

CONSTRUCTING RUSSIAN MEDIA SYSTEM IN THE CONTEXT OF GLOBALIZATION

ФОРМИРОВАНИЕ РОССИЙСКОЙ МЕДИАСИСТЕМЫ В КОНТЕКСТЕ ГЛОБАЛИЗАЦИИ

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In the last century, Russia's identity has been characterized by numerous contradictions and tensions being simultaneously a centre of empire and geopolitical periphery, a world-wide known culture and quite strong economy based on supply of natural resources, a multi-cultural and multi-linguistic society with a dominance of the Russian background. In the nation state building process Russian media have played different roles, among which the following ones are of great importance: provision of communication infrastructure for a large territory and development of the national identity through instrumental use of media. In the recent decades, economic interests of the media industry through national advertising have become new agents to support all-national television channels as a backbone of Russian media system. The transformation of the Russian media has shown an interesting case of interplay between nationally determined post-Socialist transition and influences of media globalization.

Key words: *Russian media; media system; media market; globalization; post-Soviet Russia.*

На формирование российской идентичности в XX в. оказали влияние противоречия различного характера. Так, Россия одновременно являлась центром империи и геополитической периферией, страной с богатым культурным наследием и экономикой, основанной на потреблении природных ресурсов, территорией, на которой обитали представители большого числа культурных и языковых групп, и при этом преобладали представители российской нации. Говоря о роли российских медиа в становлении российского государства, следует отметить два важных момента: обеспечение протяженной территории страны коммуникационной инфраструктурой и развитие российской идентичности. В последние десятилетия, основой российской медиасистемы стали общенациональные телевизионные сети, развитие которых стимулируется интересами общенациональных рекламодателей. Процесс трансформации российских медиа продемонстрировал интересную взаимосвязь между национальной спецификой и влиянием медиаглобализации в пост-социалистическом переходе.

Ключевые слова: *российские медиа; медиасистема; медиарынок; глобализация; постсоветская Россия.*

Russian Media: Interplay of Centralization and Decentralization

Many scholars argue that contemporary Russia is being characterized by the conflict between centralization and decentralization of political, economic, and cultural actors. Centripetal and centrifugal vectors are present in many areas of social and corporate life, making the Russian situation extremely difficult to comprehend. Researchers have pointed out the state of flux, chaos, and “mosaic” as important characteristics of modern Russia (Petrov, 2000; Nechayev, 2000). For example N. Pokrovsky (Pokrovsky, 2001) stressed:

“In Russia we are witnessing a specific symbiosis of proactive global trends with traditional, semi-feudal stratifications. [The] new economic system encompasses

very dissimilar and even impertinent “fragments” like technologically advanced post-industrialism and quasi-markets, revived archaic natural exchange of goods, criminal economics, forced labor, industrialization, post-industrialization and de-industrialization. Moreover, the new system is not a transitional multi-faceted way of life, but [a] new stable social and economic structure”.

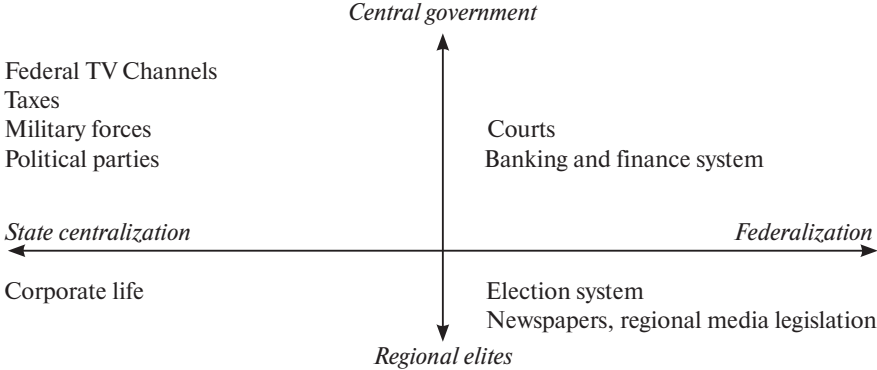
Russia as a post-Soviet country inherited many institutions from the past that have turned out to be rather stable and paradoxically in some practices even rooted in traditions of the Russian Empire (Vartanova, 2012). On the other hand, it has also developed new structures and routines that often coexist with the old structures while being in nature contradicting them. The co-existence between the old and the new has become very interesting particularly in the Russian media, which inherited a media and communications traditions of the Soviet state represented by relatively developed though completely divided segment of economy. These traditions in fact have a mixed nature originating from different periods: the press from Imperial Russia, broadcasting from the Soviet Union, and the Internet from the post-Soviet period (Rantanen, 2002). The penetration of the different media at early post-Soviet period was uneven and reflected ideological priorities of the Soviet media policy. Press, TV, and radio achieved the largest possible audiences, while the number of fixed telephone lines needed for Internet access was a limited and the lines were of poor quality. Although satellite communications were numerous and comparatively advanced, they were not in public use and were controlled by the military.

