
In 2010, the media community began to show some resolve to stop tolerating the domination of authorities—a trend that continued in 2011.



RUSSIA

In advance of the December parliamentary elections and the March presidential elections, regional media, especially state-owned outlets, fell under very strong pressure to publish panegyrics about the United Russia party. Some state-owned media outlets were barred from selling advertising space to opposition parties. Gazprom's NTV channel aired an investigative piece questioning the objectivity of the elections observer, NGO Golos, because it is financed by U.S. grants.

Independent media outlets also withstood considerable pressure from the authorities but continued to provide balanced information. Several leading independent websites and blogs suffered from distributed denial-of-service (DDoS) attacks surrounding the parliamentary elections. Many journalists and photographers were denied access to the polling stations or were prohibited from taking election-day photos. In the days after the elections, many journalists covering public protests against election fraud were detained and beaten by police.

In 2010, the media community began to show some resolve to stop tolerating the domination of authorities—a trend that continued in 2011. Fedor Kravchenko, managing partner of the Media Lawyers Collegium, noted that he saw an increase in requests to media lawyers from media outlets seeking advice on expressing their civic position while still complying with existing laws.

Federal television channels did not cover public protests against election fraud that took place on December 5 and 6, but they did cover rallies in support of the United Russia party. The political observer of the Kommersant FM radio station, Stanislav Kucher, who has several years of television experience, publicly appealed to journalists working at federal television channels and called them unprofessional for not covering the protests. A reversal came on December 10, 2011, after thousands of people all around Russia came out to protest against election fraud. All federal channels broke their silence and covered demonstrations in Moscow and around the country. Over the following several weeks, opposition politicians, previously unmentioned on television, started to appear in the news. "After December 10, things started to move. Even federal television channels started to show faces that had not been approved officially," said Boris Timoshenko, head of monitoring of the Glasnost Defense Foundation. He added that journalists began asking questions nobody would dare to ask even a month earlier.

Overall, the MSI score increased slightly to reflect these shifts. For example, in 2011 libel was removed from the criminal code, so the score for the corresponding indicator gained ground. All objectives showed modest improvement except for Objective 3, plurality of news, which remained nearly unchanged. However, Russia still has a ways to go to enter the "near sustainability" score category.

RUSSIA AT A GLANCE

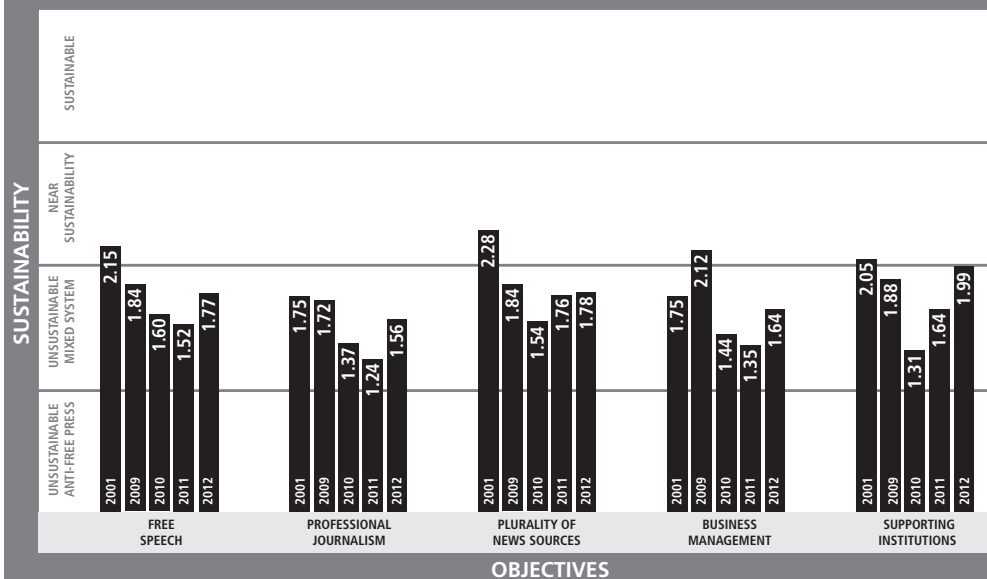
GENERAL

- > **Population:** 138,082,178 (July 2011 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:** Russian (official), many minority languages (*CIA World Factbook*)
- > **GNI (2010-Atlas):** \$1.404 trillion (World Bank Development Indicators, 2011)
- > **GNI per capita (2010-PPP):** \$19,190 (World Bank Development Indicators, 2011)
- > **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.
- > **Newspaper circulation statistics:** Annual circulation of 7.8 billion newspapers, 1.9 billion magazines total (Federal Agency of Press and Mass Communications, 2009); top three newspapers and daily circulation: *Rossiyskaya Gazeta* (1,262,000), *Moskovsky Komsomolets* (979,000), *Izvestia* (323,000) (TNS Russia, May–October 2011)
- > **Broadcast ratings:** top three television stations: Russia 1 (18.7%), Channel 1 (18.4%), NTV (12%) (TNS Russia, last week of 2011)
- > **News agencies:** ITAR-TASS (state), RIA Novosti (state), Interfax (private)
- > **Annual advertising revenue in media sector:** \$8.46 billion including VAT (2010 est., Association of Communication Agencies of Russia)
- > **Internet usage:** 60 million (2011 est., Public Opinion Foundation)

MEDIA SUSTAINABILITY INDEX: RUSSIA



Scores for all years may be found online at http://www.irex.org/system/files/EE_mscores.xls

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.

