

Russia - Media Landscape

Author(s): Elena Vartanova

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Overview

Russia's media is unique in several aspects. The country has the largest in the world though unevenly populated territory comprised by 11 time zones and inhabited by a multi-ethnic population speaking more than 100 languages besides official

Russian. This has seriously influenced the structure of the media system in which the dominance of federal television channels transmitted both via terrestrial and satellite networks has been essentially determined by geographic factors. The ethnic structure of the population also affects media functioning since there is a clear need to maintain a high number of minority languages media.

The fall of the USSR in 1991 was a start of a new period in the history of the Russian media. The post-Soviet construction of a new nation-state was supported with radically different social institutions and processes – competitive elections, the end of the one party and ideological (Communist) monopoly, a decrease in state control over the national economy and culture. In the Russian media there have emerged a number of new practices including abolition of censorship, freedom of press concepts and related legislation, privatisation of media, a shift to more universal standards of journalistic professionalism, and increasing control editorial boards over news production. Year 1991 has become a turning point for the transformation of Russian media since it opened up the double sociopolitical – from the Soviet to Russian, and technological – from analogue – transition to digital media system. An important change was also a breakdown of the heavily centralised and pyramid Soviet media system and the rise of horizontally and regionally structured media markets based on advertising business model.

The present Russian media landscape is being very diverse and characterised by the centrality of television, which has taken upon itself several roles – a major instrument of maintaining national identity; a universally accessible channel to inform Russians about domestic and international news; and a tool to organize leisure time. While television has grown into the core medium, Russian mass circulation press in the last decades has not progressed much. Major processes in the print media after 1991 were the reduction in newspapers circulation, increasing backwardness of printing technologies in regional press and ineffectiveness of press distribution systems, decline in print media advertising, drop in number of “paper press” readers among young Russians. This has mirrored their diminished interest in newspapers as a source of news agenda and growing popularity of online media. The state of Russian mass-circulation newspapers reflects country’s social and technological dynamics, and the USSR Russia’s press moved towards commercialisation or alliances with local administrations.

Major trends of the media market also include the competition of private media companies operating in a liberalizing media industry in the area of print and broadcasting media, cable and satellite TV, television production, telecommunications, online media, search engines; uneasy coexistence of state (state-owned and operated media companies) and overtly commercial interests (private media); clashes of innovative breakthrough technologies (RuNet and mobile telephony).

Political parallelism has not seriously influenced the present structure of the Russian media, and one of the reasons was the slow maturation of Russian multi-party system. The long-standing tradition of the Communist party monopoly alienated Russians from multi-party politics thus not leading to the establishment of a competitive political party system, accordingly, the Russian media until now could not be described through the political parallelism concept, though some media informally support different ideological positions present in the public sphere.

On the contrary, the relationship between the state and media in Russia has always defined the nature, particularities and conditions of the media system. The tsar Peter the Great established the first Russian newspaper *Vedomosti* in 1703, and this became the first reflection of top-down relations between the Russian state and journalism almost for two centuries. The legal practice of censorship introduced in 1804 by Alexander II existed in Imperial and Soviet Russia until 1991, and this paternalistic tradition made a strong subsequent impact on the state–media relations, including changing patterns of state regulation and the financial support for economically weak media through state subsidies. This has been proved by the state media policies to guarantee cultural diversity in multi-ethnic and multi-linguistic Russian regions.

Russian journalism as a profession has strong literary roots being a strong cultural institution. Starting from literary journals of the XIX – early XX Centuries it has matured into a literary profession with a high social role, which later turned into a political

and educational activity. Historically Russian journalism has been oriented less towards reporting but more towards 'publicistics', political or moral essays with moral reasoning, and this still remains a distinguishing feature of the profession, which is gradually embracing new professional standards and re-thinking principles of social responsibility.

Media

Print

Print newspapers still have a role to play in the Russian media system although the general circulation and popularity of the print media dramatically decreased in 1990 – 2010s. According to RKN, in Russia in 2016 there existed 22,009 registered newspapers yet not all of them have been published. The total circulation was estimated as 6.8 million copies in 2016 compared to about 8 million in 2006.

The Russian newspaper market is divided into three geographical sectors: national (Moscow-based publications) and regional, located in big cities and large administration centers and local small settlements with the prevalence of the last two. Frequency of publication tends to decrease with a transition from dailies to weeklies. Thematically, Russian newspapers vary considerably, from quality socio-political and business ones to entertainment tabloids of general interest

Russian national quality newspapers include both general interest and business dailies such as *Rossiyskaya Gazeta* (136,927), *Izvestia* (431,200), *Kommersant* (93,874), *Vedomosti* (59,000), *Nezavisimaya Gazeta* (40,000). Although the quality newspapers set the news agenda and provide readers with analytical articles, the influence of their print circulations is limited to the largest industrial cities with their brands remaining influential online.

