

# Armenia - Media Landscape

Author(s): Zhan Baghiyan

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## Overview

Armenia is a republic in the South Caucasus which borders on Georgia, Azerbaijan, Iran and Turkey. Its capital city is Yerevan. The population of the republic is approximately 3 million, whereas the number of Armenians residing outside the republic, according to the World Bank data, is over 7 million. The Armenian diaspora formed as a result of various circumstances, both historical (the 1915 Armenian Genocide in Ottoman Turkey) and socio-economic (the difficult economic situation after the collapse of the USSR, the Nagorno-Karabakh conflict, the border blockade by Turkey). The diaspora has always maintained contact with Armenia and had a great cultural, historical and economic impact on the development of the historical homeland. Thus, till the present day the economy of the republic heavily depends on foreign aid and remittances from Armenians residing or temporarily working abroad.

In spring 2018, Armenia underwent a peaceful transition of power, which brought about drastic changes in domestic policy. The people took to the streets of capital Yerevan and other cities across the country demanding the change. As a result of numerous meetings and demonstrations, the premier in power and two-time president (2008-2018) Serzh Sargsyan resigned, and the leader of the protest movement, an opposition MP Nikol Pashinyan was elected the country's prime minister by the Parliament. The process of sociopolitical reforms in the country is underway.

In terms of time, the history of the Armenian media landscape development is divided into two stages: The period preceding the collapse of the Soviet Union - from 1920 to 1991 - and the period after the Proclamation of Independence - from 1991 to the present day. In the first period the main segments of the media system were created and technologically equipped. Year 1926 saw the establishment of ?????????? ?????????? ?????(Public Radio of Armenia). Year 1957 witnessed the emergence of ?????????? ?????????? ?????????????????????(Public TV Company of Armenia), the establishment of what would become the traditions of Armenian print media, as well as the emergence of mass-circulation newspapers, of which special mention should go to ?????????? ?????????(Soviet Armenia). However during Soviet times, mass media were not independent in Armenia as in other Soviet republic; they adhered to a uniform ideological doctrine and mainly propagated communist ideas. The post-Soviet transformations of the media system took place at all key levels of state governance: legal, economic, political and technological. Whereas the processes in the first three spheres began immediately in Armenia after the collapse of the Soviet Union and were determined by the new realities of the newfound independence (freedom of speech and expression, the multiparty system, the emergence of advertising business), the development of the technological sphere and the functioning of so-called "new media" were first of all driven by the global factors of the Internet and the digital technology development.

Despite the presence of a sufficiently well-off and influential diaspora outside Armenia, the republic's media system is not influenced by diaspora media as a source of public opinion in the country. Moreover, it is often the Armenian media

themselves that form the information agenda of the diaspora. As a rule, diaspora media perform the functions of preserving the identity of Armenians abroad and help to keep nostalgic feelings about their historic homeland alive, as well as inform them about the internal political situation in Armenia. Among the most renowned publications outside Armenia, it is worth highlighting the Armenian political weekly newspaper *Agos* of Turkey, published in Turkish in Istanbul; the first Armenian newspaper in America *The Armenian Mirror Spectator*, published in English in Watertown, Massachusetts since 1932; the newspaper of the Armenians of Russia *Erkramas*, published in Russian; the independent socio-political newspaper *Noah's Ark*, published in Russian; the weekly newspaper *Araks*, published in Armenian in Tehran. Diaspora media are an important source of informing diaspora representatives about the key panArmenian strategic issues, such as the Armenian-Azerbaijani confrontation in the Nagorno-Karabakh conflict, as well as recognition of the 1915 Armenian Genocide in Ottoman Turkey by the world community.

In terms of functioning of the print media, the Armenian media market is stagnant and this also indicates the overall state of affairs in the media sphere. The studies carried out in Armenia by the Regional Research Center organization, indicate that since 2019, in the key sources of getting information the Internet has occupied the first place - 58.9%; in the second place is television - 35.7%; in the third place is the information received from friends and family members - 4%, followed by radio - 1%; print media occupies the last line - 0.3%. Among the sources of daily news, the social networks are in the first place - 72.6%; 62.5% of the population of the republic considers only television as a daily source of information, and 53% of the population use only online media.

Of the four key sources of information, television plays the leading role, followed by the Internet and social networks, which are slightly behind; radio ranks third and the print media rank the last. Since 2012, the drop in prices of Internet service providers has brought about a massive transition from print to online media.

In the history of independent Armenia, virtually all media since 1991 have been controlled by various forces: the state, political parties, entrepreneurs. As a rule, this link has always been anonymous or hasn't been shown in any national registers. Thus, the activity of a major media holding Panarmenian Media Group, which included the Armenia TV channel, was linked to the name of the country's former president Serzh Sargsyan's son-in-law Mikayel Minasyan. Early in February 2019, the holding announced the cessation of activity due to the change in its shareholders' composition. The activity of the metropolitan ??????? (Kentron) TV channel is linked to oligarch Gagik Tsarukyan and his ????????? ?????????? ????????????????? (Prosperous Armenia Party), which until quite recently had the second place in the Parliament by number of deputies. The Yerkir Media TV channel is associated with ??? ?????????? ?????????????? ?????????????????? (The Armenian Revolutionary Federation - ARF). The third Armenian channel ?3, represents ?????? ?????? ?????????????????? (The Rule of Law Party), while the ?R TV channel is related to late businessman Hrant Vardanyan's family and the Grand Candy Company. The dependence of the republic's media has been stated repeatedly by international organisations as well. In the 2020 rankings of Reporters Without Borders, Armenia ranked 60<sup>th</sup> among the countries that are free in terms of media activity.

The development of journalistic professionalism is organised under the Bologna system and includes a 4-year bachelor's programme and a 2-year master's programme. Departments of Journalism function in all major state higher education institutions. Annually the republic's academic institutions graduate about four hundred qualified journalists to the media space. The departments of journalism function in ?????? ?????? ??????????(Yerevan State University - YSU), ?????? ?????? ?????? ?????? ?????????????????(Armenian State Pedagogical University after Khachatur Aboyan - ASPU), ???-????????? ??????????(Russian Armenian University - RAU), ?????? ?. ?????????? ?????? ?????? ?????????????????(Yerevan Brusov State Linguistic University - YSLU), ?????? ?????????????? ?????????????????? ?????????? ?????? ?. ?????????? ? ?????? ?????????(Branch of

Lomonosov Moscow State University in Yerevan).

In the history of independent Armenia, the first case of state interference into the media activity was the shutdown of the A1+ TV channel. The 1998 presidential election demonstrated the strengthened role of TV in the political agenda. The A1+ TV channel covered events from all perspectives and, for the first time in the republic's contemporary history, it demonstrated the influence of information media on shaping public opinion. Later the situation recurred in connection with the tragic events of the seizure of and killings in the Parliament building on 27 October 1999. In contrast with the state media, which covered the information rather poorly, A1+ presented a comprehensive analysis of the events, not ruling out the probability of a connection between the incumbent authorities and the perpetrators. Such ungrounded interpretation of the events displeased Armenia's government, and, as a result, the channel was shut down. Until spring 2018, the channel participated in the competitions for broadcasting activity 17 times without effect. This case became demonstrational for all the other media. Since then the state has done everything to exercise total control over media; it set limits and rules, which the media complied with in silence. Nevertheless, the cases of oppression of journalists recurred periodically, especially in time of large-scale public protesting such as the Electric Yerevan movement, which resisted the rising costs of electricity in 2015, and the seizure of a police station in Yerevan in 2016. However, the economic factor has been the main media control agent in Armenia. Big businesses were monopolised as power was in the hands of oligarchs, who lobbied for the interests of entrepreneurs. Given that Armenia's advertising market was rather small (variously estimated at between US\$30m and US\$50m), the media directly depended on advertisers. By exercising control over businesses, the state could block the media from accessing the advertising market, thereby depriving them of the possibility of real earnings. The extent to which the new government influences the Armenian media system after the transition of power has not been studied yet, because of the rather short period that has passed since the establishment of the new government. As mentioned before, the media landscape is going through a post-revolutionary development stage. However, two years after the "velvet revolution" and the change of power in Armenia, there are some disagreements between the new government and representatives of the journalistic community. Opposition media, which supports the former authorities, has serious financial resources and a wide range of media resources.

