

The Patterns of Media Ownership in Russia: Implications for Freedom of the Press

By
Kirill Bryanov

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Supervisor: Professor Philip Edward Howard

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Abstract

This study seeks to apply the extant media concentration theories to the context of contemporary Russian media system. It is argued that in authoritarian and neo-authoritarian media systems concentration of media ownership is a considerable threat to media pluralism, although its nature and mechanisms are different from those in developed liberal democracies. The author then proceeds to the analysis of the Russian television industry ownership structure dynamics, in order to demonstrate how the expansion of state control over the major broadcasters corresponded with limitation of media pluralism. This limitation is reflected in the increasing share of national TV audience exposed to state-sponsored hard news, as well as the elimination of any alternative communicative power centers. In the last section of the study, the author conducts content analysis, which is supposed to reveal the effects of ownership change on media content. The findings of this analysis are by large consonant with expectations derived from the theory: in both cases under review, there was a recognizable change in the way salient political figures were covered, after the media outlets were acquired by a state-controlled conglomerate.

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Introduction

As the processes of globalization, digitalization, deregulation and convergence of national media markets dramatically change the global communication landscape, the problem of media concentration gains prominence among academics, policymakers and the public. Media concentration, understood as consolidation of financial and operational control over significant shares of media markets by a limited number of actors, raises concerns about possible abuse of communicative power in the hands of those actors. It is believed that detrimental market tendencies might enable or even nudge corporate or state decision-makers to take advantage of centralized control over production and delivery of media content at the expense of the public good. The main concern is that excessive concentration of media ownership lays fertile soil for the limitation of media pluralism and freedom of speech.

During the last three decades, a solid corpus of literature on the topic has been produced. As in many other subfields of media and communication studies, the bulk of the scholarship deals with the ownership concentration problem with regard to deregulated and democratic media systems of developed Western democracies. Meanwhile, the majority of national media systems in the world operate under different rules, facing various kinds of political, legal and economic pressures that state or elites impose on them. In such countries, media concentration is widely present as well, but its nature is different from that in democratic media systems. The major agent of media concentration is usually the state, and the dominant rationale behind consolidating media assets is political instrumentalization rather than maximizing profit. Many media systems are in between the two abovementioned extremes. They combine features of market economy and widespread private media ownership with authoritarian political regimes that seek to establish control over the media sphere through various legal and economic means, including the expansion of financial

control over media outlets. This suggests that the forms and the substantial meaning of media concentration differ drastically across national contexts, and therefore this issue has to be studied with reference to a particular national context.

One of such peculiar and “in-between” media systems is Russia. After a short period of rapid commercialization, virtually unlimited freedom of speech and impressive media pluralism that followed the disintegration of the USSR, the major Russian media had found themselves in an arena of intense political struggle within the multiple-power-centers system which persisted during Boris Yeltsin’s presidencies. However, Vladimir Putin, Yeltsin’s successor, opted for a centralizing course for development. Right after he became president, Putin started to centralize and consolidate all the major political institutions, at the same time expanding state influence on the most important media outlets. A set of manifold pressures imposed on the media by the state was a success in terms of eliminating expression of any opinions rival to Putin’s regime from the air of the country’s most popular broadcast media. As many scholars noted, these processes have contributed to the overall degradation of the political discussion in Russia, severely limiting the spectrum of political viewpoints that were allowed to make their way to audiences. Acquisition of the most popular broadcast networks by the state or state-controlled commercial entities is universally recognized as one of the primary instruments in establishing Putin’s regime control over the media system. The state’s capacity to orchestrate the news agenda and framing throughout all major national-level TV channels perfectly manifested itself during the Ukrainian crisis of 2014, when even the most controversial opinionated news pieces were spread through all the significant TV networks in an evidently coordinated manner.

Yet, as it is laid out in the literature review presented in Chapter 1 of this paper, the majority of the authors that contributed to the topic take it as a truism that gradual media ownership concentration by the state contributed to eviscerating media pluralism and freedom

of the press in twenty-first-century Russia. Very few of them ever attempt to evaluate the magnitude of this contribution and observe the dynamics of concentration processes as they unfolded over time. Even fewer address the question of what are the concrete outcomes of the state seizing control over media organizations, in other words – what the precise mechanism of media pluralism limitation through establishing operational control over the outlets is. Taking into account these shortcomings of the extant literature, I arrive at two research questions that I address within the current study.

The first question pertains to the aggregate effects of transformation of the Russian television industry ownership structure on the state of media pluralism in the country. It is addressed in Chapter 2. Taking as point of departure the channels' shares of viewership, I evaluate the dynamics of the audience exposed to hard news broadcasts by channels of various ownership types. The question is – how has the share of the national TV audience watching state-sponsored news changed as a result of media concentration processes?

The second research question is about the particular outcomes of ownership concentration on media content. Does the way in which important political issues are covered dramatically change shortly after an independent media outlet is acquired by agents of the state? Based on the content analysis of the programming that was broadcast by two media outlets merged by this private (but allegedly state-controlled) media corporation, I attempt to detect a slant in the coverage of crucial political issues. This analysis is presented in Chapter 3. This question is also partly informed by the emergence of private media corporations in Russia, principally the National Media Group. Does this alternative type of media concentration challenge the state control of the television agenda, or is it merely a different type of state control? The study of particular media outlets' content is supposed to uphold the claims of the aggregate-level analysis in the second chapter, as well as probe the methodology

of media bias research as applied to the Russian context. Drawing upon its findings, I will be able to suggest a theoretical evaluation of this type of media ownership concentration.

Chapter 1: Theoretical framework

The ownership structure of media industries and the problem of media concentration have enjoyed mounting scholarly and public interest over the last three decades. However, the precursors of this debate might be traced back to the cornerstone theories of modern democracy. The authors of classical models of democratic society universally recognize mass media as its essential component, responsible for exercising free speech and for promoting public debate and plurality of opinions. Media is central to Habermas' concept of public sphere, and his argument on modern public sphere erosion is built upon the idea of detrimental social consequences of mass media's commercialization (Habermas 1989 [1962]). The significance of social implications of media ownership is not a novel idea as well. In their 1948 publication, Lazarsfeld and Merton pointed out that "the social effects of the media will vary as the system of ownership and control varies" (Lazarsfeld and Merton 2004 [1948], p. 236).