OBJECTIVE 1: FREEDOM OF SPEECH

Russia Objective Score: 1.77

The panelists upped their scores modestly for the objective measuring the freedom of speech. Most notably, on December 8, 2011, the state dropped libel and defamation clauses from the criminal code, and thus the score for the corresponding indicator increased by nearly one point—but it still falls shy of scoring with the “near sustainability” range. The scores for indicator 1 (legal and social protections of free speech exist and are enforced), indicator 3 (market entry), and indicator 5 (protection of editorial independence of state media) also showed some improvement. Many of the indicators scored close to the objective score, but four deviated noticeably. Indicator 8 (journalists’ access to local and international news) exceeded the objective score by about a point and indicator 9 (entry into the journalism profession) did so by about three-quarters of a point. However, indicator 2 (media licensing) lost ground and scored more than half a point behind; indicator 4 (crimes against journalists) again had the lowest score in Objective 1 and lagged behind by nearly a point.

Russia’s constitution guarantees free speech. The Russian Media Law, in effect since 1991, also supports the freedom of speech, guarantees editorial independence for all media, and

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 or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > 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 available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets’ access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

For example, in Dagestan, independent media protect the rights of citizens by closely following operations of law-enforcement authorities and exposing their wrongdoing. “Without this oversight, law-enforcement authorities would operate without any restraint,” commented Kamalov.

is in line with international human-rights and freedom-of-expression standards. “But there is no consolidated, informal public agreement on what freedom of speech and freedom of journalism mean,” said Elena Vartanova, dean of Moscow State University’s Journalism Department. As a result, elites and other social groups interpret the meaning of free speech as they please.

Irada Guseinova, an analyst for the Center for Journalism in Extreme Situations, feels that laws protecting free speech do not work because journalists themselves do not insist on their implementation. Journalists are often too busy with their work to take time out to fight for their legal rights in court and demand the prosecution of violations against journalists.

Protections for free speech also vary from one region to another, depending on regional authorities and their attitudes to free speech, as well as on journalists’ eagerness to use the laws that guarantee editorial independence. “Part of the print media belongs to the state or is tied to local interests. Another part is just afraid to say something that will be not in line (with the position of the authorities). The fear of being out of line is the worst type of paralysis. And a small but growing cluster of print media are proving that it is possible to be not affiliated with the state, nor the opposition,” commented Victor Yukichev, director of the Institute for Press Development–Siberia.

In 2010 the Glasnost Defense Foundation published the Map of Glasnost, showing the degree of media freedom in various regions of Russia (see <http://www.gdf.ru/map/>). None of the 83 regions were recognized as free. In 16 regions media are relatively free, in 44 regions (including Moscow) media are relatively not free, and in 22 regions media are not free at all.

According to the map, in Dagestan, for example, media experience the highest degree of freedom in the North Caucasus, though that freedom is relative. Ali Kamalov, editor-in-chief of *Haqiqat (Truth)* and secretary of the Union of Journalists of Dagestan, confirmed, “The situation in Dagestan is much better than in Chechnya, North Ossetia, and

“Nobody feels protected in our country; it’s not just the journalists,” commented Maria Eismont, director of the Russian Independent Media Program of the New Eurasia Foundation.

Ingushetia. There, the authorities do not let journalists work; they do not let them come to events, and they restrict access to official information.”

The value that citizens place on freedom of speech and media freedom is higher if people have already experienced the benefits associated with media freedom. For example, in Dagestan, independent media protect the rights of citizens by closely following operations of law-enforcement authorities and exposing their wrongdoing. “Without this oversight, law-enforcement authorities would operate without any restraint,” commented Kamalov. “Now, authorities are afraid of media. *Chernovik (Rough Copy)* was the first to discuss activities of the mayor (of Makhachkala, the capital of Dagestan), who used to be untouchable, as well as activities of judges, prosecutors, and investigators. Without independent media, the situation in the republic would be much worse. Authorities try to buy independent media and pressure them, but they stand strong.”

However, various social groups value the freedom of speech and media differently. “Unfortunately, the society is not consolidated, and different social groups and strata have different media practices and media cultures. The Internet-based media culture of a big city, e.g. Moscow, is very different from the media culture of small cities. There is a digital divide that leads to behavioral, consumer, generation, and cultural differences within the society. I think that if we put a loyal member of the Channel One audience (a federal channel, with the state as a majority shareholder) together with an active Internet user, especially one with a good education and reasonable income, they would not find any common ground for discussion,” said Vartanova. Internet users are more accustomed to free speech and are more likely to value it than representatives of other social groups, the panelists feel.

Infringement upon the free-speech rights of highly reputable media outlets attracts more public attention than cases of pressure on smaller media outlets. The panelists brought up an example, involving Kommersant Publishing House, one of the most reputable Russian media outlets known for high-quality, professional journalism. Russian oligarch Alisher Usmanov, Kommersant’s main shareholder, decided to fire the chief editor of the magazine *Vlast (Power)* for publishing

a photo of a ballot with obscene language addressed to Prime Minister Vladimir Putin. The media community widely condemned the decision, which became the most covered event in the media sector in 2011.

