

RUSSIA



MEDIA SUSTAINABILITY INDEX 2019

Tracking Development
of Sustainable
Independent Media
Around the World



RUSSIA

AT A GLANCE

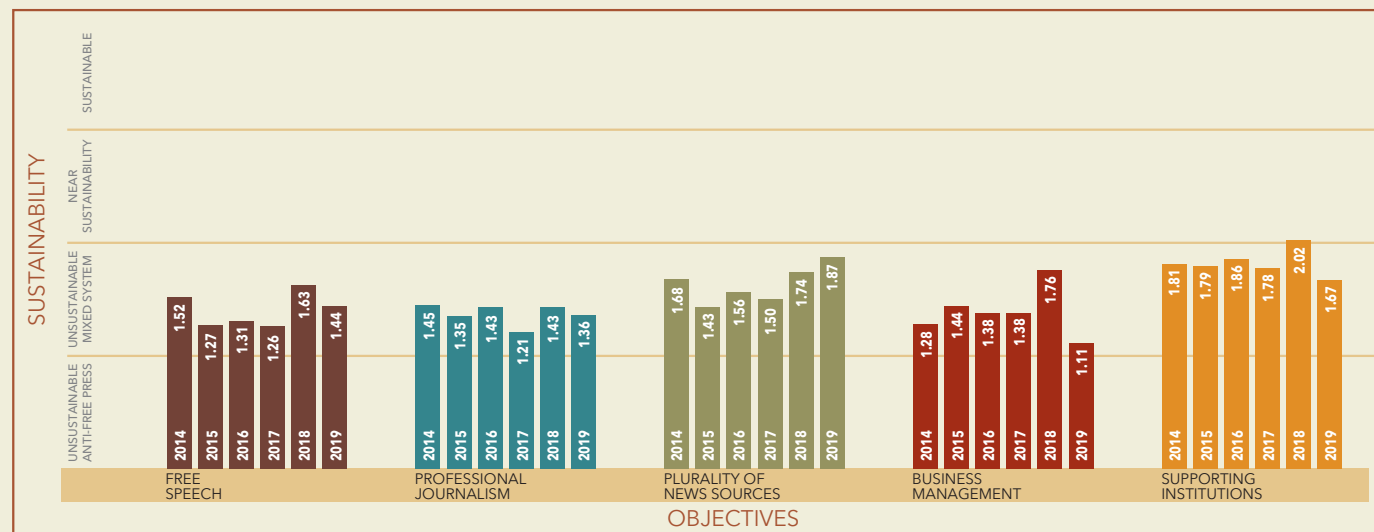
GENERAL

- ▶ **Population:** 142,122,776 (July 2018 est., *CIA World Factbook*)
- ▶ **Capital city:** Moscow
- ▶ **Ethnic groups (% of population):** Russian 77.7%, Tatar 3.7%, Ukrainian 1.4%, Bashkir 1.1%, Chuvash 1%, Chechen 1%, other 10.2%, unspecified 3.9% (2010 est., *CIA World Factbook*)
- ▶ **Religions (% of population):** Russian Orthodox 15–20%, Muslim 10–15%, other Christian 2% (2006 est., *CIA World Factbook*)
- ▶ **Languages (% of population):** Russian (official) 85.7%, Tatar 3.2%, Chechen 1%, other 10.1% (2010 est., *CIA World Factbook*)
- ▶ **GNI (2016-Atlas):** \$1.356 trillion (World Bank Development Indicators, 2017)
- ▶ **GNI per capita (2016-PPP):** \$9,230 (World Bank Development Indicators, 2017)
- ▶ **Literacy rate:** 99.7% (male 99.7%, female 99.6%) (2015 est., *CIA World Factbook*)
- ▶ **President or top authority:** President Vladimir Putin (since May 7, 2012)

MEDIA-SPECIFIC

- ▶ **Number of active print outlets, radio stations, television stations, Internet news portals:** Print: 20,315 newspapers, 28,508 magazines; Radio Stations: 3,405; TV Stations: 2,945; Online: 12,746 news sites (Federal Agency for Press and Mass Communication, 2018)
- ▶ **News agency:** ITAR-TASS (state), Russia Today (state), Interfax (private)
- ▶ **Annual advertising revenue in media sector:** RUB 469 billion (\$7.3 billion) in 2018 (Association of Russian Communication Agencies, 2019)
- ▶ **Broadcast ratings:** Top three channels by daily audience: Russia-1 (12.8%); Channel One (11.8%); NTV (9.3%) (Mediascope, 2018)
- ▶ **Newspaper circulation statistics:** Top three daily general new national newspapers by readership (May–October 2018): *Rossiyskaya Gazeta* (737,800/1.2% of population, state-owned); *Moskovskiy Komsomolets* (690,700/1.1% of population, private); *Izvestia* (436,500/0.7% of population, private) (Mediascope, 2019)

MEDIA SUSTAINABILITY INDEX: RUSSIA



SCORE KEY

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.

Scores for all years may be found online at <https://www.irex.org/msi>



Russia's overall score dropped this year—from 1.72 in the 2018 MSI edition to 1.49. This decrease is driven by factors including the country's weakening economy, sustained governmental pressure on and erosion of the media sector, violence against journalists, and the normalization of propaganda. Almost all of Russia's objective-level scores declined from the previous study, placing it solidly in MSI's "unsustainable mixed system" classification. Objective 3 (plurality of news) received the highest score (1.87), reflecting varied news and viewpoints available in the online environment; however, state television remains the main source of news for the majority of the population.

In March 2018, Vladimir Putin predictably won the presidential election, carrying 77 percent of the vote. However, after the government introduced an unpopular pension reform that increased the retirement age from 55 to 60 years of age for women and from 60 to 65 for men, Putin's ratings – as measured on a weekly basis by the All-Russian Public Opinion Research Center – plunged. His ratings did not recover until the president added amendments to the measure – including a 10-year transition period when the retirement age would be increased incrementally. Even with the changes, the reforms led to widespread discontent, open public protests, and pro-Kremlin candidates losing governorship elections in Vladimir, Khabarovsk, Khakassia, and Primorie regions.

The 2018 economic situation was bleak. Under international economic sanctions, the Russian economy grew only 1.8 percent, and citizens' income decreased. The ruble value declined nearly 20 percent against the U.S. dollar. Russian citizens are concerned with growing prices, declining income, a lack of jobs, and a deterioration of social protection services, according to the independent Russian research group Levada-Center. Its December 2018 survey showed that 53 percent of Russian citizens think that the current government officials should resign. Results of a similar survey in 2016 indicated that 33 percent held that view.