In the most general terms, the core of the media ownership debate lies in the dual nature of media products, which are simultaneously economic and public goods. Hence, the media in democratic society might be perceived at the same time as economic entities aimed at maximizing their profit, and as performers of a number of societal functions, such as socializing, educating, and informing citizenry, providing space for public debate and expression of contradicting viewpoints, as well as imposing checks on power exercised by public institutions (Just 2009). Searching for the balance between these two qualities has been informing the discussion on economic structure of media industries since its inception.

1.1 American approaches

One of the first contemporary authors to address the issue of media ownership concentration, and still one of the most quoted, was Ben Bagdikian. In his 1983 book, *The Media Monopoly*, he claimed that fifty biggest conglomerates controlled most of the daily

press output, as well as the bulk of broadcasting, books, and movies in the United States. He also contended that such state of affairs was detrimental to democracy, and the nation would be better off if the ownership of all media outlets was much more widely dispersed (Bagdikian 1983). Although Bagdikian's methodology, calculations and conclusions were often challenged, it is clear that he opened a massive debate /which became not only persistent, but even proliferous over years, along with the evident exacerbation of the problem considered. In 2004 edition of his seminal book, Bagdikian asserted that the matters got worse over time, with only 5 biggest corporations controlling the majority of the American media by that time (Bagdikian 2004).

The structure of media industries and the patterns of media ownership are researched largely within the field of political economy. Its distinct subfield, the political economy of media (or political economy of communications), centers around the idea that studies of the media have to take into account broader social and economic context within which they operate, with regard to the role that they play in political, social and economic life of the society. Yet, as the Canadian scholar Dwayne Winseck suggested, this field is far from being coherent and homogenous: dynamic changes that dramatically altered the global media landscape in recent decades brought about a variety of theoretical perspectives. Winseck advances a classification that includes at least four major approaches to the subject, or, as he puts it, four distinct political economies of media. Those are: 1) neoclassical media political economy, emphasizing the notion of media sphere as the 'marketplace of ideas' and the role of the state; 2) radical media political economies, including the monopoly capital and digital capitalism schools, focused on studying power relations which drive media markets; 3) creative industries school and network political economy of media, informed by the emergence of global 'network of media networks', – both considered to be derived from Schumpeterian ideas; and 4) a cultural industry approach, seeking to apply Marxist economic

analysis to contemporary processes of distribution and consumption of symbolic goods (Winseck 2011). I will stick to this broad categorization while reviewing the major works in the field with the focus on their arguments regarding concentration of media ownership. I will mostly concentrate on the more “mainstream” first and second domains of the literature, since the majority of the influential authors in the field might be assigned to either neoclassical or radical political economies of media.

1.1.1 Neoclassical political economy of media

The neoclassical approach to political economy of media rests on the concept of “the marketplace of ideas”, which dates back to the scholarship of J. S. Mill (1859). As stated by this principle, freedom of speech in democratic society makes information spread according to the rules of free market. The major debate within this school pertains to the role of the government: what should be the extent of regulation, under what conditions should government step in when the market failure occurs, what is the desirable balance between protection of property rights on information and the widest possible dissemination of information as public good, etc. Most of the representatives of neoclassical approach are reluctant to consider media ownership concentration as a major problem or a threat to freedom of speech. The view established among a significant group of influential authors is that enormous growth of television networks and later the internet produced such a vast array of choices that the idea of scarcity of information, or any consolidated control over its flow, does not make sense. Production of media content, its distribution and reception, according to this view, are getting more and more competitive and fragmented.

One of the sharpest critiques of Bagdikian’s concerns comes from a neoclassical economist Benjamin Compaine (2001). He attacks both Bagdikian’s factual and evaluative lines of argumentation, claiming that the share of the American media market controlled by the biggest players is by far less dramatic, and that ownership concentration is not a policy

problem that needs urgent measures to be resolved. According to his view, even with a number of big players controlling a substantial share of market, this share is way below a threshold of oligopoly. Finally, the internet, he contends, is an ultimate solution for any remaining concerns about the possibility of media concentration, as it diversifies the number of sources to an unprecedented extent.

However, it would be nonobjective to represent the neoclassical school of media political economy as unanimously sharing the abovementioned stance towards media concentration as nonexistent problem and the internet as the ultimate antidote to any possible concerns. In his 2009 book, *Media Ownership and Concentration in America*, neoclassical author Eli Noam takes a rigorous attempt to evaluate the state of the problem, trying to avoid ideological bias, as well as the extremes of Bagdikian's dramatization and Compaine's optimism. He introduces much more transparent and sector-specific methodology of evaluating the rates of concentration across the industry, as well as the solid historical analysis of the issue. He concludes that the levels of concentration in the American information industries are higher than Compaine suggests, but not as disastrous as it is claimed by Bagdikian: from 1984 to 2005, the share of the mass media market controlled by the 5 biggest companies doubled from 13 to 26 per cent. Another important point that he makes is that the internet is by no means secure from the concentration tendencies, since certain segments of the web industry, such as internet providers, search engines, browsers, etc. are evidently prone to become more and more consolidated by a limited number of internet giants (Noam 2009). Overall, it might be concluded that Noam's work marks at least partial turn that neoclassical school of media political economy makes towards more scrupulous and less dogmatic view of the media concentration issue.

1.1.2 Radical political economies of media

The radical political economy approach attaches much greater significance to the public function of media and value of information as public good than neoclassical political economy. As Robert W. McChesney, the most prominent contemporary author in this tradition, puts it, the media system based on the marketplace model in practice falls short to maintain a proper performance of public function that media industries are supposed to carry out. He elaborates a three-level model of the American and global media, with some 10 biggest corporations on top of the pyramid, the second tier comprised by about 20 American and 40 worldwide firms, with all the smaller players falling under the third category – their actions and development being defined and constrained by those who constitute the first two levels. Such a configuration of the American and global media industries, McChesney holds, switches the logic under which it operates from competitive capitalism to monopoly capitalism logic (McChesney 2008). As a result of these “commercial” developments, the largest media conglomerates consolidate considerable communicative power resources, which puts the democratic principles of media freedom and diversity of sources under threat. Radical political economists of media also significantly extend Noam’s cautious claim that invocation of the internet as a final solution to any communication power concentration is somewhat hasty. According to some of the authors, there are aspects of economy of the internet that make it even more vulnerable to concentration tendencies than the “old” media (Baker 2007).