At the mass press market the leader, in terms of circulation and reach of the audience is the *Metro* free daily published in Moscow, St. Petersburg, Rostov-na-Donu, Togliatti, Novosibirsk, Nizhny Novgorod and Ufa. The most significant group within print periodicals is general interest dailies, merging features of quality and mass circulation / tabloid press. They could be described as mixed-type publications tending to be socio-politically oriented with no particular thematic specialisation. In terms of distribution mass newspapers are most widely represented across the country and reach different social strata of the audience. *Komsomolskaya Pravda* (1.1m) is published daily in 44 Russian cities with regional inserts and is still popular in the neighboring post-Soviet states. The newspaper safeguarded its popularity outside the capital by producing inserts in cooperation with regional newspapers which turn adopted content strategies of the Moscow daily similar to sensational journalism. *Moskovskiy Komsomolets* (700,000) characterised by a combination of features of the analytical quality press (strife for exclusiveness, an analytical focus on political issues, investigations and the like) and of the mass press (scandalous topics, provocative headlines and so on). Other capital newspapers with regional or local inserts are *Rossiyskaya Gazeta* daily and *Argumenty i Fakty* weekly (1.2m).

Among the leading newspaper publishing houses one should mention:

- Komsomolskaya Pravda: newspapers *Komsomolskaya Pravda*, *Express Gazeta*, *TeleProgramma*
- Argumenty i Fakty: newspapers *Argumenty i Fakty*, *Argumenty i Fakty zdorovie*, *Argumenty i Fakty na dache*
- Bauer Media: newspapers *777*, *Gvozd Sezona*, *Kaif po vykhodnym*, *Russkii krossvord*
- Moskovskiy Komsomolets: newspapers *Moskovskiy Komsomolets*, *Moskovskiy Komsomolets bulvar*, *Rossiiskaya okhothichiya Gazeta*

- Metro: newspapers *Metro* Moscow, St. Petersburg, Rostov-na-Donu, Togliatti, Novosibirsk, Nizhny Novgorod, Ufa.

In terms of publishing houses ownership the newspaper market is more complicated because a long-term economic decrease in the market made it non attractive for private investments. This also explains the ownership structure of the newspaper publishing business, especially in Moscow, with a dominance of state companies and private industrial or financial holdings including:

- The Government of RF is the publisher of *Rossiyskaya Gazeta* daily and the Federal Assembly of RF is the publisher of *Parlamentskaya Gazeta*
- The group of investment companies owned by Georgy Berezkin is considered to be the major stakeholder of *Komsomolskaya Pravda*, *Metro* (in Moscow), *Delovoy Peterburg* and *RBK daily*,
- *Natsional'naya Media Gruppy* (NMG) holding with diverse interests both outside and inside media industry (in on-air and cable television, film and TV production, digital services) is nowadays an owner of the *Izvestiya* (334,900) together with *Metro Peterburg* and *Sports Express*.

Regional and local newspapers published in Russia vary in circulations and ownership structures, but they remain important sources of local information and instruments of supporting local identities. Among the most popular regional newspapers are *Moye* (Voronezh, circulation 78,000), *Oblastnaya gazeta* (Sverdlovskaya region, 70,000), *Nashe vremya* (Rostov-on-Don region, 45,000), *Krasnodarskie izvestiya* (Krasnodar region, 32,000), *Vladivostok* (Vladivostok, 22 000), *Lipeckaya gazeta* (Lipetck region, 20 000), *Kaliningradskaya pravda* (Kaliningrad region, 14,000), etc Local press in Russia is numerous, and the largest circulations have the following publications: *Magnitogorskii rabochii* (Magnitogorsk, 80,000), *Yakutsk vechernii* (Yakutsk, 40,000), *Odincovskaya nedelya* (Odintsovo Moscow region, 50,000) and many others.

In the last decade following trends became important for the Russian newspaper market:

- newspapers in large industrial centers were able to link their distribution to urban transport and trade infrastructure and the arrival of the global phenomenon of free newspapers, together with the establishment of new lifestyles made this development even stronger;
- the regional press surviving the decrease of advertising markets became dependent on subsidies from local authorities;
- almost all Moscow-based dailies and newspapers of regional administration and economic centers became active online practically duplicating their content in digital media.

The magazine segment is currently the most globalised and successful print medium, though with more limited audience reach than newspapers. The total annual magazine circulation amounted to 1.3m copies in 2016. The leaders among magazines are weekly TV guides *Antenna Telesem* (1.9m) and *7 Dnei* (770,000), celebrity monthly magazine *Kollekciya Karavan Istorii* (660,000) and weekly *StarHit* (520,000) and *Hello!* (350,000), women's weekly *Liza* (650,000), with monthly special interest auto magazine *Za rulem* (310 000), fashion monthly magazine *Burda* (278 667), men's magazine *Maxim* (141,667), and women's *Psychologies* (140,000) and *Elle* (135,000).

Magazine publishing, particularly Russian franchises of global brands (men's and women's, fashion and lifestyle, automobile, interior brands), is still more attractive to investors than newspapers and other media because of higher advertising revenues and less expensive distribution. The exposure of Russia to Western consumerism in the 1990s increased the popularity of publications carrying lifestyle content, thus making magazines more attractive to fashion and travel advertisers than other media platforms.