State authorities control the majority of Russian media, using it to promote government policy. The government has continued to pressure the few remaining independent media outlets. In 2018, several media companies received record-breaking fines from the Federal Service for Supervision of Communications, Information Technology, and Mass Media (Roskomnadzor). For example, the online magazine

The New Times was fined RUB 22.25 million (\$349,000, equivalent to the magazine's annual budget, and the highest fine ever imposed on a media outlet in Russia) for not reporting funds received from a Russian NGO.

The community of Russian media professionals is fragmented and disenchanted given the state of affairs. Galina Arapova, director of the Center for Protection of the Rights of Media, commented on 2018 media trends, noting, "The year brought new restrictions on the dissemination of information. Roskomnadzor's efforts to block the Telegram messenger app was probably the hallmark of the year. There were new waves of site blockages, further restrictions on free speech online, draft laws prosecuting fake news, and [draft laws on] disrespect to authorities. But these developments came as no surprise to the media community. Several years ago the media community would have been outraged, but now all these developments are seen as inevitable."¹

Russia does not meet the majority of the MSI indicators for sustainability. Authorities place no restrictions on entry to the media market or to the journalism profession, but the unfavorable political and economic situation has eroded the quality of Russian journalism and proliferated state propaganda. The internet offers citizens a variety of news sources that present a full spectrum of viewpoints and public interests, but state TV channels remain the most common and most trusted sources of news.

1 Shabel'nikov, D., & P. Baigarova. "Галина Арапова, «Возникает неприятное ощущение, что ты постоянно бьешься головой об стену»." *Legal Dialogue*, November 28, 2018. <https://legal-dialogue.org/ru/galina-arapova-you-get-the-uncomfortable-feeling-of-trying-to-break-a-wall-with-your-head?fbclid=IwAR0dXixz49nMir77sklfi9N6J7Fk3S-mawZiWYJToUjqxuTa2-DJMEChdFpJ0>.

**OBJECTIVE 1:
FREEDOM OF
SPEECH**

1.44

Russia has legal norms that protect and promote free speech and access to public information, but they are often ignored. Russian society does not value free speech or media independence, and authorities see media as propaganda instruments.

The constitution guarantees free speech; the universal right to obtain, produce, and disseminate information; and media freedom. Censorship is prohibited. The Russian Mass Media Law of 1991 protects journalists from censorship and undue denial of access to information. However, the government has recently adopted laws—on personal data protection, prohibiting insulting religious beliefs, protecting children from objectionable information, and media operating as foreign agents — that limit free speech and put pressure on independent media and bloggers. Another new law on anti-extremism includes, but is not limited to, prosecution for: derogation of national dignity, Nazi propaganda, and promotion of racial, national, religious, or social discord.

In 2018, the Chamber of Commerce and Industry of the Russian Federation initiated the adoption of a new media law. The law is supported by the Russian Union of Journalists (RUJ), which is loyal to the government, as well as the State Duma, the lower house of the Federal Assembly. Practicing media lawyers cautioned that the proposed Law on Media Communication might further reduce free speech. “This [law] is a warning sign, because no known media law experts are involved in developing [it], Arapova said. “We can end up with a law that will regulate the media as a business

instead of protecting journalists as a special professional group serving public interests. As a result, we can lose the remaining freedom ensured by the current media law.”²

This year saw several cases of Roskomnadzor imposing excessive fines on independent media. Media law amendments adopted in 2015 require the media to report all direct funding from international sources, including from supposed foreign agents. The online magazine *The New Times* was fined RUB 22.25 million (\$349,000) for not reporting funds received from the Fund in Support of Freedom of the Press, a Russian NGO that authorities deemed to be a foreign agent. In another case, the online magazine *7x7* was fined RUB 800,000 (\$12,500) after publishing an interview with a politician that discussed the potential advantages of drug legalization. Roskomnadzor later decided the article was drug-use propaganda. Both *The New Times* and *7x7* are well known for their editorial independence and for publishing critical investigative materials about high-ranking public executives.

Overall, Russian society does not place a high value on freedoms of speech or of the media. According to the 2018 Levada-Center survey, Russian people mostly are concerned with increased prices (63 percent) and lower income and poverty (47 percent). Only five percent see restrictions of civic rights and freedoms as a problem.³ As one panelist commented, “Our society has never had an experience demonstrating the value of free speech. But . . . people are not happy when free speech is suppressed on social media, when a repost can lead to criminal prosecution,

when they have a problem using the *Telegram* messenger [app]. And young people who grew up in the period of economic stability—who did not experience the economic hardships of the 1990s—care about free speech and freedom of expression.”

Roskomnadzor manages both the licensing of broadcast media and registration of print media. Registration — a simple and non-restrictive process — is required for print publications with a print run of more than 999 copies. Roskomnadzor has to complete registration for print media within 30 days of application and only issues registration certificates electronically. According to the Glasnost Defense Foundation, 2018 had no reported cases in which Roskomnadzor denied registration to print media.

The transition to digital broadcasting, expected to be completed in 2019, puts local and regional TV stations at a disadvantage. Roskomnadzor has granted digital broadcast licenses to 20 national and 72 regional TV channels (49 state-owned and 23 private). Access to digital broadcasting for local TV channels is still under discussion, so their future is unclear.

“We have the law, but it is not implemented. Authorities view the state media as branch offices of state press departments,” a panelist commented.

Online media have the option of not registering with Roskomnadzor, though this excludes them from protections offered to registered media under Russia’s media law, for example access to information. Additionally, staff members of unregistered online media are not recognized as journalists and often are denied access to press conferences.

² Ibid.

³ Levada-Center. “Наиболее тревожащие проблемы.” Press release, April 24, 2018. <https://www.levada.ru/2018/04/24/naibolee-trevozhashhie-problemy-3/>.

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.

Once a media company is registered or licensed, its market entry and tax structure are similar to other industries. However, foreigners are not allowed to launch Russian media outlets or to own more than 20 percent of a Russian media outlet's shares. These laws considerably limit Russian media's ability to attract investment from international groups. Russian media outlets also have to report to Roskomnadzor foreign funds they receive, other than advertising and circulation sales.