Generally, this media tends to pursue the interests of its owners. These resources openly and actively criticize the current government, blaming it on any occasion. Criticism annoys government authorities and the Prime Minister Nikol Pashinyan has repeatedly made loud statements about the corruption of "99% of the media and 70% of journalists". This caused a wide resonance among journalists and the media initiative Media advocate and the Journalists Union of Armenia called on the Prime Minister not to label their former colleagues and disclose the names of corrupt journalists. The Journalists Union of Armenia also issued a statement that "today the current government considers the free press an adversary and enemy." According to the public organization, the authorities use the tactics of inciting the army of controlled fake users on social networks against the insubordinate social media. The Public TV of Armenia is also the supporter of the ideas and initiatives of the current government.

The involvement of security services in combating disinformation is worrying. Having declared war on fake news, especially at the initial stage of the spread of coronavirus infection in Armenia, authorities overdid it. There were cases when special services demanded to delete posts on Facebook of famous doctors and cultural figures about COVID-19 for not spreading panic among the population.

The entire media system certainly does not benefit from such a heated environment of hatred, mutual insults and reproaches and this can harm the principles of freedom of speech in Armenia. Freedom House and Reporters without Borders have already responded to these facts by displaying the situation around the media of the republic in their 2020 reports.

# Media

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## Print

The history of the Armenian print journalism began in India. In 1794, the first journal ??????? (*Azdarar*) was published in Madras. The first Armenian newspaper, ??????? ?????????????? (*The Eastern News*) weekly, came out in Astrakhan in 1815. After gaining independence Armenia experienced a boom in print media. Early in the 1990s the number of periodicals amounted to over 500. However, the economic crisis in the country triggered by the border blockade, eruption of the *Nagorno-Karabakh conflict* and the growing prices for printing services had an impact on the profitability of the print media, most of which had to shut down. The modern print media market in Armenia is very fragmented and complex. By virtue of the 2003 Law on Information, the print media may be published and circulated with no preliminary registration or license. This complicates the determination of the precise number of print media. Today 11 newspapers are published in Armenia on a daily basis; another 32 periodicals are issued at least once a week. The overall daily circulation is of around 35,000 copies. The circulation of each periodical varies from 2,000 to 4,000 copies, of eight pages maximum. ??????? ??????? (*The Armenian Times*) newspaper, whose editor-in-chief is the incumbent prime minister's wife Anna Hakobyan, enjoys the largest circulation, reaching 10,000 copies.

The Armenian print media are in a dire economic state. Newspaper printing is an exceedingly losing business. The average price of an issue is 100 Armenian Drams, about US\$0.2, whereas the prime cost is AMD140-150, about US\$0.3. Therefore, newspapers do not make an essential influence on the news market and the news content. The price has remained stable since the beginning of the 90s of the last century, while over this period many other prices have grown and a lot has changed in the republic. This indicates the stagnation of the print media market. As a result, investments are not made in the newspaper business and there is absolutely no commercial advertising, basically only announcements. Newspapers come out only in black and white and have difficulties with the content of the news agenda. As a rule, the agenda focuses on political issues and covers social processes very poorly.

The immaturity of the advertising market forces newspapers to rely heavily on sponsors, who are either political parties or benefactors supporting various political forces. This factor adds slight bias and protectionism when shaping the editorial policies, which significantly complicates dissemination of independent information. These circumstances also directly affect the reputation of the periodicals and their popularity with the people. Thus, periodicals are divided into ones supporting the authorities and the opposition press, with no evident golden mean. The following newspapers are the most important ones amongst those who support the Armenian opposition: ??????? ?????????????? (*The Fourth Power*), ?????????? (*The People*), ??????? (*The Time*), ??????? (*The Square*), ??????? ??????? (*The Armenian Times*), ??????? (*The Law*). State interests are represented by periodicals such as ?????????? ?????????????????? (*The Republic of Armenia*, Armenian edition), ?????????? ??????? (*The Republic of Armenia*, Russian edition), funded through the state budget, the liberal newspapers ?????? ??????? (*The Voice of Armenia*, in Russian) and ??? (*The Nation*).

As mentioned, the drop in prices of Internet service providers has brought about a massive transition from print to online

media. Today, the vast majority of newspapers, mostly metropolitan, have their online version. In Armenia the print media is mostly read by the older generation, aged 50 and over, mainly due to their inability to use gadgets and other technological devices. The young prefer to get information from Internet resources since online media are quick to release urgent and rather objective and unbiased information. A different situation can be seen in the regions: dire socio-economic situation and poor Internet infrastructure do not allow the regional publications to function online. The cost of paint, paper, the rental of premises, payments to employees, as well as ones of technical nature make it hard for regional newspapers to survive. These newspapers are only formally registered in their regions as print media; in fact, however, they are either very rarely published or not published at all. But while city newspapers have a chance to go online, regional ones do not have such opportunity, and they slowly die out. There are 20 regional newspapers published at least once a month, with the overall circulation of about 10,000 copies. It's often the case that most of them do not even have a mere promo site. The only daily newspaper published in the regions is the ??????? (Asparez) newspaper, which belongs to the ?????????????????? ??????? ??????? (Asparez Journalists Club). Its circulation amounts to 250-300 copies.

The national composition of Armenia is 98.1 percent Armenians, 1.2 percent Yazidis, 0.4 percent Russians and 0.3 percent other ethnicities, including Assyrians, Ukrainians, Georgians, Jews, Kurds and Greeks. Virtually all the national minorities have successfully integrated in the social life of the country; they speak, read and write Armenian and also publish newspapers. The Jewish community's newspaper *David's Shield* comes out monthly in Russian, with circulation from 300 to 500 copies; the Greek community's newspaper *Ilios* is published monthly in Armenian, Greek and Russian, circulating 300 copies; the Yazidi community of Armenia publishes two monthly newspapers: *Shangal* and *Ezdikhana*, each circulating 500 copies. The Assyrian community publishes the *Assyrian News* monthly newspaper in Russian and Assyrian, circulating 500 copies. The publication of these newspapers is funded by the government. The main language of the printed matter is Armenian. Since the attainment of independence in the republic, a number of Russian-language newspapers have been published, among them *Republic of Armenia*, *Golos Armenii*, *Novoye Vremya*, *Business Express* Russian-language newspapers are mainly distributed in the capital; their main consumers are senior citizens, representatives of the Soviet intelligentsia.

## Radio

According to the annual report by the ?????????????????? ? ?????? ?????? ?????? ??????????(National Commission on Television and Radio - NCTR), in 2017 Armenia had 18 functioning radio broadcasting companies, including one public and 17 private companies. In terms of coverage, three radio companies broadcast all over the republic, 13 broadcast in the capital Yerevan and two companies broadcast in the Shirak and Lori regions of Armenia. These radio broadcasters predominantly air music and entertainment programmes. Almost all of them have brief news reports. The radio audience measurement has not been carried out systematically in Armenia; hence it is difficult to determine the latest ratings of radio broadcasters and the listener preferences.