At this point, I consider it worthwhile to look at the arguments that radical political economists advance against media ownership concentration. One of the most comprehensive and precise of such arguments was developed by C. Edwin Baker in his 2007 book *Media Concentration and Democracy: Why Ownership Matters*¹. Baker lays out three main reasons to oppose the ownership concentration. The first is based upon the idea that democracy

¹ I first referred to this argument in my final paper for Political Communication course – “The Patterns of Media Ownership in Former Communist Countries: Implications for Freedom of the Press”.

requires as wide as possible dispersal of power within public discourse. Democratic distribution of communicative power implies wide distribution of the mass media control, which is heavily associated with ownership. The second reason is that wide dissemination of media ownership produces natural democratic safeguards within the media system, preventing individual or corporate decision makers from exercising enormous and unchecked communicative power. The third point is that the dispersed ownership is focused more on quality of content rather than on revenues. The most significant point of Baker's argument, to my mind, is that conglomerate ownership makes the media more vulnerable to censorial outside pressure. Large corporations and media holdings are exposed to the threat of powerful interest groups seeking to use economic leverage in order to mute criticism or slant editorial policies in the desired direction (Baker 2007).

Now it is visible that the essential contradiction between neoclassical and radical political economic approaches to media industries might be at large confined to the difference between two cornerstone models of the media, which are prevalent in each of those literature domains. These are, as distinguished by Croteau and Hoynes (2006), marketplace and public sphere models². Both of them, as Croteau and Hoynes observe, tend to emphasize one set of factors and ignore others. Marketplace model, which looks at media as essentially no different from any other kind of business, puts stress on the competitive and commercial environment in which they exist. Under this perspective, maximizing profit is a valid and socially beneficial objective. Croteau and Hoynes outline a number of advantages of the marketplace model: flexibility and organizational efficiency of the markets, responsiveness to technological innovations and audience preferences. However, they argue, such a view of media has a number of serious drawbacks as well. For the ends of this study, the crucial one is the dissonance between one-person, one-vote principle of democracy, and the marketplace

² I first referred to this argument in my final paper for Political Communication course – “The Patterns of Media Ownership in Former Communist Countries: Implications for Freedom of the Press”.

dissemination of communicative power proportionally to financial influence. Other shortcomings include the markets being driven only by products that are profitable, thus ignoring small or specific consumer groups; lack of freedom of market tendencies such as oligopoly or monopoly; inability to handle the unique aspects of information goods. As it was noted by many (e.g. Rice 2008), the marketplace model tends to bias media content towards that attractive to large audiences, as well as to boost concentration of media control. Horwitz (2005) goes even further, suggesting that the very notion of “marketplace of ideas” contains inherent bias, slanting the debate towards the model behind this rhetorically appealing and neat term, and thus has to be avoided.

The public sphere model, as Croteau and Hoynes maintain, highlights the role of the mass media in achieving the public good. Within this approach, there are four ways in which the media serve the society: maintaining diversity of political and cultural views; promoting innovation in both technology and content; producing content which considers salient social issues, and, finally, separating the channels that provide citizens with information, thus preventing centralization of communicational power (Croteau and Hoynes 2006).

A few words have to be said about the policy outcomes that are meant by the two dominant models of media industries. For those who adhere to the marketplace model and lean towards the idea that there is still abundance of autonomously owned outlets, there is no reason to wish for more regulation than is currently provided by regular antitrust law. Adherents of the public sphere model usually advocate for more, and more specific, regulation. Their central claim is that antitrust law even at its broadest conception does not account for the crucial democratic function of the media, as well as it is incapable of embracing the noncommodified nature of information, which both justify additional regulation. They usually condemn the wave of deregulation whose punchline is associated with Telecommunications Act of 1996: this piece of legislation is seen as surrender of FCC

and the US government in general to the powerful media behemoths (Winseck, 2011). It is also noteworthy that the motives of radical media political economy scholars are sometimes political, as they advocate for challenging the current state of affairs. One vivid example is Free Press, a national media reform organization founded in 2003 by Robert W. McChesney and his colleagues.

As it is clear from this brief observation, there is a solid corpus of varied literature on the topic, which was produced over the last three decades. However, it is striking that all the works mentioned so far – arguably the most prominent works on the issue – deal either with the American media system or with the global media markets, spearheaded, once again, mainly by the US corporations. Given the specific features of the American media system, perhaps the most commercialized and deregulated one in the world, the questions regarding the media concentration across the rest of the world naturally arise. To what extent models and theoretical frameworks developed with regard to the US are applicable to other media systems? What major differences in terms of media ownership concentration do non-American media industries exhibit as compared to their American counterparts? And what are dominant theoretical approaches that are used to make sense of non-American media industries' structures?

1.2 Beyond the U.S.

Specific literature dealing with media ownership issues is notably less abundant in Europe than in the US. Yet, there is a host of influential British scholars who specialize in media political economy. With regard to Winseck's classification, they largely represent radical media political economy (Colin Sparks, whose ideas are considered further) and creative industries school (David Hesmondhalgh, Anna Reading). Contemporary creative industries scholars fiercely criticize the current "marketized" order of social relations, especially in the sphere of mass media and distribution of cultural goods Yet, scholars like

Hesmondhalgh argue that the role of media ownership in explaining the communicational environment is overstated. There are a multitude of other factors to explain the media content outcomes, and there is no clear evidence of the relation between concentrated ownership and reduced media pluralism (Hesmondhalgh 2006).

Outside of the UK, the bulk of media ownership research is conducted as a part of national or comparative media systems studies, or represents the tremendous body of policy-oriented studies that seek to conceptualize, measure and evaluate media ownership concentration against the backdrop of permanently increasing national governments' attention to the issue.

One of the most significant features that distinguishes European media systems (as well as the vast majority thereof elsewhere in the world) from the American media system, is the presence of usually state-controlled public service media, which is virtually non-existent in the US. This immediately brings in a new dimension to the media ownership debate: dichotomy between marketplace and public sphere models appears as a debate revolving around state and private ownership of the media. Two major approaches towards this issue might be outlined within the European political economic tradition. According to public interest, or Pigouvian theory, government ownership of the media is preferable, since it helps to avoid distortions and manipulation made possible by the market system and deliver socially significant information to the citizenry more accurately. Conversely, public choice theory states that state-owned media tend to succumb to the influence of elites in power and distort information in favor of them (Djankov et al. 2003). Public interest theory partly applies to some of the established liberal democracies: a good example would be what is known as Reithean approach towards the media in Great Britain, a policy that is responsible for the emergence of the British Broadcasting Corporation.