Crimes against journalists inside the country, while relatively rare, do not cause a public outcry and are not persecuted vigorously. The score for

the corresponding indicator (crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare) is one of the lowest for Objective 1, with the majority of panelists saying that Russia only minimally meets this indicator.

The Committee to Protect Journalists' 2018 Global Impunity Index ranks Russia eleventh in terms of the per-capita number of unsolved cases of journalist murders. According to the Glasnost Defense Foundation, one journalist was murdered in 2018: Denis Suvorov, a TV reporter from Nizhny Novgorod. The police detained a suspect for Suvorov's murder but claimed that the murder was not related to Suvorov's professional work.

More than 50 cases of violent attacks against journalists were reported in 2018. In one example, Dmitry Polyanin, editor-in-chief of *Oblastnaya Gazeta*, was attacked in front of his Ekaterinburg residence. Polyanin thought the attack was linked to his reports about corruption in the utilities sector, but law enforcement authorities were reluctant to investigate. They believed that Polyanin staged the attack.

Russian media law protects editorial independence equally for state and private media. However, state media outlets only represent the government's point of view and mostly ignore the opposition. "We have the law, but it is not implemented. Authorities view the state media as branch offices of state press departments," a panelist commented.

Libel is a criminal law issue. An offender faces fines ranging from RUB 500,000 (\$7,800) to RUB 5 million (\$78,000) — more than a Russian's average yearly salary — or 160 to 480 hours of public work. Libel cases are rare because the plaintiff has to prove intent. The Glasnost Defense Foundation recorded only two libel cases against journalists

in 2018. In the first case, Ilya Traber, a businessperson from Saint Petersburg, filed a complaint against the independent TV channel Dozhd for airing a documentary in which Traber was called "the only criminal leader whom Vladimir Putin has acknowledged."⁴ The second case involved Pavel Bolshakov, a reporter with the Chelabinsk newspaper *Vozrozhdenie Urala*, who was found guilty in a libel case launched by a member of the State Duma, Valeriy Gartung. Bolshakov's article disclosed that Gartung had connections with Chechen rebels in 1994-1996 and was based on information that the journalist heard at a secret meeting in 1997. Bolshakov was not able to present any documents in support of the published information.⁵

Russian citizens have the constitutional right to seek and receive information, unless it is legally recognized as state secret. The law gives journalists preferential treatment regarding access to information: public officials must respond to a journalist's information request within seven days but are allowed 30 days to respond to citizens' requests. In reality, the state regularly limits information by denying journalists access to government meetings and press conferences.

Authorities have detained journalists covering public protests. According to the Glasnost Defense Foundation, 2018 had more than 340 cases in which journalists were denied access to information, and more than 120 cases in which officers detained reporters covering public demonstrations. For example, police detained Vladimir Guba, the editor

4 Коммерсантъ. "По иску бизнесмена Трабера возбуждено уголовное дело о клевете в фильме «Дождя»." January 16, 2018. <https://www.kommersant.ru/doc/3521724>.

5 Челябинск. Журналист признан виновным в клевете и оштрафован. <http://gdf.ru/digest/item/3/1577>

of *Tomskaya Nedelya*, who was reporting on an unauthorized public meeting against pension reform. Later the court fined Guba RUB 12,000 (\$188) for participating in the meeting. The panelists also reported cases in which regional legislatures (e.g., Ekaterinburg and Saint Petersburg) denied journalists access to meetings where pension reform was being discussed.

The government places no legal restrictions on access to news sources. For example, Russian media openly acknowledge use of information from *Telegram* channels throughout 2018, even though *Telegram* was officially blocked in April 2018. The law does place some limitations on using news sources. It prohibits the use of information released by organizations that are considered “undesirable” – which included 15 organizations by the end of 2018. Information published from NGOs and media considered foreign agents has to be labeled accordingly. Media outlets that do not comply with these rules can be blocked or fined.

Entry into the journalism profession has long been free, and this indicator received the highest score under Objective 1. Hiring entry-level journalists is often driven by an owner’s economic interest: to save money, owners hire people with little or no formal journalism education. At the same time, the government is starting to impose limitations on who can occupy certain media positions. Since 2018, people who have served jail sentences or who have received court sentences for extremism and other criminal acts involving the use of media and the Internet are prohibited from being editors-in-chief in any media outlet.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

1.36

According to a Mediastandart Foundation study, 60 percent of Russian citizens and 81 percent of journalists think that Russian journalists are not free to report unbiased news but rather work in the interests of their bosses.⁶ According to Pavel Gusev, editor-in-chief of *Moskovsky Komsomolets* media, “A big part of Russian media gets some sort of financial support from the state, either directly or through affiliated businesses. This means that the content of such media is mostly or fully controlled by government officials. And such media talk to people, consumers of their information content, using the language of government executives”⁷

Prominent Russian journalist Vladimir Pozner commented on the problems with professionalism, “There is no journalism in Russia. There are just a few [real] journalists. But there is no journalism profession. There is propaganda that works both ways—either in favor of authorities or against them. But in both cases, [the news] is not objective and does not try to be objective. A person tries either to prove his personal point of view or the point of view

6 Zadorin, I.V. et al. *Образ журналиста в массовом сознании россиян*. Moscow: Фонд медиастандарт, Циркон, и Комитет гражданских инициатив, 2018. http://www.msindex.ru/wp-content/uploads/2018/10/Obraz-zhurnalista-v-massovom-sozdanii-rossiyan_doklad.pdf.

7 Goliakov, A. “Павел Гусев: «Тенденция огосударствления СМИ стала угрожающей».” *Инвест-Форсайт*, December 3, 2018. <https://gipp.ru/overview/obzory-sobytyiy-v-media-srede/pavel-gusev-tendentsiya-ogosudarstvleniya-smi-stala-ugrozhayushchey/>

of his media owners.”⁸

Other panelists shared that opinion. One commented, “Media that reach many people don’t provide fair and objective reporting. Federal state media carry propaganda and don’t represent views of all parties to a story. Journalists don’t make distinction between facts, opinions, and interpretations. Often a reporter presents his own interpretation of a fact and selects comments that support his point of view.”

Some panelists are concerned that propaganda is now perceived as the norm and that journalists who engage in propaganda receive media awards. According to a Mediastandart Foundation study, the best-known Russian journalist is Vladimir Soloviev, who anchors a propagandized political show on TV channel Russia-1. “It is scary that many journalists see people who produce propaganda as a professional role models,” said one of the panelists.

