

Ukraine - Media Landscape

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Overview

The Ukrainian media market had to be developed from scratch after the country gained independence from the Soviet Union in 1991. Most all-Ukrainian media of Soviet times were closed, and the market was opened to private entrepreneurs at the national level. At the same time, at the local level, media that are financed from the local budget and depend on local officials still have strong positions.

State-owned all-Ukrainian media have been underfinanced and understaffed during all the post-Soviet years. This has created a media market that is dominated by oligarch capital. This applies to all national-level media: TV, radio, print, and online. But while in the TV segment the presence of oligarchs is the most visible, in other segments there is much more room for independent journalism.

The problem with oligarchic influence is that oligarchs can control the agenda and messages of the media they own. At the same time, the Ukrainian media and NGO community is quite strong, there are traditions of journalists' fight against censorship, and there is significant room for the independence of editorial boards even on oligarchs-controlled TV channels. After the Euromaidan events of 2013-2014, independent media had a new boost. Generally speaking, freedom of expression has numerous distortions in Ukraine, but it is stronger than in many of its post-Soviet neighbors.

Ukraine also has no influential broadcaster to counterweight the oligarch-owned media. *Suspilne* (Civic), the public broadcaster, has been launched on 19 January 2017. It still remains underfinanced, and its audience is less than one percent of the population. Other independent outlets, like *Hromadske TV* (Civic) or *Hromadske radio* (Civic radio), or more niche media projects appeared; they are influential in their segments, although they still cannot compete for massive audiences with oligarchic TV channels. At the local level, there are strong independent editions, but their audience is also small, and business models are weak.

Social networks and Television are the most popular media distribution platforms among Ukrainians, 68 and 66 percent of the population respectively uses it as the main source of information (USAID-Internews 2019 study of media consumption in Ukraine). <https://www.slideshare.net/MarianaZakusylo/2019-185366145> Online media are a runner up: their main benefit is that they are free. A paywall is not common for Ukrainian online media, who mainly earn money via ads and paid articles, often hidden. Such hidden adds are called *dzhynsa*. *Dzhynsa* were widespread in the 1990s and 2000s, but today their presence is less visible than before.

Even the coronavirus epidemic has not changed this situation. Only one nationwide HB media introduced a paywall, other notable media started collecting donations, but they publish their content for free.

Radio stations and Print media, which must be purchased, are the least popular source of information. Due to the overall low level of welfare, people prefer to get their news from free sources, online or on TV. There are very few successful print projects, mostly based in Kyiv. The main newspapers are part of media houses which also include news websites, TV channels, and radio stations. They are often not profitable, so media houses treat print outlets as a matter of status for niche audiences and cover expenses with profits from other sources. During quarantine, many print media ceased to be published.

The most popular Ukrainian media have clear links to politicians and political parties, as they belong to oligarchs who are often involved in politics directly or indirectly. Direct involvement means that a media owner holds an official position in the government or is a member of parliament. For example, the media holding 1+1 of billionaire Igor Kolomoisky actively participated in the election campaign of the President of Ukraine Volodymyr Zelensky elected in 2019. A year later, the media holding Ukraine of another billionaire Rinat Akhmetov actively supported the acting Minister of Energy. At the same time, Akhmetov owns a large business in the energy sector.

Former Ukraine's President Petro Poroshenko owns news TV channel *5 Channel* and allegedly controls a recently created news TV channel *Priamyi* (Direct), whose editorial policy is openly pro-Poroshenko. Indirect involvement means that a media owner supports certain politicians and/or political parties.

A good example of this is Viktor Pinchuk, one of the richest people in the country. His media group StarLighrMedia, which consists of several TV channels, a newspaper, and a website, gives a lot of coverage and air time to various politicians and parties. ?? ??? ????? ?????? ??????????. Just a year ago, Rinat Akhmetov's media group could be considered fairly objective, but the situation has changed, and today his media are actively lobbying for the interests of his energy business.

As there took place both presidential and parliamentary elections in 2019, the political influence on media has been at the highest point in recent years. In 2020, local media are more important because the country is preparing for local elections in October. One of the former members of parliament with great influence in the Ukrainian capital, Vadim Stolar, has already announced the launch of a new city television channel.

In the years the 2000s, one could trace a clear distinction between pro-European, pro-Western, media and Eurosceptic, pro-Russian, media. Today this distinction is much less clear. As the majority of Ukrainians consider that Russia has illegally annexed Crimea and provided its military support to secessionist forces in Eastern Ukraine, it is very difficult for any media or political force with a clear pro-Russian position to get any audience in today's Ukraine. At the same time, several media maintain editorial lines that are rather aligned with pro-Russian narratives. This is a case of such media as *Vesti* (News) , *Strana.ua* (Country.ua), *112 Ukrayina* (112 Ukraine), *NewsOne*, *ZIK*, or *NASH*. Some of these media are connected with the former head of the presidential administration, Viktor Medvedchuk, who is a godfather to Russian President Vladimir Putin. There are also influential pro-Russian bloggers on YouTube. As well as media that only pretend to be Ukrainian, but in fact, their editorial staff is in Moscow, not in Kyiv. For example, the site *Ukraina.ru*.

The politicization of Ukrainian media sometimes blurs the lines between politicians and journalists. Journalists going in politics were quite typical for Ukraine and it has become even more common after the Euromaidan. Former journalists serve as diplomats, they are represented in the government, as well as in Ukraine's *Verkhovna Rada* (the parliament). Likewise, politicians appear in media not only as those being interviewed or spoken about but as hosts of talk shows and news programs. For example, Vadim Rabinovich, a Ukrainian MP and one of the leaders of *Za Zhityya* (For Life) party hosts a one-man talk show on *112 Ukrayina* (112 Ukraine) TV channel. Some other MPs have their TV programs as well.

The *Natsionalna Spilka Jurnalistiv Ukrayiny* (National Union of Journalists of Ukraine) unites professional journalists and oversees journalistic standards, but it is not very influential and effective because most journalists do not join it and several

key Ukrainian media organizations and NGOs have published statements criticizing its management.

The independent media union of Ukraine was a prominent organization until 2016, but after several internal conflicts lost its influence.

Media-focused NGOs often assume the role of media watchdogs, even though Eurosceptic and pro-Russian media tend not to trust these organizations because they receive financing from the West and allegedly act against opposition outlets. Examples are *Detector Media* and the *Instytut Masovoi Informatsii* (Institute of Mass Information).

After 2016, the government has also tried to regulate the language policy of media. As use of the Ukrainian language was hampered during the Tsarist and Soviet periods, the Ukrainian government tries to provide the national language with regulatory support. Thus, it launched a campaign aimed at strengthening the role of the Ukrainian language in media. To this end, language quotas have been introduced for TV channels and radio stations. For licensed all-Ukrainian television and radio companies broadcasts and films in Ukrainian should make up at least 75 percent of the total weekly broadcasting between 07:00 and 22:00. For local audiovisual media, the mandatory quota of content in Ukrainian between 07:00 and 22:00 is 60 percent. There are exceptions for television and radio companies that broadcast in the languages of the indigenous peoples of Ukraine: the Crimean Tatars, Karaites, and Krymchaks. Meanwhile, radio stations are obliged to air at least 35 percent of songs in the Ukrainian language. At the same time, Russian is still very widespread in Ukrainian media: There are numerous websites, magazines, and newspapers in Russian; Russian is also a language often used during talk shows or interviews.

The monitoring of the implementation of these norms is being handled by the official regulatory body, the National Council of Television and Radio Broadcasting of Ukraine. Its members are appointed by the president and the parliament. *Sluzhba Bezpeky Ukrayiny* (Security Service of Ukraine) has also been active in this sector recently: It has conducted numerous searches in the premises of media suspected to have been funded with Russian money.

After the election of Volodymyr Zelensky as President of Ukraine in 2019, language policy has faded into the background. The language ombudsman prescribed by law was not able to start work due to a lack of funding and announced his resignation. Several prominent supporters of the Ukrainian language were withdrawn from the National Council on TV and Radio. At the same time, Zelensky extended sanctions against Russian social networks and the Russian search service.