However, many media systems around the globe operate under much more illiberal, state-controlled and regulated markets than in the US or the United Kingdom. A study conducted by a group of World Bank and Harvard researchers showed that state ownership of the media is still prevalent in many parts of the world, and that it generally undermines political and economic freedom (Djankov et al. 2003). Media outlets, as it was illustrated by the study, tend to succumb to the influence of political elites and transmit the messages that favor certain political actors. One of the most essential means of extending political groups' control over the media is the centralization of media ownership, which expands elite groups' influence and control over flows of information through the mechanisms of the state. These findings are consonant with the view of Jonathan Becker, who has analyzed a series of annual press freedom reports produced by a number of journalist organizations, and arrived at a conclusion that the state remains the main agent of limiting freedom of the press globally (Becker 2004). This seems to be the case for Russia under Vladimir Putin, a country which has been ranked as “not free” in the annual Freedom of the Press reports since 2003.

Becker came up with one more statement of great importance, which is well suitable to conclude the section of the “commercial” media ownership concentration literature. He suggested that the concerns of market as the danger to media pluralism that are widespread among the Western scholars might be overstated. Whereas negative market effects on the media in liberal democratic polities are possible, they pertain mainly to the question of quality of democracy. Yet, concentration of media owned by the state, complemented in many national contexts by lack of institutional checks preserving its autonomy, is a real threat to the very existence of democracy (ibid.).

1.3 The Russian media system: theorizing media ownership concentration

I have so far reviewed the major domains of literature that tackle the problem of media ownership within the context of the American and Western European media systems.

Obviously, theoretical frameworks that they are based upon are of limited applicability when transferred to a context as peculiar in terms of politics, economics, and culture, as Russia. I consider it relevant, following Hannu Nieminen, to borrow a general distinction between two ways of going about this problem from the broader field of democratic development studies. Nieminen outlines two general research strategies, which he labels the similarities school and the exceptionalism school. The former rests on emphasizing the common in historical development of advanced democracies and transition or non-democratic regimes. Viewing democratic development as a linear process, similarities school holds that democratization of any political system has to be measured against the standards applied to established democracies. Exceptionalism school, conversely, prescribes focusing on the unique historical and social experience of each country, and devising measures of development based on its unique trajectory. With regard to the Russian media studies, Nieminen contends, Western researchers not surprisingly resort mainly to the similarities strategy, whereas the Russian media scholars usually seek to come up with more nation-specific frameworks. Both, however, tend to focus on the political effects of the Russian media system, devoting considerably less attention to its social, cultural and economic dimension (Nieminen 2008).

There are no salient works to specifically address the political economy of the Russian media. The problems of media industry structure and ownership patterns are largely tackled on the level of media system research. One of the most neat and precise conceptualizations of the contemporary Russian media system belongs to the American researcher Jonathan Becker, who has already been mentioned above. Becker, whose analysis definitely leans towards the similarities school, assigns Russia to neoauthoritarian (as opposed to totalitarian) media systems category. He points out a number of characteristics of the Russian media that are common for this model: the state's tendency to exert both positive and negative influence on broadcast media, based on the view that they are the most efficient tool to reach and influence

the populace; limited pluralism, where various viewpoints are allowed to be represented as long as they do not touch upon the issues of vital political importance; existence of privately owned media organizations, along with elaborate mechanisms to limit their autonomy. One of the key features of journalism in neo-authoritarian media system is self-censorship. In terms of ownership structure, Becker claims, the state influence is entrenched by retaining control over a significant number of media outlets.

The most influential author on the Russian media system within the country is the Dean of Moscow State University Department of Journalism Elena Vartanova. Since the late 1990-s, she has been conducting theoretical research on the Russian media industries. In her numerous works she reflected on the role of media in the process of post-communist Russia's social, economic and political transformation.

Vartanova's approach relies on rich descriptive narratives that aim to grasp the complexity of multi-level processes shaping the modern Russian media system. A representative of the exceptionalism school, she advocates for in-depth examination of the historical path that the country's mass media have undergone during the Soviet and even the Imperial period, for increasing attention to cultural factors, as well as the role of market and ICTs, and for including in the scope of analysis not only federal, but also regional and local media markets (Vartanova 2013). Recognizing the limitations of applying Western theoretical models to the Russian case, she nevertheless conducts some comparative research within the framework of Hallin and Mancini's (2004) categorization of media systems. She arrives at a conclusion that the Russian media model has similarities with those of Northern Europe in terms of significant role of the state regulation and control, and with the Italian model with regard to the intensity of mass media's political involvement. Rather than that, as Vartanova contends, the Russian media model might be characterized as in-between, "Eurasian" model, exhibiting the features of both European and Asian media systems (Vartanova 2013).

Although Vartanova never explicitly uses the notion of ownership concentration, mentioning state interference in the media markets is not exceptional for her analyses. In her 2008 publication, Vartanova first highlights the existence of “state paternalism” in media economy that hampers the processes of fair market competition (Vartanova 2008). She also emphasizes the key role of national television in formation of the identity and electoral preferences of the population, as well as its vulnerability for the elite groups’ pressures. One of the key factors that have to be taken into account in the Russian media system analysis, Vartanova argues, is the informal influences of the state and other “power centers” that might significantly alter the media landscape (Vartanova 2013).

The power centers and power relations discourse is central to Colin Sparks’ analysis of the Russian media industries as well. This renowned British Neo-Marxist scholar has devoted a solid number of his works to study media systems of the authoritarian and post-communist states, such as Russia, Poland, Hungary and China. His research is focused around the common patterns of power relations that emerge within the media systems of formerly or currently authoritarian countries, as well as the interpenetration between the media, political groups, and the capital. He arrives at the conclusion that in media systems in which the boundaries between these groups of actors are blurred, mechanisms of industry concentration are merely the means of entrenching incumbent elites’ political influence. In this sense, there is no essential difference between media ownership concentration at the hands of the state or corporate entities, since both have the same detrimental effects on freedom of the press and pluralism in public discourse (Sparks 2000).

These claims did not go unchallenged. As Ellen Mickiewicz noted, commercial media ownership concentration in the Yeltsin period often enhanced the private broadcasters’ ability to challenge the “official” state agenda and viewpoints, thus promoting media pluralism rather than hindering it (Mickiewicz 2000). In her later works, though, she acknowledged the fact

that in the Putin era the character of media concentration has changed: “President Putin, as head of government, consolidated as many media organizations as possible under his ultimate control and to serve his political interests” (Mickiewicz 2008, p. 42). However, since the chief focus of her seminal book “Television, Power, and the Public in Russia” is on the viewership’s perception of news, Mickiewicz never goes in detail into how exactly Putin managed to achieve the ultimate control of the media.