With the start of the social transformations a new challenge emerged from the global environment characterized by a rapid progress of digital communication technologies and expansion of media and advertising business searching for new markets. This all resulted in a unique situation of “post-Soviet Russian transformation within an exterior framework of globalisation” (Segbers, 1999). Despite its former economic isolation, post-Communist Russia has experienced globalization in ways similar to other countries, but this has now resulted in increasing nationalism, in terms of both the content and the reception of programs (Rantanen, 2002). As a result, its media and communications system has been reorganized

and remodelled in a way that cannot be observed except with tools that can explore the emerging combinations of the old and the new, penetrated at different levels by processes that go beyond the analysis of the local to the global. As Rantanen and Vartanova pointed to, a detailed analysis of the different levels within the Russian media and communications system might help to understand the complexity of systematic transformations on four different levels: (1) global-national; (2) national-regional; (3) regional-local; and (4) various other combinations such as global-regional, global-local, and national-local. It should be noted that territorial/regional diversity, unevenness of economic development, political diversity, multi-ethnicity and multiculturalism might be easily observed in various combinations on all levels (Rantanen, Vartanova, 2004).

Figure 1

Media Influences of Different Vectors of the Russian Federalism¹



In this framework, the Russian media provide a fascinating case to illustrate the interplay between the global, the national (which for Russia is mostly equal to the federal), and the local (which might be seen as both sub-federal, regional and communal). Media as agents of social change contribute to contradictory processes of both federalization/centralization and regionalization/decentralization, which enhance each other as well as con-

¹ Source: Rantanen, T., Vartanova, E. (2004). P. 147–162.

tradict. This is illustrated by the Figure 1 which shows that Russian media is in a great degree described by tensions inside the nation state itself.

At the same time, Russian media channel global influences through content, economic activity and organizational principles of rapidly developing media industry. The role of advertising market that has brought huge investments into media industry since 1991, is difficult to overestimate (see table 1). New formats and professional standards of a global nature might be easily found in regional and local media while federal (or all national media) often guide nationally determined traditions and values. Consequently, Russian media have become simultaneously, as part of a changing reality, both dynamic and vulnerable, thus reflecting the complexity of problems of the Russian post-Soviet transformation.

Table 1

Structure and Dynamics of the Russian Advertising Market²

Segment	2007	2009	2010	2011	Growth in 2011 in %
	Bln \$				
TV	4,35	2,75	3,82	4,51	18
Terrestrial	4,32	2,71	3,76	4,44	18
Cable and satellite	0,02	0,03	0,05	0,07	36
Radio	0,57	0,26	0,35	0,40	15
Print media	1,99	1,01	1,31	1,39	6
Newspapers	0,44	0,20	0,28	0,30	7
Magazines	0,90	0,48	0,63	0,68	8
Advertising publications	0,65	0,32	0,39	0,40	3
Outdoor advertising	1,55	0,72	1,02	1,18	15
Internet	0,48	0,46	0,92	1,44	56
Media advertising	0,21	0,18	0,36	0,52	45
Contextual advertising	0,26	0,27	0,56	0,91	63
Other media	0,09	0,06	0,10	0,14	32
Indoor advertising	0,07	0,05	0,08	0,11	35
Movie theatres	0,01	0,01	0,02	0,03	25
Total ATL segment	9,05	5,28	7,53	9,08	21
BTL segment	2,31	1,24	1,90	2,43	23
Total	11,3	6,56	9,43	11,4	44

² Source: AKAR, 2012. URL: www.akarussia.ru

In the process of conceptualizing the Russian media model there exists an obvious need to provide up-to-date definitions of the local and the regional as well as the relationship between the local and other levels, including the different levels of the regional and the national (federal). In the long run, by analyzing these levels, it would be easier to understand not only the relationship between the global and the national/local but also to see how centripetal media can contest the power of centrifugal media.

Decreasing Press

The Soviet media system was rather specific and implemented many features which today look rather old-fashioned. First of all, the Soviet Union was a print media country with strong traditions of daily reading newspapers and books. The number of newspapers was high and the newspaper system itself was balanced in terms of geographic representation; in 1990, before the disintegration of the Soviet Union, there existed a strong sector of 43 all-national dailies and more than 4,500 regional and local newspapers with a total distribution of 37,848,556,000. The distinguishing feature of the Soviet press was its pyramid hierarchy, which subordinated all levels of daily newspapers to the central (national) newspapers published in Moscow (Richter, 1995; Zassoursky, 1997). After two decades, by the 2010s, Russian newspaper sector looked even more balanced and was comprised of three more or less equal parts with national newspapers accounted for about one third of circulation, one third – for regional and one third for local newspapers. Although the structure of the newspaper industry has changed, the main trend, e.g. the reduction in circulation, looked quite negative. This might be explained by the demographic situation (declining population), decrease in interest of Russian to newspapers as a part of their media menu, and the rise of TV and new media as sources of news and entertainment (Vartanova, Smirnov, 2010). This lack of readers' interest to the print newspapers also

explains why the amount of advertising in print media decrease while the same indicator for television remains stable and for new media even grows (see table 2).