In Russia, only broadcast television and radio need to be licensed. But the panelists said that the licensing process is not fair and apolitical; media outlets affiliated with authorities often receive preferences, which resulted in a low score for this indicator. Internet sites (including online television and radio) have the right to register as media, but it is not required. Print media can publish up to 999 copies without registration; otherwise, they have to register, but the registration is easy to obtain. The main purpose of print media registration is to avoid having several publications with the same name. Bloggers do not need to register as media.

Market entry and the tax structure for media outlets are comparable to other industries, and media outlets are not burdened with taxes heavier than those for other private businesses. Some panelists noted that news media should be treated differently from other types of businesses, because news media provide an important social service. The panelists also noted that in 2011 all Russian businesses, including media, were hurt by the increase of social taxes on salaries paid by business from 26 to 34 percent.

Ten journalists were murdered in 2010, and four journalists were murdered in 2011 (two in Dagestan, one in Moscow, and one in Magadan [in the Far East]). The murder of Hadzhimurat Kamalov, the founder of newspaper *Chernovik (Rough Copy)* in Dagestan that took place on December 15, when the Russian journalism community commemorates murdered journalists, was widely covered by media and caused an outcry in the media community.

Although fewer journalists were murdered in 2011, Timoshenko underscored the growing number of threats received by journalists in 2011 and said that journalists do not feel protected. “Nobody feels protected in our country; it’s not just the journalists,” commented Maria Eismont, director of the Russian Independent Media Program of the New Eurasia Foundation. “The police and courts are dysfunctional. Dysfunctional courts are the main problem. Free speech is not a problem, especially on the Internet. The problem is that nobody is protected, mostly because the courts make arbitrary decisions.”

Many crimes against journalists are not prosecuted vigorously. “Domestic crimes [committed against journalists] are usually prosecuted...But crimes related to professional activities of journalists are not prosecuted properly. And there are suspicious cases when it is not clear if a car accident or a robbery attack was just accidental. Authorities always push the domestic crime version,” said Guseinova.

There are no true public media in Russia, just state-owned media, and there are no separate laws governing operation of state-owned media outlets. In principle, the Russian Media Law equally protects the editorial independence of all media, but in practice, state-owned media outlets serve as an instrument of government propaganda.

As indicated earlier, a major development in this objective was the December 8, 2011, decision to drop libel and defamation clauses from the criminal code. At the same time, the minimum fines for libel and defamation in the administrative code were increased by about three times, and new provisions opened up the possibility for lawsuits not only against individuals but legal entities as well. "And there is a new clause that provides an opportunity for abuse. Now editors can be punished for not taking measures to prevent libel. This means that if the court recognizes some information as libelous, the editor-in-chief can be automatically punished using this new clause," commented Galina Arapova, director of the Center for Protection of the Rights of Media.

Several panelists noted that the abolished anti-libel clause in the criminal code was rarely used even before it was eliminated. Criminal code article 282—on the prosecution of extremism (stirring up enmity against national and social groups)—is much handier for punishing critical voices, as any criticism of authorities can be interpreted as extremism, noted Timoshenko. For example, in January 2011, the court suspended the editor-in-chief of *Vechernaya Riazan* from the job while the editor was under a criminal investigation launched under article 282. The prosecutors claimed that in 2004–2009, the newspaper ran an article that stirred up enmity against the Jewish people and, in 2010, an article that stirred up enmity against the police.

The authorities also use anti-defamation clauses in the administrative code to punish disloyal media. For example, the editors of the independent paper in Berdsk, *Gorodskoy Vestnik (City Herald)*, reported to the Glasnost Defense Foundation that local authorities and affiliated businessmen were lodging numerous court cases against the newspaper, on charges of defamation and business reputation damage, to ruin it financially and drive it out of business.

The Russian Media Law guarantees journalists access to public information, but its implementation remains poor. When journalists send in written requests for the information, authorities often give them the runaround or simply do not reply at all. However, Kravchenko said that in 2011, journalists showed greater interest in protecting their rights to access to information. In 2011 the Media Lawyers Collegium provided more consultations to media outlets on procedures to use to

Women accept a lower level of pay than men, so the lower the salaries, the fewer males there are on staff. According to Kamalov, in Dagestan most journalists entering media now are women, because men find the pay levels too low.

exercise the right for access to public information than during the previous five years combined.

Journalists are not restricted from accessing or using any domestic or international news sources. Media are allowed to reprint and rebroadcast foreign and local news programming, as well as information from news agencies.

Entry into the journalism profession remains free. The government does not in any way control entrance to journalism schools, and a journalism degree is not required to be a reporter.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Russia Objective Score: 1.56

In general, Russian journalism hardly meets internationally recognized professional standards of quality. Most general-interest news media outlets belong to the state, and their output is better described as propaganda than news reporting. Only a few media outlets are committed

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 and retain qualified personnel within the media profession.
- > 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 exist (investigative, economics/business, local, political).

Only major media outlets, usually national ones, can afford journalists who cover specialized issues, such as health and economics, and who do investigative reporting. "Regional media cannot let journalists specialize; the editorial staff is too small," commented Guseinova.

to providing fair, objective, and well-sourced information to their audiences. Accordingly, this objective, measuring professional journalism, again received the lowest score of the five objectives. Nonetheless, the objective regained a moderate amount of lost ground as several indicators received better scores from panelists.