The prevalence of propaganda makes ethical standards obsolete. “The atmosphere in media has changed. It has gotten more aggressive, more brutal. In the past, kicking [out] an invited expert from a political TV show was rare — now it is the norm. You cannot find a program on any of the TV channels where guests have not been ousted during the show,” wrote journalist Nikolay Svanidze.⁹

“It is scary that many journalists see people who produce propaganda as a professional role models,” said one of the panelists.

8 Sul’kin, O. “Владимир Познер о цензуре, Сенцове, пенсиях и футболе.” *Голос Америки*, August 3, 2018. <https://www.golos-ameriki.ru/a/vladimir-pozner-journalism-censorship-/4512843.html>.

9 Svanidze, N. “2018: Итоги нашей работы: Мнения и оценки.” Центр защиты Прав СМИ, n.d. [phttp://mmdc.ru/2018/](http://mmdc.ru/2018/).

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Still, some professional associations honor ethical codes. In 1994, the Congress of Russian Journalists adopted the Code of Russian Journalist Professional Ethics, which is in line with international norms. As one panelist observed, “Following ethical standards is a personal choice for each journalist. Media that have their own codes and enforce them make up about five percent of the sector.”

The Alliance of Independent Regional Publishers (ANRI), an organization of media outlets that adhere to principles of fair journalism and editorial independence, has adopted its own code of ethics. Media members that violate the code can be expelled from ANRI. A few private media that follow their own professional codes make clear distinctions between news reporting and advertorials.

Self-censorship has become an inextricable part of the journalism practice. In response to a reader’s question about the quality of Russian journalism, Pozner wrote, “I understand that under existing political conditions it is difficult to be a journalist. Nothing is prohibited openly, but there are many topics that are prohibited unofficially. Self-censorship is very strong. There is no censorship, but every journalist knows that it is better to not report on certain things because it is dangerous.”¹⁰

Other panelists confirmed the understood restrictions. “Many journalists report only on neutral topics. Criticism of regional authorities is the most they dare to do,” one panel member said, while another commented, “Self-censorship results from fear. Regional authorities react harshly to published criticism. The [private and public] media are afraid

of negative financial consequences, and state media journalists are afraid to lose their jobs.”

Often important events and issues are covered only by small independent media. For example, major media did not report on public protests in the Republic of Ingushetia in the North Caucasus. The demonstrations were against the agreement between Ingushetia and Chechnya on a new border, involving a transfer of land from one jurisdiction to another.

Panelists expressed the belief that journalists consistently avoid topics related to regional elites and economic development. The media offer no proper coverage of social issues such as health care, industrial development, business climate, education, or the quality of state administration.

According to Russia.trud.com, a website that monitors pay levels, the average salary offered to a journalist in 2018 was about RUB 25,000 (\$392) — considerably less than the average salary in Russia (about RUB 40,000–44,000 [\$627 - \$689]). Pay levels differ hugely between print journalists and other media professionals, according to one panelist. “Journalists working in small municipal newspapers in the provinces get RUB 10,000–15,000 (\$157 - \$235) per month. Federal TV channels pay journalists RUB 50,000–60,000 (\$783 - \$940) per month. Those who engage in propaganda are paid the most. Journalists working in major cities make more than their colleagues in the provinces. Provincial journalists often have to work two to three jobs, which negatively affects the quality of their work. Salaries on TV and radio are better than in print media,” the panelist said.

The editor of a local newspaper from a small city in central Russia shared that “the average salary in our newspaper is RUB 17,000 (\$266). This is on the level of a regular pension. We often get requests from the tax inspector to explain why our pay levels

are below the average salary for the region (RUB 26,000 [\$407]).”

Panelists agreed that existing pay levels do not support the quality of journalism and are not sufficient to retain qualified personnel, especially in regional media.

A recent study on gender issues in Russian media, commissioned by Sweden’s Fojo Media Institute and Russia’s ANRI-Media, found that women make up the majority of staff in the Russian media sector and that women are paid less than their male colleagues in equivalent positions. Declining revenues force media to cut staff as well as salaries and to increase the number of freelance journalists, who do not receive guaranteed income or social benefits. Young female journalists are particularly likely to work freelance and accept low salaries.

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).

10 Познер Online. “Владимир Познер: «Нельзя требовать от журналиста, чтобы он чем-то жертвовал всерьез...».” October 23, 2018. <https://pozneronline.ru/2018/10/23037/>.

Entertainment programming and channels prevail because they are profitable and risk-free. State channels air propaganda-laden information programs, especially political shows, and widely use infotainment technologies. Even print media and news agencies publish a substantial amount of news that is not related to public interest issues.

Facilities and equipment for gathering, producing, and distributing news are adequately modern and efficient. The panelists said that overall, Russia considerably meets the corresponding indicator and gave it the highest score under Objective 2. “To produce news for print and online media, you don’t need much equipment. In general, media have no problems with equipment,” noted one of the panelists. At the same time, a decline in advertising and circulation revenue has forced some print media to choose cheaper Internet subscriptions, use slow Internet connections, and work on outdated computers and other equipment.

Quality niche reporting and programming, especially investigative journalism, are rare. “Regional media don’t have the financial means to allow a journalist to spend two months to work on a quality investigative piece,” said 7x7 editor Pavel Andreev at the 2018 Summit of Independent Regional Publishers.¹¹ In addition, investigative journalism carries high political risks to media: authorities see the few that still produce investigative reports as the opposition.

Still, some media outlets continue to produce investigative journalism. For example, in 2018, a website run by a group of investigative journalists published material on authorities taking over

information channels in the Telegram messenger app, which became a popular source of information in 2017.

**OBJECTIVE 3:
PLURALITY
OF NEWS**

1.87

Online news sources allow citizens to access a plurality of news and viewpoints. However, the use of multiple sources is limited by the current media consumption model, with state TV as the main news source for the majority of the population. Russia meets four of Objective 3’s indicators including plurality of news sources; unrestricted access to media; production of news by private media; and media coverage of local, national, and international issues.

Russia has many news sources, but the majority of media are owned by national, regional, and local authorities and affiliated businesses. Television continues to be Russians’ primary source of information. According to Levada-Center surveys, 85 percent of Russian citizens report getting news from TV. Approximately 72 percent of consumers get news from Channel One and 51 percent from Russia-1. Citizens use Internet media sources for about 27 percent of news; social media, 21 percent; radio, 15 percent; and newspapers, 13 percent.