Ukrainian media sphere is designated as “partly free” by *Freedom House’s Freedom of the Press 2019-2020 reports*. There are several vulnerable spheres such as personal data protection and security. In May 2016, the website *Myrotvorets* published the personal information of approximately 5,000 Ukrainian and foreign media professionals. Those on the list have received accreditation from the self-proclaimed authorities of the non-government controlled areas of Donetsk and Luhansk to report on the conflict in Eastern Ukraine. The website said that by publishing their personal data, it was disclosing information about “collaborators” with the “secessionist republics” which Ukrainian authorities consider to be terrorist organizations. The publication was harshly criticized by many journalists and media NGOs, but there was substantial support for this in some parts of Ukrainian society; it was also backed by the Interior Ministry. The website exists to this day despite official inquiry.

Attacks on media professionals and houses are occurring. On 20 July 2016, a prominent Belarusian-Ukrainian journalist, Pavel Sheremet, was killed in a car explosion but those responsible have not been found yet. Manipulations with media have also happened. On 29 May 2018, the media reported that Arkady Babchenko, a Russian journalist who moved to Ukraine, was killed. The next day it turned out that Babchenko was indeed alive and his “murder” was a decoy for security services to catch a killer, allegedly linked to a broader plan by Russian security services to murder journalists and activists working in Ukraine.

Media

Print

The print market is rather large, but not wealthy. According to data provided by the State Committee for Television and Radio Broadcasting of Ukraine, in 2019 there are 3,085 papers and periodical outlets with a combined circulation of 660,462,700 per six months (however, this is official data; real circulation may be somewhat lower). Of these papers, 1,120 are issued in Kyiv, Ukraine's capital, while 1,965 are regional. The print media market reflects the Ukrainian multilingualism: 1,370 outlets are issued in the Ukrainian language, 612 are in Russian, 459 are in both languages. There are also outlets in national minority languages: four in Hungarian, two in Polish, two in Romanian, and one in Gagauzian. There are also 44 outlets in English.

As the income from selling newspapers and journals is very low, advertising revenues are considered to be the indicators of media efficiency in Ukraine. That being said, the share of print media in the advertising market hardly reaches 10 percent, as research by the Ukrainian Institute for the Future shows. However, there was stable growth in the second half of 2017, and in the first nine months of 2018, a 5-7 percent increase in advertising revenues was seen. This can be explained with the general economic trend, as Ukraine was slowly recovering from the drastic recession caused by the crisis in Crimea and the secession of industry-rich parts of Eastern Ukraine in 2014.

Print media were also dragging behind all other media in terms of audience. According to the study by InMind for Internews Network, only 21 percent of Ukrainians read print media at least once per month - this figure had declined by 10 percent since 2016. Only 16 percent of Ukrainians used print media as their weekly source of news.

The most popular daily newspaper *Segodnya* (Today) had a circulation of 230,000 and was oriented to the general audience in cities and villages alike. It stopped its output at the end of 2019. *Novoe Vremia* (New Time), the most popular weekly journal, had a circulation of only 19,000 and aimed at highly-educated people interested in politics and economy. It is worth noting that both these outlets were produced in Russian only (the law allows printed media to be published in Russian until May 2021, after which the norm on mandatory duplication of all content in Ukrainian enters into force).

InMind research shows that print media are the least trusted in Ukraine. Only 35 percent of Ukrainians trust regional print outlets, while 33 percent trust the national newspapers. However, these figures have increased if compared to 2017 results which were 31 percent and 28 percent respectively. While explaining why they don't trust print media, readers complain about the outdated information papers provide in comparison to TV and online, the lack of facts, and a one-sided view on events.

A slightly higher level of trust in local media is not accidental. There is a tradition for Ukrainians who live in regions to support

local newspapers. Regional outlets mostly focus on local news and events, as they often lack resources to cover national and international news properly. In this case, local media are mostly reprinting the messages of information agencies.

The market of print media is dominated by private capital. The total share of state- and community-owned media outlets used to reach up to 22 percent of the total number of Ukrainian periodicals. However, in late November 2015, Ukraine's parliament has changed the situation by adopting a law on reforms of state- and municipal-owned printed media. The law obliged all such media to be privatized – voluntarily during the 2016 and obligatorily in 2017-2018. The process is currently underway.

A rare example of independent, popular (but loss-making in terms of money) newspaper is *Dzerkalo Tyzhnya* (The Mirror of the Week) edited by Yulia Mostova, a Ukrainian journalist. However, the audience of this paper is quite a niche: high-educated Ukrainian- and Russian-speaking readers of 40+ years of age.

The lack of transparency in the media ownership structure favors the spread of disinformation. For example, media outlets which belong to Ukrainian politicians who have fled to Russia are used, *inter alia*, for carrying out disinformation and propaganda campaigns (the latest case concerns the so-called “autocephaly” of the Ukrainian Orthodox Church) aimed at the general public, as research by Internews Ukraine and UkraineWorld shows. A vivid example is *Vesti* (News) newspaper, the second most popular newspaper in Ukraine as of 2019 (published in Russian). It is allegedly owned by Oleksandr Klymenko, the ex-minister of income and charges of Ukraine, and an ally of ousted president Viktor Yanukovych. The paper is one of the most Eurosceptic and NATO-critical media outlets in Ukraine, with its most EU- or NATO-related publications having negative and sarcastic tones.

Journalists are also subjected to increasing pressures, often depending on the topics they choose to cover. In 2016, the Ukrainian activist website Mirovorets published the names and personal info of approximately 5,000 Ukrainian and foreign media professionals who had received accreditation from self-proclaimed authorities in Donetsk and Luhansk to report on the conflict, which led to direct threats to several of those journalists and was updated even after an official inquiry was opened. Journalists and activists covering anti-corruption topics have often faced harassment and intimidation through physical violence and surveillance of their communications. In 2018, anti-corruption journalists Nataliya Sedletska and Krystyna Berdinskykh's phones were tracked for almost one year, allegedly as part of an ongoing investigation against the Head of the National Anti-Corruption Bureau, Artem Sytnik.

Ukrainian press is not available in Donetsk and Luhansk regions, as well as in Crimea, where only Russian and local newspapers circulate. According to regular media monitorings by *Donetskaya Pravda* (Donetsk Truth) and Detector Media, these outlets often promote hate speech against Ukrainians. A recent study by *Texty.org.ua* called *We've got bad news!* revealed that many of the “junky media” active in spreading manipulative news, emotionally exaggerated information, etc, are based in non-government controlled territories.

Radio

Radio is the second least popular medium in Ukraine. According to the research by InMind for Internews Network, only 26 percent of Ukrainians listen to the radio at least once per month, and 25 percent use it as their daily source of news. These people, however, are quite committed to this media. A study by Kantar TNS shows that an average Ukrainian who listens to radio spends 260 minutes per day with it. The approximate portrait of the average listener is as following: male (54 percent), active Internet-user (84 percent), car owner (59 percent), married (61 percent), with a university degree (53 percent) and a higher-than-average level of income (57 percent).

Over the last years, few radios have started gaining a new audience due to the upsurge of online radio stations. Their growth has been enabled by the usage of smartphones and the launch of 4G mobile Internet in 2018.

Radio is also the second least-trusted medium, with 34 percent of Ukrainians trusting national radio stations and 39 percent thinking local radio stations tell the truth. As in the case with print media, these figures went up in comparison with 2017 - by 4 percent and 6 percent respectively.

The Ukrainian radio market is dominated by FM stations that prioritize mainstream music programs with focus either on Ukrainian or on Western pop music. The three most popular radio stations - *Hit FM*, *Radio Pyatnitsa* (Radio Friday), and *Lux FM* - fall under this category.

State-owned stations like *Ukrainske Radio-1* (Ukrainian Radio-1), as well as private Radio Era, and existing on grants *Hromadske Radio* (Civic Radio) were the only news-and-analysis and opinion-making radio stations for a while. In 2017, *Radio Era* was bought by Dragon Capital, Ukraine's largest investment company, which already owns the weekly *Novoe Vremia* (New Time) and *nv.ua* news website. In March 2018, *Radio Era* was transformed into *Radio NV* - the latest newcomer to the Ukrainian radiosphere which focuses on talks shows, interviews, as well as programs about science and culture. However, already in 2020, the owner of *Radio NV* announced that there would be less talk and more music on the air.