That is to say, there is considerable amount of literature both in Russia and abroad that analyze the contemporary Russian media model. Despite the seemingly various approaches to the subject, there is a number of characteristics upon which virtually all the authors agree. Those are, most notably, central role of the state in media system, importance of the informal norms and practices, and critical influence of broadcast media.

These works on the Russian media that I have observed often touch upon the matters of ownership and state of pluralism within the system, but these issues are never central to the analysis. The bulk of the authors consider it sufficient to acknowledge that the most important broadcasting organizations are owned by the government, and that the state retains control over tremendous amount of outlets in other media industry sectors. It is considered intuitive that more state ownership means more state control over the media, and therefore less pluralism. However, this view seems to be simplified. Most of the accounts that follow this logic are descriptive and do not rely on empirical research in their conclusions. Researchers are seldom interested in what exactly are the economic mechanisms of establishing government control over the media organizations. At the same time, the ownership structure of the media markets is far from being clear-cut and straightforward, let alone the fact that it is subject to ongoing transformation. Along with state media concentration, Putin era has seen emergence of giant commercial media holdings, most notably National Media Group. This process is still to be given theoretical evaluation, and its effects on media pluralism are to be

studied. One more visible shortcoming of the extant literature is the lack of studies examining the practical effects of ownership change on media content. I suggest that the ownership outcomes on media freedom in Russia should not be taken for granted, but rather become subject to rigorous research.

Drawing upon the Becker's notion of Russia as neoauthoritarian media system and taking into account its characteristics outlined by other major researchers, the current study aims at filling the aforesaid void in the literature. Its main focus is on broadcast media, mostly television, although the case of a radio station is also examined in Chapter 3. The reason is that, according to neoauthoritarian media systems framework, television is perceived as the most important component of the media in terms of instrumental usage for achieving political goals. This is perfectly applicable to the Russian case: with deterioration of the print press and the internet still being available to a limited faction of the Russian citizens, broadcast media throughout the Putin period remained the primary source of information for the majority of population (Poluekhtova 2009). Moreover, television is probably the most researched segment of the media market in contemporary Russia, which renders the ownership data relatively transparent, and the data on audiences available for the whole period of interest. Thus, the way is paved for conducting a political economic analysis of the Russian television industry ownership structure.

Chapter 2: The dynamics of television market ownership structure and its implications on media pluralism

2.1 Television in Post-Soviet Russia

After the fall of the Soviet Union, the Russian media had to face a completely new reality. Following the decades of ideological control by and organizational dependence on the state, they were introduced to the newly proclaimed principles of editorial independence, freedom of speech, market competition, and pluralism of opinions. Whereas the print press was more in a position to adjust to the new rules of the game and was able to adopt, at least partly, the role of public institution serving watchdog function and promoting pluralism, in case of television the transformations were not that immediately salient (Vartanova 2013).

The institutional transformation of post-Soviet television took place in several stages. It began with liberalization of content after the advent of Perestroika, when the array of topics that were allowed to be discussed in the air was considerably broadened. For the first time state television agenda started to include not only reports of the Communist party congresses and industrial achievements, but also news items discussing societal problems and technological catastrophes like Chernobyl. The beginning of nineties saw the emergence of first non-state commercial television channels, accompanied by the processes of deregulation and decentralization of broadcasting industries (Poluekhova 2009). At the same time, introduction of new laws and market principles did not mean the abolition of deeply entrenched informal practices that determined the relations between television industries and the elites. Turbulent economic situation and galloping inflation in the early nineties made the biggest broadcasters unprofitable and prone to seek for private sponsorship. It resulted in a submission of many TV channels to powerful businessmen who were craving media assets at the early stages of privatization (Khvostunova 2013).

In terms of institutional design, communist-era broadcasting entities were characterized by a large scale, hierarchical organization and high levels of bureaucratization. In contrast to many democratic public institutions, which started to emerge at the time of decline of communism as brand new entities that never existed before, the television in most cases were heirs of structures that acted under the old regime. Being huge and inertial entities, they carried with them the patterns of power relations inherited from the communist times (Voltmer 2011). The elaborated mechanisms of transmitting messages consistent with the will of the authorities were retained, as well as, in many cases, the good deal of personnel (Sparks 2006). The main difference between the old times and the post-communist reality was that instead of one ultimate center of power media organizations had to work in the environment where several power centers were competing³.

Three major television assets of the nineties were ORT, RTR and NTV channels. The first two were the structures of the former Soviet Central Television, and thus retained its rebroadcasting infrastructure, making them available for some 98% of the country's population. NTV was founded in 1993 by an influential businessman Vladimir Gusinsky, becoming Russia's first major commercial broadcaster. In 1994, a special presidential decree transformed the state structure behind ORT into a joint-stock company, with the state retaining 51% share, and the rest being spread among commercial enterprises. Eventually, the control of most of non-state shares was consolidated by Boris Berezovsky, another influential businessman and advisor to President Yeltsin. As the Russian researcher Irina Poluekhtova noted, although these ownership changes were officially declared to be a transformation of a state broadcaster into a public service television channel, in fact what happened was a toll-free privatization of a biggest broadcaster in the country (Poluekhtova 2009). As a result, by the mid-nineties the only major TV channel fully controlled by the state was RTR, a former

³ I first referred to this argument in my final paper for Political Communication course – “The Patterns of Media Ownership in Former Communist Countries: Implications for Freedom of the Press”.

second channel of the Soviet Central Television and a part of state media holding VGTRK, which was established in 1991.

At the same time, the national television market was undergoing major transformations as well. The beginning of nineties saw proliferation of regional and local-level commercial channels and TV stations. Advertising has become a factor of great importance in determining the agenda and content of the major TV channels, and was responsible for the emergence of brand new format of commercial broadcasting enterprises, specializing mainly in entertainment (Vartanova 2013). One of the most important developments in this direction was the introduction of national commercial television networks such as STS, TNT and REN-TV, which were able to quickly gain considerable audiences due to popularity of the “soft” content and the new efficient broadcasting scheme. Unlike the abovementioned federal-level broadcasters that took advantage of old Central Television infrastructure, these channels had their base stations in Moscow and sought to develop a network of regional partner stations to rebroadcast their content in the regions (Poluekhtova 2009).

