aspects. On the one hand, public officials and state agencies do not want to provide information. The second is that they are unable to provide information properly, because of their weak

⁴ This number is for January-November 2009.

information infrastructure. Also, the situation varies a lot from city to city, and even from one municipal department to another. The working style of press offices can differ considerably—some are completely closed; others are open to cooperation.”

Indicators regarding access to international news and entry to the journalism profession again received the highest scores within Objective 1; the country has been meeting most aspects for several years. Even journalists in rural areas have Internet access; thus, according to the panel, foreign language barriers are the only restrictions on using international news in media reports. Temicheva noted that some Russian media have established partnerships with western media outlets and reprint or rebroadcast their news. Additionally, sites such as InoPressa.ru translate articles from other languages into Russian.

Entry to the journalism profession is free; a journalism degree is not required.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Russia Objective Score: 1.37

Russia has few media outlets that meet internationally recognized professional standards of quality. “The notion of journalism is changing,” Timoshenko said. “Journalism is sliding down to propaganda and entertainment; to digging into the soiled linen of celebrities. There is less and less true journalism. We have not reached a point where professional journalism is a rarity, but we are close.”

Muchnik agreed that professionalism is on the decline. “There are very few people and organizations left to serve as role models for Russian journalists. Journalism in the regions, especially television journalism, was heavily hit by the departure of Internews, which played a large role in improving communication between regional media outlets,” he said.

Panelist Tamerlan Aliev, the former editor-in-chief of *Chechen Society* who currently serves as an advisor to Chechnya’s president, also deplored the lack of standards in Russian journalism. “There are no professional standards of quality. Journalists are ill-qualified, and even worse, they do not strive to improve. They are satisfied with the quality of their work because their employers are satisfied. And employers care only about filling newspaper pages and air time. Also, there is a generational gap. The older generation of journalists is more professional, but they follow old Soviet standards. The younger generation is unprofessional and does not follow any standards.”

This year, the overall score for Objective 2 again put Russia in the lower half of “unsustainable, mixed system” and the score fell by 0.35 compared to last year. Indicators 1 through 5 all suffered lower scores, while the other three remained more or less the same. Nearly all indicators scored within a half-point of the overall average with the exceptions of indicator 3 (self-censorship), which scored about three-quarters of a point lower, and indicator 7 (modern equipment), which scored more than a point higher.

A majority of panelists said that in 2009, Russia only minimally met aspects of the indicator measuring fair, objective, and well-sourced reporting. Andrei Allakhverdiv, editor-in-chief of The Foundation for Independent Radio Broadcasting in Moscow, commented on the shortcomings of Russian journalism. “Everybody knows very well that there should be at least two independent sources of information. But in most cases, this rule is not followed. An administrative press release from the administration is taken at face value. A government executive’s words are taken for granted. A person needs professional training and courage to check the information. And I don’t see these people in the media community.”

Journalists often fail to check facts or pursue comments—even from major parties to a story. As an example, Vartanova described the media’s coverage of the results of a Russian language test conducted by Moscow State University’s journalism department. The purpose of the test was to gauge the objectivity of the results of state exams (now used as the basis to enter Russian higher education facilities). Many first-year students failed the test, and this was covered widely but not accurately. “I can tell you for sure that no media—except *Rossiskaya Gazeta*, where I wrote my interview

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

myself—provided correct information, consulted experts, or checked with us,” Vartanova said. Even *Echo of Moscow*, which usually maintains the highest journalism standards, did not ask the journalism department to comment in its coverage, she added.

Still, Temicheva observed some positive developments. For many years, Russian journalists did not use any sources of information other than state sources. Now, she said, the commonly used pool of sources includes businesses and NGOs.

The panelists noted that some Russian journalists follow ethical standards, usually modeled after standards developed by international professional journalist associations, but in most cases these standards live on paper only.