Journalists working in media outlets affiliated with authorities might have learned to juggle facts and quotes from experts to imitate fair, objective, and well-sourced reporting, but they do not cover many key events and issues because they are censored by the authorities, and journalists often practice self-censorship as well.

"Some events just never appear in the media; similarly some newsmakers never appear. Yavlinsky (head of the democratic Yabloko party) was not mentioned for a long time, until his party entered the electoral campaign. Media outlets, especially the state ones, have lists of people who should not be mentioned. In some places these lists are written; in others they exist on the level of common understanding," said Yukichev.

At the same time, there is a relatively small group of independent media that adhere to principles of fair, objective, and well-sourced reporting, cover all key events and issues, do not practice self-censorship, and adhere to high ethical standards.

The Code of Professional Ethics for Russian Journalists, adopted by the Russian Union of Journalists in 1994, is well in line with international standards. There is a Big Jury responsible for reviewing ethical conflicts and violations of ethical standards by journalists. There are also media outlets that have their own ethical codes, and strictly follow them. But in general, as several panelists noted, journalists generally follow their own ethical standards rather than professional ones. Yukichev noted that as long as there are no common rules in the media sector—and some media serve the interests of authorities while others serve their audiences—it is impossible to agree on common ethical standards.

In most cases the pay level for journalists and other media professionals is commensurate with the average pay level. In general, salaries in bigger cities are higher than in smaller cities, and journalists in Moscow earn the most. For example, in the first three months of 2011, the average salary in Russia was about RUB 21,000 per month (around \$722), but RUB 39,000 (\$1,340) in Moscow. In Dagestan, by contrast, it was only RUB 10,000 (\$343). Kamalov said that as an editor-in-chief, he made RUB 25,000 per month (\$860), while regular journalists in state media in Dagestan made RUB 10,000 to RUB 15,000 (\$345–\$515).

According to Eismont, who works with independent regional media, the pay level for journalists varies a lot. She explained, "I know media outlets where journalists make RUB 7,000–8,000 (\$230–260); in other media outlets journalists make RUB 30,000–40,000 (\$1,000–1,350). The latter amount is sufficient to live on. I don't know how people can live on RUB 8,000 or even 12,000 per month, given that just utility bills amount to RUB 4,000 (\$130) per month."

The level of pay correlates well with the number of male journalists on staff. Women accept a lower level of pay than men, so the lower the salaries, the fewer males there are on staff. According to Kamalov, in Dagestan most journalists entering media now are women, because men find the pay levels too low.

Differences in pay levels encourage younger and more qualified journalists to move from smaller to bigger cities and from regions to the capital. Often journalists leave media to take jobs in public-relations companies and departments where salaries are higher.

Many panelists do not believe that the level of pay and the level of corruption are related. Taking or not taking gifts for favorable coverage depends, rather, on the personal values and beliefs of a journalist as well as on an outlet's editorial culture. However, advertorials are an important source of revenue for many media outlets, and often editorial and advertorial materials are prepared by the same journalists. Anna Koshman, executive director of the Alliance of Independent Regional Publishers (AIRP), noted that it is standard practice for journalists to be paid about four times more for an advertorial article than for an editorial one.

Federal (national) television channels are the only media that reach all people in Russia, and on these television channels entertainment programming has eclipsed news and information programming (and news is biased in favor of the authorities). At the same time, there are media that specialize in news and information programming, and many of them are available online.

Facilities and equipment for gathering, producing, and distributing news are sufficiently modern and efficient. Media outlets affiliated with authorities often have better equipment than their independent, private counterparts, and media outlets in big cities are better equipped than media outlets in smaller cities, but this does not affect the quality of journalism. Many regional media outlets lag behind Moscow-based media in terms of Internet presence and mastering multimedia technologies. “We are doing a small research project on development of multimedia in Russian regional newspapers. The situation is just catastrophic,” said Vartanova. “Sometimes the website of a newspaper is managed not by its editorial staff, but by some outsourced specialists, and site content has almost nothing in common with the content of the newspaper.”

Only major media outlets, usually national ones, can afford journalists who cover specialized issues, such as health and economics, and who do investigative reporting. “Regional media cannot let journalists specialize; the editorial staff is too small,” commented Guseinova. As a result, the coverage is driven by events and press releases, while there are very few analytical materials on any topic.

The quality of local reporting varies a lot from one location to another, commented Eismont. Some cities may have a great local newspaper, a radio station, or a city forum where citizens exchange local news, but in many locations high-quality local news is not available. For example, out of 36 district centers in the Moscow region, only six have independent local newspapers.

Blogging and other social media platforms offer regular citizens an easy way to publicize any information they have, including the results of their own investigations. For example, in August 2011, database specialist Victor Simak discovered an admission fraud scheme in one of Moscow’s medical universities. Simak wrote about the scheme on the university’s online student forum. In comments to his post, students added new pieces of information confirming the story. Then independent media picked up the story, and eventually it even made it to the federal television channels. The media coverage prompted a criminal investigation at the university, and the head of the university was fired. Still, bloggers will never be strong substitutes for professional journalists, commented Yukichev, because they post information if and when they please, rather than making any commitments to the audience to provide information on a consistent, regular basis, as professional journalists do.