The majority of the Russian media researchers note that although during this initial period of post-communist development, the ownership of key media outlets was dispersed quite widely, the level of their instrumentalization and politicization was drastic. It is widely recognized that, for instance, massive media support was one of the key factors that helped Boris Yeltsin to preserve the presidency in a close struggle against the Communist party leader Gennady Zuyanov in 1996 (Khvostunova 2013). However, the major broadcasters were not always friendly towards the state. The viewpoints that they expressed reflected the struggle for power among the elites, and the coverage was dependent on the current balance between the key interests of the major players within the federal government and those of the influential media shareholders, the “oligarchs”.

In sum, giving a theoretical evaluation of the ownership structure of the Russian television industry throughout the 1990-s, I suggest that during this period the evidence favors the Sparks' "detrimental influence of the elites" view rather than "counterbalancing state agenda" argument advanced by Mickiewicz. Despite the fact that the ownership of major broadcasters was dispersed between the state and a number of private stakeholders, the pluralism of opinions expressed in the air was a result of a power struggle between influential media players rather than a result of competitive public discussion.

2.2 Industry configuration and transformation during the Putin era

Throughout the first and second decades of the 21st century, despite the massive penetration of internet technologies, new media and social networks, federal-level television remained the major source of information for the majority of Russians. As of 2014, 78 per cent of the representative national sample indicated that they primarily consumed news content delivered by federal TV channels (Levada Center 2014). As these figures illustrate, broadcast media are still a key asset within the Russian political system.

Right after ascending to presidency in 2000, Vladimir Putin began to consolidate all major power centers and political institutions, seeking to establish the "vertical of authority" that would secure the stability of the political system. Along with the gradual submission of the legislature and the judiciary, the media, primarily broadcasting, became the target of the predatory interest of the state. In his 2000 State of the nation address, Putin mentioned that *"economic inefficiency of the bulk of the media makes them dependent on their owners' and sponsors' commercial and political interests. It allows them to use the media as a tool of retaliation on their adversaries, and sometimes even make them a means of mass disinformation, a means of fighting against the state"* (President of Russia 2000). Throughout Putin's first presidential term, the structures of the government seized financial and/or managerial control of a considerable number of influential outlets in print press, electronic,

television and radio segments of the media industry, both on the federal and regional levels (Vartanova 2013).

With regard to television market, the most notable ownership developments affected the assets of the media moguls which exposed their ambitions to contain and oppose Putin's drive to an unchecked political authority – Boris Berezovsky and Vladimir Gusinsky. The former was forced to sell his 49 per cent stake in ORT to an alleged Putin's ally, oil tycoon Roman Abramovich, who reportedly purchased the asset “on behalf of the Kremlin” in 2001 (Zolotov 2001). It was a result of a public standoff between Putin and Berezovsky, who was fiercely criticizing president's policies. Eventually, the former oligarch had to sell the rest of his assets in Russia and leave the country.

NTV channel was renowned for its sharp criticism of the federal government's military operation in Chechen republic, as well as for its uncompromising stance on a number of other public issues of salience. The channel was the core asset of Vladimir Gusinsky's media corporation MediaMost. Starting from 2000, MediaMost has been a defendant in a controversial lawsuit filed by state-controlled energy champion Gazprom over a property conflict. Gusinsky's arrest and several attempts to declare the company bankrupt followed. In April 2001, the broadcaster was taken over by Gazprom subsidiary Gazprom Media, along with TNT television network and influential Echo of Moscow radio station (ABC News, 2001). The NTV team was split over acceptance of the takeover; editor-in-chief and several leading journalists joined a minor TV6 channel following the invitation by Boris Berezovsky, who was the main stakeholder at the time. However, in 2002 TV6 was also shut down upon court order (New York Times 2002).

As the Russian media scholar Olga Khvostunova noted, these ownership transformations contributed to the general trend of public political debate deterioration and limitation of media pluralism. Substantive political discussions were pushed out of the most

popular outlets to the margins of the media sphere – middle-class-oriented print press and emerging internet media. In the outlets with the widest coverage, most notably federal-level television channels, they were replaced by discussions artificially narrowed in scope and the array of expressed viewpoints (Khvostunova 2013).

Subsequent years of the second Putin's and then Medvedev's presidential terms, no more mergers and takeovers in the first tier of national television channels took place. Yet, the state continued to concentrate federal-level channels of a smaller scale and more specific thematic orientation. In 2004, Rossiya 2 channel was established (by the name Sport) within VGTRK media holding. Initially, its content was only sports-related, but in 2010 the concept was changed: array of topics covered considerably broadened and embraced socially significant issues. 2006 saw the emergence of Zvezda (Star) – a channel fully controlled by the Ministry of defense. At the same time, a number of influential commercial television networks specializing in entertainment content, such as STS and REN TV, were enjoying mounting audiences and, therefore, increasing advertising revenues. During the Putin era, these private enterprises were allowed to operate free of direct state interference. They formed a separate realm of television industry, functioning according to the competitive market logic. It was not until the advent of tightening legislation trend of 2014 that many of them were severely affected by the state-induced pressure.

Yet, there were a few cases of commercial television networks that aired not only entertaining content, but hard news as well. One example is REN TV, a channel that had its own news subdivision and was airing analytical programs since the late 1990-s. It was owned and operated by its founders, Irena and Dmitry Lesnevsky, until 2005, when the German media holding RTL and the Russian steel manufacturer Severstal acquired the asset. However, this ownership configuration persisted for just a little more than a year. In late 2006, the share previously owned by Severstal was partly acquired by Abros, an enterprise

controlled through the structures of Rossiya bank by Yuri Kovalchuk – an associate and a personal friend of Vladimir Putin (Bordyug 2008). Nearly at the same time, structures controlled by Kovalchuk purchased a share in a restored 5 Kanal, a Saint-Petersburg-based broadcaster that used to have had a federal status until 1997, which in 2006 obtained a federal broadcasting license again. In early 2008, both channels became a part of National Media Group, a media holding newly formed by Kovalchuk, although it was not until 2011 when REN TV was fully integrated into this conglomerate. Since its inception, NMG purchased shares in or fully merged a number of influential media enterprises, including 25 per cent share in Perviy Kanal (former ORT). Despite the fact that media holding is privately owned, most of the researchers note that its main beneficiary has strong informal connections to Putin, and therefore consider National Media Group as fully state-controlled (Freedom House 2011).