This year, the self-censorship indicator score was the lowest among all MSI indicators. Self-censorship was rife in 2009 and few media outlets are unaffected. A majority of media outlets are affiliated with the authorities; journalists understand that they serve authorities rather than the public and report accordingly.

Most panelists said that Russian media minimally met aspects of the indicator on coverage of key events and issues. Temicheva said that coverage is “uneven,” with some issues—including informal youth groups and trends, social protests, and gender issues—not receiving television coverage at all. “These issues start to appear in the Internet editions of newspapers, but they are never present in the official [print] edition,” she said. “Sometimes online media refuse to cover top news presented in official media on principle, because the trust in this news is low.”

Pay levels vary across the country and between media outlets. In general, pay levels are low for journalists compared to most other professions. “I pay low salaries, and stick to the average level for the city,” Glukhov said. “But my journalists don’t write ‘jeans materials’ [favorable articles that journalists sell to politicians and businesses], and any journalist caught in the act will be fired immediately.”

Although Glukhov’s publishing house has taken an ethical stance against selling favorable articles, the panelists noted that many media outlets do sell advertorials, which make up an important source of their revenue. In many cases, these advertorials are not distinguished from editorial materials.

Panelists generally agreed that wages and corruption are not related. “I don’t think that corruption depends on the level of pay...it depends on the ethical standards of a person; [his or her] personal attitude [and] sense of professionalism and self-respect,” said Maria Eismont, director of the Russian Independent Media Program of the New Eurasia Foundation. “It is all about personal values. If a journalist, an editor or a

media owner believes in high quality journalism as a public service, he or she will adhere to professional and ethical standards, not practice self-censorship and corruption even if his/her level of income is low.”

Entertainment programming eclipses news and information programming, given the lower production costs and lower likelihood of causing problems. “There are more ‘yellow’ programs and fewer programs that try to reflect and analyze issues without bias. There is much more hysterical and provocative coverage. The news is also getting more uniform,” Kravchenko noted.

Most panelists said that Russia less than minimally met this indicator. For example, a weekday on Channel 1 might feature 110 minutes of news, Channel Russia might have 195 minutes, and NTV 130 minutes. Of their 24-hour-a-day broadcasts, the air time dedicated to news represents 7.6 percent, 13.5 percent, and 9 percent, respectively. The rest of air time is mostly entertainment. The stations do broadcast some late night talk shows that touch upon serious topics, so overall the share of news may be a bit higher. Temicheva noted one interesting new trend: The analytical programs and political talk shows on television are now offering their audiences interactive opportunities, either during the broadcast or afterward through online forums.

Some media have much better facilities and equipment than others, but in general, facilities and equipment are considered sufficient and efficient, even outside major cities.

There are some instances of quality niche reporting; for example, Russia has some good business media outlets. But they are few in number, so the majority of panelists said that Russia met this indicator only minimally. Good investigative reporting is still very rare, as it demands considerable time and highly skilled journalists. Allakhverdov gave examples of television journalists investigating by working jointly with law enforcement officers, although true investigative reporting requires that journalists collect information independently.

This year, several panelists expressed concern that journalism no longer has its respected status. “The profession long ago lost its prestigious reputation, compared to perceptions in the 1990s. As a result, there is very little inflow of ‘new blood,’” Muchnik said. Eismont added that men specifically are steering away from the field. “Journalism remains mostly a woman’s profession in the regions,” she said. “First, the pay is low, but more importantly, the prestige of the profession is low. There is a strong chance that someone will humiliate you or refuse to talk, and men cannot bear this, while women usually don’t care as much.”

OBJECTIVE 3: PLURALITY OF NEWS

Russia Objective Score: 1.54

Russians have a variety of sources of news. By the end of 2008, Russia had about 14,000 daily and weekly newspapers and about 10,000 magazines, according to the Federal Agency for Press and Mass Communications. Total newspaper circulation in 2008 was 7.8 billion copies. The country has dozens of broadcast television channels; hundreds of radio stations; and even more cable, satellite, and Internet television channels. The research company Comcon measured 185 cable and satellite television channels. Approximately 38 percent of Russians use the Internet, and estimates suggest that half of all Internet users create their own content.

