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WORKING PAPER

Market and Political Factors and the Russian Media

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1. Introduction

The Russian media landscape has been changing rapidly in recent years, influenced not only by the rise of digital media across the globe but also by more specifically Russian developments in media markets and policy. This paper shows how television remains central and subject to several forms of state and political interference and how the newspaper industry, which has offered a more diverse mix of relatively independent commercial media, politically-connected media and foreign-owned media, is suffering due to the secular migration of advertising and audiences. In addition, the discussion below reveals how increasingly important digital platforms offer a mix of dissident, pro-government and largely apolitical offerings.

The Russian media landscape is complex and varied. At least six out of 10 Russians use the Internet, while, in cities, more than three out of four do so (Internet Live Stats, 2014).[1] The largest daily, *Komsomolskaia Pravda*, attracts almost three million readers a day, and the largest TV channel, Pervyi, has a 50 million strong audience each month (Beard et al., 2014; Federalnoe Agentstvo po Pechati i Massovym Kommunikatsiiam [FAPMK], 2014). Printed newspapers have lost a large part of their previously sizable readership, and, today, only 20% of Russians read the national dailies (Vartanova, 2013). Advertising on the Internet, however, is growing rapidly, but, in 2014 and 2015, this growth slowed down. According to Reporters Without Borders (2015), Russia was 152 of 180 countries indexed according to their level of media freedom. Regulation of communication and advertising has tightened over the last years, although the largest magazine publishers, among some other media, still have foreign investors.

The description above reveals the peculiarities of the Russian media's reality today. It is a mixture of market forces, state ownership, power struggles between actors in different sectors, obstacles to media freedom and challenges within the media convergence.[2] After the Soviet Union's collapse in 1991, the media started to compete

[1] Around 74% use the Internet at least once a month in cities with over 100,000 inhabitants (TNS Web Index, 2014), while fixed broadband penetration in 2013 was 16.6% (or fiftieth in the world, according to International Telecommunications Union (ITU) statistics (Broadband Commission, 2014). Mobile broadband penetration in 2013 was 60.1% (or twenty-ninth in the world as compared to Finland in second place after Singapore, Estonia sixteenth, Latvia twenty-eighth) (Broadband Commission, 2014).

[2] Convergence, in this context, means a shift towards converging digital technologies in media content production and distribution (Doyle, 2013, p. 25).

in market conditions. However, at the same time, the centralisation of power and media ownership had left an indelible mark on the Russian media. In terms of state intervention levels, Russia continues to be regarded as a relatively closed regime that pursues an open internet policy (e.g. Oates, 2007; Toepfl, 2012, 2014). The Russian media has also been called a two-tier, dichotomous media system 'where some outlets, notably national TV, are very tightly controlled, while others, including the Internet, are allowed a substantial degree of freedom' (Dunn, 2014, p. 1425). This country's media has also been labelled as a system with conflicting messages within and between fields of communication (Beumers, Hutchings & Rulyova, 2009, p. 2). The role of the Internet is seen to be manifold: while the government 'promotes the use of the Internet for social and economic development, it also attempts to use the Internet as an additional political tool for control and co-optation' (Oates, 2013, p. 87).

This working paper seeks to discuss the above mentioned dichotomised character of the Russian media, in particular taking into account the developments in print, TV and Internet media during Vladimir Putin's current, third presidential term (2012–2018) (for information on the preceding years, see, for example, Pankin, Fedotov, Richter, Alekseeva & Osipova, 2011). Combining secondary sources and interviews with media experts and practitioners, this report focuses on two competing and, at the same time, intertwining factors driving change: politics and market developments. Both factors are intertwined with the rise of digital media.

2. Media transformation: A dichotomised media model

In the beginning of the 2000s, Russia experienced economic growth that also helped the so-called development of media marketisation. Both domestic and foreign investors were attracted by the Russian media market, among which were the Norwegian Schibsted and the German Westdeutsche Allgemeine Zeitung, which, according to Pankin et al. (2011, p. 6), were 'principally interested in local print media with politically safe content that were less likely to lead to confrontations with the authorities'. At this time, legislation did not restrict foreign ownership in the print media – only in broadcasting (on the development of the Russian media in the 2000s, see, for example, Nordenstreng & Pietiläinen, 2010 and Zassoursky, 2009). The financial crisis that started in 2008 shaped the future direction of media and news consumption in Russia, that is, while advertising and circulations of the print media declined, online communication increased (see, for example, Pankin et al., 2011, p. 6). This trend has continued since then.