Independent media outlets often use blogs and other social media as sources of information and tips for stories. The site of the Echo of Moscow radio station and the news portal Slon.ru provide blogging platforms for individual bloggers,

Furthermore, Guseinova noted that a great number of news sources do not necessarily mean a variety of information or viewpoints: “Every day I look though a lot of information...and I often read the same information in different media, reprinted from each other.”

thus increasing the amount of information and commentary available for their audiences. Many online sites of media outlets allow people to comment on and even report news themselves, which also increases the amount of news and commentary available to the audience.

OBJECTIVE 3: PLURALITY OF NEWS

Russia Objective Score: 1.78

The overall score for this objective did not change this year. The scores for indicator 2 (citizen access to news) and indicator 5 (private media produce their own news) increased noticeably, based on the panelists’ impression of improvements over time. These two indicators were the only ones to exceed the objective score by more than half a point. On the other hand, the scores for indicator 6 (transparency

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens’ access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the 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
- > The media provide news coverage and information about local, national, and international issues.

Vartanova noted that the quality of international news available to citizens is declining as well: "Journalists talk a lot about the financial crisis, demonstrations in Greece, the criticism of Berlusconi, but they do not analyze the international situation and how it relates to Russian foreign policy. As a result, people hardly understand what is happening in the world."

and concentration of media ownership) and indicator 8 (the media provide news coverage and information about local, national, and international issues) moved in the opposite direction. The score for indicator 3 (state or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest) once again drew the lowest scores for this objective, lagging behind the objective score by more than a point.

A majority of general-interest news media are owned by the state, which comprises federal, regional, and municipal executive authorities. "We have estimated that 80 percent of print media belongs to the state," said Arapova. "State officials say that 80 percent of the press is private. But these are mostly entertainment and advertising media, which are not very important. The majority of media outlets that cover social and political issues belong to the state. If we look at the regions, very few newspapers that cover social and political issues are private."

According to the Public Opinion Foundation, 48 percent of Russians used the Internet on a monthly basis in 2011, and 17 percent of Russians were using mobile phones to go online. Still, those numbers do not describe the vast differences between regions. In Moscow and St. Petersburg the monthly Internet audience makes up 67 to 68 percent of the adult population; in Tyva this number is only 29 percent, and in Mordovia it is 34 percent.

People with Internet access can easily obtain a lot of national and international sources of information, including blogs and social media, and gain access to many points of view. But people who watch only federal television channels get a very limited picture and a very limited number of viewpoints. "I know people who get news and information only from blogs, and they are much better informed about the situation in the country than those who only watch television," commented Arapova.

The role of traditional print media as a source of information is decreasing. In Dagestan, for example, Kamalov said, "People watch television more than they read. The press circulation is decreasing there, as in all regions. In 2003, my newspaper had a circulation of 23,000 copies; now we have only 11,000. Over the past 10 years, the circulation dropped almost twofold. This is because of Internet and mobile phones. Newspapers in national languages suffer most of all. People study national languages less and less. And the postal service does not deliver newspapers to small villages, where elderly people, who are the main readers of these newspapers, live."

Furthermore, Guseinova noted that a great number of news sources do not necessarily mean a variety of information or viewpoints: "Every day I look though a lot of information... and I often read the same information in different media, reprinted from each other."

The government does not restrict citizens' access to domestic or international media. People are not required to register with authorities to gain Internet access, own a satellite dish, or use any other type of media. Sites that publish translations of foreign publications are available. Access to foreign-based social media platforms, such as Facebook, Twitter, and YouTube, is not restricted, and their popularity in Russia is growing rapidly. People in larger cities have greater access to media sources, compared with people who live in smaller towns and villages, but the rapid development of Internet access is closing this gap.

There are no public media in Russia. State media are not independent of the state and the ruling United Russia party and do not follow a public-service model. State media mostly provide favorable reporting on government leaders, virtually ignoring the opposition. State federal television channels even ignored mass protests against elections fraud on December 5 and 6, though they covered major protest rallies on December 10 and 24. Only state television channel Russia K (previously called Culture), which offers cultural and educational programming, somewhat resembles public television, noted Yukichev. Still, it is worth noting that in 2011 the Russian president said several times that Russia needs public television, and in December 2011 he ordered the government to prepare a plan for the launch of a public television channel in Russia.

Major news agencies that offer a variety of multimedia services belong to the state. There are a growing number of regional news agencies that distribute a lot of information free of charge through their sites and generate revenue by providing media-relations services to various clients, e.g., Rosbalt (rosbalt.ru), Independent Information Agency (24rus.ru), and UralInformBuro (uralinform.ru). Major media outlets

use news produced by news agencies. At the same time, many news agencies turn their sites into full-fledged online media.

Private media produce their own news and information programming. The quality of news and reporting in private media is often higher than in the state media, the panelists feel. Most reputable Russian general-interest and business newspapers, like *Kommersant*, *Vedomosti*, *Nezavisimaya Gazeta* (*Independent Newspaper*), and a number of regional newspapers are private. Small local private media produce their own local news and often become the main source of local news both for local citizens and bigger regional, and even national, media.