On the other hand, about 80 percent of media outlets are owned by or affiliated with state authorities at the federal, regional, or municipal level. According to Koshman, Russia might have around 3,500 information newspapers, but only 10 percent of them are independent. Most television channels offer their audiences only the official point of view.

Online social networks and blogs are emerging as an alternative for consumers losing trust in the traditional media. "People are looking for other sources for their news. Recently, there has not been a single important event that was not taken up in social networks and blogs," Temicheva said. She provided the example of the discussion of the catastrophe of the Nevsky Express train in November 2009. Many bloggers wrote that because state officials claimed that this catastrophe was a result of a terrorist attack, it definitely

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens' access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

was not. Still, bloggers often discuss news already reported in the traditional media, so the blogs do not add considerably to the net quantity of news available to people.

Like the other objectives, Objective 3 suffered a reduction in score. Much of this drop came from lower scores for indicators 2 (citizen access to media), 4 (independent news agencies), and 7 (coverage of a broad spectrum of social and minority issues). However, indicator 2 received the highest score again this year and remained about three-quarters of a point higher than the average. On the low end, indicator 3 (state media reflect the political spectrum) again received the lowest score, falling short of the overall objective score by nearly a point.

The panelists' opinions were split on the plurality of public and private news sources. About half thought that Russia minimally met the aspects of this indicator, and another half took a more optimistic view. In major cities, people have access to many news sources. But according to Eismont, in small cities "independent local media offer the only possible source of objective information about local activities, and not all communities have independent options. Municipal newspapers exist everywhere, but there are far fewer private ones. And if there is a private newspaper, it is not necessarily independent and able to provide quality information that people really need. Now, there are many city forums where people discuss various issues. But only young people tap them."

The state does not restrict citizens' access to domestic or international media. Disparities exist between urban and local areas, but they result from differences in the reach of media and infrastructural development, as well as economic conditions, rather than government interference. In fact, the panelists mentioned that the government has taken steps to expand access to Internet and coverage of national television channels.

In Russia, state media reflect only the views of the state and ruling party, and most panelists expressed very negative views while discussing this point. Panelists agreed that certain topics and personalities never would appear in the state media. In Russia, state media is an instrument of propaganda, and outlets spend a predominant amount of time covering government and leaders. Major national television channels belong to the state, and Russians have no national state television channel for culture or a national television channel for children. However, non-state channels offer some quality educational and cultural programming.

Out of three major Russian news agencies, two (ITAR-TASS and RIA Novosti) are state-owned and one (Interfax) is private. The major Russian news agencies are well equipped and can produce various kinds of media content. For example, RIA Novosti has the most advanced multimedia newsroom in Europe and offers its customers text, audio, video, photo, and infographic

materials. Smaller private agencies (Regnum, Bankfax in the Altai Kray, and UralPolit.ru) cover the Urals and Siberia.

National media outlets do use agencies—sometimes to the extent that they stop doing their own reporting. Regarding crediting news agencies, usually the rule of two sources is followed. National media outlets use news only after it appears in at least two agencies, and then the agency is not credited. In some cases, if producers or editors do not want to wait for a second source, they cite an agency as a source. Local media outlets in smaller cities usually do not use agencies; they need mostly local news, which agencies do not produce typically. Only the major news outlets use international agencies.

Independent broadcast media produce their own news programs, but these media are few in number and the quality of the programs is often poor. Panelists were split in their opinions for this indicator. Many independent television and radio companies in the regions enter into agreements with national television and radio channels to minimize production costs and use popular brands to generate more advertising revenue. The local station rebroadcasts centrally produced and programmed content, and usually reserves timeslots for local advertising and news. Muchnik said that working with networks proved to be very negative for the development of television journalism in the regions, as networks are not interested in encouraging local stations to produce their own news or other content.