Table 2

Number of titles of Russian newspapers³

	2005	2006	2007	2008	2009
Total dailies	494	552	545	533	582
Total paid-for dailies	491	521	510	495	541
National paid-for dailies	23	25	25	25	24
Regional and local paid-for dailies	468	496	485	470	517
Morning paid-for dailies	470	497	486	473	520
Evening and afternoon paid-for dailies	21	24	24	22	21
Total free dailies	3	31	35	38	41
Regional and local free dailies	3	31	35	38	41
Total non-dailies	25,984	26,542	26,610	27,510	28,011
Total paid-for non-dailies	25,686	26,112	26,100	26,930	27,391
National paid-for non-dailies	7,056	7,145	7,080	7,120	6,980
Regional and local paid-for non-dailies	18,630	18,967	19,020	19,810	20,411
Total free non-dailies	298	430	510	580	620
Regional and local free non-dailies	298	430	510	580	620

The magazine segment of the Russian media market has stably developed compared to the newspaper one. In 2000s, its annual growth exceeded 13% and only India's and China's magazine sectors developed

³ Source: Federal Agency for Print and Mass Communications

faster. However, the national market of Russian magazines in early 2010s was characterized by a strong segment of glossy magazines (900 million copies by late 2000s), and 600 millions of which were printed abroad. Circulations and popularity of glossy fashion and life style magazines increased while quality political weeklies demonstrated economic losses and decreasing influence at the national level. Another trend has been the reinforcement of the capital magazine market. In Moscow, magazine periodicals clearly outperformed those in the regions – about 60% of the circulation was comprised by the central editions. However, as was the case with newspapers, out of the total number of magazines, only 12,000 are really being published in the country. One of the major problems of this segment is the imperfect system of distribution, especially when it comes to subscription. The main consumers of magazines are citizens of metropolitan areas (Vartanova, Smirnov, 2010).

Among the main reasons to explain the decline of print media the economic ones should be mentioned the first. Scholars have pointed to many depressing processes in the Russian print media industry – the crisis of the national distribution system, increase in prices of newsprint and printing, and emergence of the state paternalism – informal interferences of the state in the media economics which distorted principles of market and fair competition (Vartanova, 2009; Ivanitsky, 2011). As a result, by 2000s, the print media became an element of the urban life style, because their distribution systems could survive only in transport communications of megapolities and their business models could attract advertising of cities' shopping centers.

Nevertheless, it would be unfair to explain all the changes in the newspaper system only by the shift of the Russian media economy to the market-based relations. Among the reasons one should mention are processes of liberation of regional political systems from pressures of the federal elites accompanied by the constructions of regional identities and de-politicization of print media content.

Political regionalization of the Russian press markets. In the struggle against the post-Soviet leadership in the 1990s, President Yeltsin formu-

lated a well-known strategy – “Grab as much sovereignty as you can” – in his effort to gain the support of Russian regional elites which have gained more legal independence and have been actively pursuing this strategy. For the print media this has resulted in new centrifugal trends that have changed the Russian print media. The circulation of national newspapers has decreased dramatically in the regions. In 1990s the market share of all Moscow dailies in Rostov was only 10% of that of the main regional daily; in Vladivostok the distribution of the national daily *Izvestiya* was more than thirty times less than that of the local daily. Resnyanskaya points to the researchers of the VTsIOM and other sociological surveys which “reveals that the public prefers the more accessible regional and local media” (Resnyanskaya, 2009). In 1998, the number of national dailies per 1,000 Russians in central Russia was less than 60, and in Siberia and the Far East it was only 1 per 1,000 (Gabel’nikov, 2002).

Change in regional identities. The formation of regional identities, especially in areas with multinational and multilingual populations and non-Russian minorities, became a vital issue in cultural policies for involving the media, especially newspapers, in the construction of the post-Soviet society. Support was also given to new public movements and to the restoration of local traditions, especially in economically and culturally independent regional centres like Nizhny Novgorod, Samara, Irkutsk, and Stavropol’ as well as in the ethnic republics of Tatarstan, Bashkortostan, and Chuvashiya. The legitimization of regional independence became an important issue for the regional press to win over public opinion during election campaigns (Pietilainen, 2000). Regional elites inspired the creation of a regional identity, and local and regional newspapers were enthusiastic in advocating the concept of a *malaya rodina* (little motherland) to remind their readers of their locality.