In early 2016, Ukrainian lawmakers introduced language quotas for radio stations obliging them to air at least 30 percent of songs in the Ukrainian language, in November 2018, this quota was increased to 35%. This legal change aims at boosting the Ukrainian-language music industry. Since then, radio stations have been mostly adhering to the rule, and the quotas have been upheld. However, occasionally quotes are not being met by media all across the spectrum. In this case, media become subject to fines as decided by the National Council of Television and Radio Broadcasting of Ukraine.

Currently, there are no radio stations in national minority languages (besides Russian). However, there are radio programs in most national minority languages at *Suspilne* (Public), Ukraine's public broadcaster, which has local radio stations in all regions. *Suspilne* (Public) branches in Zakarpattia, Chernivtsi, and Odesa regions - the ones with most national minority representation - feature radio programs in Romanian, Bulgarian, Moldovan, Gagauzian, Slovak, and German. There are plans in place to expand the number of programs for national minorities.

The only areas where radio coverage is largely unavailable in the non-government-controlled territories of Donetsk and Luhansk, as well as Crimea, where Ukrainian radio stations have been jammed since 2014. However, *Ukrainske Radio-1* (Ukrainian Radio-1) has overcome the jamming in June 2017, so Ukrainians living on the non-government-controlled territories have access to at least one Ukrainian radio station. For the Crimean audience, also from the neighboring Kherson region, *Krym.Realii* (Crimea.Realities), a radio created by *RFE/RL* is broadcasting. However, its signal reaches only the steppe regions of Crimea and is not available in large cities of the peninsula on the coast. The editors of this station are located in Kyiv, and only freelance writers work on the peninsula who have to report news anonymously or under a pseudonym. One of these authors, Nikolai Semena, was arrested by Russian security forces in 2017 and spent 2.5 years in prison. In February 2020, Semena left for mainland Ukraine. Other radio stations are available only online.

Television

Television is the most popular medium in Ukraine by a large margin, except social networks as a separate type of media. According to the study by InMind for Internews Network from 2018, 77 percent of Ukrainians watch television at least once per month, while 74 percent use TV channels as their weekly source of news. TV is also the most trusted medium - 56 percent of Ukrainians trust regional TV channels and 61 percent trust national TV channels.

In a more recent USAID-Internews media consumption study of 2019, other data are already cited. Social networks are named by 68% of the respondents as the main source of information, and 66% of the respondents chose television. For the first time in the history of Ukraine, social networks have bypassed television as a channel for distributing content.

Since 2014, the Ukrainian TV sphere has developed mainly in the information direction. New channels such as *Hromadske* (Civic), *Espresso*, *112*, *NewsOne*, and *Priamyi* (Direct) are focusing exclusively on news and talk-shows about politics, economy, and society. However, all these channels, except for crowd-funded and grant-funded *Hromadske* (Civic), are private and have a non-transparent ownership structure.

As mentioned before, Ukrainian media have clear links to politicians and political parties, as they belong to oligarchs who are involved in politics directly or indirectly. These links are the strongest in the TV sphere. For instance, Ukrainian politician Viktor Medvedchuk, who is closely linked to Russia's President Vladimir Putin (his daughter's godfather), allegedly controls *112*, *ZIK* and *NewsOne* TV channels, popular news channels in Ukraine. Numerous journalist investigations have proven Medvedchuk's connection to the owners of these channels, that often promote messages close to those advanced by several Russian media (most extremely, that Ukraine is a failed state, or that pro-European reforms are aimed at "selling" Ukrainian economy to the Western capital, or that the bringing gas prices to the market level mean an economic "genocide" of the Ukrainian people). However, they also invite people with openly anti-Russian views, which helps these TV channels maintain a veneer of objectivity. However, because of their perceived pro-Russian stance, these channels have also come under increasing pressure. On 4 October 2018, the Ukrainian parliament voted measures intended to shut down *112* and *NewsOne* TV channels, both of which have regularly criticized the Ukrainian authorities and given a platform to ex-president Viktor Yanukovych's entourage and to pro-Russian views. The parliament addressed the National Security and Defence Council (NSDC) of Ukraine, asking it to introduce sanctions against the companies that own these TV channels and to remove their broadcasting licenses.

As of May 2020, all of these channels continue to broadcast, although *112* channels became less influential after losing the digital broadcast license.

According to research by Big Data Ua, the top 5 most viewed channels are *1+1*, *Ukrayina* (Ukraine), *STB*, *ICTV*, and *Novyi Kanal* (New Channel). All of these are infotainment channels, producing a wide range of programs for families of all ages. Basically, the composition of programs on all these channels is the same. All of these TV channels belong to different oligarchs: Ihor Kolomoyskyi controls *1+1*, Rinat Akhmetov owns *Ukrayina* (Ukraine), while *STB*, *ICTV*, and *Novyi Kanal* (New Channel) belong to Victor Pinchuk, son-in-law of former Ukraine's President Leonid Kuchma. The only non-oligarch-controlled TV channel in the top 10 is *Suspilne* (Public), Ukraine's public broadcaster, but it sits in 10th place and reaches less than one percent of the audience. The situation with national minority languages is the same as in the radio sphere. There are no TV channels in national minority languages only (besides Russian), but there are TV programs for most national minorities at *Suspilne* (Public). The station's branches in Zakarpattia, Chernivtsi, and Odesa regions - the ones with most national minority representation - feature TV programs in Romanian, Bulgarian, Moldovan, Gagauzian, Slovak, and German. There are plans in place to expand the number of programs for national minorities.

People with impaired hearing do not have much choice compared to national minorities. There are some programs on *Suspilne* (Public), which are accompanied by sign language interpretation and/or subtitles. In July 2018, Zurab Alasania, the head of Ukraine's public broadcasting company, announced that all the programs on all the channels of the company - national and regional alike - will be accompanied by the sign language, but there is no estimated time for implementation of this plan. Private channels rarely do sign language interpretation (there is such interpretation on *Priamyi* (Direct) and some other channels, however), but subtitles are more common. Approximately, only 10 percent of programs are subtitled. There

are more opportunities on the Internet. For instance, 1+1 TV channel publishes daily news programs with sign language interpretation on its website.

Contrary to the radio, Ukrainian TV channels are entirely unavailable in the Donetsk and Luhansk regions and in Crimea. Ukrainians who live there only have access to Russian and local channels. For instance, the following Russian TV and radio companies illegally seized pre-annexation Ukrainian TV channels' frequencies (indicated in brackets): NTV (Inter), *Perviy Kanal* (First Channel) (1+1), *Rossiya* (Russia) (First National), *Zvezda* (Star) (STB), TNT (Channel 5), TNV-Planet (ICTV), *Rossiya 24* (Russia 24) (Chornomorska), etc.

Digital Media

The Internet plays a significant role in the everyday life of Ukrainians.

According to the 2018 Factum Group Ukraine research, 21.35 million Ukrainian citizens (65 percent of the country's population) are regular Internet users. 21.9 million (67 percent) have an Internet connection at home. The average Internet-user resulting from this study is female (52 percent), 25-34 years old (28 percent), lives in a city with a population of 100,000, and more (44 percent). As many as 27 percent of Ukraine's Internet users live in villages and 28 percent live in small cities. The only social group which does not use the Internet often is people aged 65+ which constitute only 4 percent of Ukraine's Internet-users.

According to a study commissioned by USAID-Internews in 2019, the largest number (68%) of Ukrainians call social networks the main source of news, television with 66% in second place. At the same time, social networks are not media in the classical sense, but rather a channel for distributing news from various sources. One such source is digital media.

According to the earlier research by InMind for Internews Network of 2018, online media are the second most popular in Ukraine after television, as 60 percent of Ukrainians visit news websites at least once per month and 57 percent use the Internet as their daily source of news. Online media are almost as trusted as TV: 52 percent of Ukrainians trust in regional news websites, while 58 percent trust in national websites.

That is, we see that from 2018 to 2019 the role of the Internet as a source of news has grown and is already taking the first place. It is also true, that television is almost as influential.

All major Ukrainian media also have news websites. TV channels and radio stations also air online. Thus, the most popular news websites are largely controlled by big media holdings.