A majority of radio stations broadcast music and offer only short news programs. According to Allakhverdov, analytical news programming exists in the regions only on radio stations that are members of the Echo of Moscow radio network. These programs are low quality and usually discuss only minor issues.

Ownership of media businesses is not particularly transparent, though it is not too difficult to find information on who owns major media outlets. According to the panel, most consumers do not particularly care who owns media outlets and do not use this information to judge the objectivity of news. In smaller cities, people usually know who owns what. Often, judgment about ownership is based on content: If the outlet presents favorable information about authorities, that outlet is most likely state-owned.

Russia is a country of media conglomerates because this model is more effective economically. According to the 2008 data of the Federal Agency for Press and Mass Communications, about 50 national media conglomerates accounted for 50 percent of all circulated copies and 70 percent of advertising revenue. There are also 100 to 110 regional companies that generate 30 percent of circulation and 20 percent of advertising revenue.

Foreign investment in Russian media is still relatively low. Initially, investment was concentrated in the magazine segment, but now foreign investors have taken an interest in newspapers. The European media group Schibsted publishes *Moy Rayon*, and the German WAZ Medien Gruppe has a share in a publishing house, Novosti Regionov, which owns and operates newspapers in several regional capitals.

Most of the panelists said that Russia minimally met the indicator regarding the media's reflection of social interests. "Most critical themes that attract public attention are either ignored or covered only superficially," Melnikov said. "For example, the media tends to present only positive aspects of issues such as housing and health, while the real situation is very negative."

Temicheva, however, said that the media have expanded the scope of themes addressed. Media outlets that used to ignore social and ecological news now pay more attention. For example, in December 2009, *Russian Reporter* did a quality interview with biologist Kirill Eskov about the human impact on the environment, including a discussion of global warming and possible solutions.

Russia has several minority-language media outlets, which are often funded by the state. Examples include *Vatanym Tatarstan* in Tatar (www.vatantat.ru), *Khypar* in Chuvash (www.hypar.ru), and *Khanty Yasang* in Khanty (<http://www.eduhmao.ru/info/3/4502/>).

OBJECTIVE 4: BUSINESS MANAGEMENT

Russia Objective Score: 1.44

The overall score for Objective 4 this year suffered a decline of more than half a point as panelists rated all indicators much lower with the exception of indicator 6 (market research), which remained more or less the same. All indicator scores were within a half point of the objective score.

This year, several panelists contested the very concept that well-managed media businesses facilitate editorial independence. According to Eismont, "There is no connection between business efficiency and editorial independence. And this is a reason why all media assistance efforts failed. The idea was, 'Let's help media make money, and once they make money, they will immediately start conducting investigative reporting.' They did not and they will not. Media cannot be efficient businesses because they are public interest institutions. *Novaya Gazeta* is editorially independent, but it loses money and it belongs to an oligarch... It was a mistake to start teaching business models to people who did not yet understand what journalism is about. They have learned

business models, but still they do not understand what journalism and public service are all about.”

Editorial independence comes from the values of media owners and editorial staff. Journalists who believe in journalism as public service founded many of Russia’s independent media outlets. Referring to the estimate that only 10 percent of newspapers in the regions are truly independent, Koshman said that Russia has about 350 independent information newspapers. “And a portion of them are so independent that they even don’t bill themselves as businesses—they just maintain a public interest stance,” she said. “Who knows how they survive.” Koshman estimated that 100 to 110 independent newspapers outside of Moscow operate as businesses.

Many of these independent newspapers are part of media holdings that include other newspapers and often other media, e.g. radio and Internet projects. Some have their own print houses that take orders from other companies. For example, Glukhov shared that he has a flagship newspaper, *Khabarovsk Express*, and 13 other newspapers, including *Best Recipes* and *Retiree*. In addition, *Grand Express* has its own printing house that generates additional revenue.