Media ownership in Russia is not transparent. According to data published by the Russian Agency for Press and Mass Communications, 50 national media companies account for 50 percent of press circulation and 60 percent of advertising revenue. Another 90 to 100 interregional and regional media companies account for an additional 25 percent of circulation and revenue. Twenty free television channels belong to nine companies. The state is the largest media owner in Russia. Business conglomerates own media outlets, but the level of property concentration in the media sector is low, noted Vartanova, especially in newspaper, magazine, and radio segments.

Mainstream media do not reflect a broad variety of social issues. Topics of gender, ethnicity, social convention, religion, and sexual orientation are often avoided or covered stereotypically. There are minority-language media that are often financially supported by the authorities, but they are available only to people who know the language. There are no community media.

However, blogs and special-interest forums considerably broaden the spectrum of social interests present in media, and in many cases such news breaks first in blogs and social media, then eventually makes it to the mainstream media. For example, during summer 2011, several bloggers reported about physicians refusing to give official disability diagnoses to disabled children because they received instructions to reduce the number of officially recognized disabled people—a bid to improve the disability statistics. The issue was actively discussed by bloggers, and some stories were picked up by individual media outlets, including online TV Dozhd and the online newspaper Gazeta.ru.

People living in smaller towns can find fair and balanced information about their hometowns only if there is a local independent newspaper, radio station, television station, or city forum where citizens share information. In 2011 state-affiliated companies bought up a number of independent media outlets, so in some cities people

“Revenue from subscriptions is limited by the monopoly of the post office and the authorities’ pressure on press retail networks. The advertising market is stagnant. And the pre-elections period proved that authorities can easily put pressure on media outlets, using fire and sanitary inspections, and destroy even a stable business,” said Koshman.

lost access to high-quality local information. Vartanova noted that the quality of international news available to citizens is declining as well: “Our international journalism is deteriorating, so we do not get a detailed explanation of international developments. Journalists talk a lot about the financial crisis, demonstrations in Greece, the criticism of Berlusconi, but they do not analyze the international situation and how it relates to Russian foreign policy. As a result, people hardly understand what is happening in the world.”

The Russian media sector still has a lot in common with the centralized media model developed in the USSR. During Soviet times, Moscow-based national media covered national and international news. Regional media, based in regional capitals, covered regional news. And local media covered local news. This situation has not changed much. People in Russian regions get international and national news from Moscow-based media, while local media concentrate on local news.

OBJECTIVE 4: BUSINESS MANAGEMENT

Russia Objective Score: 1.64

With a slow economy in 2011, newspaper advertising grew only about 4 percent, less than the rate of inflation. Independent media outlets continued to suffer from unfair competition with state-owned media, which received state subsidies and preferences and also played in the advertising market. Nonetheless, panelists awarded somewhat better scores in several indicators, and the objective picked up ground previously lost. Most indicators scored close to the objective score. However, indicator 3 (the advertising market) beat the objective score by nearly one point, while indicator 5 (government impact on the market) lagged behind by the same magnitude.

The federal agency that oversees advertising exercises only lax control over state media, so they are able to publish officially prohibited types of advertising, e.g., advertisements of fortune-tellers and of uncertified medicines.

The Russian media market is distorted by unfair competition between state-owned and private media. "State media receive funding from state budgets, are distributed for free, and get favorable treatment in terms of licensing and entering the digital television packages, and at the same time they compete in the advertising market with private media that lack any of the above-mentioned privileges," commented Kravchenko.

In 2011 the increase of the social tax of 26 to 34 percent levied on the staff salaries also hit media outlets severely. "I know several media outlets that worked hard over the past several years to make their operations transparent and comply with all accounting requirements, up to the point when all salaries were paid officially and all financial transactions were transparent. They paid this 34 percent tax for a couple months and realized that they have to go back to the gray economy or close down. And they went gray [paying their employees under the table]," said Eismont. Later, the social tax was reduced for general-interest news media, but media outlets that publish both general-interest

and advertising newspapers have difficulties using this tax break.

To achieve financial sustainability, many private regional media companies diversify, e.g., publish several entertainment and advertising publications to earn revenue that supports the flagship general-interest newspaper. Many also launched websites, and some have radio and television stations and printing facilities that provide services to other media outlets and clients.

Although editorial independence is protected by law, as business entities media outlets are not adequately protected—and that affects their bottom line as well. The authorities often use fire and sanitary inspections to pressure disloyal media. For example, a fire inspection was used to shut down the printing facility of the publishing house Krestianin (Peasant) based in Rostov-on-Don.

Local authorities also sometimes put pressure on local advertisers, asking them to place advertisements in state media rather than independent media, and on local press distribution networks, asking them to give preferential treatment to state-owned media—which undermines the revenue base for independent media. "Revenue from subscriptions is limited by the monopoly of the post office and the authorities' pressure on press retail networks. The advertising market is stagnant. And the pre-elections period proved that authorities can easily put pressure on media outlets, using fire and sanitary inspections, and destroy even a stable business," said Koshman.

The funding of bloggers is not transparent. "There are many bloggers who get paid for writing against certain people and groups. This is a very common, and dangerous, practice," noted Koshman. "There are very few bloggers who earn advertising revenue. But this is a shadow economy, and it does not add credibility to bloggers."