The research by the Ukrainian Internet Association for December 2019 shows that *24tv.ua* and *unian.ua*, the most popular news website, reach 16 percent of Ukrainians monthly. These are followed by *Segodnya.ua* (Today.ua; 14 percent), *tsn.ua* (14 percent), and *obozrevatel.com* (13 percent).

Online, however, is the most likely place for interesting new projects and civic initiatives. *Hromadske* (Civic) could serve as an example. It was launched in November 2013 by the group of Ukrainian journalists and was focused mainly on reporting about the Euromaidan. When the Euromaidan ended, *Hromadske* (Civic) turned into an independent TV channel and news website.

Most news websites provide an opportunity for people to create their own author columns. However, this opportunity is not open for everyone - such blogs are arranged by the editors. Thus, the person applying for the column should be famous and/or have something interesting to say. Facebook is the key platform for political and social discussions.

The Ukrainian online sphere is very fragmented. There is no legislation on the transparency of ownership and editorial

boards, which allows the creation of news websites with no information about their affiliation or editorial policies, which push forward specific narratives in the interests of those who control them. The “news” circulating from these websites are put up and spread very quickly, as the audience’s “demand” for information is higher than the “supply” provided by professional journalists. This, in turn, has often a direct impact on the quality and accuracy of the news presented. Russian narratives (especially those aimed at maintaining the “disappointment” messages) easily get their way through, but it is important to remember that manipulations are often used by Ukrainian internal players in fights against each other.

Social Networks

As we wrote above, social networks are the main channel for the distribution of news in Ukraine according to the end of 2019 (a study commissioned by USAID-Internews). 68% of Ukrainians obtain news from social networks and only 66% from television (several options could be mentioned in the survey). Thus, social networks and television complement each other in Ukraine and have a mutual influence. TV channels broadcast their best shows through social networks. Leading journalists lead their pages on social networks. On the TV channel, guests answer questions from social networks.

Facebook is the dominant social network in Ukraine with few real opponents. Russian social networks *Vkontakte* (In contact) and *Odnoklassniki* (Classmates) used to be the most popular, but things changed dramatically in May 2017 when Ukrainian President Petro Poroshenko, on the basis of a decision by Ukraine's National Security and Defense Council, imposed sanctions on some Russian Internet services. *Vkontakte* (In contact) and *Odnoklassniki* (Classmates) were on the list. These sanctions continue to apply under President Volodymyr Zelensky, and in May 2020 they were extended for another three years.

Now Ukrainians can access these social networks only using VPN or proxies, which has led to a decrease of their audiences. Meanwhile, *Vkontakte* (In contact) was not blocked on non-government controlled territories, so it remains the most used social network there.

According to the study of media consumption commissioned by USAID-Internews in 2019, Ukrainians most often used Facebook (11%), YouTube (4%) and *Vkontakte* (1%). Only 0.2% of respondents named Twitter popular in the West.

Social media have become an important part of the country's media sphere. Newsrooms actively use different types of video production to attract an audience, including live streaming on *Facebook*, video dispatches on their sites, etc. Each newsroom invests time and efforts to communicate with its audiences on *Facebook*.

As social networks are increasingly used to provide and share information and news, they have also become the focus of attention regarding so-called “disinformation campaigns” and “information warfare” in the country. Particularly in the wake of the 2013-2014 crisis, the Kremlin has been accused of orchestrating disinformation campaigns against the Ukrainian government and western countries by using online trolls and state-controlled online outlets such as RT (formerly known as Russia Today), Sputnik, 1st Channel, RTR, Life News, etc (see eg VoxUkraine, Singularex and Texty.org.ua studies). Social networks have magnified the effect of these campaigns and are still considered the primary channel to ensure the spread of this news.

On the other side of the spectrum, Russian public officials and academics argue that western countries are also waging information warfare against Russia, with Ukraine being only one of the fronts of this conflict. Russian official documents such as Military Doctrine, Information Security Doctrine, and Foreign Policy concept stress that in today's world information has become a weapon and that Russia should use a weapon, too, in a global “information battle.” External observers, such as Amnesty International Ukraine, have remarked that “[i]ndependent journalists and media companies, especially those who are accused of disseminating “pro-Russian” views, have increasingly come under pressure by both the authorities and

members of violent groups" (Amnesty 2019). Ukrainian side often replies to these accusations that in a situation of Russian military attack Russian information organizations cannot be considered as "media", but should be viewed as instruments of an information war.

Opinion Makers

Social media are the most important platform through which Ukrainian influencers communicate with their audience. Mustafa Nayyem, a former journalist and former MP, is one of the most important influencers - his post in *Facebook* kicked off the Euromaidan. Nowadays Nayyem poses himself as a reformer and writes a lot about political and societal issues on the agenda. He is also rather active on *Twitter* and on *Instagram*. As of May 2020, Mustafa Nayyem worked in the state concern Ukroboronprom and was responsible for GR there.

However, the most popular influencer in Ukraine is Svyatoslav Vakarchuk, the leader of *Okean Elzy* (Ocean of Elza) rock-band. Since Euromaidan, Vakarchuk has been writing a lot about politics and society and has some 2,000,000 followers on *Twitter*. Vakarchuk has also been one of the top-polling candidates for Ukraine's president, until the moment when he announced that he would not be running. In 2019, he led Golos party and held 20 deputies in the Ukrainian parliament (out of 424 seats, another 26 seats have remained empty since 2015 - there should be representatives of Ukrainian territories occupied by Russia).

Another unexpected influencer is Volodymyr Zelenskyi, a Ukrainian comedian and producer and the leader of *Kvartal 95* (District 95) comedic group which does a satiric show about politics and society hosted by 1+1 TV channel. All their products resonate with a wide public, which results in support for Zelenskiy. In 2019, Ukrainians elected Zelensky as president of Ukraine, he was also able to hold 248 of his supporters from the party "Servant of the People" in the parliament and form the so-called "mono-majority". His party appointed the government. For the first time in the 28-year history of Ukraine, the president, the majority in parliament, and the government were representatives of one political group.

There are also many oppositional influencers. The most notable one is Anatoliy Shariy, a contradictory journalist turned video blogger. He has sought asylum in the European Union claiming persecution by Ukrainian law enforcement bodies in 2012. His YouTube channel has 2,33 million subscribers. He mostly promotes pro-Russian messages, mocks Ukrainian authorities and maintains an opinion that Ukraine is a failed state. In 2019, Shariy's party took part in the elections in Ukraine for the first time, it gained 2.23% of the vote and thus it did not overcome the 5% barrier to parliament.

The government and politicians try to be influencers as well. Each ministry and top officials have social media representation, mainly on Facebook, Twitter and YouTube. These social media pages are often a preferred way to publish statements on issues of public concern, and they make it into the information space being quoted by media.

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? [Mustafa Nayyem](#)

? [Petro Poroshenko](#)

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? [Volodymyr Groysman](#)

Organisations

Trade Unions

The only national trade union in the sector is the *Nezalezhna media-profspilka Ukrayiny* (Independent Media Trade Union of Ukraine - IMTU). Established in 2002, the union obtained its legal status in 2005. As of today, it unites around 600 journalists and is a member of both the European and International Federation of Journalists. The union provides its members with free legal, psychological and financial support as well as supplies bulletproof vests and helmets to those working in hot spots. Also, starting from 2007, the Union has been publishing an annual rating called Enemies of the Press, based on monitoring violations of journalists' rights and conducting surveys among them. After a series of internal conflicts in 2016, the union lost its former influence. As of May 2020, it does not have a permanent office, Sergei Shturkhetsky, a reputable journalist and teacher of journalism from the city of Rivne in western Ukraine, is trying to revive the union.

There is also the *Natsionalna spilka zhurnalistiv Ukrayiny* (National Union of Journalists of Ukraine - NUJU) established in 1959 and encompassing around 19,000 members according to own statements. While it defines itself as a national all-Ukrainian creative union as well as an independent non-profit and non-partisan NGO (formally, not a trade union), it is also

listed as a member of both the European and International Federation of Journalists. Unlike the Independent Media Trade Union of Ukraine, funded exclusively through members' contributions and charitable donations, the National Union of Journalists of Ukraine is partially funded from the state budget. Also, part of the organization's budget is formed at the expense of income from the lease of premises in the center of Kyiv - these premises were received by the organization during Soviet Ukraine.