The independent media suffer from unfair competition with state media that receive state funding and sell advertising. The economic crisis that hit Russia in late 2008 and continued through 2009 changed this situation to a degree. Some regional media outlets funded by state or big business closed, while independent companies that worked hard to build efficient businesses in earlier years survived. “Companies that focused on the quality of journalism were in a better position than their competitors,” said panelist Veronica Dmitriyeva, a regional program director for the Media Development Loan Fund. “Some of them even modestly increased their circulation during the crisis.” Indeed, this was true for some local independent newspapers with established business plans and exhibiting professional journalism.

The economic crisis hit Russian media businesses hard. According to the Russian Association of Communication Agencies, the advertising market fell by 30 percent overall.⁵ Different media were hit disproportionately: Television lost 21 percent of advertising revenue, radio lost 35 percent, newspapers lost 37 percent, and magazines lost 41 percent. Authorities also reduced the amount of funding to state media. “To survive, media owners had to cut personnel. Many had to lay off 30 percent of staff. Some preferred to avoid layoffs and cut salaries by 25-30 percent. Some had to cancel new projects. Others rented out part of their office space to bring in additional revenue,” Dmitriyeva said.

⁵ In January – September 2009 compared to the same period of 2008.

Clearly, the crisis pushed independent private media outlets to be more creative and look for new ways to generate revenue, Koshman and Dmitriyeva said. Outlets developed new ways of working with advertisers, started paying more attention to the Internet, and began selling advertising space in their Internet projects. As a result, advertising in the Internet grew by 3 percent. However, in general, very few media outlets operate as efficient, profit-generating businesses. Vartanova claimed that only 5 percent of print media outlets in Russia are profitable.

Distribution companies are inefficient, and often try to generate revenue by charging the media entrance fees and imposing other so-called service fees rather than working to make money from sales of copies.

Most panelists said that Russia met the indicator evaluating the breadth of revenue sources only minimally or less. Revenue streams that feed the media include advertising sales (including advertorials), sales of copies, subscriptions, and state grants.

Advertising agencies support an advertising market. However, agencies were affected severely by the economic crisis in the past year as well, and had to lay off staff. Russia has both international and local agencies. International agencies are usually based in capital cities and manage the advertising accounts of international companies. In smaller cities, advertising agencies are usually local. However, in many small cities, local advertising markets are too small to sustain advertising agencies, and media outlets work directly with local advertisers.

Major advertising agencies rarely work with local media, particularly in smaller cities, in part due to the lack of audience data for local outlets. To address this problem,

INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

in 2009, the Alliance of Independent Regional Publishers established the Union of Regional Business Newspapers. The union includes eight local business newspapers published outside of Moscow, and its mission is to serve as a link between national advertisers and local business publications.

Russia has no accepted standards regarding the appropriate percentage of advertising revenue, so panelist opinions on this indicator varied considerably. However, the Russian law on advertising does set limits on the amount of advertising in media. On television, advertising cannot exceed 15 minutes per hour in most cases; radio advertising is limited to 20 percent of airtime; and print advertisements (except in print media registered as advertising circulars) are limited to 40 percent of copy space.

Broadcast media outlets receive all their revenue from advertising. Print media follows two models: Some newspapers and magazines sell copies and advertising space, and some newspapers and magazines are distributed for free and generate all revenue from advertising. The latter group was hit particularly hard by the economic crisis.

The issue of government subsidies this year again was one of most controversial discussion points. Individual scores for this indicator ranged widely, with the majority of panelists thinking that Russia meets this indicator only minimally. Most people said that independent Russian media outlets do not receive government subsidies. Surnin, however, said that the private newspaper *Moskovsky Komsomolets* receives around RUB 1 billion (\$33,340,400) per year from Moscow, and in Moscow's budget, this money is called a subsidy.

Many panelists were concerned that authorities are using contracts for placement of information materials, and even grants as instruments of pressure on independent media. "Previously, administrations used to award such contracts only to state media. Now, they select the best media, usually an independent, and seduce it with money," Dmitriyeva said.