Television news also remains the most trusted source of information. In the Levada-Center survey, 51 percent of people selected TV news as one of three news sources they trust most. Internet media was selected by 19 percent of respondents; social media, by 15 percent; and newspapers, by 9 percent. The most popular TV news programs are the propaganda machine *Evening with Vladimir*

Soloviev on Russia-1, *Weekly News* on Channel One, and *Week in Review* on NTV.¹²

Similar results came up in the study commissioned by the Mediastandart Foundation. When respondents were asked to identify three news sources they trust most, 63 percent selected news programs on Russian state TV channels; 18 percent, online media; 16 percent, newspaper; and 15 percent, social media.¹³ One panelist commented on a downside to the ubiquity of the internet: “A multitude of viewpoints is available due to online media that are difficult to control.”

Since 2014, Roskomnadzor has had a legal right to block websites that call for unauthorized public meetings and publish other extremist information without a court order. The first sites that Roskomnadzor blocked include independent Grani.ru, Kasparov.ru, and *Ezhednevny Journal*. In 2018, Russia adopted a law that allows the government to block websites that disseminate defamatory information, if a court has declared information about a person or organization as defamatory and the website has not removed it.

According to research by the agency Content Review, Russia is among the top 10 countries with the cheapest mobile internet access.¹⁴ In 2018, 61 percent of citizens accessed the internet from a

11 ANRI. “XII саммит независимых региональных издателей в Краснодаре.” ANRI.org, April 28, 2018. <https://anri.org.ru/2018/04/28/xii-sammit-nezavisimyh-regionalnyh-izdatelej-v-krasnodare/>.

12 Levada-Center. “Информационные источники.” Press release, April 18, 2018. <https://www.levada.ru/2018/04/18/informatsionnye-istochniki/>.

13 Zadorin, I.V. et al. *Образ журналиста в массовом сознании россиян*. Moscow: Фонд медиастандарт, Циркон, и Комитет гражданских инициатив, 2018. http://www.msindex.ru/wp-content/uploads/2018/10/Obraz-zhurnalista-v-massovom-sozdanii-rossiyan_doklad.pdf.

14 Telecom Times. “Россия в топ-10 стран с дешёвым мобильным интернетом.” News feed, January 3, 2019. <https://telecomtimes.ru/2019/01/russia-desheviy-internet/>.

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mobile device and, for the first time, exceeded internet access from desktop computers (51 percent). Many media outlets now have mobile versions of their websites. To some extent, the proliferation of mobile internet compensates for the disparities in access between urban and rural areas. But people in major cities still have access to more media, especially print, than people in smaller cities and rural areas.

Private media have always been producing their own news. News in private media is often more objective and informative compared to state media. But private media also avoid reporting on certain topics, especially if they are affiliated with some business interests,” commented a panelist.

Russians are also limited by lack of knowledge of foreign languages. According to the Levada-Center, 86 percent of Russians do not know a second language,¹⁵ and only 1 percent of Russians read online news from international media in foreign languages.¹⁶

State media serve state interests and do not reflect the entire spectrum of views. Public Television of Russia (OTR), which receives most of its funding from the national government, avoids political issues and focuses on social and educational themes. “OTR produces good programs, but they serve mostly decorative

purposes — as proof that Russia has public television,” one panelist noted. A Levada-Center survey indicated that OTR news programs are watched by four percent of all citizens.

The majority of news agencies are either affiliated with, or owned by, national and regional authorities. National news agencies — such as state-owned ITAR-TASS and RIA Novosti and the privately-owned Interfax — disseminate news, photos, and video to subscribers. These agencies and the majority of regional news agencies operate as online media. Small media outlets produce their own reports and do not subscribe to news agencies.

In small cities, the content provided by local private newspapers and websites is often the only source of local news. “Private media have always been producing their own news. News in private media is often more objective and informative compared to state media. But private media also avoid reporting on certain topics, especially if they are affiliated with some business interests,” commented a panelist.

Media ownership is not fully transparent, and the government remains the majority owner of news media production. The national government has full ownership of All-Russia TV and Radio Company (VGTRK). VGTRK operates three national channels (general interest Russia-1, all-news Russia-24, and culture and education channel Russia-K) and four non-music radio stations (Radio Rossii, Mayak, Radio Rossii Kultura, and Vesti FM). VGTRK also has a 38.9 percent share of TV Channel One.

National Media Group has a 25 percent share of TV Channel One and controls national TV channels 5 and REN, as well as *Izvestia* and *Metro* newspapers. Although the group is a private media holding, and Russia’s largest, it is believed to be

affiliated with national authorities.

Foreign investment in Russian media is limited to 20 percent of a company’s shares. Panelists denounced the 2014 introduction of this restriction as detrimental to Russian independent media, as it limits their access to support from international groups.

Most Russian media fall short in representing a spectrum of social interests. Only social media cover such topics. “The media don’t pay much attention to issues that really matter for an ordinary citizen,” one panelist observed. “Even independent media don’t really report any such issue. The media still follow the Soviet tradition where journalists did not feel that they were serving interests of their audiences.”

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.
- ▶ 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.
- ▶ Citizens’ access to domestic or international media is not restricted.
- ▶ A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.
- ▶ State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- ▶ Broadcast ratings, circulation figures, and Internet statistics are reliable.
- ▶ Independent news agencies gather and distribute news for print and broadcast media.

15 Levada-Center. “Запад: восприятие и стремление эмигрировать.” Press release, October 13, 2015. <https://www.levada.ru/2015/10/13/zapad-vospriyatie-i-stremlenie-emigrirovat/>.

16 Levada-Center. “Информационные источники.” Press release, April 18, 2018. <https://www.levada.ru/2018/04/18/informatsionnye-istochniki/>.

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According to the Guild of Interethnic Journalism website, Russia has more than 2,000 registered minority-language media, including about 1,500 print media. Their principal focus is preservation of minority culture and language. Since 2017, the guild has organized annual media forums to discuss the state of these outlets. Media representatives at the forums have raised concerns such as the need to secure state financial support and to provide journalism training for people who write proficiently in minority languages.

Traditionally, national media focus on national and international news, while regional outlets report on regional news and local outlets on local news. National media only report regional and local news if something exceptional happens — usually major natural disasters or man-made emergencies. Russia has very few independent regional and local media, so the majority of Russian citizens have no access to independent information on situations in their hometowns and regions.