Leading publishers in the segment are:

- Burda: magazines *Burda*, *Liza*, *Otdokhni!*, *Lublu gotovit*
- Hearst Shkulev Publishing: magazines *Elle*, *Maxim*, *Psychologies*, *Marie Claire*
- Bauer Media: magazines *Teshchin yazyk*, *Zyatek*, *Tainy Zvezd*, *Vse dlya zhenshchiny*
- Independent Media: magazines *Cosmopolitan*, *Men`s Health*, *Harpers Bazaar*, *Esquire*
- 7 Dnei: magazines *7 Dnei*, *7 Dnei TV-Programma*, *Karavan istorii*, *Kollektsiya Karavan istorii*

Even more than with newspapers, magazine production and distribution are anchored not just to big cities but to Moscow. The leader is the Central Federal District (FD) comprises 59 percent of magazine titles, the Volga FD 11 percent, the North Western FD nine percent, the Siberian FD seven percent. But in terms of circulation Moscow magazine periodicals have significantly outperformed regional periodicals: capital publications account for 60 percent of the total magazine circulation. However, as in the case of newspapers, magazines are faced with the imperfections of the distribution and subscription systems. As a result, in the 2010s residents of the largest cities with populations in the millions remained the major magazine consumers because it was easier to buy magazines in kiosks anchored to the transport networks of these cities or in supermarkets.

Two recent trends have become important for the magazine sector. First, because of legal restrictions of 2014, some foreign investors (Axel Springer, Sanoma) left the Russian market, while others (*Burda*, *Bauer*, *Hearst*, *Condé Nast*, *Toloka*) reduced their investment to the allowed 20 percent. Second, seeking for new production models in the context of decreasing advertising, many publishing houses have been shifting their news rooms to the use of the '360° model', which means business diversification into all accessible related segments of the media market.

Radio

Today, the radio market comprises national networks and local radio stations. This segment started to emerge in its modern form in the mid-1990s, when FM radio stations appeared in Russia. The newcomers were of foreign origin, and the first networks of commercial FM radio *Evropa Plus*, *Radio Maximum*, *Nostalgie* have been set up by French and American companies. But at the same time the growing popularity of Russian music brought about a number of new stations and networks with Russian music formats and domestic ownership. The key players in the radio market today are several scores of central radio stations: By various estimates, there are from 35 to 40 radio networks operating in the country. The development of regional radio broadcasting occurs mostly because local broadcasters join the existing networks.

Radio broadcasting in Russia is developing with a comparatively good business dynamic. As in other media sectors, ownership of radio stations is either state or private, and the key players are the state-owned channels with news-and-music content (*Radio Rossii*, *Mayak*). Music channels (*Russkoje Radio*, *Dorozhnoe Radio*, *Avtoradio*, *Europa+*, *Retro FM*, etc) are their main competitors though focused on different audience clusters. Most of them use FM frequencies that limit the distribution within a single place or a small city (Radio Broadcasting in Russia, 2014, 58). A few radio broadcasters offer a talk-radio format, these include the traditionally popular *Echo Moskvyy* and its recent rivals *RSN* or *Komsomolskaya Pravda* or *Business-FM*.

The key players in the Russian radio market are represented by following holdings:

- Gazprom-Media Radio: *Echo Moskvyy*, *Comedy Radio*, *Like FM*, *Relax FM*, *Detskoe Radio*, *Avtoradio*, *Yumor FM*, *Radio ENERGY*, *Radio Romantica*
- All-Russia State Television and Radio Broadcasting Company (VGTRK): *Radio Rossii*, *Vesti FM*, *Mayak*, *Radio*

Cultura, Yu FM

- European Media Group: *Europa Plus, Retro FM, Dorozhnoe Radio, Radio 7, Sport FM, Novoe Radio*
- Russian Media Group: *Russkoe radio, Radio Maximum, Khit FM, DFM, Radio Monte Carlo*
- Holding group controlled by Mikhail Gutseriev: *Radio Dacha, Love Radio, Taxi FM, Radio Shanson, Strana FM, Govorit Moskva, Vostok FM, Vesna FM*
- Multimedia Holding: *Nashe Radio, Best FM, Rock FM, RU FM, Radio Jazz.*

Television

The core of the contemporary Russian media system is represented by the federal nationally distributed television channels. Terrestrial on-air television in Russia is generally available: 99 percent of the population receives at least one TV channel. TV viewing time in Russia is rather high – about 353 minutes (5 hours and 53 minutes) on average. For 86 percent of Russians TV remains the main source of news, and 56 percent of them acknowledged that they trust it. About 18 percent of Russian viewers subscribe to cable platforms, while 12 percent rely on satellite platforms. The regions most highly developed in this respect are Moscow, St. Petersburg and the 11 largest industrial centres (with populations of more than a million).

The media landscape is characterised by the dominance of a few federal broadcasters operating 10 free on-air TV channels transmitted from Moscow. Regional TV stations are relatively insignificant, being in many cases regional affiliates of Moscow entertainment networks. National federal public television channels are almost universally available, but do not have the programming responsibilities of public-service broadcasters. The group includes:

- channel *Pervyi kanal* (The First Channel) with mixed state and private ownership, operated by the namesake broadcaster of which 25 percent is owned by NMG;
- state-owned channels *Rossija 1, Rossija 2, Rossija K* (Culture) and *Rossija 24*, operated by the VGTRK state broadcaster;
- children's channel *Karousel* operated by the *Pervyi kanal* and VGTRK;
- *Pyatyi kanal* (Channel 5) – the only regional channel from St. Petersburg with national distribution;
- commercial broadcaster NTV, owned by state operated Gazprommedia, an affiliate of the national monopoly GazProm company;
- the state channel *TV-Tsentr* (TV Centre) owned by the Moscow government.