De-politicization of content. Newspapers in Russian regions experienced the same trends as the central dailies – going from political engagement in the early days of *perestroika* to disillusionment with politics

and therefore interest to human interest stories. The regional and local press had to find new ways to survive economically and to attract readers. They experimented with previously unknown tabloid formats, attempting to build a close relationship with their readers. Scholars have described this process negatively as “boulevardisation”, emphasizing that regional newspapers were becoming more sensational and scandalous, less professional, and of poorer quality than national newspapers. Unlike the national political dailies, regional and local newspapers began to concentrate on everyday issues such as gardening, housekeeping, and legal and business advice, using humor, photos, and big headlines. Many editors-in-chief of local newspapers have suggested that the everyday usefulness of their newspapers’ content and advertising – in short, their relevance to the practical life of readers – has contributed to their success (Vartanova, Smirnov, 2010).

Stable Broadcasting

As for the broadcasting, television is the largest and still highly developing segment of the modern Russian media system accompanied by the positive dynamics of the radio market. There are three main types of terrestrial broadcasters: centralized national channels, networked national channels, and regional channels. In major 200 Russian cities there are 10–12 publicly accessible TV channels. Cable television and satellite television are rapidly developing. Market experts believe that the total number of channels broadcast in Russia stay close to 1500. Television has become the most important source of information and entertainment for most Russians. About 40% of Russians watch the central channels broadcast from Moscow every day. For many families, an important factor in the choice of this or that medium is money: they do not have to pay for television (Vartanova, Smirnov, 2010).

However, the core of the Russian TV market is composed of a few channels, available to more than 50% of population. Practically all Rus-

sians receive three state-controlled channels: *Perviy Kanal* is available to 98,8%, *Rossiya 1* – to 98%, and *NTV* – to 96% of the whole population (Televidenie v Rossii. Sostoyanie, tendencii i perspektivy razvitiya, 2012).

The role of TV in the everyday life of Russians is difficult to overestimate. One of the crucial indicators is definitely the time audience spent for daily watching TV. In 2011, Russians watched TV 220 min. per day (3 hours 40 min.), which was 8 min. less than in 2009 – the peak year for the duration of TV watching (ibid). Although daily TV watching is slightly decreasing in all age groups, especially among young people of 15–24 years old and men 40–54 years old, TV remains the leader in the media system in terms of time spending. This is rather similar to the general trends in many developed countries, and the decreasing interest of young Russians who growingly watch TV programs and video online is another consequence of the digital revolution in Russia.

The federal government maintains strong (formal or informal) relations with the nationally distributed state and private TV channels. Many post-Socialist countries experienced similar pressures from their central governments, which used to utilize the state broadcasters to promote their own political philosophy and values though they were restructured as public service broadcasters (Sparks, Reading, 1998). In Russia, after the introduction of President Yeltsin's policy of political and economic regionalization, the federal government has increasingly used TV to promote Russian integrity and challenge the influence of local authorities. This process was even strengthened since 2000s with the optimization of the state-owned broadcaster VGTRK and changes in ownership of *Perviy Kanal* (Televidenie v Rossii. Sostoyanie, tendencii i perspektivy razvitiya, 2010 and 2011).

National television channels have played a particularly important centrifugal role in present-day politics and construction of modern Russian identity. As for the structure of the media system, this role led to the subsequent “redistribution of power”: the central (federal) channels took upon themselves the function of covering national politics and that of

mass entertainment. This was actually supported by the growth of the national advertising market which used TV as a major advertising channel to reach mass audiences (Vartanova, Smirnov, 2010). It has been proved by recent developments of the regional TV that demonstrated its degrading role because of the decrease in number of regional news and current affair programs replaced by the entertainment and advertising provided by Moscow-based networks. In addition, one should take into account the new effects produced by online media which supply simultaneously global, national and local, communal content thus making a new impact upon centrifugal influences of the federal broadcasters on national and local audiences.

However, the centrifugal role of Russian federal TV broadcasting in 2010s has been challenged, and the potential of the federal channels in forming the national agenda has not been fully realized. In an attempt to satisfy advertisers' needs, Russian TV has shifted its programming policies to emphasize entertainment, with elements of infotainment, tabloid style, and to promote journalism "on demand". This, in turn, shifted audiences' attention either to regional print media or to the Internet both outperforming the national television in more adequate and unbiased coverage of politics (especially of Parliamentary Elections in December, 2011) and their information proximity to audiences.

The internal contradictions of the nature of Russian television broadcasting resulted from its instrumental involvement into politics, on the one hand, and obvious profit-oriented motives of its operation stimulated by the development of Russian advertising industry, on the other. Because of its technical characteristics and penetration level, Russian television still retains its unique ability to maintain the unified information space of Russia. This has put TV into difficult and vulnerable position in the media system with a complexity of pressures on it from different Russian elites, but also made it extremely influential in political/public communication. Some scholars argued that since 1993 major federal channels mobilized voters more efficiently than any political party, and the Russian mediacritic Elena Rykovtseva even pro-

posed the term “airwaves (or broadcasting) party”, thus proving the particular role of TV in the public communication in the Russian society.