Obviously, a media outlet's contractual relations with the government might undermine its editorial independence. But according to Andrei Allakhverdov, editor-in-chief of the Foundation for Independent Radio Broadcasting, some independent media were more than eager to take money from the government to survive during the economic crisis. Kravchenko said that in 2009, the governor of the Moscow region offered local newspaper editors support to cover their operational expenses, but in exchange they would have to behave as government executives. Still, Koshman said, "it is very difficult for independent media to win grant competitions for social projects. On the federal level it is still possible, but local competitions are not transparent and state media receive preferences."

Many media outlets have already learned how to use marketing research, but often it was one of the first budget lines that media outlets cut this year to survive. According to the Guild of Periodic Press Publishers, print media outlets cut their marketing budgets by 50 to 60 percent.

Private research companies produce broadcast ratings and readership figures. The major players in the Russia media measurement market are TNS Gallup Media and Comcon. Major advertisers and advertising agencies widely use TNS Gallup Media data. However, these two companies hire local companies to do media measurement in the regions, and local media have questioned the quality of the work.

The National Circulation Service, established in 1998 as a not-for-profit organization, audits and certifies print runs and circulation of print publications. To be covered by NCS, a media outlet has to become a member and pay an annual fee. By the end of 2009, NCS had 572 members.⁶ Koshman said that in 2009, major players in the press market were dissatisfied with NCS and decided to establish an alternative circulation service.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Russia Objective Score: 1.31

The overall score for Objective 5 slipped by more than half a point this year as panelists rated indicator 1 (trade associations), 2 (professional associations), 3 (supporting NGOs), and 5 (training opportunities for practicing media professionals) lower than last year. Scores for most indicators fell close to the overall objective score; only the indicator on journalism associations lagged noticeably.

Russia has several media trade associations, including the National Association of Television and Radio Broadcasters, the Guild of Press Publishers, the Alliance of Independent Regional Publishers, and the Alliance of the Heads of Russian Regional Media. They perform industry research and monitoring and organize trade fairs, conferences, and training programs for their members. They also attempt to lobby for the interests of the media industry.

Panelists said that Russian Union of Journalists (RUJ), a non-governmental association of journalists in existence since the Soviet era, does very little to protect journalists' rights. Glukhov said that his city of Khabarovsk has been without a local RUJ chapter since its chair died several years ago.

However, the panelists said that the issue is not simply that RUJ is inactive and does not protect its members. The deeper

⁶ As of December 2, 2009. See <http://www.pressaudit.ru/registry>

problem is that most journalists do not care about protecting their rights and do not truly value freedom of speech. Unless this changes, panelists said, there would be little benefit in investing in rejuvenating RUJ. The demand has to come from the ground—from the journalism community. According to the panelists, the number of journalists and others who appreciate democratic values is gradually growing, but they are still a minority. Journalists who want to be are independent, and Russia has NGOs that help them. When and if independent journalists feel that they need their own association, they will create it, but not earlier.

NGOs that support free speech and independent media are in Russia, but they are too few, and they have limited resources and access to donor funding. “There is only USAID and some nascent oligarchic charitable structures that are best avoided,” Dmitriyeva said. “And this is a terrible situation; it looks like media NGOs are begging for money at the U.S. Embassy.”

Timoshenko also noted efforts this past year to again flag the idea that NGOs protecting free speech are agents of U.S. influence. The website Pravda.ru, for example, alluded to this in an article about the Glasnost Defense Foundation’s school for bloggers, which was conducted in cooperation with the U.S. Center for Education of Journalists.

Russia has many universities and other higher education institutions offering journalism degrees. Glukhov noted that Khabarovsk alone has three schools offering journalism degrees. Still, the quality of degree programs remains low, so many media outlets prefer to hire entry-level workers without a journalism degree and train them in-house.