In 2014, in the wake of political crisis and at the outbreak of hostilities in the east of Ukraine, the two unions established *Obiednaniy tsentr dopomogy zhurnalistam* (Joint Centre for Providing Assistance to Journalists - JCPAJ). Its goal is to provide journalists affected by the said political crisis and hostilities with complex assistance and protection of their rights and security. 2014 can be called the peak of influence of these two organizations.

For different reasons, these organizations gradually lost their weight and credibility. The IMTU has been suffering from protracted and irreconcilable disagreements among its leadership whereas the NUJU, being dependent on budgetary funding, has been recurrently accused of a biased stand.

Journalist Associations

The Ukrainian media landscape does not include any comprehensive nationwide professional associations that would unite all journalists. Neither is there any system of smaller associations of that kind. Those that do exist are simultaneously few and sporadic. Usually they are based on either of the two criteria: specific sector affiliation or geography.

A good example of the former is *Asotsiatsiya sportyvnykh zhurnalistiv Ukrayiny* (Ukrainian Sports Press Association - USPA). Established in 1999, it unites around 600 TV, radio and print and online press journalists working in the sphere of sports. Starting with 2001 the USPA is a member society of the National Olympic Committee. Together with the latter, the USPA board provides accreditation for sports journalists to cover Olympic Games, whereas the accreditation to cover European and world championships in specific sports is carried out in cooperation with the respective federations. Represented in all regions of the country by its branches, the association seeks to protect creative, social, economic, national, cultural, sporting and other interests of its members both domestically and abroad.

Another association operating based on the sectoral criterion is *Spilka pravoslavnykh zhurnalistiv* (Union of Orthodox Journalists). Established in 2015 against the backdrop of the standoff between Ukraine's two Orthodox Churches, those of the Kyiv and Moscow Patriarchates, the Union tends to lean toward the latter in materials it promulgates. Notably, information about the union, including any details on its founders, editors, members and membership procedure, on its official website as well as elsewhere, is very scarce. The union is allegedly affiliated with Vadym Novynskyi, a Ukrainian MP who is a consistent member of pro-Russian political parties and patron of the Ukrainian Orthodox Church of the Moscow Patriarchate.

An example of an association that was established based on the regional criterion is NGO *Pivden* (South). Known before 2014 as the Kherson City Journalists' Association *Pivden* (South), the Association was established in 1998 with a view to unite regional journalists in their professional activity. In 2014, it expanded its focus and became an NGO advocating for human rights, rule of law and other democratic values, the promotion of journalistic standards having become only one of its numerous aspects.

However, when not limited to journalistic criterion, associations in the media sector as a whole are both nationwide and numerous. These include, among others, *Nezalezhna asotsiatsiya teleradiomovnykiv* (Independent Association of Broadcasters - IAB), *Asotsiatsiya korporatyvnych media Ukrayiny* (Association of Corporate Media of Ukraine - ACMU), *Ukrayinska media-asotsiatsiya* (Ukrainian Media Association - UMA), *Ukrayinska asotsiatsiya media-biznesu* (Ukrainian Association of Media Business - UAMB), *Ukrayinska asotsiatsiya vydavtsiv periodychnoyi presy* (Ukrainian Association of

Press Publishers - UAPP) as well as *Asotsiatsiya Nezalezhni regionalni vydavtsi Ukrayiny* (Independent Regional Publishers of Ukraine Association - IRPUA).

News Agencies

News agencies are very important in the daily functioning of the media system. Many media often rely on what news agencies put out for their content. This is especially the case for regional media, news websites, and radio stations. The problem is that the information provided by news agencies is rarely verified by the newsrooms. If mistakes or distortions appear in the initial messages put out by news agencies, they are quickly spread around the readers all over Ukraine. Even when the news agencies correct the mistakes, many media do not.

However, Ukrainian news agencies, like most other media, are scarcely independent as they are often part of big media groups owned by oligarchs. For instance, UNIAN news agency is included in *1+1 Media Group* owned by Ihor Kolomoisky. *Ukrainski Novyny* (Ukrainian News) is a part of Inter Media Group which belongs to Dmytro Firtash and Serhiy Liovochkin. Although Interfax-Ukraine declares full independence, it operates under a license from the Russian agency Interfax. Ukrinform is a state-owned agency that is subject to the influence of the Ukrainian government. Ukraine also has offices for international news agencies such as Bloomberg, Reuters, or AFP.

Audience measurement organisations

Organizations involved in audience measurement in the Ukrainian media landscape can be broadly divided into three groups. The first one consists of media companies or their professional associations that carry out such measurements to evaluate their own audience, primarily for marketing and strategic purposes. A good example is the *Idustrialnyi televiziyniy komitet* (Television Industry Committee – TIC) that is essentially an association made up of four major television groups, four media groups and several separate channels. This particular organization, however, has recently slowed down its research and analytical activity, having rather concentrated on media monitoring. The second group is represented by organizations involved in markets analysis business, including the media sector, such as BIG DATA UA, InMind, Gemius, Kwendi or Kantar (TNS).

This group is also the most numerous. The third group is represented by NGOs acting primarily as watchdogs in the media sector and carrying out an entire array of activities related to media monitoring and evaluation, including audience measurement. These include organizations such as *Detector Media* and the *Institute of Mass Media*. The latter, however, are not trusted by all the players on the Ukrainian media market. Eurosceptic and pro-Russian media often claim not to trust these organisations saying they receive financing from the West and act against opposition outlets.

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Policies

Media legislation

Given that Ukraine's legislature in the media sector is relatively vague, its practical implementation can be characterized as sporadic, multidirectional, inconsistent, unbalanced, and non-transparent. Existing laws are predominantly declarative and

therefore insufficient in their regulative function, which results in their failure to translate into specific, effective policies. Instead, these declarative laws often overlap and duplicate each other, leading to ineffectiveness at best and legal impasses at worst.

Anyway, the main pieces of legislation in the media sector include:

- ? Law On Television and Radio Broadcasting (1993);
- ? Law On Information (1992);
- ? Law On Telecommunications (2003);
- ? Law On Public Television and Radio Broadcasting (2014);
- ? Law On Cinematography (1998);
- ? Law On Information Agencies (1995)
- ? Law On Print Media (Press) in Ukraine (1992);
- ? Law On State Support of Mass Media and Social Protection of Journalists;
- ? Law On the National Council of Television and Radio Broadcasting of Ukraine.

Most of these laws have been developed based on their Soviet prototypes, and as such they are not entirely up to date to the new trends in the sector. Legislation on online media is virtually nonexistent. Their operations are based on the abovementioned general laws at best. As a result, there is a major gap in national law that leaves online media neither regulated nor protected.

The key among the above laws in Ukrainian media sector, Law On Television and Radio Broadcasting of 1993, is currently being replaced by a new piece of legislature, as provided for in the EU-Ukraine Association Agreement (AA) with a view to harmonizing Ukraine's and EU's legislature. The new law that was to change its title to Law On Audiovisual Services needed to be adopted within two years after the AA's entry into force, which means that the deadline was set for 1 September, 2019.

In 2019, deputies actively discussed the bill "On Media", which was to replace almost all the old laws and comply with European standards. The bill even received a positive assessment of the profile committee of the Ukrainian parliament. However, deputies did not vote for him. After the Ukrainian government announced quarantine in 2020, its discussion stopped altogether.

Recently, the Ukrainian state broadcaster has been reformed into a public broadcaster. The aim was to provide an independent source of unbiased information, without financial or administrative influence by the state. The issue has been pending for the last twenty years so far, although the first tangible progress in this respect was achieved in 2014, once the Law On Public Television and Radio Broadcasting was adopted. Its implementation, however, has protracted in the absence of the state authorities' political will as well as continuous underfunding.

Independence of public broadcaster is also in constant danger, as shifts in management keep happening. The board of *Suspilne* (Public) suddenly decided on 31 January 2019 to fire CEO Zurab Alasania. On 12 February, his termination from *Suspilne* (Public) was postponed until 6 May, from 19 February. Alasania filed a court suit to overturn the decision of the supervisory board to dismiss him. As of May 2020, Zurab Alasania continues to run the TV company.