As it is visible from the review above, since 2000 Russian television industry presented a varied picture in terms of ownership. Along with state-owned and state-influenced private broadcasting enterprises, independent commercial television existed in the entertainment sector. Yet, the state managed to eventually seize control over all the major broadcasting organizations delivering hard news to the majority of population, and responsible for providing room for political discussion at the national level.

Obviously, concentration of ownership was not the only instrument that was used by the Putin's regime in order to eliminate competition in media sphere and curb the pluralism of publicly expressed opinions. Elena Vartanova laid out a vast array of political, legal and economic methods that contributed to squeezing media freedom by the state. Among those are selective application of legal sanctions, from tax law to fire safety regulations; unequal treatment of different media outlets and journalists – providing preferences such as access to events and closed information to the loyal while denying any cooperation to the outsiders;

licensing manipulation; suing disloyal media for libel, etc. (Vartanova 2013). This list might be complemented by the fact that during the Putin era there were cases of violent attacks, murders and kidnappings of journalists, which might have contributed to promotion of self-censorship among media professionals.

It is therefore legitimate to ask, what were the exact outcomes of media ownership concentration, in particular ownership of the federal broadcast media, for limiting media pluralism in Russia? What political consequences did this economic interference in media system by the state bring about? The following analysis is an attempt to quantify the influence of broadcast media concentration by examining the expansion of the state-controlled channels audience reach.

2.3 National hard news audience dynamics 2000-2014

In order to examine the effects of broadcast media ownership concentration, I will resort to the data on television audience. This is because viewership, rather than market share or revenues, is the chief indicator of broadcasters' political influence within the context of the Russian media system. It is the matter of how many people regularly watch the news on a certain channel that makes this channel attractive for the state to take over. Drawing upon the findings of the Russian media system researchers that were presented in preceding subsections of the current chapter, I assume that concentration of television ownership in the hands of the state and state-controlled corporations was one of the tools that was utilized by the Putin regime in a process of limiting media pluralism throughout the observed period of 2000-2014. This consolidation of media assets has to be perceived as a part of coordinated set of political, economic, legal, and informal policies and practices that the state has been taking against the mass media. Expansion of the share of television viewers exposed to hard news broadcast by the "loyal" outlets has to mark state's successful attempts to dismantle media pluralism.

Following the methodology used by Djankov et al. (2003), in my analysis I will regard the organization (or the state) as ultimately exercising control over the media outlet if it controls the highest share of its stock, but no less than 20% at every tie of the chain (in case control is exercised through a chain of intermediate owners). Ownership data is gathered from two most influential Russian business dailies, *Kommersant* and *Vedomosti*, which report on all salient mergers and acquisitions in the major industries and markets, and which usually provide the most comprehensive publicly available ownership information.

I retrieved the audience data from the archives of TNS Russia group, a branch of TNS Global corporation, that has been a leader of the Russian television audience measurement market since the mid-nineties. These data are not publicly available, and were provided directly by the company's research department (see Appendix 1). The exact source of the data is the weekly TV Index measurement. It combines the results of telephone survey, online survey and observations made by a special "peplemeter" device, installed directly to some of the respondents' TV sets. The sample is representative for the cities with population over 100 000 (TNS Russia n.d.). I assume that characteristics of the sample might slightly slant the results towards reducing state channels viewership compared to the national representative sample. Given the results of sociodemographic research of television audiences, the rates of internet penetration are higher in the cities, whereas TV viewership is lower (Poluekhtova 2009). However, I suggest that these differences are insignificant for the ends of the current study, provided that they can only weaken the observed rates of state influence. Since the unit of analysis is one year, each channel's weekly audiences are averaged into one aggregate yearly value. It represents the percentage of overall TV audience (including regional and cable channels) that watched a certain channel throughout the time period. The initial sample of broadcasters includes 20 national-level channels with the highest audience reach.

For each year, a single variable for share of “state-controlled news” audience is constructed. It summarizes the audiences of those channels which are by aforementioned criteria recognized as ultimately owned by the state or the commercial structures loyal to the state (e. g. National Media Group) during more than a half of a certain year. Here I include only the audiences of those channels which broadcast “hard” content – at least one regular news program for more than half a year. The ultimate variable score is obtained by dividing the share of “state-controlled news” audience by the aggregate audience of all channels that broadcast news, irrespective of their ownership category.

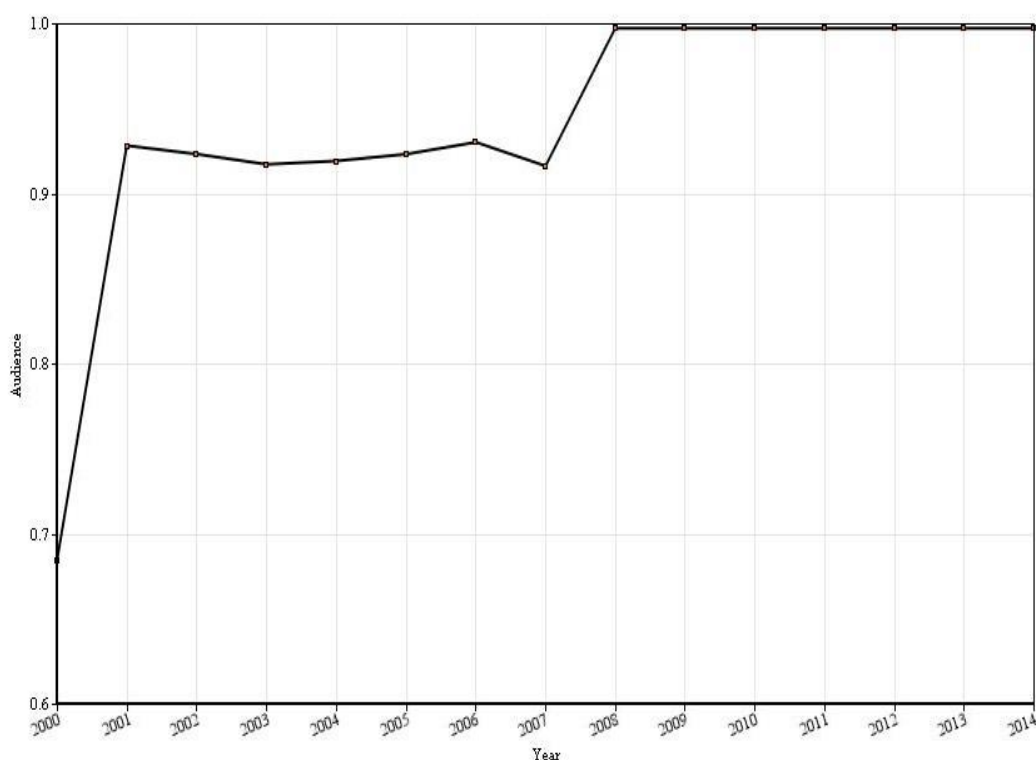


Figure 1. The share of overall hard news TV audience reached by state-owned and state-controlled broadcasters