Today, the Russian media system is a mixture of different media models, existing simultaneously and sometimes intertwining. The main dichotomy is between more tightly controlled media loyal to the authorities and freer media outlets and online communication platforms (e.g. Dunn, 2014; Toepfl, 2014). The Russian media model has been described also, for example, as semi-authoritarian or authoritarian (e.g. Toepfl, 2014, p. 69) and neo-Soviet (Oates, 2007). In addition to media that fall within the state or local government's sphere of control, part of the media behaves according to commercial models, selling products directly to consumers and serving as the contact between consumers and advertisers. Typical formats following commercial media models include glossy magazines, business newspapers and commercial radio stations.

In addition, part of the media business is owned by so-called oligarchs or business tycoons, who may have other business and political interests besides the media. These oligarchs include one of the richest men in Russia, Alisher Usmanov, who owns, among others, the Kommersant publishing house, part of Mail.ru (i.e. the largest Internet company in Russia), half of the UTV holding (i.e. radio stations and music and Disney TV channels) and part of mobile operator MegaFon (Forbes, 2015b). However, the core of his business is the metal and mining industry. Usmanov is seen as loyal to Putin's regime. Yuri Kovalchuk is another billionaire with stakes in several TV channels; his background is in banking and insurance business (Forbes, 2015a). Another business tycoon, Mikhail Prokhorov, has oppositional political views and minor media assets. Prokhorov represented the Civic Platform party in the 2012 presidential elections, receiving almost 8% of votes. He sponsors *Snob*, a social media platform and magazine that serves networking more than purely business purposes (Roesen, 2011). *Snob*'s business model includes, in addition to selling the magazine, membership fees for the social networking site.[3] These media owners, with resources derived from other activities in business and politics, are in a position to make instrumental use of their media properties, advancing varied interests and working to counter rivals, in contrast to non-instrumentalised media operated for simpler editorial and/or commercial motives.

The Russian media model relies heavily on the central role of TV, as it has done since the collapse of the Soviet Union. TV is the main medium for most Russians. Ninety-nine per cent watch TV at least monthly, while computers are used by 72% and

[3] Compare this with the business model of the United States-based online magazine *Slate*, which offers readers free content and a membership programme with special access to columnists, the opportunity to read columns before the general public, online discussions with authors and private question-and-answer sessions (Burke, 2014).

mobile devices, such as tablet computers, by 45%.[4] The main TV channels are state-controlled directly or through companies closely connected to the state. These channels include, for example, Pervyi Kanal (First Channel), Rossiia 1 (Russia 1), NTV and TNT (Vartanova, 2015, p. 139). They still get the majority of their funding from advertising and sponsorship. Among the top-10 channels are also privately owned channels, including STS and Ren-TV.

When it comes to news supply, newspapers also still have an important albeit diminishing role. Even though social media have gained more significance in people's lives in Russia (Fossato & Lloyd, 2008; Lonkila, 2012; Toepfl, 2014; Zassoursky, 2009), news is still mainly produced by TV and newspaper companies (cf. Kleis Nielsen, 2012).

3. Market and political factors as main drivers of change

In the beginning of the 2000s, Russian media was on a marketisation track, which meant a strengthening position of privately owned media and media as business as compared to the position of government-owned or subsidised media. The move towards operation of private, non-state-owned media started with the adoption of the Mass Media Law in 1991. In the first decade of the 2000s, Russia was among the most rapidly growing advertising markets in the world, and the media were increasingly dependent on advertising (Vartanova, 2012, p. 123). However, this trend appears to have reversed later in the 2000s and 2010s, towards a strengthening position of government-owned media or those loyal to the government.

In the following discussion, the Russian media model is looked at in terms of two main factors: market and political. Market factors refer to the influences of economic cycle and other economic constrains. The market perspective includes also the effect of technological development: changes in the industry related to the shift from printed newspapers to digital publications and from terrestrial to digital TV – widely shared across the world. Politics shape the media through policy interventions, which, in Russia, have lately introduced uncertainty into the commercial media's operational environment because of several rapid, unexpected changes. These political factors are more specific to Russia than to many other countries. Historically, for example, in Nordic countries, a media model combining a high degree of political parallelism and strong commercial media has prevailed (see Hallin & Mancini, 2004). Thus, state or political intervention is not necessarily seen as a barrier to the development of strong commercial media (e.g. Vartanova, 2012).

[4] Figures given in the TNS TV Index, Web Index, in May 2014.