Further reforms in the media sector include the forthcoming reorganization of state and communal printed media into independent outlets and providing for the open and transparent information on mass media owners.

A particular legislative issue that has been around in the Ukrainian media landscape for the last couple of years is the issue of language quotas. As the Ukrainian language was banned from public use in the 2nd half of 19th century under the Tsarist regime and was similarly restricted under the Soviet Union at least from the 1930s (a policy creating what has been referred to as a “linguicide”), there is growing support for the government’s efforts to promote the Ukrainian language. Nevertheless, Ukraine remains largely a bilingual country, with the Russian language dominating in big cities and specific fields of life (such as business). As a result of this new language policy, Ukrainian-language content quotas for radio were introduced in November 2016. According to the respective law, as of November 2018, at least 35 percent of songs and 75 percent of programs broadcast shall be in Ukrainian. June 2017 saw the adoption of a similar piece of legislature for television, according to which at least 75 percent of programs and movies broadcast on national television shall be in Ukrainian (the share is reduced to at least 60 percent for local TV companies).

However, Ukrainian legislation also targets certain Russian content. The Law On Cinematography prohibits broadcasting movies, produced after 1 August 1991 in case they were created with the participation of people that appear on the list of persons threatening national security. At the same time, the Law On Television and Radio Broadcasting prohibits broadcasting any movies, irrespective of their production year, in case the said people participated in their production. Furthermore, according to the presidential decree of 15 May 2017, Ukrainian Internet providers blocked access to several popular Russian social networks and e-mail services, including *Vkontakte* (In Contact), *Odnoklassniki* (Classmates) and *Mail.ru*. In May 2020, sanctions against Russian social networks were continued. These services, however, stay available for users who use VPN or specific browsers.

Accountability systems

Given the above mentioned broad nature of Ukrainian laws in the media sector, there are little to no mechanisms to hold journalists and outlets legally accountable unless there is enough ground to imply defamation or similar serious crimes. This is accentuated by the fact that most legal conflicts are either based on bad faith accusations or are resolved in bad faith upon agreement of the parties concerned based on their vested interests. Both situations stem primarily from the oligarchic nature of Ukrainian media that has spread even into the state sector.

However, the situation is somewhat different when it comes to accountability in terms of the reputation of outlets. It has become especially tangible in the wake of 2014 revolution with the establishment of a good number of NGOs and watchdogs in the media sector, including, among others, the *Institute of Mass Media* and *Detector Media*.

Regulatory authorities

The principal authority involved in TV and radio regulation is *Natsionalna rada z pytan telebachennia ta radiomovlennia Ukrayiny* (National Council of Television and Radio Broadcasting of Ukraine - NCTRBU). It is a standing constitutional collective body whose function is to supervise the observance of laws in the area, elaborate state policies regarding TV and radio broadcasting as well as to carry out regulatory functions provided for by these laws. Apart from that, there is also *Derzhavniy komitet telebachennia I radiomovlennia Ukrayiny* (State Committee for Television and Radio Broadcasting - SCTRBU), an executive body responsible for the elaboration of state information policy (including language policy, publishing industry and public morals protection).

Looking beyond the state sector, there is the Independent Media Council. Established in 2015 by 15 members of media

community and professional NGOs, it acts as a standing monitoring and advisory body, promoting high professional standards of journalism. The council looks into disputes (both upon request and on its own initiative) relating to compliance with media legislature, international standards of information coverage as well as to breaches of rules of journalistic ethics.

Speaking of the latter, there are two more organisations deeply involved in this area. These are the Commission on Journalism Ethics and the *Stop tsenzuri* movement. The former was originally established in 2001 to deal with censorship and self-censorship in mass media but gradually took on the role of an arbitrator in disputes relating to media sector, too. The latter was established in 2010 primarily with a view to countering pressure exerted on media by the state as well as outlets' owners. The Stop Censorship movement ceased to exist after 2014 when mass protests in the streets of Kyiv forced former Ukrainian President Viktor Yanukovych to flee Ukraine to Russia.

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- [State Committee for Television and Radio Broadcasting](#)
- [Stop Tsenzuri \(Stop Censorship\)](#)

Education

Universities and schools

There are 39 Ukrainian Universities holding licenses to provide education in the area of journalism. Among them, 37 offer BA programmes, while only 30 offer MA programmes. There are also two Universities, the National University of Kyiv-Mohyla Academy and the Ukrainian Catholic University, that offer exclusively MA programmes. As many as 3,000 students can be admitted to BA programmes annually, with the number of MA students totaling 1,400. Of said Universities, 31 are public while eight are private; nine are located in Kyiv whereas the remaining 26 are regional. Overall, there are 26 departments of journalism, two departments of social communications, one department of journalism and new media and one department of Ukrainian stylistics and journalism.

It should be added that there are instances of specific media companies having their own schools of journalism. For instance, the *Inter* TV channel has its own educational establishment called *Interschool* that trains specialists for the TV, new media and cinema industries

Finally, there are some opportunities for those who want to study journalism online, although this could be hardly compared to in-class education. The most prominent instance is the platform *Prometheus* that is basically the Ukrainian analogue of the universally known platform *Coursera*. It offers, among other things, courses on Internet media, information warfare as well as on big data processing and analysis.

Having said the above, here is the list of the most prominent Universities offering programmes in journalism (apart from the several ones that have already been mentioned):

- Institute of Journalism of Taras Shevchenko National University of Kyiv;
- Ivan Franko National University of Lviv;
- V.N. Karazin Kharkiv National University;
- National Aviation University;
- Borys Grinchenko Kyiv University;
- Zaporizhzhia National University;
- The National University of Ostroh Academy;
- Chernivtsi National University;
- Mariupol National University;
- Ukrainian Catholic University.

Professional development

There is no legal requirement for Ukrainian journalists to undergo professional development. However, it is considered professional to do so and is therefore very common. Professional development courses are numerous and are offered by various entities. First and foremost, such courses are available at Universities and postgraduate educational institutions. For instance, the Institute of Journalism of the Taras Shevchenko National University of Kyiv offers seven different professional development programs. Another good example is the Ukrainian TV, Radio Broadcasting and Press Institute that specializes exclusively in programs of professional development for journalists working in either of three sub-sectors. Secondly, such programs may be delivered either by associations of the media sector or by foreign/international journalistic organizations. A good example is the Ukrainian Media E-School organized by the Independent Association of Broadcasters in cooperation with DW Akademie, School of Journalism at Ukrainska Pravda in cooperation with DW Akademie.

Since 2017, there is a regular program in economic journalism from the Center for Journalism at the Kyiv School of Economics, where economists teach journalists data analysis, market analysis, the basics of finance and economics.

Finally, professional development services are offered by media development organizations to be dwelled upon in the section below. A good example is OPEN Media Hub. A big role in education of journalists is played by media NGOs such as Internews Ukraine, Detector Media, *Fundatsiya Suspilnist* (Commonness Foundation), Ukraine Crisis Media Centre, *Instytut rozvytku regionalnoyi presy* (Institute for the Development of Regional Press), etc.

Media Development Organisations

There are several organizations in Ukraine focused on media development: a non-governmental Media Development Foundation, as well as a private consulting company JNOMICS.

It would rather be fair to say that media development, as a goal and practice, exists at the intersection of numerous NGOs' activities. For instance, there is the already mentioned watchdog Detector Media. It is involved in media development, but the main practices it resorts to are scrupulous monitoring and harsh criticism. Hence, it makes media want to improve themselves rather than being a source of funding/training/promoting/etc. itself. To cite another one, the Institute of Mass Information is primarily a think tank, and media development is only another of its activities.

In 2019, the Center for Journalism [at the Kyiv School of Economics](#) conducted a study of business models of the Ukrainian media, its results help editions to improve their practices. The Center also advises media owners and editors.

However, there are also NGOs that are exclusively involved in media development. Some good examples are Information Security, Internews Network, Internews Ukraine and *Media Business Development Institute, and Independent Media*

Association.

Finally, there is a number of programs/organizations, established by foreign embassies/international organizations. For instance, the US Embassy has a Media Development Fund, funneling money to the development of media and media-related NGOs. Another good example is the already mentioned OPEN Media Hub, established by the EU within the framework of its Neighbourhood Policy.