In the first nine months of 2011, the Russian advertising market grew by 25 percent. The growth rates in different sectors of the market vary considerably. Internet advertising grew 57 percent, advertising on cable television grew 41 percent, advertising on regular television grew 25 percent, and newspaper advertising grew just 4 percent. Still, broadcast television gets the largest share of the advertising pie. In the first nine months of 2011, 88 percent of advertising revenue went to regular television, less than 1 percent went to cable television, 15 percent went to the Internet, 4 percent went to radio, and only 3 percent went to newspapers. According to TNS Russia, in the first nine month of 2011, the number of companies that advertise on television (about 20,000) far exceeded the number of companies that advertise on radio (slightly more than 2,600) and in press (9,800).

MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > 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.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

Top-50 advertisers account for just over half of the advertising budget in Russian media. The majority of these advertisers are big international companies, and they place their advertisements based on market principles.

While the Russian advertising market is relatively well developed, it is quite monopolized and skewed in favor of federal media based in Moscow and media outlets in major cities with a population of more than one million people, commented Koshman. Major advertising agencies ignore local newspapers in small cities, and these media get only local advertising.

The Russian media community has not developed any standards on the ratio between advertising and other sources of revenue. The Russian Law on Advertising sets limits to the amount of advertising in media: 15 minutes per hour on television, 20 percent of air time per day on the radio, 40 percent of space in non-advertising print publication. Advertising publications can use 100 percent of their space for advertisements.

Tight competition for advertising revenue forces high-quality independent newspapers to make some controversial business decisions, e.g., selling front pages to advertisers or wrapping newspapers in advertising spreads. Koshman commented, "Even *Delovoy Petersburg (Business Petersburg)*, a highly reputable newspaper, is selling its front page (to advertisers). This practice started a year and a half ago. The advertising market dropped and still has not recovered. Serious independent publications lost half of their advertising revenue. They cut their expenses by 2.5 times and continue to operate under these very tight conditions. As they still fail to restore their advertising revenue, they have to use some controversial methods to get advertising money."

State media are allowed to sell advertising. The federal agency that oversees advertising exercises only lax control over state media, so they are able to publish officially prohibited types of advertising, e.g., advertisements of fortune-tellers and of uncertified medicines. State media also receive direct funding from the state budget, enjoy a number of other privileges; the price at which they can afford to sell advertising considerably distorts the market.

The panelists also expressed concern over the contracts for information services that authorities make with media outlets. Under these contracts, media must publish advertorials about activities of the authorities. "It is not always obvious to the reader that this information was paid for by the government. These materials look like editorials," noted Arapova. "This is a hidden way of presenting information the way that state authorities find appropriate. In essence, this is hidden advertising."

The authorities award contracts for information services not only to state media, but to independent media as well. According to Dmitriyeva, in 2011 the authorities sometimes used these contracts to put pressure on independent media: media outlets were told that if they published critical materials about the United Russia party, they would not get information service contracts.

Tight economic conditions limit the ability of media outlets to use marketing research. Only large media can afford to order professional third-party research. The bigger media outlets use the results of regular market research conducted by such companies as TNS Russia and Synovate Comcon, and the smaller ones do without marketing data.

Broadcast ratings and readership of print media are measured only in bigger cities and for a limited number of media. For example, within the framework of its National Readership Survey, TNS Russia measures 206 national publications in cities with a population of 100,000 or more. The sample includes 65 cities. At the same time, the Russian postal service offers subscription for 466 national newspapers, and the number of national publications is even more. There are two organizations that measure and certify circulations, but they again cover only part of the existing media outlets.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Russia Objective Score: 1.99

In 2011 the score for three out of eight indicators for this objective increased notably, and a few others increased slightly, accounting for the increase in score. Indicators 2 (professional associations), 3 (NGOs support free speech and independent media), and 5 (short-term training) led the improvement. All indicators, however, scored within half a point of the objective score.

There are several trade associations representing media owners and managers. The Guild of Periodic Press Publishers (GIPP) has more than 400 members, including 250 regional media outlets. GIPP members publish more than 3,000 newspapers and magazines. The National Association of TV and Radio Broadcasters includes more than 200 members. Membership in the Alliance of Independent Regional Publishers (AIRP) is conditioned on adherence to principles of editorial independence. At the end of 2011, AIRP had 62 members. According to Koshman, AIRP's executive director, membership dues cover only part of the operational expenses of the Alliance; some projects are funded by grants. Both GIPP and AIRP offer its members training and consultative services and lobby the government on behalf of their members. GIPP

"I think that academic programs are detestable. I judge by our Journalism Department; I teach there now," noted Arapova, who also teaches in the Journalism Department of the Voronezh State University. "I think that this is a complete profanation of academic teaching. Students graduate completely unprepared."

and AIRP cooperate with the World Newspaper Association and the World Editors Forum.

The panelists were rather critical of the Russian Union of Journalists, although Koshman said, "This year, many people say that the Union of Journalists is working a bit better." The Russian Union of Journalists conducts various events, including days to commemorate the memory of journalists who died on duty. It offers legal consultations to its members and supports the Big Jury that settles conflict situations related to journalistic ethics.

Letters from media associations also helped secure the reduction in the social tax for general-interest news media, along with lobbying efforts in regular meetings with ministry staffers. As state-owned media also had to pay, there might have been some behind-the-scenes lobbying involved as

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

well, though it is difficult to say for sure. Eismont noted that existing informal social networks of journalists are effective enough to protect media outlets that are being pressured.