Despite print media's shrinking readership – a trend that has continued into the twenty-first century, both in Russia and the industrialised West – the total readership for Russian daily national newspapers has not significantly changed to date. Although overall news readership has declined, the number of publications is now greater compared to the Soviet Union era. This means that the average readership for newspapers has fallen. The reading of paid, traditional papers has dipped the most radically, while, at the same time, free newspapers such as *Metro* have gained a wider circulation. Newspapers are important sources of local and regional information even as their role at the national level has diminished, so the local print press's growth has not boosted the development of quality daily national newspapers. This trend has been determined not only by a crisis in distribution but also by the decreasing role of print media as a whole in shaping the national 'agenda'. However, the main daily newspapers are widely recognised outlets for both the greater public and political and business decision makers. Important so-called quality newspapers include, for example, the main newspapers for the business community: *Kommersant* and *Vedomosti*.

In economic terms, Russian newspapers have suffered from a slowdown. The printed press's advertising income fell by 11% in 2014, as compared to 2013. The number of subscriptions shrank by 20% in the second half of 2014, compared to the same period in the previous year (FAPMK, 2015, pp. 10–11). In discussions with media experts and managers, the impression these give is that the newspaper business's future in Russia is generally seen as a no-growth business. The advertising- or advertising and subscription-based business model is not enough, and new, innovative solutions are needed, both in print and digital distribution. According to some editors, paywalls are not a viable solution since Russians are not ready to pay for news they are used to getting free. The editor-in-chief of one of the largest newspapers, *Komsomolskaia Pravda*, even believes the publication of a daily printed edition may possibly cease in a few years (Sungorkin, 2014).

Regarding the Internet, it has developed rapidly, and it is the only media sector in which growth of advertisement was observed during the first six months of 2015 (AKAR, 2015). At the beginning of the 2000s, it was estimated that the Russian language Internet, often referred to as Runet, was estimated to be lagging 3–5 years behind European and North American development (Perfil'ev, 2002, p. 26). However, the number of Internet users doubled each year between 1993 and 1997, and, while this growth initially started in large cities (i.e. mainly Moscow and St.

Petersburg), the gap between geographical areas has been decreasing since the 2000s (Vartanova, 2015, p. 134).

By 2010, Russia, statistically, had relatively high Internet user numbers. This is because, in technical terms, the Internet – due to rapid development – is now relatively widely available in Russia. Thus, access to information society services is guaranteed for many. The quantity of Internet users in Russia is reported to be the highest in Europe in absolute numbers: an estimated 84.4 million in 2014 (Internet Live Stats, 2014). In cities of more than 100,000 inhabitants, over 74% of those aged 12 or older use the Internet at least once a month (TNS Web Index, 2014). According to a survey by FOM (2015b), 53% of all Russians used the Internet on a daily base in the spring of 2015. This recent growth, especially in the countryside, is due to the increased amount of mobile phones with Internet connections (Gorham, Lunde and Paulsen, 2014, p. 2).

Table 1. *Internet Users by Country: Ten Largest in 2014*

Rank	**Country**	**Internet users (2014)**	**Penetration (% of population)**
1	China	641,601,070	46
2	United States	279,834,232	87
3	India	243,198,922	19
4	Japan	109,252,912	86
5	Brazil	107,822,831	53
6	Russia	84,437,793	59
7	Germany	71,727,551	87
8	Nigeria	67,101,452	38

9	United Kingdom	57,075,826	90
10	France	55,429,382	86

Source: Internet Live Stats (2015)

Media companies, especially those in traditional newspaper publishing, face a challenge keeping in touch with digitalisation and converged media production and output. A study by Vartanova, Makeenko and Vyrkovsky (2012) showed that the newspaper publishers' efforts and opportunities to join the digital turn differ based on their area, economic situation and position in the local market. Radio broadcasters have also reacted to the 'multimedia revolution'. As the president of Evropeiskaia Mediagruppa, Ekaterina Tikhomirova, observed in 2014, since traditional listening to radio is diminishing, the number of alternative platforms must grow. Thus, she called for alternative audio content in new media formats to find new ways of generating profit. A challenge in the Russian context is also competition from pirate broadcasters (Tikhomirova, 2014).

According to some observers, one sustainable business model option can be the one of *Meduza*, an internet-based news service that covers Russian news – from outside Russia. *Meduza* works from Latvia. It was founded in 2014 by Galina Timchenko, who was dismissed earlier in same year from her job as editor-in-chief of a popular Russian Internet news service, Lenta.ru. According to Timchenko, *Meduza*'s audience has grown faster than expected, managing in less than six months to get 2.7 million unique monthly visitors. In addition, Timchenko said, in April 2015, the news site is, even after such a short time, not yet profitable but meeting its financial goals (Lees, 2015).