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- [National Aviation University](#)
- [National University of 'Kyiv-Mohyla Academy'](#)
- [OPEN Media Hub](#)
- [Regional Press Development Institute](#)
- [The National University of Ostroh Academy](#)
- [Ukrainian Catholic University](#)
- [Ukrainian Media E-School](#)
- [Ukrainian TV, Radio Broadcasting and Press Institute](#)
- [V.N. Karazin Kharkiv National University](#)
- [Zaporizhzhia National University](#)
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- [Media Development Foundation](#)
- [Jnomics](#)

Telecommunications

Mobile network ecosystem

Overall, the Ukrainian telecommunications market has been actively growing in recent years. In May 2020, there were 1,280 telecommunications operators and providers in Ukraine according to the register of the National Commission for the State Regulation of Communications and Informatization.

Mobile network coverage in Ukraine is more extensive than that of fixed Internet access connection. Whereas mobile network coverage exists almost in all cities, towns and villages, big Internet providers usually do not penetrate deeper than *rayon* centers. All major cities have 4G mobile communications, but as of May 2020, there was no high-speed mobile Internet in the metro.

This also reflects the major trend in device usage, where mobile phones are very common for all age groups and locations,

having penetrated deep even in rural areas. At the same time, there is a quite tangible difference in desktop/laptop usage between towns and smaller rural communities where it is far less common.

The mobile network market used to be more diversified in the past, having been represented both by a bigger number of players and more diverse custom-tailored packages. An overall trend consists of the fact that mobile network companies used to bet on providing better or more diversified conditions than their competitors whereas now, with package offers having undergone significant unification, mobile network providers bet on making their products more affordable.

Ukrainians are reported to buy new mobile network devices once in 5-6 years, 5-6 million smartphones are sold per year in the country with a population of about 42 million people.

According to a study by the provider Cable.co.uk, which analyzes the availability of the Internet in 228 countries, mobile Internet in Ukraine is the cheapest in Europe and 5th in availability in the world. The study was conducted in 3 February and 25 February 2020.

Company profiles

When it comes to mobile network companies, there are three main players in the Ukrainian telecommunications market, therefore providing an oligopoly in the respective sector. These include *Kyivstar*, *Vodafone*, and *Lifecell*, all of which are private. They account for 26.4 million, 19.8 million, and 6.9 million users respectively. In total, Ukraine has over 50 million mobile subscribers with a population of about 42 million people according to data for 2019. That is, many Ukrainians have several cards of mobile operators.

A common feature of all three companies is a significant share of foreign capital investments. This is connected with the fact that the nature of the market sector itself demands extensive investments that cannot be provided by Ukrainian market players.

The situation is more diversified in the sector of fixed Internet access providers. The major players in the market are private in nature and include *Ukrtelecom* (together with its branch 3Mob), *Intertelecom*, *Vega Telecommunications Group* and *Volya Group*. While the market may be quite difficult to enter due to existence of disproportionately big companies, the situation in the fixed Internet sector cannot be characterized as an oligopoly but rather as a healthily developing market.

Although fixed-line communications are losing their influence with the development of 4G mobile technologies.

Main trends

While the popularity of landline desk phones began swiftly decreasing quite a long time ago, recent years have also seen an interesting trend in mobile networks' usage. As of 2017, 32 percent of mobile network companies' revenues were made on providing Internet access, including 3G. This was only two percent less than revenues made on voice calls which demonstrated quite an unequivocal shift in market demands.

As of January 2019, Ukrainian users possessed 53,934,000 active SIM cards, which is 1,78m less than the number of SIM cards used as of January 2018. At the same time, Ukraine's population in 2019 totals at roughly 42 million people, excluding those living in non-government controlled territories, which translates into 1.28 SIM cards per citizen. This can be explained by the growing popularity of dual SIM-card phones.

As of 2018, 91 percent of touch screen devices' owners use apps. The most active social group in this respect are people aged 25-34. Up to 70 percent of smartphones operate on Android; 20 percent are iPhones; six percent use a desktop

version. As many as 73 percent of smartphones users have social media apps installed on their devices whereas 61 percent of users have gaming apps, 51 percent have navigations apps and 49 percent have messengers installed. The breakdown of specific messengers' popularity suggests that 85 percent of smartphone owners use Viber, 44 percent use Facebook Messenger, 32 percent use Skype, and only 11 percent use Telegram.

A major recent development in the telecommunications industry in Ukraine has been the launch of a 4G Internet connection. Having been formally launched by a Ukraine's president's decree in 2015, works on 4G technology implementation have finally started translating in practical steps only in late 2018 – *Kyivstar*, *Lifecell*, and *Vodafone* launched 4G in big cities in the spring and summer of that year. By May 2020, 4G communications already covered almost all Ukrainian settlements, but it is not in the metro or on Intercity routes.

Finally, quite a significant trend in the Ukrainian telecommunications market is the popularisation of mobile banking. All major Ukrainian banks, including *Privatbank*, *Alpha Bank*, *Ukrsibbank*, and *Raiffeisen Bank Aval* have both desktop- and app-based platforms for online banking. As much as 47 percent of smartphone users in Ukraine are believed to regularly use mobile banking services.

The digitalization of Ukrainian society has risen sharply due to the coronavirus pandemic in 2020, but the consequences of this transformation are still hard to express in numbers.

Mobile coverage

Leaders of the mobile network coverage, as it has been already mentioned above, are *Kyivstar*, *Vodafone* and *Lifecell*. Being national leaders in 3G coverage, all three of them have already undertaken to provide 4G connection that is only starting to be implemented.

When it comes to 3G coverage, maps of *Kyivstar* and *Lifecell* are not only comparable in terms of percentage of territory covered, they overlap in their bigger part. However, a significant difference between these two companies is that *Lifecell* can boast a far denser coverage in southern and eastern Ukraine. *Vodafone*'s coverage is significantly smaller, being extensive in the capital and several major cities, including Dnipro, Kharkiv, Odessa, Zaporizhzhia, Lviv and Kharkiv, its representation deeper in regions could be characterised as little to none. The general feature of all players in the market is weak coverage, or absence thereof, in rural areas.

As of 2019 none of the three companies operate in the Crimean peninsula and in the non-government-controlled areas of Donbas region.

Mobile ownership

The share of Ukrainians using smartphones is skyrocketing. Compared to just nine percent in 2013, it has grown fivefold in just five years and reached 45 percent of the population in 2018 and already 66% of Ukrainians in 2019. Apparently, such an upheaval can be explained with harsh economic conditions in the first couple of years after the 2014 revolution that was succeeded by sustainable economic growth. According to experts, however, even these digits suggest that Ukraine is still lagging behind Europe in terms of smartphone ownership by three years: 85 percent of people aged 18-30 use devices with touch screen display. The majority thereof live in big cities and have higher education.

An important thing to point out is that the number of mobile phone users has almost reached the number of TV viewers which is 40 million people. Also, judging from the dynamics, there soon will be a moment when the 40 million milestone will be reached by smartphone users alone, too. These dynamics suggest that the long-standing trend of Ukrainian media, according

to which the main channel through which information is delivered to the population is television, is likely to change in a matter of years.

Many Ukrainian TV channels in 2020 already felt the “aging of the audience” and tried to reach a younger audience on the Internet.

The gender breakdown of smartphone users also suggests that women use such devices more often (53 percent) than men (47 percent).

Sources

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- [Kyivstar](#)
- [Lifecell](#)
- [National Commission for the State Regulation of Communications and Informatisation](#)
- [Ukrtelecom](#)
- [Vega Telecommunications Group](#)
- [Vodafone](#)
- [Volia Group](#)

Innovation

Landscape analysis

Unfortunately, innovations in the telecommunications sector are significantly underdeveloped in Ukraine. Due to constant underfunding and lack of political will to prioritize the sector, Ukraine lags behind in implementing technologies that have long been implemented in the west, at best. A good example in this relation is the introduction of 4G Internet connection that has been postponed in Ukraine by years compared to when it appeared in the West.