The new digital technologies are actively being developed by non-terrestrial pay-television operators. Each region in the country has its own cable TV companies; the Association of Russia’s cable television alone includes more than 100 regional companies. All in all, there was more than 55 million subscribers. The regions most highly developed in this respect are Moscow and St-Petersburg. At the same time, not more than 20% of Russia’s population has access to digital cable supplying “Triple Play”, Internet, television and telephone. The leading players in the national cable and IP-television system are *NKS/Nacional’nye Kabel’nye Seti*, *MTS*, and *Akado*. Direct satellite broadcasting (Direct TV) is carried out by two powerful companies, *NTV-Plus* and *Nacional’naya Sputnikovaya Kompaniya (Trikolor TV)*. *NTV-Plus* has broadcast via the *Bonum-1* satellite since 1998, and the number of its subscribers is 550 thousand. In 2006, the company extended broadcasting into Siberia. It was the first company to try experimental high-definition broadcasting (HDTV). *Nacional’naya Sputnikovaya Kompaniya* emerged on the Russian market in December 2005. The *Trikolor TV* package is distributed in the European part of Russia via the *Eutelsat W4* satellite. By 2012, it had 12 million subscribers.

Rising Internet

The fastest growing segment of the media system in Russia is the Internet. The number of its users in 2011 experienced 5,4% growth and stood close to 70 million Russians. Russia is also a Europe’s leader in broadband penetration growth, which in 2011 was close to 20% increase annually. Most Russian users search for the news, this trend indicating the triumph of the Internet over the traditional media. Russians also are active in social networks combining information search and personal

communication, they also read and actively write blogs, frequently visit video- and photohosting services. In terms of the size of the Internet audience, the absolute leaders are Moscow (6,5 million), St-Petersburg (2,7 million) and big cities (with population more than 1 million). On the other hand, still about 6% of the population has not even heard about the Internet, and about the half do not have an opportunity to use it regularly (Internet v Rossii. Sostoyanie, tendencii i perspektivy razvitiya, 2012).

Compared with its growth rate in other countries, initial development of Internet in Russia was slow. However, from 1993 to 1997 the number of Russian Internet users doubled each year. The statistics show that the number of Russian Internet users is now close to 70 million (about 50% of the population). The progress of the Internet initially occurred in big cities, especially Moscow, but in recent years it has also expanded to the regions. The residents of Moscow and St-Petersburg now represent less than 20% of Russian users. The share of female users is close to 40%. However, the majority of users are still educated and/or high-income urban men between 20–35 years old, including state officials, politicians, businessmen, journalists, and students (ibid).

The Russian media form the core of the Runet, the Russian language content sector of the Internet. There are websites for traditional newspapers as well as for TV and radio companies that offer an online version of their offline content. About 70% of Russian online media represent the Internet versions of paper publications (termed “clones” and “hybrids” by Russian scholars), and the rest are Internet-only papers (“originals”). The most popular original online sources are *kp.ru* (this Internet version of *Komsomolskaya Pravda* is among top-10 European sites in terms of unique visitors), *rian.ru*, *lenta.ru*, *rbc.ru*. Those which have no equivalent in the traditional media or news agencies and successfully compete with them, offer constantly updated news and reviews of other information sources. In contrast to many national newspapers, Internet news services have been promoting more diverse and balanced reporting trying to

represent extended (compared to traditional media) or alternative news agenda. However, in recent years it was the Internet media which represent a variety of politically engaged news sites. Yet, the Runet contains almost infinite content resources in Russian and the languages of other ethnic groups.

Distances and technical backwardness hamper the all-Russian use of the Internet. These problems arise mostly from the low level of the national telecommunications infrastructure and the crisis in the economy. Only a small number of Russian Internet users have access from home, due to low telephone penetration (no more than 180 lines per 1,000 inhabitants) and the poor quality of telephone lines (ISDN lines are extremely rare even in big cities, and fiberoptics are almost inaccessible). Low living standards also make rapid progress of the Internet unrealistic.

The development of the Internet in Russia can be divided into three main periods. The first one covers the years 1991–1993, when main users were academic institutions. In the second period, 1993–1996, the Internet spread mainly in Moscow and St-Petersburg among state officials, businessmen, and journalists in large media companies. And in the current period (since 1996), the most rapid growth has taken place in large academic centers (Novosibirsk, Samara, Ekaterinburg, Nizhniy Novgorod, Irkutsk, Khabarovsk) outside Moscow and St-Petersburg. Although the progress of the Internet in the regions is obvious, its unevenness still characterizes the present situation. Of all Russian Internet users, almost one-third are residents of the Central and Northern regions and one-third are in Siberia and the Far East, whereas the southern areas have a much lower share – 8,8% (Perfiliev, 2001).