According to the study of the Armenian radio market conducted by the Caucasus Research Resource Centre in October 2011, a fifth of Armenian households have a radio and 16 percent have a radio in their car. In addition, over three quarters of the population (76 percent) report they have not listened to the radio in the last 12 months. Amongst those who do, 35 percent listen for one to three hours and 28 percent for less than an hour per day. More than half of the listeners (59 percent) do so at home, another 26 percent in their cars, and 12 percent listen at work. *Armenian National Radio* is listened to most frequently, with 13 percent of the population listening at least once a month. Half (50 percent) of the radio audience prefers to listen to Armenian-language stations, 44 percent listens to both Armenian and Russian stations, and 6 percent listens to Russian-language stations only. Music content is by far the most popular, mentioned by 78 percent of the listeners, followed by news, with 51 percent. The transition of Armenia to digital broadcasting has been delayed repeatedly. Digitalisation was

postponed due to shortfalls in funding. The republic's authorities have officially stated that the government will proceed with the transition to digital broadcasting after the transition to digital TV has been completed.

Radio stations in Armenia broadcast in the Armenian and Russian languages. Radio broadcasts of major Russian radio stations as *Russian Radio*, *Autoradio*, and *Radio Shanson* are also relayed in the republic. From the local radio stations broadcasting in Russian and Armenian, *Radio Van* and *Radio Aurora* should be highlighted. All major radio stations broadcast mainly within the capital and adjacent cities. *Radio Aurora* entirely broadcasts in a visual format. Virtually all radio stations have Internet broadcasting. *The Armenian Public radio* has the widest coverage – it includes all regions of Armenia, as well as an international broadcasting network operating in the short-wave range, via satellite communications, as well as online via the Internet. In addition to the Armenian language, *The Armenian Public radio* broadcasts in the main languages of the national minorities of Armenia, as well as in English, Arabic, Azerbaijani, Spanish, Turkish, German and French.

## Television

The broadcasting field of Armenia is regulated by the following laws: The Law on Television and Radio, the Law on Mass Communication, the Law on Freedom of Information, the Law on Copyright and Related Rights and the Law on Advertising. In accordance with the Law on Television and Radio of year 2000, the ?????????????????? ? ??????? ??????? ?????????? (National Commission on Television and Radio) was established. It regulates the activity of private broadcasters and the licencing process. The Commission's activity is frequently criticised. In particular, the processes of channel licencing and appointing the commission members are not very clear. Half of the existing eight members were appointed by the country's then-president, and the other half were elected by the Parliament. It is the Commission that was charged with monitoring the republic's transition to the digital broadcasting system.

After the Regional Radiocommunication Conference held in Geneva in 2006, Armenia agreed to stop analog broadcasting from 1 January, 2015 and switch over to broadcasting in the DVB-T2 standard. The very process began dynamically in 2009. Based on the amendments in the Law on Television and Radio, the deadline was extended several times. The government justified the need for these amendments on the grounds that there were 'serious technical, material and financial difficulties' which appeared during the transition: The poor did not receive enough decoders, and the information campaign in society was not conducted properly. More than 50,000 receiving devices were provided to the population. On average, the price on the market ranged from US\$10 to US\$50. According to official information, the republic has completely switched to a digital signal since December 2016. But in fact this is not true and analog broadcasting has not been terminated yet in the regions.

Before the transition to digital broadcasting, Armenia had 42 operating licenced private TV channels: 16 in the capital and 26 in the regions. As a result of the transition to digital broadcasting, a state multiplex was formed, which incorporated 18 metropolitan channels and 9 regional channels, one from each region.

According to the annual report of the International Telecommunication Union (ITU), in 2017 the number of households using television in Armenia was 798,000, that is 96 percent of the population, meaning everyone who has a TV set uses this free service.

In addition to the state multiplex, there was also a plan to create a private or commercial one. However, the competition has not been held for the second year due to the lack of applications. According to the heads of regional channels, impractical conditions are purposely prescribed in the law to prevent attempts to get into a private multiplex, among them the high cost and a mandatory full coverage. Thus, the transition to digital broadcasting by large national broadcasters was fairly smooth and without much loss. Almost everyone who sought to get into the multiplex entered it. This can be explained by the fact that these channels are controlled either by political parties or representatives of big business. Television channels broadcast in

the republic in three ways: via terrestrial broadcasting (channels in the multiplex), via Internet broadcasting, and via cable broadcasting. The ratings of the leading channels of the republic according to data for July 2019 were as follows: 1. ??????? TV (Armenia TV); 2. ???? (Shant TV); 3. ATV; 4. ?????????? ?????????? ?????????????????? (Public Television of Armenia); 5. ??????? (Kentron TV).

Practically all Internet providers in Armenia offer users cable TV services in the general package. This is one of the actively developing segments of the television market. It is difficult to determine the exact number of cable television users in view of the absence of statistical data from providers. The cost of the package Internet + major international and Armenian channels is about US\$15.

Regional television companies suffered the most from the transition to digital broadcasting. Geographically, Armenia is divided into eleven regions. Three to four local TV channels were formed in each region after independence, and, as a rule, they had high ratings. The main income came from local advertising, as well as from the materials they shot for the news releases on the capital's channels. After transition to digital broadcasting, one channel remained in each region, while the rest were offered to merge. This could be realised only in Gegharkunik region. The National Commission has not turned off analog broadcasting yet, but this amounts to a slow death. In order to write this report, in-depth interviews were conducted with all the heads of regional channels. Practically all of them have the same problems: loss of audience, advertising revenue and staff reduction. From different regions, 14 channels not involved in the multiplex merged together and asked to allow temporary broadcasting in digital format several times, but this didn't take effect, and the complaints went unanswered.

All regional and metropolitan channels broadcast in multiplex in Armenian. Several Russian TV channels broadcast in Russian are also relayed in Armenia, among them *RTR Planeta*, *Russia K*, *Channel one Russia*, *Mir*, and the American television channel *CNN*. In addition, television signals of Turkish, Iranian and Azerbaijani channels reach the Armenian territories bordering with Turkey, Iran and Azerbaijan. At the same time, foreign films and foreign TV series are still shown in Russian, especially on regional TV channels; more recently, the *Public Television of Armenia* has started dubbing films into Armenian.

All the above-mentioned problems related to the television sphere are caused by the failure of the Law on Television and Radio. The law has long been outdated and requires changes in many articles.

The process of licensing channels is excessively regulated. The field of radio and the activities of radio stations in the regions of Armenia require special attention, as most of the regions are deprived of local radio stations today and there is a need for state support for television channels that create socially useful content. The problem of the second commercial multiplex, which is open for everyone, must also be settled. Now, the draft of the new law is under discussion; hearings on its approval may be held at the National Assembly in the spring-summer of 2020.

## Digital Media

Conventionally, the history of the development of the online environment in Armenia can be divided into three time stages: The emergence of the Internet (1988-1995), the period of monopolisation and stagnation (1997-2006) and the period of active development (2010 to present). In the first period, the users of the Net were mainly academic circles of the republic: institutes and research centres. The second period (1997-2006) is related to the activities of ??????? (ArmenTel), the largest telecommunications company and the first Internet provider in Armenia. The high monthly fee for using the Net during this period, poor infrastructure, slow Internet traffic, according to most experts and representatives of the journalistic community, had a very negative impact on the development of the ICT sector and online media in the republic. The third period of the Internet development in Armenia was marked by the fall of ArmenTel's monopoly.