With the Russian digital switch over in 2019, these channels are planned to become free and universally available as part of the first digital multiplex. The state maintains a firm position in the television industry by supporting the technical infrastructure, controlling the financial operations of the state channels and formally and informally influencing news flows.

Several media companies of national importance lead the media market today, including the state broadcaster *Vserossiyskaya gosudarstvennaya televizionnaya i radioveshchatelnaya kompaniya* (the All-Russia State Television and Radio Broadcasting Company - VGTRK), Gazprom Media, a company with state and private ownership, as well as the purely commercial organisations, the National Media Group (NMG). Apart from VGTRK, the latter three operate in various segments of the media business – press, broadcasting and online.

Another group of broadcasters comprises entertainment networks (*REN TV, CTC, TNT*), which have a strong presence in the regional markets. And the third group consists of smaller broadcasters with entertainment and niche focus such as *2x2, TV 3, Peretz, MTV, Yu, Disney*, etc The number of regional TV companies has been increasing and there are about 700 local stations, both public and private.

Since the early 2000s the development of non-terrestrial pay TV became an important trend. In 2016, there were 26

terrestrial channels (among them, 20 generally accessible digital multiplex channels), numerous regional TV broadcasters and more than 20 non-terrestrial thematic channels distributed in the networks, and they accounted for 14.3 percent of the total television audience.

The leading cable platform providers at the national level are the Moscow-based NKS (with 4.7 million subscribers), Comstar (2.4 million), Acado (1.3 million) and the regional providers ER Telecom (880,000) and Moline (870,000). Direct satellite broadcasting (DBS) is dominated by NTV+, established in 1998 and with a subscriber base of 550,000 in 2010, and Tri kolor TV, established in 2005 with 3.1 million subscribers which became the largest satellite TV platform provider in Russia (and all of Eastern Europe, for that matter). Both cable and satellite TV platforms also provide limited IPTV services.

In 2009, Russia adopted a Federal Program of transition to digital broadcasting "Development of Television and Radio Broadcasting in the Russian Federation in 2009 - 2015". And although Russians in general were aware of the program implementation process, both broadcasters and viewers faced a number of challenges. Among them was a need for additional investment in home television equipment, the creation of a national network of stable digital signal transmission and regional broadcasters' access to digital multiplexes. The realisation of the program has been postponed until the end of 2018, although now almost 94 percent of Russian population can receive the digital TV signal.

Digital Media

In the Russian media system the Internet has become the most open medium, thus closely corresponding to the concept of the public sphere. In 2011-2015, the number of Russian Internet users almost doubled. In 2017, the Russian Internet monthly audience was about 72.8 percent. The size of the advertising market in the period increased more than threefold, up to rubles 97bn. With its increasing penetration, the Internet is becoming the most serious challenger to the traditional television, radio and the print press.

Traditional media companies have been also active on the Internet. There are more than 5 million sites in the Russian-language sector of the Internet, RuNet. The most popular online news media in 2017 are *Ria.ru* with an average audience per month of 10.6 million people, *Kp.ru* (10.5 million), *Rbc.ru* (9.4 million), *Gazeta.ru* (7 million), *Lenta.ru* (6.6 million), *Aif.ru* (5.9 million), *Mk.ru* (5.7 million), *Rt.com* (4.9 million), *Vedomosti.ru* (3.6 million) and *Kommersant.ru* (3.6million). Convergent platforms affect traditional media practices and force them towards integration, convergent solutions, interaction with audiences and alternative agenda settings. For instance, *Gazeta.ru*, *Lenta.ru*, *Republic.ru* and many other media do not have offline versions, but attract big audiences online all over Russia.

Online media challenge the traditional media in terms of content, offering alternative news agendas, broadening the diversity of political views, contributing to cultural pluralism. Young city residents get their news agendas from online, while middle-aged, politically concerned Russians rely upon TV or print media, especially quality press though from online versions. The most active group of Russian Internet users is young residents of industrialised urban areas. In Russian cities with a population over one million, about 70 percent of young people under 22 are active Internet users, especially mobile. In Moscow more than 90 percent schoolchildren connect to the Internet from mobile devices. The average Russian mobile Internet monthly audience was 56 percent in 2017. However, the digital divide, as defined by various indicators, from access to technologies and communication networks to lifestyle and digital literacy, remains a problem in Russia.

The Russian Internet today has become a unique communication and information channel, which provides users with maximum freedom of choice and content. Political and intellectual preferences are presented on the Internet in the form of polarised viewpoints. On the one hand, the Runet allows for great freedom of choice of diverse content, ranging from information to education. Thus, political parties operate numerous sites, and a diversity of political and cultural views is

created by the Internet presence of many opposition parties and politicians. Official state agencies also are very active on the Internet offering useful services for city residents, while in big cities online banking has become more widespread than offline services. On the other hand, there are many voices in the Russian society which express a lot of concerns about information security of children and digitally illiterate people who cannot critically analyse digital environment. Some regulations adopted recently reflected these concerns.

Social Networks

In the 2010s, a new stage of the Internet maturation in Russia has been characterised by the increased influence of social media widely used by younger generations. The Russian-language Internet grows owing to the popular national services *Vkontakte* and *Odnoklassniki*. In the early 2010s the average time Russian users spent on social networks was up to 13 hours a month. Russians actively use global Google as well as the national search engine Yandex and the Mail.ru postal service.