Vartanova agreed that academic journalism programs lack a practical approach and maintain a heavy literary focus. The programs are so fundamental, academic, and demanding

that students often do not have time to develop enough professional and practical skills. The skills they obtain usually do not meet the needs of a modern newsroom, because most professors belong to older generations. Younger journalists do not teach journalism because the pay is low.

Still, schools have made some strides in addressing education gaps. Koshman noted efforts underway to integrate media outlets and journalism schools. For example, Altapress in Barnaul and *Chelyabinsky Rabochy* in Chalyabinsk established close cooperation with local journalism schools. Temicheva noted that in the past year, a new standard of journalism education has emerged that calls for more specialization and development of niche reporting skills.

Opportunities for short-term training are very limited, so most panelists viewed this indicator pessimistically. According to the Guild of Periodic Press Publishers, print media outlets cut their budgets for staff training by 70 to 90 percent in 2009. Short-staffed by the crisis, these outlets felt that they could not afford to let any employees miss even one or two days for training.

However, the development of online education technologies may help to improve the situation. In 2009, the Alliance of Independent Regional Publishers launched webinars for its members. The most popular webinars related to the Internet, including developing newspaper websites, marketing and promotion, how to generate revenue using websites, and advertising sales to Internet sites. Webinars addressing advertising sales techniques and other financial issues, such as collecting debts from advertisers, also proved popular.

Russia has private and state-owned printing facilities. Prior to the economic crisis, the printing industry was growing, and print houses invested heavily in new equipment. As a result, more newspapers experimented with color. In 2009, however, the demand for printing services fell, and competition increased considerably. Surnin said that this helped his newspaper to get better prices for printing, but by the end of the year, several printing houses went bankrupt and closed.

Distribution of print media remains the Achilles heel of the Russian media industry. In 2009, changes to the tax code upped taxes imposed on distributors, so distributors had to increase their mark-up. Prices of print publication went up 120 to 200 percent, and in turn, newsstand publication prices increased by 20 to 30 percent, resulting in a drop in sales. According to data from the Guild of Press Publishers, the profitability of distribution networks decreased fivefold, and is now about 2 to 3 percent. Subscription prices in 2009 did not change, because the Russian government froze fees charged by the Russian Post Office, which handles the majority of subscriptions in Russia.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists’ rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

Internet access is unrestricted; according to the panelists, no websites are blocked. The state controls transmitters in that broadcasting requires a Ministry of Telecommunication license. However, many private broadcasters have their own transmitters and hold telecommunication licenses.

List of Panel Participants

Andrei Allakhverdov, editor-in-chief, The Foundation for Independent Radio Broadcasting, Moscow

Tamerlan Aliev, aid to the president of Chechnya, former editor-in-chief of *Chechen Society*, Grozny

Veronica Dmitriyeva, CIS regional program director, Media Development Loan Fund, Moscow

Maria Eismont, program director, The New Eurasia Foundation, Moscow

Mikhail Melnikov, analyst, Center for Journalism in Extreme Situations, Moscow

Boris Timoshenko, head of monitoring, Glasnost Defense Foundation, Moscow

Anna Koshman, executive Director, Alliance of Independent Regional Publishers, Moscow

Fedor Kravchenko, managing partner, Media Lawyers Collegium, Moscow Office, Moscow

Stanislav Glukhov, general director and editor-in-chief, *Khabarovskiy Express*, Khabarovsk

Dmitry Surnin, editor-in-chief, *Moy Rayon*, Moscow

Elena Vartanova, dean of the journalism department, Moscow State University, Moscow

Elena Temicheva, program coordinator, Agency for Social Information, Moscow

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Moderator and Author

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Note: Conflicting panelist schedules prevented a panel discussion from being held in Moscow. However, individual interviews with panel participants were conducted between November 17 and December 3, 2009. Interviews with panelists based in Moscow were conducted in person, while those with panelists based outside of Moscow completed by phone.