In the first years of independence, right up to 2005, the digital media of Armenia were usually represented by singular sites. Among the journalistic community, paid subscriptions to offline distribution of information were most common. The first informational site, the *Aragil* news digest, has been functioning since 1994. The site distributed articles from Armenian newspapers translated into English. Later, such distribution began to be realised by the news agencies ?????? *Snark*, renamed ??????? (*Arminfo*) and ?????? ?????? (*Noyan Tapan*). In those years, the pioneers in online journalism were the newspapers *Azg* (*Nation*) and *Aravot* (*Morning*), the information portal *Panarmenian.net*, and later *A1+ TV* channel, which had lost its licence. The difficult socio-economic situation in the republic and the high prices for Internet services sharply limited the number of users, which mainly consisted of the journalistic community, representatives of the IT sector and representative offices of international organisations. Online media were focused on outside audiences and conducted a selection of information within a week, usually in English and Russian. Another obstacle for the development of online media was the lack of ability to create texts in Armenian. Due to technical problems with Armenian encodings and fonts, the content was created mainly in Russian or English.

Today, online media as an alternative to traditional media are perceived as a more liberal platform for searching information and free expression of opinions. For example, for the Armenian press, especially the print media, electronic media became the only way to somehow "stay afloat". Given that most newspapers have a circulation of several hundred to several thousand copies, almost all print media seek to go online and become a source of information on social networks. Moreover, it is often the case that some electronic media themselves form an information agenda for all types of media in the republic. Thus, in April 2016, the Armenian public was stirred up by an investigation conducted by the online source *Hetq.am*. The journalists of the newspaper together with the International Consortium of Investigative Journalists (ICIJ) revealed the involvement of Mihran Poghosyan, the head of the Compulsory Enforcement Service of the Ministry of Justice, in the activities of offshore companies registered in the British Virgin Islands and Seychelles. The journalists of the online edition proved that the official had been doing business through registered offshore companies and concealing the income received. The investigation caused a wide public response; as a result, the official sent in his resignation and was dismissed. For the first time in the history of modern Armenia, a precedent was established. The activities of online media caused the resignation of a civil servant, which was a significant achievement.

An important role in increasing the number of Internet users was played by the factor of the Armenian diaspora and the large number of labour migrants working outside the country. Socio-political processes are also among the reasons that stimulated interest in the Internet space. Thus, the first and truly mass consumer interest in online media in the modern history of Armenia manifested itself in March 2008, when the opposition, which expressed disagreement with the results of the presidential elections in February, took to the streets of Yerevan. The Velvet Revolution, which took place in Armenia in April 2018, stated the absolute domination of online media and social networks over traditional media, which were considered to be biased and pro-governmental. In fact, the entire revolutionary process, starting with the first rallies and ending with the parliamentary meetings at which the new prime minister was elected, was transmitted by online media promptly and in real time. This period saw an unprecedented increase in the online media audience. Thus, the monthly attendance of online media sites *A1+*, *1in.am*, and *Azatutyun.am* (Armenian service of *RFE/RL*) in April 2018 increased by ten folds, reaching 15m, 20m, and 40m views respectively.

According to statistics posted on *Similarweb.com*, in the global ranking of information resources, the leader among Armenian online information resources, as of Spring 2020, is *News.am*, which ranks at 7,382, followed by the following information sites: *Mamul.am* (rank 21,172), *Lurer.am* (rank 43,290), *Tert.am* (rank 47,415), *1in.am* (rank 44,712), *Blognews.am* (rank 50,602). According to the results of the 2018 Freedom on the Net study published by Freedom House, of the nineteen countries that recorded progress in 2018, Armenia significantly improved its position and moved from the list of 'partially free'

to the list of 'free' countries, ranking 27th in the world. The authors directly associate this success with the Velvet Revolution. In 2020, the republic retained the status of "free from the Internet", however, according to the report of Freedom House, from the position of general freedoms, it continues to remain PartyFree. Another organization, Reporters without Borders, characterizes media processes and media activities in Armenia in the terms of diversity but not yet independence.

Studies of the linguistic aspects of online resources of Armenia, registered in the largest rating system Kayqer.am, have revealed the following picture: 45 percent of the sites operate only in Armenian; 32 percent place information in three languages – Armenian, Russian and English. As a rule, the source is created in Armenian, with translations into other languages. Only 10 percent place information exclusively in Russian, with the source initially created in Russian. All the other sites translate articles from Armenian into foreign languages. Thus, online media of Armenia are the only ones in the media system focused on three languages, with the original source in Armenian.

## Social Networks

According to the company Mail.ru Group, as of January 2017, of all social networks the Russian Odnoklassniki (Ok.ru) occupied the first place in terms of traffic - the monthly audience of the network users in Armenia reached 1.4 million people, and the daily audience of the network was 713,000 people. Facebook was in second place, Mail.ru and Instagram were in the third. Up to 66 percent of users of social networks in Armenia are men. The social network VKontakte, highly popular in Russia, does not have many Armenian users engaged in discussions. As a rule, Armenian users of VKontakte prefer to watch movies and listen to music.

Social networks are perceived in Armenia as a platform for searching alternative sources of information. Not uncommonly, various campaigns discredit the activities of the official authorities or reveal pressing social problems. During the parliamentary elections, held on April 2, 2017, the highest social network user activity fell on April 1, the pre-election silence day. While the traditional media complied with the universal law, social networks were not subject to the law and continued to distribute the archived materials of various TV and radio channels undisturbed.

During the peaceful transition of the power in April 2018, the number of users of Facebook increased. According to a research conducted by the cyber security expert Samvel Martirosyan, a significant part of the population, up to 250,000 people, moved to Facebook from the *Odnoklassniki.ru* network during this period, thereby sharply increasing the number of views of articles and video material. This was facilitated by online media, which constantly posted live broadcasts and reports from rallies and protest actions on their social network pages. The key source for the mobilisation of the general public during rallies and for a larger switch of the population to Facebook, were live Facebook broadcasts by the opposition leader Nikol Pashinyan. Pashinyan actually created a precedent: By establishing direct connections with the population, he managed to push the traditional media out of the information field and become the main newsmaker.

Facebook, in turn, lost some users, who moved in three directions in favour of Instagram, Twitter and LinkedIn. In the last two years, in the light of aging of Facebook users and the slowdown in the number of Instagram users, there has been an active growth in TikTok network users. Mainly young people such as schoolchildren and students are flocked in TikTok.

According to the site Similarweb, in the April of 2020, google.com ranks first in terms of traffic among online resources, youtube.com ranks second, facebook.com takes third place, in fourth place twitter.com, and Instagram and Ok.ru are last on the list. Interestingly, thanks to the active work of young bloggers, YouTube is interpreted in Armenia as a social network with all its components, rather than as a platform for posting online broadcasts and videos.

## Opinion Makers

The history of the Armenian blogosphere began in March 2008. At that time, after the presidential election, the opposition, not agreeing with the election results, took to the streets. Clashes began and a number of sites were blocked for several weeks. It was during this period that blogs became the most reliable source of information. From 1 to 20 March, 2008 bloggers dominated the information environment. This dominance was so strong that even later, for two or three years, the accounts of popular bloggers were visited more often than online news resources, not to mention newspapers. Later, the popularity of bloggers was replaced by activity in social networks.

Today, the blogosphere in the classical sense is practically absent in Armenia. There are no Armenian bloggers who write online in plain text format on pressing and topical issues to influence public opinion. The existing blogs are anonymous; it is difficult to identify their authors or the organisations that stand behind them. One of the main reasons, according to the bloggers themselves, is the lack of demand for analytical materials. Another reason is bloggers' unwillingness to disclose their personal data, hence the lack of public confidence in bloggers and in the material they post online.