However, the main focus of Internet news search and communication in Russia is the social media, which include the blogosphere, social networks, microblogs (Twitter) and the like. RuNet comprised 12 million blogs, 10 percent of which were regularly updated. Social networks in Russia became the most popular Internet resource for Russian users (34 percent of all audiences), followed by search engines and email services. However, the users of social networks are characterised by generational differences. For instance, younger users access fewer networks through mobile devices while older users access more networks from personal computers.

The most popular websites of the Russian Internet in terms of reach are the search engine Google with the desktop and mobile reach of 40.4 million people, and Russian search engine *Yandex* (39.9 million). In 2017 a popular Russian social network *Vkontakte* was repositioned and claimed to have a monthly active audience of 95 million. Its main competitor the social network *Odnoklassniki* had 71 million. monthly users.

Since the mid-2010s a very recent trend in the segment of social networks has been the rise of messengers, and among them are global brands such as WhatsApp with 10.6 million users (40.7 percent of Russians), Viber 8.6 million (33 percent), Skype 3.4 million (13,3 percent). Created by Pavel Durov from Russia, Telegram has had an indicative success in 2018 with 7.7 percent (with a year over year growth of about 4.5 percent). Instagram is also a very popular social media network with about 22 million monthly users in Russia.

Opinion Makers

There are several popular multimedia platforms where Russians could access non-professional media content. Among them are *LiveJournal*, YouTube and Telegram.

One of the most popular Russian bloggers is Iliya Varlamov, an architect by education. He created the most popular photo blog in *LiveJournal*, later he started his own critical media which has about 2 million visitors per month. Another popular person in *LiveJournal* is Artemii Lebedev, designer and businessman, with his blogs about personal journeys, work, inventions and many other. They both are among the top persons on Telegram.

As for YouTube, the most popular channels are done by children – Like Nastya (8.2 million subscribers), a five years old girl, Miss Katy (6.8 million subscribers), three years old girl, and Mister Max (6.5 million subscribers), eight years old boy. All of these video blogs contain toys advertisements. Many popular non-professional channels are conducted by girls and discuss teenagers problems, beauty and lifestyle issues.

The top three popular video bloggers includes:

- Ivangay (Ivan Rudskoy), author of a lifestyle blog where he sings, plays computer games, disputes with his subscribers and does parodies. Its core audience is made of teenage girls and the total reach is of about 11.6 million subscribers.
- Max+100500 (Maxim Goloposov), author and host of the show +100500 which is a review of ridiculous videos from the Internet with 8.2 million subscribers.
- TheKateClapp (Ekaterina Trofimova) 24 years-old girl, author of the blog with comedy sketches, musical skits for show business stars, reviews of films and books, with 6 million subscribers.

Sources

Newspapers

- [Argumenty i Fakty](#)
- [Izvestiya](#)
- [Kommersant](#)
- [Komsomolskaya Pravda](#)
- [Metro](#)
- [Rossijskaya Gazeta](#)
- [Vedomosti](#)

Magazines

- [Antenna Telesem](#)
- [Burda](#)
- [Elle](#)
- [Hello!](#)
- [Liza](#)
- [Maxim](#)
- [StarHit](#)
- [Telenedelya](#)

Radio

- [Avtoradio](#)
- [Business FM](#)
- [Echo Moskv](#)
- [Europa Plus](#)
- [Komsomolskaya pravda](#)
- [Mayak](#)
- [Nashe Radio](#)
- [Radio 7 na semi kholmakh](#)
- [Radio Rossii](#)
- [Russkoe Radio](#)

Television

- [Karousel](#)
- [NTV](#)
- [Pervyi kanal](#)
- [Pyatyi Kanal](#)
- [Rossiya 1](#)
- [Rossiya 24](#)
- [TV-Tsentr](#)

Digital media

- [Gazeta.ru](#)
- [Kommersant.ru](#)
- [Kp.ru](#)
- [Lenta.ru](#)
- [Mk.ru](#)
- [Rbc.ru](#)
- [Ria.ru](#)
- [Rt.com](#)
- [Vedomosti.ru](#)

Social networks

- [Odnoklassniki](#)
- [VKontakte](#)
- [Yandex](#)

Opinion Makers

- [Like Nastya](#)
- [Miss Katy](#)
- [Mister Max](#)

Organisations

Trade Unions

Russian journalists do not have powerful trade union associations although some attempts to establish such associations have been made in the last decade. Two organisations were set up in Moscow. *Trud i Tvorchestvo* (Labor and Creativity) was founded in 2009 and claimed to have about 5,000 members; another independent journalists trade union was established in 2016 with the support of 30 journalists. Anyway, there is not much information about their present activities as well as about such attempts in the regional markets.

The lack of professional unity among journalists working for competitive media companies and the continued strong positions of the Russian Union of Journalists in regional media, partly explain why journalists' consolidation efforts to protect social and economic rights of newsroom employees still have been so rare in Russian media. On the contrary, professional associations of employers representing different segments of media business have been developing since the 1990s. Among them one could mention *Natsionalnaya Associatsiya Veshatelei* (National Association of TV and Radio Broadcasters – NAT, unites 600 companies) established in 1995, *Gildiya izdatelei periodicheskoi pechati* (Guild of the Press Publishers – GIPP, unites 370 companies, est 1995), *Assotsiatsiya kabelnogo televideniya Rossii* (Cable Television Association of Russia – AKTR, about 80 companies (est 1998), *Aliyans nezavisimyykh regionalnykh izdatelei* (The Alliance of Independent Regional Publishers – ANRI, unites 70 regional publishing houses (est 2006) and others which bring together press distributors, representatives of advertising and public relations. These associations aim to protect business principles and to develop media business, to analyse tendencies in Russian and global media business, to elaborate and protect industrial standards, provide analytical data and training to their membership, and try to lobby with the Russian federal government and to advance the interests of their members. However, support for journalists employed by media companies is not the main focus of these associations.