In terms of the media business's political environment and state intervention levels, Russia has been categorised as a relatively closed regime that, nonetheless, pursues an open Internet policy (e.g. Oates, 2007; Toepfl, 2014). However, researcher Sarah Oates states that the Russian government still is capable of applying its power through online resources just as it does through print and TV media (Oates, 2013, p. 8). According to Peterson (2005), in the beginning of the 2000s:

> [While the Russian administration] embraced information technology as a productivity enhancer in government and an economic motor in business, the

> Kremlin's active campaign to curtail media freedom and democratic activity suggests that the regime is not really interested in I[nformation] T[echnology]'s potential to promote openness and accountability in government or politics or to promote an informed and engaged civil society. (p. 5)

Some other researchers have estimated that, in addition to restrictions on Internet access or content, the degree of civic freedom and the existence or nonexistence of strong independent media and civil society institutions may have an important role in how effectively and how much the Internet can be used in organising political protest movements (Kerr, 2013, p. 5).

Russian media regulations are based on the 1991 Mass Media Law, which has been labelled one of the most liberal press laws in the world. At the same time, several laws still restrict media freedom (e.g. anti-terrorism legislation). Regulations have been concerned with such aspects as children's information security (Federal Law No 436-FZ, 2010). According to some estimates, the volume and restrictiveness of media legislation in Russia increased between 2012 and 2014 (e.g. Jackson, 2015, p. 30). Legislative acts and regulations, as well as financial constraints, are seen as forms of indirect pressure from the Kremlin. The editor-in-chief of Ekho Moskvy, Alexei Venediktov, reported that these restrictions are used instead of direct pressure. Ekho Moskvy has kept its status as a media source opposing the power elites, even though this radio station is owned by Gazprom Media, a holding loyal to Putin. However, Venediktov reports feeling economic pressure from a drop in advertising and a downsizing of the advertising department (Heritage, 2015).

Recent developments give the impression that Russia's media policy is mostly based on state-driven logic: the state is still, in practice, the only actor to formulate media policy in Russia. Forthcoming changes in media legislation and regulation cannot easily be predicted, and regulations have, in some cases, changed abruptly. The example of a law on TV advertising summarises many of these patterns. The law came into force in early 2015 and prohibited advertising on chargeable cable channels and satellite channels. However, the law caused problems that were partly acknowledged and addressed by lawmakers and authorities at the turn of the same year. At that time, some cable channels received regional terrestrial transmission licenses, which allowed them to continue to show advertising. In January 2015, the Duma passed a law that loosened the ban on advertising for those cable channels that show at least 75% domestic productions (Lehtisaari, 2015).

Foreign ownership has now been restricted after a long period of relatively free investment policy. Russia had, in the 1990s onwards, a more liberal media legislation as compared to Eastern and Central European countries (Stetka, 2012, p. 436). However, from 2016 onwards, the foreign ownership share of media companies will be limited to no more than 20% of total shares. The current law concerning strategic investments restricts foreign ownership to no more than half of large TV and radio channels and those newspapers and magazines with more than a million circulation per issue. All media outlets fall within the sphere of the new law. Some foreign owners started to reduce their share in Russian companies in 2015, in response to this law. For example, Disney sold part of its TV channel in Russia to the businessmen Ivan Tavrin and Alisher Usmanov, and the media company STS was similarly under offer (Boletskaia, 2015). During the year, other acquisitions were recorded, including the sale of Finnish Sanoma's 33% of *Vedomosti*, a newspaper that is part of United Press International, to the businessman Demian Kudriatsev. In addition to legislation, these withdrawals have also had economic motivations, as in the case of Sanoma, which, during recent years, diminished its shares in Russian media companies due to financial pressures. Similar movements based on business logic were witnessed in Hungary, Bulgaria and Poland, from 2009 to 2011, when major foreign investors departed after having fulfilled their economic goals (Vačkov, 2015).