However, vlogging is gaining popularity since 2016. There are not so many vloggers, but they have several tens of thousands of subscribers. As a rule, vloggers upload videos on urgent political problems - *SOS channel* has 50,000 subscribers and covers social and political issues - *adekvad* has 2,000 subscribers and covers health and healthy lifestyle topics - *Doctor Armen Astvatsatryan's corner* has 20,000 subscribers; covers urban stories about the capital of Armenia, Yerevan - *Yerevan Every Day*, with 6,000 subscribers, covers culinary topics about Armenian food and shares personal stories - *Anush The Blogger* has 80,000 subscribers. Over the past two years, the famous Armenian vlogger Zhorzh has noticeably increased the number of subscribers. The author conducts a vlog about Armenian food and he managed to gain 1.7 million subscribers.

The main audience of the vlogger is outside the country; its members are either the representatives of the Armenian diaspora or the Russian-speaking audience around the world. Despite the fact that the "Velvet Revolution" in the country took place largely with the help of video broadcasts and direct connections, vlogging did not gain popularity among politicians and oppositionists. Traditionally, the Prime Minister and many other politicians continue to communicate with the public through profiles on Facebook.

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- [Radio Aurora](#)
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#### Opinion Makers

- [Adekvad](#)
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- [Anush The Blogger](#)
- [Samvel Martirosyan](#)
- [SOS](#)
- [Yerevan EveryDay](#)
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- [Zhorzh](#)

## Organisations

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### Trade Unions

All attempts to establish industrial media associations in Armenia were unsuccessful. These either disintegrated over time, or the initiatives to create them were unsuccessful from the very beginning. The main reason for this is the difficulty in constituting the Armenian media as independent businesses. As a rule, Armenian journalistic communities do not belong to any trade unions or business communities and do not cooperate with trade missions or organisations.

### Journalist Associations

The largest organisation is ?????????? ?????????????????? ?????????? (Journalists Union of Armenia - JUA). The Journalists

Union of Armenia was founded on 27 March 1959. On 1 June 1978, the Journalists House was opened in Yerevan. The main goals of the JUA are to assist in enhancing pluralism, reform media legislation, and ensure the constitutional right of freedom of expression and media in Armenia. A member of the International Federation of Journalists and the International Confederation of Journalists Unions, the JUA is a creative public organisation, currently uniting 1,520 media people. The JUA mainly deals with social problems of the media professionals, carries out various educational programmes, and participates in the discussions on reforming the media legislation.

?????? ??????? ?????? (Yerevan Press Club - YPC) was founded in July 1995 and is the first professional association of journalists in Armenia established during the post-communist period. YPC is a non-profit, non-governmental organisation that unites journalists, publishers, media leaders and experts, irrespective of their political ideas. Its mission is to support and develop independent and professional media, seeking to help strengthening democratic institutions and establishing civil society in Armenia. Its objectives are: to defend the journalists' right of freedom of expression and of free access to information; to assist in improving the legislative and the economic base of the media; to promote professional contacts between Armenian and foreign media and individual journalists; to strive for respect and adoption of principles of professional ethics by journalists; to assist in the growth of journalists' professional skills through various workshops, conferences, trainings, etc.

Internews Media Assistance Organisation, currently the ????? ?????????????????????? (Media Initiatives Centre), was also founded in 1995. It provides broad-based assistance to the Armenian broadcast media, has extensive experience working with schoolchildren and students, it promotes the introduction of modern technologies in the information sphere and produces high-quality video and audio products. Throughout their existence, Internews and YPC have cooperated closely and effectively in most priority areas. Since 2003, more than ten public journalistic associations have been established in Armenia, specialising in specific areas of work and seeking to activate professional communities in the regions. Among them are Gyumri Journalists Club Asparez, Investigative Journalists, the Committee to Project Freedom of Expression, Media Diversity Institute-Armenia, Goris and Vanadzor Press Clubs, etc. Most of the journalistic organisations have long-term partnerships and agreed approaches to supporting and developing independent and high-quality media, protecting freedom of speech, information and the rights of journalists, and improving the legislative and economic base of the media.

## News Agencies

There are nine news agencies in Armenia. The oldest state agency ?????????? (Armenpress), originally called the Armenian Telegraph Agency, was founded in 1918. In 1991, two private news agencies started to function - ?????? (Snark) and ?????? ?????? (Noyan Tapan), which reported breaking news not burdened by stereotypes of the Soviet journalism. Developing its activities, Noyan Tapan became a peculiar holding, which then started a TV company of the same name, the *Noyan Tapan Highlights* newspaper in English and also became engaged in a publishing business. As to Snark, it was transformed in 2001, and ?????? (Arminfo news agency) was established on its base. The mid-1990s saw the establishment of ????? ?????????? ?????????????? (Arka news agency), which found a niche specialising on the publication of economic news. Later in 1999 and 2000, two other agencies ?????????? (Mediamax) and ?? ?????? (De-facto) started to operate.

## Audience measurement organisations

The TV market of Armenia is measured by the company Admosphere Armenia. It was founded in 2015 and is a business partner of the Czech company Mediaresearch, which was renamed Nielsen Admosphere in 2017, becoming part of the world's largest telemetry measurement company Nielsen. Since 1 April 2016, Admosphere Armenia has provided digital-television audience-measurement data. The radio market monitoring in Armenia is carried out by the company RadioControl

Armenia. Almost all of the capital's radio channels cooperate with it. The company mainly conducts marketing measurements of the radio market to provide information to large advertisers.

## Sources

Journalist Associations

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- [Media Initiatives Center](#)
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News Agencies

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- [Photolure](#)

Audience measurement organisations

- [Admosphere Armenia](#)

## Policies

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### Media legislation

The first basic law on Mass Media in the history of modern Armenia was adopted by the Supreme Soviet of the Republic of Armenia in 1990. The law initiated the process of legitimising *samizdat* newspapers as well as formulated the basic concepts for subsequent legislative acts regulating the media sphere.

One of the few progressive documents of Armenia, highly appreciated by international experts, is the Law on Freedom of Information, adopted in 2003. However, since its adoption, the law has been a topic of much discussion. Criticisms from the journalistic community are provoked by articles five ‘Recording, classification and storage of information’ and ten ‘Conditions for providing information’, which guarantee important conditions for free access to information. In addition, the regulations on the transition to digital broadcasting require serious revision. Since October 2016, the republic has completely switched to digital reception, but social packages for helping low-income families have not been finalised. Greater freedom is required for the regulation of relations in the field of television and radio broadcasting and licencing of television channels. The national licencing commission consists of nine members appointed by the president of the republic. The sphere of copyright and intellectual property protection also needs reforms. Thus, the lawmaking process in the media field is far from complete and requires major changes.

The Information Communications policy in Armenia is determined by the Ministry of Transport and Communications. The practical application of legal acts, laws and regulations in this area is introduced and monitored by the Public Services Regulatory Commission, which ‘is an independent national regulator in the field of telecommunications.’ Although the government does not have a direct impact on the activities of the commission, its activities are financed by the state, and the commission members are appointed by the president of the republic. The entire telecommunications sector is regulated by the Law on Electronic Communication, adopted in 2005. On the whole, the Internet space of Armenia functions in a liberal field.

In the Law on Electronic Communication there are no mechanisms for blocking or monitoring the activities of an Internet provider or a communication channel. Local providers may be subject to administrative punishment in the form of revocation of a license under article 12 if, for example, ‘suspension or termination is necessary for reasons of national security or public interest.’ Another body monitoring the regulatory and legal sphere in Armenian cyberspace is the ICT Sector Development Support Council. It includes representatives of the public sector, civic activists and private investors. The Council makes decisions on the allocation of radio frequencies, as well as the issuance of network licences. Overall, three types of licences are issued: a licence to provide VoIP services (Voice over Internet Protocol - voice communication services via the Internet), a licence to use radio frequencies and a licence to provide electronic communication services (Internet access).