Journalist Associations

The largest Russian journalists' association is Russia's Union of Journalists (RUJ) established in 1918. Nowadays it unites more than 100,000 journalists (estimate) from all over Russia representing 82 regional branches and about 40 creative associations. Since 1995 RUJ has been a part of the International Federation of Journalists. Its main goals look similar to those of trade unions though formally RUJ has a status of NGO. The main aims of the Union are protection of journalists' rights and freedoms, support for professional standards, pluralism and media independence, and development of journalism education.

Independently from RUJ, there are Unions of journalists in Moscow (estimated 15,000 members), in St-Petersburg and its region (established in 1957 and currently uniting about 2,500 journalists) and in Tatarstan (established in 1918 and uniting about 1,200 members). *MediaSoyuz* is another media organisation founded in 2001 as a non-commercial organisation called to facilitate freedom of speech and social protection of journalists. However, the position of *MediaSoyuz* is not influential and its impact on the professional unity and standards is unimportant.

News Agencies

The current system of Russian news agencies has been dramatically changed after the USSR where one of the global 'big five' news agencies, the *Telegraphnoye agentstvo Sovetskogo Sojuza* (Telegraph Agency of the Soviet Union - TASS), kept a domestic monopoly. The emergence of post-Soviet news agencies in the 1990s was a part of media transformations with the establishment of numerous private companies in the field. After the two decades of professionalisation a few hundred state-owned and private companies survived and provide news services that have shaped the segment of Russian news agencies in three major segments. They are:

- national agencies – large all-Russian news agencies producing thematically universal information (state-owned TASS and MIA "Rossiya Segodnya", privately owned Interfax);
- specialised agencies – mostly private companies based in Moscow and in a few big cities, different in operation scale, production of thematically segmented content and catering for particular consumer groups,
- regional agencies – mostly private news agencies based in urban centers which accumulate regional news and cater for regional news markets.

The largest Russian news agencies (*TASS*, *MIA Rossiya Segodnya*, *Interfax*) are agencies of a universal type because their news feeds provide information on every topic the media may care to cover: economy and finance, politics and social issues, accidents and crime, culture and sports, high life and the like. *TASS* and *MIA Rossiya Segodnya* are universal news agencies and in terms of content, these two kinds of agencies do not differ much. *Interfax* is primarily focusing on business information of the leading Russian industries. The relentless demand for objectivity applies to all of them. Today the 'big three' of Russian news agencies transformed into news companies providing news directly to audiences online and efficiently competing with traditional press and broadcasting media.

Specialised news agencies are RosBusinesConsulting - RBC (est 1993) and *Agentstvo Sotsialinoi Informatsii* (Agency of Social Information - ASI, est 1994) belonging to different segments of the Russian media. The development of market relations led to a great and ever-increasing demand for financial and economic information. In the early 1990s, dozens of news agencies supplying this kind of news emerged in the Russian market.

Audience measurement organisations

Mediascope (formerly TNS Russia) is the largest organisation in charge of television audience measurement. It was established in 1994 and owned by the British WPP. Although it was a dominant leader of the segment, major broadcasters, especially the *Pervyi channel*, were not satisfied with the results claiming that TNS ratings were not reliable. In fact, the latter has even established its own Measurement service for the First Channel audience (STI) in 2002.

In 2016 after the adoption of amendments to the laws 'On Advertising' and 'On Mass Media' that require audience measurement companies to license their operations, and to limit foreign ownership in media companies by 20 percent, the state-owned All-Russian Center for Public Opinion Research (VCIOM) and its affiliate VCIOM-Media bought an 80 percent share in TNS Russia from WPP. The company MediaScope currently provides the most extensive audience research data, using Peplemeters. Data coming from MediaScope are used in advertising sales on major Russian broadcast, print and online media.

Other sociological companies to survey public opinion in Russian media are Public Opinion Foundation (FOM) founded in 1992 and covering more than 80 regions in Russia (where 98 percent of whole country population reside) and Russian Public Opinion Research Center (VCIOM), currently the major owner of MediaScope. The National Circulation Service agency is an independent non-profit organisation to control the circulation and distribution of periodicals.

Sources

Trade unions

- [Alliance of independent regional publishers](#)
- [Cable Television Association of Russia](#)
- [Guild of the Press Publishers](#)
- [National Association of TV and Radio Broadcasters](#)

Journalists Associations

- [Russian Union of Journalists](#)
- [Union of Journalists in Moscow](#)
- [Union of Journalists of St. Petersburg and the Leningrad Region](#)

New agencies

- [Interfax](#)
- [ITAR-TASS](#)
- [MIA “Rossiya Segodnya”](#)

Audience measurement organisations

- [TNS/MediaScope](#)
- [VCIOM](#)

Policies

Media legislation

Media legislation in Russia is based on basic principles of the Constitution (1993) and of the Law on Mass Media (1991). The Constitution guarantees the freedom of ideas and speech for everyone, as well as the right “to freely look for, receive, transmit, produce and distribute information by any legal way.” The propaganda instigating social, racial, national or religious hatred or supremacy is banned. The Law on Mass Media guarantees freedom of expression for media, journalists' rights and citizens' right for information. Recent changes to the Law on Mass Media limit the propagation of extremism, terrorism, violence and pornography in the press.