Apart from that, Ukraine has been actively developing e-governance in recent years, it is the cornerstone of public administration reform. Extensive instruments have been introduced to Ukrainians to simplify their communication with the state as well as to reduce red tape in these relations. At the same time, as much know-how, as has been invested in the sector, one can hardly say that these innovations amount to anything more than the implementation of western practices at their example.

An interesting tendency is a disparity between the number of patents obtained in the last decade and the practical impact it has had on Ukraine's market. During the last ten years, international corporations, including Bayer, GE, Samsung, Qualcomm, and others, have obtained around 20,000 patents. The number of patents Ukrainians have had a hand in globally reached the stunning figure of 124,000. At the same time, in practice the above thrilling numbers translate into little progress. Several examples of the few success stories include *Viewdle*, face recognition software, and *Lookser*, specializing in the modification of streamline videos in real time.

Overall, innovation, as scarce as it is, is more prominent in civil engineering, pharmaceuticals, medicine, transport, and even agriculture rather than telecommunications which do not seem to be a priority at all. This may owe the two specific factors:

First, as it has already been mentioned above, the sector requires significant amount of funding rarely available in Ukraine; second, Ukraine's political background coupled with protracted conflict in the East of the country significantly reduce the will of foreign companies to enter the Ukrainian market.

An exception is the creation of the Ministry of Digital Transformation in 2019, which developed the DIYA mobile application (the abbreviation for "Government and I"). This program allows you to digitize a driver's license, car registration certificate, ID-card and foreign passport. Modification of the application for business allows you to open or close a small business. One of the slogans of President Volodymyr Zelensky, who was chosen in Ukraine in 2019, was to create a "state in a smartphone".

Profiles of main tech parks, accelerators, hackathons

As it has been noticed above, Ukraine does not have a coherent strategy on implementation of innovations in telecommunications. The country undertakes quite active steps in implementing western practices with several years delay, but it does not invest enough money in domestic developments which makes these latter sporadic and few.

Yet there is a number of accelerators and incubators operating in Ukraine. These include *1991 Open Data Incubator*, *GrowthUP*, *WannaBiz*, *IoT Hub* and *AgroChallenge*. Foreign accelerators and incubators represented in Ukraine include Starta Accelerator, Y Combinator, Alchemist, Tech Wildcatters, Techstars, Spherik, Startup Wise Guys, etc. Apart from that, there are accelerators and incubators established at big Ukrainian and foreign corporations, operating in the territory of Ukraine, for instance *Kyivstar*, *Privatbank* and *Microsoft*.

When it comes to tech parks, as of now Ukraine boasts sixteen of them. However, little to none among them are dedicated to telecommunication technologies, being rather involved with such industries as machine building, agriculture, applied physics, etcetera. The only two tech parks that are worth mentioning are *Ukrinfotech* and *Intelektualni informatsiyni tekhnologiyi* (Intelligent Information Technologies – IIT). Both of them are based in Kyiv.

Sources

- [GrowthUP](#)
- [IoT Hub](#)
- [Open Data Incubator](#)
- [WannaBiz](#)

Traditional forms of communication

Summary

The landscape of trust across the country heavily reflects the current political and security situation of Ukraine. According to polls of Rating Sociological Group in October 2019, 69 percent of Ukrainians trust voluntary organizations, 67 percent trust veterans of the war with pro-Russian separatists in eastern Ukraine, 66 percent trust the president of Ukraine and 65 percent trust Ukraine's armed forces.

Least of all, Ukrainians trust the prosecution authorities, courts and anti-corruption bodies, tax and customs authorities - there the level of trust does not exceed 20%.

The level of trust in the media equals 44 percent for online editions and 41 percent for television, according to the 2019 USAID-Internews Media Consumption Survey.

This suggests that Ukrainians tend to trust community leaders and word-of-mouth communication rather than state authorities and official statements. The exception in 2019 was the level of trust to the president of Ukraine, who had never been in politics before and is an example of a charismatic counter-system leader.

A major development against the backdrop of the strained Russia-Ukraine relations following Russia's annexation of Crimea in 2014 and its support to secessionist forces in Eastern Ukraine consists of the promotion of Ukrainian language and culture. This provided for a significant boost of Ukrainian music and TV/radio products that not only have started to be in Ukrainian more often but also began popularising Ukrainian culture as a powerful factor of self-identification.

There are no significant division lines in means of communication between representatives of different ethnic origins. There are, however, some division lines when it comes to age groups and location. People in the capital and big cities prefer digital platforms of communication whereas deeper in regions the major channel of information feed is television. The major means of horizontal communication for such areas is word-of-mouth communication in communities. In rural areas (the population of which is gradually decreasing), the main forums of people-to-people communication are places of mass gatherings, like churches, markets, etc.

Sources

- [Research of Razumkov Center, leading Ukrainian think tank, on trust patterns in Ukrainian society](#)
- USAID-Internews (2019) study on consumption of different types of media in 2019
<https://detector.media/infospace/article/171769/2019-10-22-stavleniya-naselennya-do-zmi-ta-spozhivannya-riznikh-tipiv-media-u-2019-r/>

Conclusions

Conclusion

The Ukrainian media landscape can be characterized by a number of specific features:

First, the Ukrainian media sphere, especially TV, is dominated by oligarch-owned media. Oligarchs are actively taking part in the political life of the country, thus using the media they own to their own advantage: to push forward messages, which are beneficial for them or their political partners. Since 2014, a number of new independent media have appeared, but they still struggle to find and win their audience. Oligarchic domination, however, does not prevent journalists to enjoy significant levels of independence, to form grassroots associations defending their rights, and to launch independent media. A general democratic ambiance in the country, as well as competition between various oligarchic and political groups, help ensuring freedom of speech and plurality of information. Several media watchdogs ensure that violations of media standards become publicly analyzed and condemned.

Second, although television in 2019 ceased to be the most popular medium in Ukraine and literally a few points gave way to social networks as a channel for obtaining information, it remains very influential. Simultaneously, the highest share of

oligarch-owned media is in the TV sphere - this is hardly a coincidence. Social networks do not act as independent media, but rather are a new medium for the distribution of conventional media content. Online media have grown in popularity in the last few years, but the online market is very fragmented - there are few significant players, which outrun all the competitors. At the same time, there is a huge number of "junky" websites with non-transparent editorial boards and owners, who often push through specific messages multiplied in social networks. Print media are the least popular in Ukraine. Many newspapers and journals struggle with budget and outreach as many users opt for online media and television.

Third, the Ukrainian state have been quite active in the media sphere. The government has launched a campaign aimed at strengthening the role of Ukrainian language in media. It foresees the language quotas for TV and radio and quotas for print media are also being discussed. Ukrainian security services also interfere in the media sphere via investigations into media sources with alleged funding from Russia; this does not prevent these media, however, to work in Ukraine.

Fourth, the Ukrainian media landscape is characterized by weak legislature and professional institutions. Laws regulating media sector are broad and, in some cases, absent, not to mention the fact that the majority of them were developed and adopted back in the 1990s and therefore are out of date in the current context. The same could be said about professional institutions, most of which have been established either in Soviet era or based on Soviet practices; these bodies have little to no influence on the media landscape. At the same time, NGOs and watchdogs that have become quite numerous, especially in the wake of the 2014 revolution, seem to be taking the role of obsolete establishments successfully.

Fifth, professional education for journalists is quite accessible, but it has several weak points. One of them is the theoretical rather than the practical vector of education, with only several examples of the contrary. Also, while BA and MA programs are relatively numerous and qualitative, professional development programs seem to be somewhat sporadic. A single standard system of professional development in media sector would be an unequivocal benefit.

Sixth, Ukraine has seen a sustainable growth of telecommunications, although it still lags behind European countries in the level of mobile networks and Internet coverage as well as in terms of market conditions. The major problem of Ukraine in this respect is the absence of innovations as well as the virtual non-existence of its financial and promotional sectors. Ukraine has a number of business incubators and accelerators but they are not focused specifically on communications.

Notwithstanding all challenges, trends in Ukrainian media landscape, especially in post-revolutionary years, promise a sustainable development of the Ukrainian media sector. Gradual implementation of reforms, development of civil society, and active rapprochement with the EU are major factors that provide the Ukrainian media landscape for a successful, though maybe somewhat protracted, transformation.

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