The activity of websites in the .am domain is carried out by the public organisation Internet Society of Armenia. Despite the reform of the 2005 legislation and numerous amendments to the Law on Electronic Communication, there are gaps in the law that require further modification. Thus, for example, the law only regulates the legal norms of technical nature: licencing, provision of radio frequencies, etc; but it is the Law on Mass Media, adopted in 2003, that should be responsible for the electronic media content. In this law, electronic media are only mentioned in Article 3, in connection with the listing of media distribution channels: ‘via a public communication network (network medium) - as an information resource having a specific address accessible to an unlimited number of people and containing information regardless of the frequency of replenishment, storage time and other criteria.’ In other cases, there are no separate references to the legal norms for the functioning of electronic media within the framework of the main law on Mass Media. This has constantly sparked active discussions among representatives of traditional media in Armenia, who have repeatedly accused online media of plagiarism and illegal use of copyright information. Many editors of print media, for example, point to the absence of any information about the editor, editorial board, address and contact numbers of electronic media that reproduce their materials.

Since the fall of 2019, the need to amend the Law on television and radio has been actively discussed in Armenia. Discussions were held between organizations representing the journalistic community and the governing authority. Thus, Yerevan Press Club together with Media Initiatives Center, proposed a bill which was adapted to the new digital realities. The project was not approved by the government. The president of Yerevan Press Club Boris Navasardyan told that they tried to

include all the shortcomings that had been in the sphere over the past 20 years, but the government decided to limit itself to cosmetic changes. The key elements of this bill, proposed by a group of politicians from the ruling party "My Step" must be checking and submitting reliable information to the news media, and countering the spread of fake news in the context of a political struggle for power. The law is designed to establish obstacles to the spread of hatred among the population through the audiovisual media. The audiovisual media should also ensure transparency of financing and translation of foreign content into Armenian. Public hearings on the bill should be held soon.

## Accountability systems

Armenian media regulate themselves in a disorderly manner. Today there is no single organisation that has managed to unite the entire journalistic community. Several attempts have been made by Yerevan Press Club. The first attempt at media self-regulation in Armenia was the Code of Conduct for members of the Yerevan Press Club, adopted in 1995. The current version of the document was adopted in 2002 and applies only to members of the club. The club's Ethics Commission is responsible for monitoring compliance with the requirements of the code. On 10 March 2007, at the initiative of Yerevan Press Club, 18 Armenian media outlets signed a joint Code of Conduct of Media Representatives and elected members of a new body called Media Ethics Observatory (MEO). The signatories committed themselves to publish the decisions of the commission in their media. The mission of the Media Ethics Observatory is to consider complaints of violations of the Code and make conclusions on them. The media representatives that signed the Code recognised the right of the Media Ethics Observatory to review the compliance of the actions and publications with the provisions of the Code, and expressed their readiness to publish the decisions of the Observatory in the media.

Currently, 46 Armenian media outlets have signed the Code and the initiative is supported by eight journalistic associations. However, a number of large media outlets and associations, including most of the leading national and metropolitan broadcasters, mostly loyal to the authorities and generally serving their interests, have not joined the Code. Neither have the well-known opposition newspapers, which hold a prominent place in the print media market, among them the *Aravot* newspaper and the *Hetq.am* published by the Investigative Journalists NGO, which prefer to follow their own codes. Other organisations and individuals also made attempts at self-regulation: Some media outlets, such as the regional channel *GALA TV* and the *Aravot* newspaper attempted to introduce an ombudsman position, but these initiatives did not last long due to financial difficulties. Another attempt at self-regulation was undertaken by the Public Council, created by the Decree of the President of the Republic of Armenia. The Public Council developed a document called the Charter of the Ethical Principles of Television and Radio Broadcasters, which was signed by 11 television companies, but in practice the Charter has not been used. Still another attempt at self-regulation was made by the Human Rights Defender's Office (Ombudsman), who initiated the creation of the Information Disputes Council (IDC).

The IDC and the Media Ethics Observatory have different functions. The former prepares explanatory letters for consultants in lawsuits for cases involving the media, while the latter investigates complaints from individuals and legal entities and promulgates its findings on media violations of journalistic ethics, thereby facilitating out-of-court dispute resolution. These two bodies cooperate in a number of cases.

## Regulatory authorities

The media sphere of Armenia is regulated by a whole range of legal acts, laws, regulations and articles that are directly and indirectly related to the field of journalism. The laws on mass information, television and radio, freedom of information, copyright and related rights, language, and advertising have a direct impact on the legal norms of the media system. The media are also controlled by the regulations of ?????????? ?????????????????? ?????????????????? ? ?????? ??????? ?????????? (the National Commission on Television and Radio - NCTR), individual articles of the Constitution, Criminal,

Criminal Procedure and Electoral Codes of the Republic of Armenia.

There are no regulatory and supervisory bodies for print and online media in Armenia. Supervision of content in the broadcast media is carried out by the National Commission on Television and Radio. The commission consists of eight members: Half of the members are elected by the National Assembly, and the other half are appointed by the president for a six-year term. However, the procedure for the appointment of NCTR members and their independence remain issues of concern. Before the shift of power in the republic in spring 2018, the regulatory body had a pro-government bias as the parliamentary majority supporting the president nominated candidates who were loyal to the ruling power. This fact directly influenced the contests for the issuance of broadcasting licences, which frequently were not transparent and fair.

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- [Public Services Regulatory Commission\(PSRC\)](#)

## Education

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### Universities and schools

Departments of Journalism function in all major state higher-education institutions. Education is organised under the Bologna system and includes a 4-year bachelor's programme and a 2-year master's programme. Annually the republic's academic institutions graduate about four hundred qualified journalists to the media space. Classical university journalism in Armenia is just over a century old. Yerevan State University (YSU) is the founder of journalistic education in the republic. In 1949, a journalism department was established at the philological faculty of YSU. The Faculty of Journalism of YSU was founded in 1999. The activity of the faculty is conducted by two chairs: Print and Broadcast Media and New Media.

In 1993, the Department of Culture of the Armenian State Pedagogical University named after Khachatur Aboyan created a department of television and radio journalism. Here students gain knowledge both at creative workshops and at theoretical sessions. It has the chairs of Directing Skill, Television and Radio Journalism and Camerawork Skill. Taking into account the teaching process, curriculum, working disciplines, teaching staff, as well as established traditions, the Pedagogical University has traditionally trained resources for Armenian cinema.

Since 1999, the Department of Journalism has also opened at the Russian-Armenian University. Since 2014, it has been reorganised into the Institute for Media, Advertising and Cinema. The following chairs operate on the basis of the Institute: Journalism, Creative Industries and Cinema and TV.

In 2004, the Yerevan Brusov State Linguistic University made use of valuable experience of international cooperation. In a

joint project with Yerevan Press Club and later with the Dutch organisation PressNow it established the Scientific-Educational Centre of International Journalism, which, since September 2010, has been an independent division of the university, providing bachelor and master degree courses.

The bachelor's programme of international journalism major prepares multilingual professionals for the following specialisations: TV Journalism, Broadcast Journalism, Printing and Electronic Press. At the level of master's degree specialists are prepared in the following specialisations: TV Journalism, New Media.

In 2015, the Branch of Lomonosov State University in Yerevan began its activity. On the basis of the branch, a training programme in Journalism was established. All major-related subjects are taught by the Journalism Faculty staff of Moscow State University after M.V. Lomonosov (MSU) in accordance with the curricula and work programmes of Moscow University. Being a structural unit of MSU, the branch provides the same level of education as in Moscow. Over the past three years, more than 50 qualified scientists were sent to the branch from MSU Faculty of Journalism: Candidates of Sciences, professors, associate professors, and heads of chair. Dean of the Faculty, Professor E.L. Vartanova has visited the branch twice with lecture courses.