Other important laws include Law on Advertising (1995), Law on Communications (2004), Law on Information, Information Technologies and Protection of Information (2006), Anti-Piracy Law (2013) and their later amendments in 2015-2017. They set rules for media in particular fields. Media activity is also covered by the Law on Counteracting the Extremist Activity (2002) and Federal Law on Combating the Terrorism (2006). The Presidential Decree on the creation of Public Television channel in Russia (2012/2013) is an important and the only document concerning television in Russia. It stipulates that interests of the public are represented by the Public Television Council (PTC).

Special rules for media are set up by Law on Protection of Children from Information Harmful to Their Health and Development (2010/2012) and Amendments to Law on Protection of Children from Information Harmful to Their Health and Development (2013). The law itself prohibits the distribution of “harmful»”material among minors. It has been amended twice by a mandatory content rating system for material distributed through an “information and telecommunication network” (covering television and the Internet) and establishing a blacklist for censoring websites which describe suicide, glorify illegal drugs, or contain child pornography, etc.

Recent developments include the law on limits on foreign ownership in Russian mass media (2014/2016), setting the maximum foreign stake in Russian mass media companies at 20 percent, set of amendments to the Administrative Code, the Law on Information and the Law on Communications (the ‘Bill on Bloggers’ of 2014) requiring bloggers with more than 3,000 unique daily visitors to register with the *Roskomnadzor* and follow the same regulations as mass media. Amendments to the law on mass media and law on advertising (2016/2017) make it mandatory for those companies that receive a license from *Roskomnadzor* to engage the audience telemetry channels, and the new anti-terror laws (*Yarovaya law*) set obligations for telecom providers and organisers of online information distribution to store on Russian soil recordings of their customers'

telephone calls (voice information), text messages, images, sounds, videos, and other messages.

Accountability systems

There are many generally accepted mechanisms of mass media accountability to the public in Russia, including : the Public Board on Complaints About Mass Media (equivalent to media councils in European countries), as well as professional codes of ethics, media criticism in the printed press and through radio channels, a number of professional journals, online instruments encouraging openness and involving the public, the online ombudsmen and a developed network of higher educational institutions.

The Public Board on Press Complaints was formed in 2005. The board is divided into two chambers – the chamber of the media community and the chamber of the media audience. The first includes journalists, editors, publishers, broadcasters, etc. The chamber of the media audience is composed of representatives of various organisations operating outside the sphere of the media: political parties, trade unions, religious and other commercial organisations, as well as non-profit organisations, the Public Chamber of the Russian Federation, the Council of Judges of the Russian Federation and other professional bodies. Both chambers include representatives from universities and researchers in the field of the mass media. Government officials are included in the chamber of the media community. The board operates on a continuous basis without any budget and on a voluntary basis. The largest numbers of cases examined by the Public Board are cases of inaccuracy, errors or incompleteness of information in the media coverage. In second place, there are cases of discrimination on various grounds (national, religious), as well as lack of respect for the honour and dignity of the citizens.

The Russian Code of Professional Ethics of the Journalist was adopted in 1994, at the Congress of Journalists of Russia. In the same year Moscow journalists adopted the Moscow Charter of Journalists. The principles of both documents are based on similar international documents – like the International Declaration of Principles on the Conduct of Journalists (1954) and the International Principles of Professional Ethics of Journalists (1983). The Charter of Broadcasters Against Violence and Cruelty signed by the executives of six national TV channels (2005) is an extra ethical set of rules for radio and television journalists and it is also based on generally accepted standards of journalistic ethics

Regulatory authorities

The Federal Agency for Press and Mass Communications is a federal executive authority to exercise functions in the sphere of establishing and operating mass media and mass communications services, TV and radio broadcasting, the development of mass communications and the distribution of mass media. As a part of the Ministry of Press and Mass communication, the Federal Agency remains the only body with the ability to examine the state of the media industry and media system.

Another body, *Roskomnadzor* (Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications) is a federal executive authority. This body is entitled to do activities connected with permits and licenses, and can carry out validation and supervision in the spheres of telecommunications, information technologies and mass communications. Among the aims proclaimed for the *Roskomnadzor's* activities is the promotion of mass communications and freedom of mass media, which in general terms correlates with the Russian authorities' broad approach to issues of diversity and pluralism.