Following the recent creation of seven federal super-regions, several big Internet hubs have been formed around regional administrative centres. And since May 2000, Russia has been divided into seven federal regions (*okrug*), headed by plenipotentiaries appointed by the president to control the execution of federal laws in the territory of the Russian Federation. In many regions of the Northern Caucasus, the only users

are regional universities (funded by the Soros Foundation). Information and technological wealth directly correlate with the level of economic development of the region and the de-monopolization of the regional telecommunications market. In the competitive telecommunications markets with three or more access providers (Novosibirsk, Nizhny Novgorod, Ekaterinburg and Samara), Internet use is much higher, due to the improving quality of communication and the decreasing costs of access.

Firstly, the Internet and the mobile telephones have expanded the access of Russian people to information, but the problem of “digital divide”/ “digital inequality” is still quite urgent due the large territory of Russia. In the 2000s, the inequality of the regions in terms of digital access has been going down, and the social, age and gender balance among Russian mobile and Internet users has been improving. Today, the proportion of women among Runet users is slightly more above 50%, though a typical user is an educated male city dweller having a high level of income, aged between 25 and 35, an official, a politician, a businessman, a journalist or a student. Another trend in the development of the Internet is the predominance of individual users over corporate ones. However, the ratio between the internet connections from homes and from offices is still 35:65.

Secondly, it is obvious that for modern Russians the Internet is an essential part of the media system. The increase in their purchasing power undoubtedly contributed to the development of the new media: pay digital TV (cable and satellite), the Internet and the mobile telephones as vehicles for distributing news, weather forecasts, and advertising. According to the FAMPK data, in recent years the proportion of Russians who have no contact with the media has gone down, and the proportion of the audience using the Internet as a mass medium has gone up. In 2007, the number of Russians who use only the audiovisual media (TV and radio) dropped: it was no more than 55%. At the same time, the proportion of the audience in contact with the other major older sectors (TV, radio and the print media) dropped too: in 2007 it was about 10%

of Russians, which was 10% lower than in 2006. Meanwhile, a growth in the media audience in general could be observed: from 2006 to 2007 it totalled 32%, so more than 35% of Russians use the print media, TV, radio and the Internet every day (Pechat' v Rossii. Sostoyanie, tendencii i perspektivy razvitiya, 2008).

Thirdly, the Internet is becoming increasingly popular as an advertising vehicle, which strengthens its position in the Russian media system. Over recent years, the Russian Internet advertising market has developed dynamically and progressively. According to the Association of Russian Communication Agencies, this segment of the advertising market displays the highest growth dynamic, twice as high as the traditional media. In spite of the relatively small total volume of advertising on the Internet, the growth rate was very high since mid 2000s. For the first time in the modern Russian media history, the volume of Internet advertising exceeded the volume of print media (see table 2 above).

Finally, the process of technological convergence is proving beneficial first and foremost to large concerns, which succeed by establishing multimedia newsrooms and by repeatedly using their own resources for content. The instances are relatively few but the tendency can be observed in the establishment of print media by *RBK* for recycling their online content and in the purchasing by the *Prof-media* concern, which specialises in the traditional media, of the leading enterprise of *Rambler's* internet sector. Online media projects are gradually becoming full-fledged media market participants, and this dynamically growing sector of the information and communication industry attracts the attention of all players in varying degrees. The pioneering companies in this field were *RBK-Informacionnye Sistemy*, *Yandex* and *Rambler-Media*. In time, new departments specializing in the global computer net emerged within other media empires too. As the media and communication channels are closely interwoven today, large media companies tend to occupy other new market niches. The *Gazprom-Media (NTV-Plus)*, *Akado*, and *Tricolor TV* companies are developing cable and satellite television in order to realize interactive and multimedia projects. In other words, the global

process of “new media” market expansion has become a reality for Russian media companies too.

The development of the modern media system and journalism is closely related to the development of the Russian mass media into an individual industry steadily increasing its attractiveness to both Russian advertisers and foreign investors. Today the most evident process encouraged by the introduction of the market philosophy and economy into the media system and journalists’ professional activities is the transformation of their economic and typological foundations. In the modern Russian media industry, there exist some drastically new business models which were impossible under a state-controlled economy. The Soviet mass media and journalism played the role of an ideological, pedagogic and educational institution, but they did not care much about audience demands. In fact, this was not necessary, as all the money they received was allocated from the state budget. Audience demand, especially when monitored by analysis, is a vitally important mechanism for adjusting media activity to the market.

The fundamental change that triggered the transformation of the media system in post-Soviet Russia was the intensive growth of the advertising industry. As a result, the basic law of the media economy came into play, the law of constructing an audience for advertisers. In accordance with it, the media form their content with the aim of attracting precisely the audience whose custom is most advantageous to the advertisers, who are the main source of financing media enterprises (Picard, 1989). It has to be admitted that under the market conditions the performance of any social functions by the media often becomes a secondary concern, commercial interests being regarded as more important.

Disproportionate Globalization?