Training in Journalism is provided on the following thematic modules: Multimedia Journalism, Themes of Modern Journalism.

In a short time, the journalism training programme of the branch managed to actively integrate into the journalistic community of Armenia. During one of her visits, the Dean of the Faculty of Journalism of Moscow State University E.L. Vartanova signed a cooperation agreement with the Journalists Union of Armenia, under which it is planned to conduct practical trainings for Armenian journalists with the involvement of the faculty staff of Moscow State University.

## **Professional development**

There is no special legislative regulation of journalistic work in Armenia. Due to the liberalisation of media legislation in 2003, the definitions of rights and obligations of a journalist have been removed. The state does not in any way regulate a journalist's professional development and does not oblige journalists to take advanced training courses or special trainings to improve professional skills. As a rule, this is a voluntary decision.

The Law on Mass Information states that a journalist, as a person who performs an important public mission, is under special protection of the state. However, this provision is merely declarative in nature except that, as has already been mentioned, legislature ensures protection of the journalist's information sources. The specific character of the profession creates additional difficulties in monitoring the observance of journalists' labour rights, which are violated widely and universally. Established recruitment and dismissal procedures are often not followed. Frequent changes of employment can be caused by a mismatch of an employee's political and other views with those of the media owners and executives. In fact, like in other areas, there are practically no independent journalistic trade unions in Armenia. The institution of collective bargaining is lacking. Media executives often hire people without professional journalistic education in order to explore narrow professional topics more thoroughly.

## **Media Development Organisations**

Since the late 1990s, foreign donors and professional organisations, as well as Armenian journalistic associations, have carried out considerable work on translating professional literature, developing modern curricula and teaching methods, training new teaching staff and creating new textbooks. Many representatives of the media, mostly broadcast, received training at numerous courses of Internews, now the Media Initiatives Centre. Training for various television specialties in courses for television workers of Meltex LLC (A1+ TV Company) paved the way to a successful career for many directors,

operators, and television journalists. Special months-long courses for journalists from different countries of the region began to be organised by the Caucasus Media Institute, created in 2002 (later renamed as the Caucasus Institute).

Alternative teaching methods based on professional communication with renowned practising journalists are also offered by ?????????????????? ? ??????? ??????? (Academy of Television and Radio), established in 2000. Other local journalistic associations, as well as foreign organisations including the International Federation of Journalists, Article 19, the Thomson Foundation, the European Centre for Journalism, and the Institute for War and Peace Reporting also organise various short- and long-term professional development programmes.

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Universities/Schools of Journalism

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Media development organisations

- [“A1+” TV company](#)
- [Academy of TV and Radio](#)
- [Caucasus Institute](#)
- [Eurasia Partnership Foundation](#)
- [Friedrich Ebert Foundation](#)
- [Media Initiatives Centre](#)
- [Open society foundations Armenia](#)
- [Thomson Foundation](#)

# Telecommunications

## Mobile network ecosystem

In Armenia, there is a high increase in the level of mobile services. Practically the whole population of the country are using mobile services. The republic made advances in mobile communications after 2006, when the monopoly of the Greek company ArmenTel ended and other mobile operators began to penetrate the market. Mobile phones are used without restriction by all segments of population in the regions and the capital. The mobile network is the main means of communication in the country.

After 2006, new players began to emerge on the Internet services market. The competition between mobile operators and Internet service providers has led to a significant reduction in the cost of services in this area and, as a result, the number of network users increased. As of January 2017, 97 percent of the Armenian Internet market was controlled by four companies:

Ucom (39.36 percent), ArmenTel Beeline (36.36 percent), Vivacell-MTS (13.81 percent) and Rostelecom (7.44 percent). According to Public Services Regulatory Commission of the Republic of Armenia, as of March 2019, the total number of Internet users in Armenia was 3.529 million, which is more than 100 percent of the population. According to the Statistical Committee of the Republic of Armenia, the number of mobile users in the country in 2019 was 4 million; for comparison, the number of households using landline telephones was 324,000.

## **Company profiles**

Until 2014, the mobile services market in Armenia was divided between three operators: ArmenTel (Beeline), Vivacell-MTS and Orange Armenia. All the three companies represented private foreign capital. Russian telecommunication companies Beeline and MTS continue to own the controlling interest in the two largest Armenian operators ArmenTel (Beeline) and Vivacell-MTS. The share package of Orange Armenia used to belong to France Telecom subsidiary. In 2015, the assets of Orange Armenia were acquired by Ucom (Universal Communication), founded in 2007 and providing broadband Internet services. This is the only company with Armenian capital.

## **Main trends**

All the three mobile operators offer their subscribers new services related to the consumption of media content of Armenian news sites. A number of Armenian TV channels are accessible from mobile devices. Given the lack of statistical data or studies about the most popular mobile applications, the factor of the vast Armenian diaspora scattered around the world, suggests that Armenian mobile phone users communicate extensively with the outside world and do this through the most common applications: WhatsApp, Viber, Facebook Messenger. Since spring 2018, users have been actively using Telegram. This happened when the application was blocked in neighbouring Iran and Russia, which heightened interest in the platform. Although the number of users amounts to several tens of thousands, a steady growth in interest is constantly observed. At the moment, Telegram is mostly used by journalistic editors or the media for the rapid dissemination of information.

Recently some leading banks of Armenia such as, for example, Acba Credit Agricole Bank, VTB Bank Armenia, Inecobank, have successfully used mobile money and mobile banking applications, in cooperation with telecom operators, allowing users to manage their accounts via smartphones. These applications are used predominantly by progressive young people in the capital. Vivacell-MTS has launched its billing system Mobidram, which allows making monetary transactions at any time and pay bills from a mobile or online.

## **Mobile coverage**

According to the information provided on the website of the Public Services Regulatory Commission in 2020, the entire territory of Armenia was provided with mobile communications using 2G and 3G technology, and 89.5% of Armenian territories (898 settlements) were provided with 4G + / LTE Advanced communications.

ArmenTel (Beeline) provides 88.9% of the republic's coverage with 2G technology, 60% of the territory's coverage with 3G technology, and 60% of the republic's coverage with 4G technology.

Vivacell-MTS provides 99.3% of the territory of Armenia with 2G technology, 98.1% of the territory of the republic with 3G technology, and 48.5% of the republic with 4G + / LTE Advanced technology.

Ucom provides 84.7% of the territory with 2G technology, 89.5% of the territory with 3G technology, 88.2% of the republic with 4G + / LTE Advanced technology.

## **Mobile ownership**

As of 2017, Vivacell-MTS was the leader in the mobile telephone market with 61 percent shares and more than 2 million subscribers. ArmenTel (Beeline) had a share of 25.6 percent from 880,000 subscribers, and Ucom had 13.4 percent of the market and 460,000 customers. The same situation is observed in the field of mobile Internet access: According to data for 2017, Vivacell-MTS is a leading player with a market share of 73.5 percent and 1.33 million subscribers with Internet access rates. The share of ArmenTel (Beeline) makes 22 percent and almost 400,000 subscribers, and Ucom, correspondingly, has less than 5 percent and 83,000 connections. In 2017, all the three companies already provided broadband Internet access using 4G technology. The first 4G network was launched by MTS in 2010, and in 2017 the company reported that it provided 4G+ technology services to more than 52 percent of the country's population. In 2016, ArmenTel (Beeline) launched its own 4G network, and Ucom began to provide services on 4G+ technology. Simultaneously, most residential areas of the republic are still provided with access through 3G and 2G technology.