Sources

Accountability systems

- [Code of Professional Ethics of the Journalist](#)

- [The Public Board on Press Complaints](#)

Regulatory authorities

- [Federal Agency of the Press and Mass Communications](#)
- [Federal Service for Supervision in the Sphere of Telecom, Information Technologies and Mass Communications](#)

Education

Universities and schools

Journalism higher education programs in Russia are offered in 150 institutions at three qualification levels: undergraduate (bachelor's), graduate (master's), and doctoral (*aspirantura*). Journalism is included in Mass Media and Library Studies together with Television, Advertising and Public Relations,

Main schools in Media and Journalism Studies with BA and mostly with MA level are:

- Faculty of Journalism, Lomonosov Moscow State University
- High School of Journalism and Media Communication, St. Petersburg State University
- Faculty of Journalism, Ural Federal University
- Faculty of Journalism, Voronezh State University
- Faculty of Journalism, South Ural State University
- Department of Journalism, Far Eastern Federal University
- Department of Journalism, Baltic Federal University

During the 2010s, a rough estimate for the total number of students who every year begin their university studies at the Bachelor's level is about 4,000. The total number of students enrolled at this level of their journalism studies in the country must be multiplied by four (the length of the Bachelor's program), making it about 16,000. In addition, there are the students enrolled in Master's and doctoral programs – roughly 2,000. All and all, the total number of journalism students in Russia can be estimated to be roughly up to 20,000.

The syllabus for all levels is designed to provide the main four components: 1) the basic studies obligatory to all schools, 2) the optional studies enriching the program with its own specifics, 3) internships, 4) final exam and the writing of a thesis. The basic part at bachelor's level includes studies in the humanities and social sciences as well as a large component consisting of liberal arts, languages and literature.

The basic studies cover media and journalism theory, professional ethics, media economics, media systems, etc. The elective studies vary from school to school, but usually respond to the demands of the labor market, local culture, and are related to the schools' human resources and technical facilities. Master's programs include in their basic studies theories of communication, intercultural communication, philosophy, deontology, etc. For the optional part each school chooses what suits its profile and the labor market. A Master's degree in journalism means training media managers, media analysts, and

media researchers.

Professional development

No exact statistics on the size of journalistic community in Russia exists but experts estimate that there are more than 150,000 full-time journalists in Russia and that of these up to 90 percent have a background in academic education in various fields. Those who have specifically studied journalism constitute approximately two thirds of the journalistic labor force. Findings on demographic characteristics show that there is an increasing number of women working in journalism. Recent research suggests that “the profession is evidently becoming a female one” with a share of 70 percent women in the younger groups.

Journalists in Russia are also generally younger now: about 70 percent are under 35 years old, 23 percent are between 35 and 50, and only 7 percent are over 51 years old. Despite their young age, these “young professionals” are well educated – 95 percent of them have university or other higher education degrees.

Russian journalists are also being trained in several media companies providing short-term mid-career or refresher courses for staff and freelancers. Non-governmental and industrial organisations such as the Russian Union of Journalists, the Guild of Press Publishers, the National Association of Regional Press and the National Association of Broadcasters, also play an active role in upgrading professional education and improving the quality of journalism practices, including accountability topics, initiating competitions, round-tables and seminars.

An additional instrument of professional development is media research, which is provided by various university departments of journalism. Major parts of the accessible results can be found in scientific periodicals including *Vestnik of MSU: Journalism Series*, published by the Faculty of Journalism at Lomonosov Moscow State University. Other educational institutions also publish scientific journals on media and journalism studies.

Sources

- [Department of Journalism, Baltic Federal University](#)
- [Department of Journalism, Far Eastern Federal University](#)
- [Faculty of Journalism, Lomonosov Moscow State University](#)
- [Faculty of Journalism, South Ural State University](#)
- [Faculty of Journalism, Ural Federal University](#)
- [Faculty of Journalism, Voronezh State University](#)
- [High School of Journalism and Media Communication, St. Petersburg State University](#)
- [Scientific journal "Bulletin of Voronezh State University". Series: philology, journalism](#)
- [Scientific journal of Baikal State University. Issues of theory and practice of journalism](#)
- [Vestnik of MSU: Journalism Series](#)
- [Vestnik of St. Petersburg University. Language and Literature](#)
- [Vestnik of Tomsk State University. Philology](#)

Traditional forms of communication

Summary

Sources

Conclusions

Conclusion

The development of Russian media has been and still continues to be increasingly influenced by the new multimedia system. The competition of conventional media with 'other' digital and interactive media is growing all over Russia in various forms. For instance, in the 'capitals' – Moscow and St. Petersburg – challenges are coming from social networks accessed mostly through mobile platforms, while in large industrial centers the most visible competitors are online broadband media as well as cable and satellite. However, the digital divide in less developed regions still keeps small cities and agrarian areas without any serious to free on-air federal channels and local newspapers associated with local governments.

Nevertheless, online media have dramatically broadened the scope of news, analytical information and entertainment available to general audiences providing parallel and alternative agendas. It is obvious that Runet, the Russian-language content segment of the Internet, has become an intrinsic part of the media system, and the future social and industrial developments would increase the role of digital media in Russia.

Coming changes in the Russian media system appear to be a rather complex phenomenon in which:

- generally accessible terrestrial federal channels, meeting the demand of the federal government as well as global and national advertisers, took on the functions of covering national politics and mass entertainment;
- regional print and terrestrial audiovisual media focused on catering to local audiences, political and financial elites and local advertisers;
- non-terrestrial pay television channels provide fragmented audiences with programs specialised in terms of themes and genres (news, sports, films, educational and awareness-raising content);
- new media (online mass media, social networks) create communities in response to users' specialised media demands setting corporate, parallel or alternative agendas and uniting the audience irrespective of its members' place of residence.

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