There are NGOs that support free speech and independent media, but the conditions of their work are becoming less and less favorable. "We have NGOs, but they are few, and the government strangles them. In the past, the NGO sector was quite developed, but then the government suppressed it," said Dmitriyeva, of the Media Development Loan Fund. The Russian government is pushing international donors out of the country. There are Russian government grants for NGOs, but NGOs that support free speech never get them. "Our state authorities don't think that we are worth supporting, though they eagerly send their staff to the seminars that we conduct using foreign grants," commented Yukichev.

In general, the quality of academic journalism programs is not very high. "There are quality programs in two or three universities: the new program in the Higher School of Economics, at the Humanitarian University in St. Petersburg, in Rostov-on-Don. The majority of universities are following the certified programs, but who teaches? In most cases the teachers used to be Soviet journalists, and regardless of the program, they tend to regurgitate their past experience," said Yukichev. "I think that academic programs are detestable. I judge by our Journalism Department; I teach there now," noted Arapova, who also teaches in the Journalism Department of the Voronezh State University. "I think that this is a complete profanation of academic teaching. Students graduate completely unprepared."

Guseinova noted that many graduates of journalism departments do not enter the media but take jobs in public relations instead. As a result, media outlets often fill entry-level positions with people who have no journalism education.

There are short-term training opportunities for journalists, but not many. Media outlets are ready to pay for training for advertising sales and financial staff and for designers, but not for journalists. "They still don't consider journalists to be the most precious asset of media companies and don't see the need to invest in building their qualifications," noted Yukichev. In the past, NGOs provided the bulk of training to journalists, but as the availability of grants shrank, the number of seminars decreased.

In general, the sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, not restricted, and operate as efficient businesses. Still, the authorities can use administrative mechanisms, e.g., fire and sanitary inspections, to put pressure on any business. For example, in 2011 the private publishing house Krestianin

(Peasant), based in Rostov-on-Don, contracted with a local chapter of the Communist party to print their leaflets in its printing facility. City authorities unofficially asked the management of Krestianin not to print these leaflets. The management refused, and the next day fire inspectors came to the printing facility and closed it for three months. Krestianin is a member of the Alliance of Independent Regional Publishers (AIRP), so this case caused an outcry in the media community. Krestianin appealed the decision of the fire inspection in court, and after three weeks the court revoked the closure of the printing facilities.

There are also instances when state-owned printing facilities refuse to publish newspapers that carry critical materials about authorities. For example, the Kostroma Regional Print House, which belongs to the Kostroma region authorities, refused to publish the second and all subsequent issues of *Moi Gorod–Kostroma (My City–Kostroma)*, which was launched in Kostroma in June 2011, so the newspaper must use the printing facilities in the neighboring region.

Problems persist surrounding distribution of print media as well. In big cities, where there are several distribution networks, the situation is better, but in small cities, where the Russian Post is the only distributor, the situation is very bad, commented Yukichev. In 2011 the authorities closed many press kiosks, explaining it as a cosmetic step to improve the appearance of the cities. For example, in June 2011 the Department of Architecture of the city of Yuzhno-Sakhalinsk ordered local press distributors to remove their kiosks from downtown and to buy new kiosks for placement elsewhere. There were also instances when issues of newspapers and magazines were removed from newsstands or bought out en masse. For example, Publishing House Kommersant reported that the July 4 issue of *Vlast (Power)* magazine, containing a critical article about the former governor of St. Petersburg, Valentina Matvienko, was removed from St. Petersburg newsstands after press distributors received a call from the city authorities.

The Internet is not controlled, but as noted earlier, in 2011 there were a number of DDoS-attacks on independent news sites. For example, on December 4, the day of parliamentary elections, DDoS-attacks paralyzed the sites of the Echo of Moscow radio station, *Kommersant* newspaper, *Bolshoi Gorod (Big City)* and *The New Times* magazines, Slon.ru news portal, and LiveJournal blogging platform.

Information and communication technology infrastructure in Russia sufficiently meets the needs of media and citizens. There is still a considerable gap in terms of Internet use between large and smaller cities, but it is filling quickly due to the growing use of mobile Internet. According to the survey that Public Opinion Foundation conducted in summer

2011, over the previous six months the number of people using mobile modems to go online increased 44 percent to 16 million people (13 percent of the adult population). Mobile modems are the principal mode of Internet access in small cities (with a population of less than 50,000) and in rural areas.

List of Panel Participants

Galina Arapova, director and lead attorney, Center for Protection of the Rights of Media, Voronezh

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

Maria Eismont, director of Russian Independent Media Program, The New Eurasia Foundation, Moscow

Irada Guseinova, CIS countries analyst, Center for Journalism in Extreme Situations, Moscow

Ali Kamalov, secretary, Union of Journalists of Russia; secretary, Union of Journalists of Dagestan; editor-in chief, *Haqiqat (Truth)*, Makhachkala, Republic of Dagestan

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

Olga Kravtsova, director, Center for Journalism in Extreme Situations; coordinator, Frontline Project in Russia, Moscow

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

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

Elena Vartanova, dean, Journalism Department, Moscow State University, Moscow

Victor Yukichev, director, Institute for Press Development – Siberia, Novosibirsk

Moderator and Author

Natalia Kosheleva, director, Inter-regional Institute of Media Consulting, Moscow

The MSI panel convened on December 8, 2011.