OBJECTIVE 4: BUSINESS MANAGEMENT

1.11

Slow economic growth, declining citizen income, and a shrinking advertising market for print media continue to undermine the viability of media as an industry. One panelist described the market conditions by observing, “For about two years already, media stopped being business. The market is heavily distorted. Advertising money is scarce and monopolized. Political and legal risks of running a media business are enormous. Access to foreign investment is restricted.” Another panelist also lamented the financial stresses by stating, “We live in a

country that is progressively getting poorer. Media outlets that have access to state money have more chances to survive. The media sector is dependent on state support, [and] the media market is failing.” A third panel member said that state media outlets do not operate as efficient and self-sustaining enterprises, concluding that “if the government stops funding them, they will have to close.”

Channel One, the second-most popular national TV channel, is not able to operate without state funding, despite the growth of the TV advertising market. The channel fell into debt when state subsidies were cut substantially for 2018. Reportedly, it needed an estimated RUB 6.5 billion (\$102 million) to balance its budget but received only RUB 3.5 billion (\$55 million) in 2018. In 2017, the channel had received RUB 8 billion (\$125 million) in subsidies. At the end of 2018, Ostankino Television Technical Center, which provides the production premises and transmits the signal of Channel One, sued the channel to recover its debts. The channel and its contractors reportedly owe Ostankino about RUB 1 billion (\$15.7 million).¹⁷

Declining revenues have forced independent media to reduce budgets and the number of people on staff. “We cut our expenses from RUB 14 million (\$219,000) to RUB 8 million (\$125,000). To do so, we had to cut the number of staff to five people. Now we only have on staff elderly people who are already getting retirement benefits and young inexperienced journalists,” shared a panelist, an editor-in-chief of a small, independent local newspaper.

¹⁷ Afanas'eva, A. “«Первому» подали телесигнал.” *Коммерсант*, December 25, 2018. <https://www.kommersant.ru/doc/3842250>.

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.

Print media experience negative effects from the redistribution of advertising revenues in favor of internet and TV and from declining newsstand and subscription sales. In 2018, the Federal Agency for Press and Mass Communications (Rospechat) issued a report on the state of Russian press. Its figures showed that in 2017, Russian print media lost four to five percent of newsstand sales revenue, five percent of circulation sales revenue, and eight percent of advertising revenue.

One panelist, an editor for a Ural-region local newspaper, described print media's numerous financial woes: “The past year severely hit [print publications in] small markets in cities with less than 60,000 residents. All readers went online, even pensioners. Our newspaper's circulation dropped. National retail networks squeezed out local businesses that we depend on as our main

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advertisers and sales points for the newspaper. We are on the edge of survival. In small cities, media is not a business anymore but rather a social information service for residents. Still, we plan to continue with the hard copy of the newspaper because there is no advertising money for an online version yet. And we don't have staff members who understand the rules of online media operation. We receive advice to start side businesses like private day care, online marketplaces, and print shops. This is ridiculous! What's the point in funding a newspaper with revenue from a laundry shop?"

To compensate for declining advertising revenue, media companies look for other sources of income. Some, including the online versions of newspaper *RBC* and *Delovoy Petersburg*, use a paywall. The national newspaper *Vedomosti* and the regional magazine *Expert-Yug* organize thematic conferences. Some try to use crowdfunding. For example, *Novoya Gazeta* launched a crowdfunding campaign in September 2018, *Mediazona* raised RUB 1 million (\$15,665) from its audience, and *The New Times* managed to raise RUB 25 million (\$391,625) to pay a fine through crowdfunding in four days.¹⁸

According to the Association of Russian Communication Agencies, in the first nine months of 2018 the Russian advertising market grew by 13 percent and total expenditure on advertising reached about RUB 323 billion (\$5.6 billion) without VAT. For the first time in Russian history, online advertising (141 billion rubles [\$2.2 billion]) exceeded TV advertising (130 billion rubles [\$2 billion]). While advertising revenue for online and

TV has been growing (22 percent and 12 percent respectively), newspapers have lost 12 percent of their advertising revenue. The regional advertising market made up only about one-tenth of the total market (about 34 billion rubles [\$533 million]) in the first nine months of 2018.

The advertising sales market is highly monopolized. The National Advertising Alliance (an advertising agency established by Channel One), VGTRK, National Media Group, and Gazprom-Media sold 95 percent of Russian TV advertising in 2016. Major advertising agencies ignore small regional media, so these outlets have to sell advertising themselves. "Advertising agencies stopped working with us," shared a panelist, an editor in a local independent newspaper. "They are replaced by public relations agencies that offer us money — for example, to publish negative information about Grudinin [the Communist party presidential candidate in March 2018 elections]."

Major advertisers in Russia are international fast-moving consumer goods companies. According to the AdIndex agency, the top five Russian advertisers were international: PepsiCo, Nestlé, Procter & Gamble, the national mobile provider MTS, and the national pharmaceutical company OTCPharm.¹⁹

The amount of advertising in Russian media is limited by law: advertising cannot exceed 15 percent of air time on TV, 20 percent of air time on radio, and 45 percent of space in non-advertising print media. As a result, news and information content does not get lost at the expense of advertising. In 2018, the law was amended to allow beer advertisements on TV, starting during the 2018 FIFA World Cup and continuing through

the end of 2018. State media are allowed to sell advertising and often offer advertisements at a low price that private media outlets cannot.

In 2018, the federal budget allocated RUB 82.9 billion (\$1.3 billion) for the support of Russian media. This included RUB 19.9 billion (\$312 million) for VGTRK, RUB 1.5 billion (\$23.5 million) for OTR, RUB 6.8 billion (\$106.5 million) for the Russia Today news agency, and RUB 2.2 billion (\$34.5 million) for the ITAR-TASS news agency. The 2019 budget allocates RUB 75.6 billion (1.2 billion) to media subsidies.²⁰ About RUB 550 million (\$8.6 million) was distributed as grants to newspapers.

Regional and local authorities subsidize regional and local media and contract media to provide the so-called "information services" that translate into favorable coverage. For example, the VGTRK branch in Bashkiria entered into a contract for RUB 34.65 million (\$543,000) with the Bashkiria government to "maintain a positive image" of regional authorities. Overall, Bashkiria government subsidies and contracts with media exceeded RUB 160 million (\$2.5 million).²¹ In 2018, the Kaliningrad regional legislature spent RUB 5.6 million (\$88,000) to commission media materials regarding its actions. The regional government planned to spend RUB 42.9 million (\$672,000) on media, including RUB 30 million (\$470,000) for coverage of government activities. The media budget for the city of Kaliningrad was RUB 19.5

18 Golubeva, A. "Медиа-2018: тренды." *Солта*, December 28, 2018. <https://www.colta.ru/articles/media/19900-itogi-2018-media-trendy>.