In response to transition, Russian mass media embarked on a course of globalization, thereby becoming a vivid example of transformations

occurring around the world. Initially, media researchers tended to view globalization as a unidirectional process within which context media products and media technologies were imported into less developed countries from mature economies, first and foremost from the USA and the former colonial powers, such as Great Britain, France and Germany. This attitude gave rise to the conception of media imperialism, which totally disregarded the role of national factors in the process of globalization. Further research, however, raised the issues of return information flows from less developed regions as well as the strategies for acquisition and assimilation of national mass media and the resistance they put up in response to globalization (Featherstone, 1995). Thus, researchers saw modern development through the prism of the national globalization conception suggesting that globalization involves close interaction with national media systems and that the process is uneven and influenced not only by current tendencies but also by the cultural traditions of the country itself. This is what modern Russia illustrates perfectly well (Vartanova, 2005).

Importing the theory. In constructing a new market-based media model, Russian mass media were guided by Western theories of free and responsible mass media, open society and self-sufficient media market, which guarantees, by definition, political and cultural pluralism. In fact, “Western media” did not turn out to be an integrated whole but a number of individual systems shaped in response to the particular social and economic conditions, national traditions and cultural peculiarities. The “Anglo-Saxon model,” as the British researcher C. Sparks put it, “is an imaginary construction that combines the features of two different systems: American commercial press and British public broadcasting” (Sparks, Reading, 1998).

This dichotomy is indicative enough of the structural heterogeneity of “Western media”, though in reality the media systems are much more diverse.

The media models of Northern Europe or Italy may prove to be more beneficial for Russia than those of the USA or Great Britain.

From the experience of the Nordic media systems, known for significant governmental influence on the media industry, it is clear that the party that makes an order is not always guided by selfish motives. When the Nordic countries' governments subsidize political parties' newspapers or oblige commercial television channels to support the public broadcaster through a system of payments, they actually strive to encourage media pluralism and diversity. The Italian media model characterized by a high degree of political involvement suggests that the experience of Russian mass media is not unique and that there are ways to establish a viable media system. Thus, international experience may have a constructive impact on Russian media. However, it is a matter of creative adaptation of global conceptions to the Russian media context.

Importing the media content. The issue of dependence of the media systems on transnational media content producers has been discussed by politicians, researchers and journalists since the mid-1950s. In those days such discussions were labeled as information imperialism, and for many authors they were associated with the uneven information flow from the USA and Western European countries into the rest of the world. A really apt metaphor, "a one-way street", was proposed by Kaarle Nordenstreng and Tapio Varis in their work (Nordenstreng, Varis, 1974). In Russia, however, one could observe *disproportionate globalization*: in early 1990s Latin American television serials poured in making the adherents of the Americanization theory stand back unable to resist new arguments. The explanation, however, was trivial enough: as Russian media economy was undeveloped in those days, only this type of content was available to relatively poor television channels. Through commercials created by foreign advertising agencies, soap operas and serials altogether new formats were introduced to Russian television programs.

In the late 1990s, the globalization format in Russia changed. While the direct import of television products continued, adaptation and borrowing strategies started to develop intensively. Like else-

where, globalization in Russia manifested itself in the inclusion of non-national elements into the national context. Dubbing films, producing their own commercials based on global schemes and adapting Western entertainment programs (*Pole Chudes, Kak Stat' Millionerom, Fabrika Zvyozd*) do not mean the development of the traditional Russian culture. As a matter of fact, the national contextualization of globalization, known as glocalization (Rantanen, 1999), is a proof of similarity of the processes ongoing in Russian and foreign media.

In the 2000s, the mainstream of import of content from the global market has been transformed into purchasing TV formats, that have been lately produced for the local market with Russian stars and production capacities, and the acquisition of licenses to publish global magazine brands. The way to glocalization of content has become the most widely spread.

The arrival of global media companies. Although the influx of global media capital to the Russian market is limited in scale, it is becoming increasingly evident. In Russia there are no “key players” of the global media market yet, but active involvement of foreign media businesses, which started in 2000, is indicative of the growing interest. In the Russian media economy, foreign companies are still in the background but their presence is already tangible.

The German concern *Burda* has successfully operated at the magazine market for many years. Some American companies have a share in Moscow FM radio stations and newspapers (*Vedomosti*). Scandinavian countries form a significant “cluster” in the Russian media market, namely in the market for business editions of St-Petersburg (*Bonnier*, a Swedish media concern in *Delovoi Peterburg*), for UHF television (the Swedish *Modern Times Group* in *DTV-Viasat*), for glossy magazines and English-language newspapers in the Russian capitals (the Finnish *Sanoma-WSOY* in the *Independent-media* publishing house) and for the political print press in the capitals (the Norwegian concern *Orkla* in *Prof-media*).

The forecast to be done with regard to these relatively few examples of foreign media businesses' participation is as follows: as the Russian economy is increasingly incorporated into the global market, mass media are likely to become a more attractive area, particularly in response to the fast growth of the advertising market in Russia.