Formal censorship was banned after the collapse of the Soviet system, but treatment of some issues is still restricted by official policies, such as so-called anti-terrorism laws. However, the Russian public readily accepts censorship to some degree (Pietiläinen & Strovsky, 2010). Pietiläinen and Strovsky (2010) argued that censorship has long been an important part of Russian and Soviet history and that many Russians reject new phenomena. Therefore, attitudes towards censorship and restrictions, as well as towards state-driven media, vary. A recent poll by Synovate Comcon, a marketing research company (Bryzgalova, 2015), showed that trust in TV news fell to a 14-year low in spring 2015. Only 35% of 28,000 people surveyed said they trust information given on TV. The year before the figure was 42%. At the same time, trust in information published in newspapers rose to 41%, while the Internet became even more trusted at 43%. Notably, the last percentages fall within the survey's margin of error. Contradictory signs also are seen in attitudes towards the role of TV. Almost half of respondents in a 2015 poll by FOM (2015c) said that propaganda in the mass media brings the society more harm than advantage, but one in four had an opposing opinion. According to another opinion poll by the same organisation (FOM 2015a), Russians also strongly trust the government media. In

April 2015, 70% of informants preferred governmental media outlets to private ones, while only 11% had the opposite view and 19% did not have an opinion. These polls give different, even contradictory signals, which may also depend on what was asked and how the questions were formulated – as well as when the survey was done. In general, trust on information provided in the media is not high.

4. Conclusions

Given the latest developments in Russian media and media regulations, these changes appear to be leading towards the same goal: increased manoeuvring by the state. The recent economic slowdown froze advertising figures, especially in traditional print media. Thus, the operational environment has become more challenging for small, independent commercial media and for foreign-owned media, while large media holdings continue to grow. TV remains the central media platform in Russia, and the newspaper market, which, in recent decades, has become more diverse, is under pressure in part due to technological developments. The rise of digital media so far represents a mixed picture, in part because of political pressures and because the Internet provides a challenging environment for news production for traditional media companies.

What does the near future for the Russian media look like? Based on expert opinions and recent research reports, the following tendencies appear likely – not excluding other possible variants:

- Legislation that affects media ownership and advertising is tightening, leading to mergers and diminishing the number of non-instrumental commercial publishers, especially foreign investors in the market.
- Concentration of media ownership continues, and the largest media holdings are still growing.
- Forthcoming presidential elections in 2018 may have an effect on the form of mergers and acquisitions as politicians and wealthy businesspeople re-structure their media assets.
- The political effects of social media may intensify. Social media can provide a platform for debates on subjects that receive little attention in more traditional media, such as climate change, although recent studies show that social media discussions often duplicate those in the traditional media (Poberezhskaya, 2014).
- Emerging new commercial business models include publications based outside Russia but targeted for Russian audiences.

Changes predicted for the near future include mergers and acquisitions, and the closing of some media outlets. In particular, foreign-owned media companies are tending towards restructuring their assets or selling them partly or wholly to Russian companies or individual investors.

The current trends in Russia's different media sectors have some characteristic points. In TV, the two most visible trends are increased political control and restructured ownership. In addition, the digitalisation of TV has affected the market, and, as Strukov and Zvereva (2014, p. XVII) argued, this shows how the state wants to control the selection of available information channels. TV has remained the most important medium, and it does not appear that it will lose its prominence in the near future. In the newspaper sector, many publications are struggling with shrinking advertising and subscription revenue and the challenges of media convergence. Online media has the potential to become a stronger arena for public discussion – or to become more restricted. In economic terms, however, this is the only media sector that has good prospects regarding advertising income. Simply put, basic market trends are clear: TV will be stable in the short term, while print will decline and digital media will grow in importance. Political trends are less clear, and much depends on how the government and other political actors, including influential oligarchs, decide to move forward.

Russian media development has similarities with other countries broadly defined as mid-income and run by hybrid or (post-) authoritarian regimes, such as Eastern Europe and Brazil, India, China and South Africa. For example, as in Russia, the Chinese state remains an extremely important actor in the media sector. Public service media is limited in Russia, China and Brazil, and, along with South Africa, Russia shares the presence of a multi-lingual media system (Nordenstreng & Thussu, 2015, p. 4). However, in many ways e.g. BRICS countries represent different tendencies in media development (for other comparative studies, see Dobek-Ostrowska, 2010; Jones, 2002; Levy et al., 2010; Painter, 2013; Voltmer, 2013 and Voltmer & Wasserman, 2014).

In the 2010s, many observers have noted how changes in media uses have started to shake the equilibrium of Russia's system (e.g. Dunn, 2014). However, since 2012, a tendency has developed towards a stronger position of pro-governmental media and more one-sided public discussion arena (compare with Dzialoshinskii, 2015, p. 232). Notably, Russia also has a large number of TV channels, radio stations, newspapers, magazines and Internet news services. Even with these changes, not all of the Russian media are within the sphere of control by the state or local government.

Despite this power shift, the Russian media model is still divided into two main formats: commercial capital and capital owned or manipulated by the state. Inside this dichotomised model, the equilibrium, however, may be shaky, affecting how the media landscape in Russia will look in 2018, at the end of Vladimir Putin's current presidential term.

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