19 "Рекламные бюджеты в 2017 году." Adindex.ru, n.d. <https://adindex.ru/rating3/marketing/167049/index.phtml>.

20 Вести экономики. "Бюджетное финансирование СМИ в России сократится в ближайшие три года." November 21, 2018. <https://www.vestifinance.ru/articles/110536>.

21 Samoilova, I. "Господдержка СМИ из бюджета Башкирии в первом полугодии составила 70 млн рублей." *Коммерсант*, October 9, 2018. <https://www.kommersant.ru/doc/3765089>.

million (\$305,000).²² Government subsidies and information contracts go mostly to state and loyal media, leading to the subversion of editorial independence and distorting the market.

“We live in a country that is progressively getting poorer. Media outlets that have access to state money have more chances to survive. The media sector is dependent on state support, [and] the media market is failing.”

Only major media outlets have marketing plans and commission market research. Small media outlets do not have marketing budgets. Marketing is seen as a functional responsibility of editors, and they either conduct research themselves or forego it. “I know that we should do [market] research, and I know how to do it, but we don’t have money for this now,” said one of the panelists, an editor of a small local newspaper.

Since 2017, Roskomnadzor has selected a single company to measure broadcast ratings. Mediascope (formerly Mediascope/TNS, part of TNS Gallup Media) was granted a three-year media measurement contract, with the share of foreign ownership in the company not to exceed 20 percent. Mediascope has committed to improving the quality of the data it produces. It has started measuring TV viewership on desktop computers and mobile devices, as well as in dachas (country houses where residents of Russian cities spend

²² Nevar, V. “Почем лояльность: СМИ региона получают от властей 70 млн рублей.” Новый Калининград, December 13, 2017. <https://www.newkaliningrad.ru/news/politics/16282696-pochem-loyalnost-smi-regiona-poluchat-ot-vlastey-70-mln-rublej.html>.

weekends and holidays and, in many cases, live during the summer months). Measuring how people view TV online has added up to a 30 percent broadcast rating, and measuring people watching TV in dachas has increased ratings by up to 20 percent.²³ Still, media measurements cover only cities with a population of more than 100,000 people, rendering small media markets invisible to advertisers.

The media sector has no reliable information about print circulation.

**OBJECTIVE 5:
SUPPORTING
INSTITUTIONS**

1.67

Institutions that support the professional interests of independent media have existed for a long time but are not sufficient.

The National Association of TV and Radio Broadcasters (NAT) and the Union of Press Publishers (GIPP) were established in the 1990s as general Russian trade associations for media. Both associations cooperate with international trade associations; conduct trade fairs; publish industrial magazines; provide analytical, information, and training services to their members; and try to lobby the Russian government to advance members’ interests. For example, the 2018 Natexpo (NAT’s annual international congress), conducted with the financial support of Rospechat, was devoted to the topic “digital technologies in media.” NAT also conducted three workshops for media managers

²³ Golubeva, A. “Медиа-2018: тренды.” Солта, December 28, 2018. <https://www.colta.ru/articles/media/19900-itogi-2018-media-trendy>.

within the framework of its educational program. The 2018 GIPP conference was devoted to the theme of “state, problems, and prospects of the Russian periodicals market.” Rospechat provided financial backing for this conference as well.

ANRI brings together media outlets that uphold journalism standards and endeavor to preserve editorial independence. ANRI also organizes conferences, provides training services to its members, and engages in lobbying. For example, in 2017 ANRI supported the organization of the international Summit of Independent Regional Publishers and conducted a series of webinars on the legal aspects of media operation.

However, under conditions of growing state control over media, these associations have very limited actual power to advance media interests. In addition, trade associations have to rely on state grants to organize their major events. “Trade associations have no real influence on the situation,” commented one of the panelists.

Membership in these associations is also declining. GIPP membership dropped from 272 members in 2017 to 128 members at the end of 2018. ANRI membership fell from 67 members in 2017 to 62 members in 2018.

RUJ does not protect journalists’ rights or promote quality journalism. “Like any institution in a sham democracy, the Russian Union of Journalists is an imitation,” one panelist noted, “Instead of protecting journalists’ rights, it conducts festivals, media forums, and workshops, or can arrange discounts for its members to go to resorts for rest and medical treatment.”

After the 2017 elections, RUJ increased its affiliation with state authorities and has become one of the channels for distributing state funds to media. In 2018, RUJ initiatives also included adopting the law that protects Russian journalists

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working in war zones outside of the country as well as establishing an honorary title, "Journalist Emeritus of Russia," awarded by federal authorities. At the end of 2018, the title was awarded to its first 15 media professionals.

According to the panelists, it is worth noting that Russian journalists do not feel much professional solidarity. Sixty percent of journalists who participated in research commissioned by the Mediastandart Foundation held the belief that only specific groups of journalists and media outlets can have common interests and goals and that this does not include the journalism community as a whole.²⁴

A small group of NGOs working to support free speech and media freedom was established in the 1990s, when Russia opened its doors to democracy. This group includes the Glasnost Defense Foundation, which monitors violations of media rights and runs educational programs; the Mass Media Defence Centre, which provides free legal advice and support to media; and the Press Development Institute–Siberia, which recently focused on promoting civic investigative journalism.

All three of these NGOs have been labeled foreign agents. This means they have increased administrative burdens with which they must comply, in addition to the standard high reporting requirements. Still, these NGOs continue their operations. For example, in 2018 the Mass Media Defence Centre provided more than 3,800 legal consultations to members of the media,

represented media in 85 court cases, and saved media outlets from paying RUB 23.5 million (\$368,000) in damages.

Russia also has several newer NGOs that provide support to media. In 2014, the All-Russia People's Front launched its Center for the Legal Support of Journalists. The Mediastandart Foundation was also launched in 2014 by the Civic Initiatives Committee. Mediastandart conducts research of the media sector, including the media development index for Russian regions, and runs workshops for regional journalists. For example, in 2018 the foundation launched an online course on standards for reporting and fact checking.