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## **Innovation**

### **Landscape analysis**

The development of information technology and the creation of innovative research centres in Armenia is the state strategic goal for the coming decades. In 2014, the country's parliament passed a bill on state assistance to the field of information technology. The bill proposes the creation of a new state assistance system in the field of IT for Armenia.

Since 2002, the Enterprise Incubator Foundation has been operating in the republic. Enterprise Incubator Foundation (EIF) is one of the largest technology business incubators and IT development agencies in the region. Established in 2002 within the framework of the World Bank's Enterprise Incubator project, it is called to support the development of information and communication technology sector in Armenia through creating a productive environment for innovation, technological advancement and company growth.

In 2017, the financial turnover of ICT companies in Armenia crossed the US\$600m threshold. The number of IT specialists in the republic exceeds 15,000. The republic is planning the creation of a special free zone for the development of high-tech projects, including blockchain. This idea was supported by the country's government and it was planned to create a national Silicon Valley in 2019. At the first stage, an accelerator will be launched for high-tech projects from different countries. Then it is planned to create data centres on the blockchain, which will ensure the work of the accelerator.

### **Profiles of main tech parks, accelerators, hackathons**

In October 2019, Armenia will host a prestigious IT forum World Congress on Information Technologies (WCIT), which is

traditionally attended by various countries' leaders and the largest representatives of world IT companies. Since 2009, the Republic of Armenia has held the Annual Prize of the President of Armenia Global IT Award. Over the years, the award was bestowed to top managers of world-renowned IT technology development companies: Hitachi's ex-CEO Tsugio Makimoto in 2013, president of Cisco Systems Development Mario Mazzola in 2014, Apple's former CEO Tony Fadell in 2017.

One of the most important platforms promoting the development of digital society and innovative technologies among young people in Armenia is ?????? ?????????? ?????????????? ??????? (Centre for Creative Technologies - TUMO). TUMO is a new kind of educational experience at the intersection of technology and design. At TUMO teens are given the tools and know-how they need to reach their maximum potential and they chart their own learning path through hands-on activities, workshops, and projects. TUMO centres operate in several regions of Armenia and beyond, including in Paris and Nagorno-Karabakh. In October 2018, the Armenian concern Multi Group and the Swedish company Omnia Tech opened in Armenia the largest mining farm in the region. The cost of the project is estimated at US\$50m. The farm deploys 3,000 machines for the production of bitcoin and ethereum cryptocurrencies. Its capacity is planned to be increased to 120,000 machines. According to Robert Velg, the founder of Omnia Tech, the company is planning to implement technology projects in Armenia, which will be joined by 500 foreign companies, including Facebook, Google and Amazon.

## Sources

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- [Enterprise Incubator Foundation](#)

# Traditional forms of communication

## Summary

Armenia is a monoethnic Christian country surrounded predominantly by Muslim countries. Over the centuries, such a neighbourhood has established stable closed intra-communal relations. Among traditional forms of communication, close communication between neighbours deserves a special mention. Armenians are very hospitable people who often like to visit their neighbours and invite guests to their home. Important places to discuss key socio-political situations are the street, yard, and the central or main square of a city or village. As a rule, it is in such busy public places that the primary method of traditional communication is applied. It is not by chance that Republic Square, the central square in Armenia, became the concentration place of opposition forces and the change of power in the country.

The traditional communication channels are most pronounced in the cross-border regions. The lack of diverse sources of obtaining information from the media and the underdevelopment of the Internet infrastructure make people rely on face-to-face communication. As a rule, traditional communication takes place in markets, areas with the administrative offices of the village municipality or community, and village councils. Among the rural population, there is a set expression that characterizes this particular type of communication: "I'll go to the rural council and find out what is happening in the world". The main participants in traditional communication are the elderly; as a rule, they form the backbone of the population in the regions of Armenia. The difficult socio-economic situation in the republic forces young people and the employable population to leave for seasonal work or emigrate abroad for permanent residence.

Another important communication factor for Armenians is the cuisine and a nicely laid table. As a rule, people gather around

the table to have the traditional dishes. All important issues related to politics, culture, socio-economic situation in the country are then discussed at the table. Interactions with friends and relatives traditionally include visiting each other on the New Year's Eve, following days and Armenian Christmas, which is on 6 January. Traditional communication is enhanced by annual culinary festivals held in various regions of Armenia. Such events serve as a cultural platform for direct communication between the residents of these regions and visiting tourists from the capital and the diaspora representatives from around the world.

## Sources

- [Anthony Bourdain feat. Serj Tankian in Armenia - Parts Unknown](#)
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- [Armenia, the Land of Noah](#)
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- [Conan in Armenia](#)
- [One week in Armenia](#)

## Conclusions

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### Conclusion

As can be seen, the media landscape of Armenia requires serious structural changes at all levels. Print media are in poor condition. The underdevelopment of the advertising market forces newspapers to rely largely on sponsors, which has an extremely negative effect on the content and on the dissemination of independent information. Regional newspapers, which are on the verge of extinction, are especially vulnerable; they cannot be retrieved even by going online. Television completely lost its ground as a key source of information, giving way to online journalism and social networks.

The process of transition to digital broadcasting raises many questions inside the Republic. The competition for granting licenses to regional channels for broadcasting in a multiplex is not always carried out objectively. The creation of a second multiplex, whether commercial or private, which is being talked about continuously, is artificially hampered at the legislative level. Lacking sufficient means and technical capabilities, regional channels cannot meet the selection criteria and have to die out slowly in the analog format.

The country is going through a process of development of online media. The fall in prices for Internet services has contributed to the rise of online journalism, which actively forms the main informational agenda, especially amid sociopolitical processes.

To a large extent, it is thanks to online media activities that in 2018 Armenia moved from the list of 'partially free' countries to 'free' ones. Online media broadcasting live actively covered the entire process of the revolution, promptly notifying the population about all the events in the streets of Yerevan.

The legislative sphere also requires major changes. The main law on Mass Media needs to be amended, especially in terms of the activities of online publications.

After the change of power in 2018, the National Commission on Television and Radio was actively involved in the

transformation process. The draft law on Television and Radio is currently being discussed, the adoption of which should affect on channel licensing regulations, the creation of a second commercial multiplex, solving the problems of regional channels, increasing public status and state support for channels. Still, the parties have not reached a consensus in the discussion. The opponents of the bill think that drastic changes are required, and first of all the law should include the regulation of the Internet space as the main information platform, and not the individual areas of television, radio and online media.

In terms of linguistic factors of functioning, the media landscape of Armenia is primarily bilingual: Armenian is the leading language, the second is Russian. Online media seek to provide information in English as well. The Russian language is more present on television and radio; thus Russian television channels and radio stations are relayed in Armenia. This fact can be explained by the existence of the world's largest Armenian diaspora in the Russian territory, close economic relations (Armenia together with Russia is a member of the Eurasian Economic Union), and the existing historical ties. In addition, a large number of Russian-language content depends on the lack of a budget for dubbing. In the context of linguistic media consumption, the Russian-language media are more used by the representatives of the older generation who received education in the Soviet Union.

Since the "Velvet Revolution", the republic's media system, like all other industries, has been in a transitional, post-revolutionary stage. However, the past two years have not yet revealed any fundamental changes in the media sphere. Media continues to be fragmented, with a lot of polarization. Commercial media belong to either private business or opposition parties which actively intervene in editorial policy. Independent media continue to rely mainly on foreign grants and, to a lesser extent on advertising. Mutual accusations, attacks, harassment and slander between the opposition media and power structures have increased significantly, especially the intensity of hatred is great on social networks. Against this background, statements of Prime Minister Pashinyan about the venality of most of the media and journalists in the republic are adding fuel to the fire. The transformation process in the media sphere still continues.

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