Economic crisis of 2009–2010 has obviously affected economical activity of foreign media business in Russia, especially in the context of crisis at Russian advertising market. However, the drop in investments in quality media (for instance, the *Russkiy Newsweek* closed by Axel Springer) has not led to the overall decrease of investment in entertainment or specialized media. The position of *Burda*, *Sanoma*, *Axel Springer* at the Russian media market is still quite strong, while foreign newcomers at lifestyle segments are developing regardless of crisis.

Emergence of a new professional culture. An essential dimension of globalization that played an important part in the transformation of the Russian media system was penetration of Western journalistic professional standards into the everyday activities of Russian mass media. When Russian readers open *Kommersant* or *Vedomosti*, their eyes are struck by the leads and the “inverted pyramid”-structured materials. The layout, the illustrations and the headlines make the leading Russian newspapers look more like British and American editions than the daily newspapers of the Soviet times.

An important tendency in the development of the new professional culture manifested itself in a shift toward the information standards of British and American journalism, the classical principle of dividing the texts into “news” and “opinions”. The aspiration to be objective, unbiased significantly affects Russian journalists' language and style and drives genre transformation. As a consequence, in print and electronic mass media the number of opinion-based materials gradually decreases.

Adaptation of media brands. Robert Robertson, one of the founders of the cultural globalization theory, always draws our attention to the fact that globalization is closely related to localization. From his viewpoint,

along with the strategic role of the global, in particular societies and cultures it is the local that becomes the focus of attention. This is clearly manifested in economic relations. Those companies which produce and market their products on a global scale invariably place an emphasis on the local. Firstly, they adapt their product to local conditions; secondly, they tend to use the local culture to promote the product, which contributes to better sales. What the *Coca-cola* or *Sony* concerns refer to as *global localization* is in fact incorporation into the local culture (Robertson, 1992).

The experience of the Russian magazine market, first and foremost in the sector of glossy magazines for women and men, interior magazines and weekly news editions, aptly illustrates global localization. Notably, it is the magazine market that proved to adapt the global most successfully. Making use of its resources as a powerful magazine concern, the German publishing house *Burda* created a series of magazines adapted to the Russian market, a fact that became the first sign of global localization. Localization in the magazine market has taken various forms. Many foreign editions started in the mid-1990s with simply copying content by translating texts into Russian. In time, however, they came to attract Russian advertising, inclusion of Russian materials made the content more animated, and some editions even “localized” their titles (for example, *Good Housekeeping* turned into *Domashniy Ochag* and *Maison Francaise* into *Mezonin*).

Creative localization proved to be a factor which made global magazine brands successful. The magazines *Cosmopolitan* and *Russkiy Newsweek* are indeed indicative of this.

The former, by reducing the traditional format and subsequently the price in 2004, gained in sales and popularity, which gave a lead to other local *Cosmo* editions.

Another prime example of creative localization in the Russian media market is musical radio formats. Along with the emergence of Russian pop music, chanson and Russian rock stations, adaptation of the globally used radio formats also began in Russia. Because of the specific structure

of Russian society, with its variability of educational and living standards and tangible geodemographic differences, some “pure” musical formats required softening and diffusion. For this reason, many Moscow FM-stations have chosen to move away from mechanical adaptation of the foreign market findings toward a more elaborate adjustment of world experience to specifically Russian conditions.

Conclusion

For most media researchers, it is clear that the modern mass media, their economic foundations, their structures and institutions, have all been shaped by market influence. In many studies, it is emphasized that the mission of the media and journalism in democratic countries to provide unbiased information and a broad and fair reflection of existing views and ideas goes hand in hand with the commercial need to make profit. (McQuail, 2005; Croteau, Hoynes, 2001). This situation results in inevitable internal contradictions in the media systems of market economies. In other studies, these contradictions are labeled as contradictions between the commercial media and social interests, between culture and commerce, or between a prosperous business and a weak democracy (Croteau, Hoynes, 2001; *Media Between Culture and Commerce*, 2007; McChesney, 1999). Whatever the definition, in each case the idea is that there are inseparable ties between the market as an economic structure of society, and the media system existing within its context. Many researchers stress that because of these close ties the market influences the character of the media, in effect imposing its own values and thus leading to commercialization, which, in turn, results in such characteristics as sensationalism, the tabloid style, emphasis on entertainment (Sparks, 1992; Esser, 1999). Certainly under market influence media systems tend to be more and more homogeneous (Hallin, Mancini, 2004).

In spite of all its peculiarities, the development of the media system in post-Soviet Russia has changed profoundly over recent decades market

influence. The consequences have been similar to those in foreign media: a restructuring of the media system, quantitative growth, increased diversity in media channels and media content, regionalization of the media markets, and the introduction of ICT into the media infrastructure and into the media system itself. Not in summary but in clarification: the deeper the market penetrates into the economic activity of the media and into the practices of professional journalists, the further the Russian media model becomes transformed.

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