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.
- ▶ Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- ▶ Sources of newsprint NGOs support free speech and independent media.
- ▶ Quality journalism degree programs that provide substantial practical experience exist.
- ▶ Printing facilities are in private hands, apolitical, and unrestricted.
- ▶ Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.
- ▶ Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

Journalism degree programs are offered in about 160 Russian schools of higher education and graduate about 30,000 journalism students per year.²⁵ But the quality of these programs varies. Journalism schools of major universities (e.g., Moscow State University, St. Petersburg University, and the Higher School of Economics) provide students with high-quality instruction and substantial practical experience, unlike many journalism programs in regional cities. "Journalism students from the nearby cities stopped coming to do internships with us," shared a panelist, an editor of a small newspaper in Central Russia.

However, media professionals have stated that graduates of regional journalism schools often fall short. "[They] don't know even the basic things," said Vladimir Soloviev, chair of the Russian Union of Journalists, at the 2018 media forum in Voronezh.²⁶ Elena Vartanova, dean of the Moscow University School of Journalism, lamented in one of her interviews that these graduates often "don't speak Russian properly, mispronounce words, and stress the wrong syllables."²⁷

Less qualified journalism graduates are ready to accept low pay, and this distorts the job market. Media outlets in Moscow and St. Petersburg often prefer to hire cheaper graduates of regional

25 Nikitushin, A. "Долой гастарбатизацию медиа!" ГИПП, November 19, 2018. <https://gipp.ru/overview/obzory-sobytiy-v-media-srede/doloy-gastarbatizatsiyu-media/>.

26 Polukhina, E. "«Шоу должного уровня все равно не получится». Как выжить региональным СМИ." РИА Воронеж, July 15, 2018. <https://gipp.ru/overview/obzory-sobytiy-v-media-srede/-171-shou-dolzhnogo-urovnya-vse-ravno-ne-poluchitsya-187-kak-vyzhit-regionalnym-smi/>.

27 Nikitushin, A. "Долой гастарбатизацию медиа!" ГИПП, November 19, 2018. <https://gipp.ru/overview/obzory-sobytiy-v-media-srede/doloy-gastarbatizatsiyu-media/>.

24 Zadorin, I.V. et al. *Образ журналиста в массовом сознании россиян*. Moscow: Фонд медиастандарт, Циркон, и Комитет гражданских инициатив, 2018. http://www.msindex.ru/wp-content/uploads/2018/10/Obraz-zhurnalista-v-massovom-sozdanii-rossiyan_doklad.pdf.

journalism programs to save money. Television channels in economically better positions than print media are able to offer larger salaries and hire more qualified graduates. According to Vartanova, only 10 to 15 percent of journalism school graduates get jobs in print media. The majority go to work in TV, including terrestrial, cable, and online channels.²⁸

Media associations, NGOs, and universities offer numerous short-term training opportunities. But most of them require payment, so media outlets facing declining revenues cannot afford to have staff participate.

“Like any institution in a sham democracy, the Russian Union of Journalists is an imitation,” one panelist noted, “Instead of protecting journalists’ rights, it conducts festivals, media forums, and workshops, or can arrange discounts for its members to go to resorts for rest and medical treatment.”

Sources of media equipment, newsprint, and printing facilities are apolitical, are not monopolized, and are not restricted. Still, continuing hikes in newsprint prices undermines the economic sustainability of print media. In 2018, newsprint prices increased by 15 percent, and the total newsprint price increase since 2014 is more than 50 percent. This trend is due to the shortage of newsprint in the national market: Russian newsprint producers prefer to sell abroad, where prices are at least 25 percent higher.

Declining numbers of press kiosks and growing subscription delivery costs remain the

foremost barriers to distribution of the print media. In 2004, Russia had 42,000 press kiosks, while in 2018, only 16,500 remained. In the course of 2016 alone, the number of kiosks dropped by 6,000 — leading to a 15 percent decrease in newsstand sales in 2017.²⁹ Supermarkets see print as low-margin goods and therefore limit the number of titles on sale and refuse to sell local newspapers. In addition, supermarket networks regularly delay their payments to media outlets by 90 to 120 days.

Subscription rates fell from 217 subscriptions per 1,000 citizens in 2014 to 113 in 2017 — and continued to fall in 2018.³⁰ Local independent media often establish their own distribution systems to deliver subscriptions, so they can maintain circulation revenue. At the 2018 media forum in Voronezh, Indira Kodzasova, editor of the *Argumenty & F акты* newspaper, said that part of the problem is that “people don’t consider a newspaper to be an indispensable product” and stop subscribing and buying newspapers as their incomes fall.³¹

The transition to a digital TV distribution model has independent regional and local TV channels on the brink of extinction. The state plans to support free digital distribution for 20 national channels countrywide as well as one regional TV

channel per region and one local TV channel per city. In most cases, the preference is given to state-affiliated TV channels. Independent TV channels must go to cable networks, where they have to pay for digital distribution.

Overall, the information and communications technology (ICT) infrastructure meets the needs of the media industry and citizens. Ninety-eight percent of consumers have access to digital TV. Most of the population has access to mobile networks and mobile internet. However, the quality of infrastructure is disparate: residents of bigger cities enjoy better ICT infrastructure while people in rural areas still occasionally face electricity cutoffs and unstable mobile and internet connections. People from small and large towns and cities also access ICT differently: in small cities and rural areas, 44 percent of users access the internet from one device; while in large cities, the majority of people use two or more devices.

List of Panelists

Due to laws restricting NGO activity and contacts with U.S.-based NGOs, the participants in the Russia study will remain anonymous. This chapter was developed by a Russian journalist in December 2018 after a series of structured interviews with colleagues in the media sector.

29 Moiseev, S. “До тебя мне дойти нелегко. О кризисе распространения печатных СМИ в России.” *Журналист*, July 8, 2018. <https://gipp.ru/overview/obzory-sobytiy-v-media-srede/do-tebya-mne-doyti-nelegko-o-krizise-rasprostraneniya-pechatnykh-smi-v-rossii/>.

30 Ibid.

31 Polukhina, E. “«Шоу должного уровня все равно не получится». Как выжить региональным СМИ.” РИА Воронеж, July 15, 2018. <https://gipp.ru/overview/obzory-sobytiy-v-media-srede/-171-shou-dolzhnogo-urovnya-vse-ravno-ne-poluchitsya-187-kak-vyzhit-regionalnym-smi/>.

28 Ibid.