As it is visible from Figure 1, there are two points in time which coincide with dramatic shift in the share of “state-controlled news” audience. In other periods the scores are relatively stable and persist around the values achieved during these two critical times. These junctures are 2001 and 2008-2009 – points in time that are marked by NTV takeover and the emergence of the National Media Group. After seizing operational control over NTV, the

state increased the share of hard news audience reached by its “loyal” broadcasters from 68% to almost 93%. It remained at this level until 2008, when REN TV and 5 Kanal federal networks, jointly responsible for more than 5% of the national audience, were incorporated into the newly formed National Media Group. As a result, the share of state-controlled hard news broadcasters exceeded 99 per cent and was never below this mark ever since. In the following years, there were no significant changes in the structure of viewership among the top 20 most popular national level channels, and this ratio remained stable.

Another insight comes from examination of overall hard news audience dynamics in relation to the dynamics of the aggregate TV viewership (including the entertainment television sector). As it illustrates, since the share of state-controlled “hard news” channels’ audience in the overall national TV consumption peaked in 2002 at 64.6 per cent of the overall TV viewers, it has seen a persistent, although not dramatic decline, reaching the lowest point of 57.9 in 2007. It was not due to the audience expansion of the hard news broadcasters that were not state-controlled, but rather due to the aggregate changes in the national TV viewership structure. Apparently, one of the crucial contributions to this process was made by the increasing role of electronic media as the news source. It could be also the result of the shift in TV viewers’ preferences towards more entertaining content. However, in 2008 the emergence of the National Media Group which incorporated two federal-level television networks – REN TV and 5 Kanal – restored the state-controlled share of news audience almost at 2002 level – 63.9 per cent of the aggregate TV audience, which accounted for more than 99 per cent of hard news audience. It suggests that this stage of ownership concentration might have been a strategically determined attempt to restore state control of the media system that started to exhibit centrifugal tendencies.

As it was illustrated above, throughout the period of 2000-2014, the state managed to consolidate financial and operational control over all the national-level television channels

with considerable viewership reach. The hard news audience exposed to the state-controlled broadcasting increased from less than two-thirds in 2000 to a figure close to 100 per cent starting from 2008. The process of television ownership concentration was unfold in two major phases. The first one took place in the initial period of centralizing and consolidating Putin's political regime; its logic was determined by the need to eliminate all the centers of communicative power alternative to the state. It resulted in seizing control over the largest commercial TV channel NTV, and consolidating the shares in ORT stock, which enabled the state to exert financial control over broadcasters delivering the news to more than 90 per cent of the viewers nationwide.

The logic of the second phase was concentration of control over the second-tier broadcasters with national audience reach, as well diversification of content profiles of the state-controlled channels (e. g. introducing special sports and military channels). It culminated in 2008 with the emergence of the National Media Group, a privately owned entity widely regarded by the scholars as being heavily influenced by the state through the informal means. These developments led to establishing one or another form of economic state control over the channels covering almost 100% of the Russian hard news audience.

As it was pointed out before, consolidation of the most popular broadcasters' financial and operational control was just one of many economic, political and legal pressures that were simultaneously waged on the Russian media by the authorities. As researches such as Becker, Khvostunova and Vartanova argued, the rationale behind this ownership concentration strategy was to eliminate any political viewpoints or speakers, hostile to the incumbent regime, from the air of the country's most influential broadcasters. In other words, the goal was limitation of media pluralism. In the current chapter, I observed the magnitude of broadcast media ownership concentration processes. Still, the only conclusion that its findings suggest is that the state has acquired a hypothetical *capacity* to exert some degree of influence

on the content delivered to almost 100 per cent of the Russians who watch TV news. In the following chapter, I proceed to the case studies in order to examine what particular outcomes on media content did it have.

Chapter 3: Implications of the ownership change on media content⁴

The main danger of media ownership concentration, as the bulk of literature reviewed in Chapter 1 contends, is that it produces conditions favorable for limiting media pluralism. In other words, it enables the powerful and the rich to manipulate the media content in a way that limits the range of the viewpoints expressed, influences the agenda and framing, or directly biases the coverage of certain actors or events. This kind of instrumentalization makes the media serve the political or economic interests of their sponsors at the expense of objectivity, neutrality and quality of the information that they deliver. Therefore, I might conclude that detrimental effects of ownership must be traceable in the content produced and disseminated by the particular media outlet. The most straightforward way to detect the existence and the magnitude of such effects is to compare the content before and after the ownership change. As it was noted by the Russian media system researchers (e. g. Khvostunova 2013), concentration of ownership of the most popular broadcast media by the state and state-controlled commercial entities, resulted in deterioration of public political discussion and elimination of all “dangerous” opinions from the air. Consequently, one of the major indicators of pluralism limitation has to be the presence or absence of certain speakers in the air.

In this chapter, I will attempt to detect a relationship between the change of ownership and change in the attitudes towards major political actors, as reflected in content. Were there dramatic changes in coverage of politics after the outlets under study were acquired by the state-controlled media holding? This analysis will complement the findings of Chapter 2 by providing an insight into what were the particular outcomes of the observed expansion of state control over the Russian broadcast media. Also, it will provide evidence that is needed to assess the character of corporate ownership consolidation – a relatively new type of media

⁴ This chapter is based on my final paper for the Qualitative Data Analysis course – “Political Implications of Media Ownership Change: The Case of Russia”.

concentration, represented by the emergence of the National Media Group, to which both considered media outlets belong.

3.1 Case selection

During Putin's regime, there have been several notorious examples of how previously independent media outlets were taken over by state enterprises, only to quickly shift their orientation from neutral or even anti-government to pro-Kremlin. One of the most renowned instances was an NTV channel takeover by Gazprom in 2001. The first major commercial broadcaster in Russia, which was setting the standards of professional television journalism, NTV soon became considered as one of the most loyal pro-regime proponents (Coynash 2014). Yet, selecting cases according to this principle would be a case selection on the dependent variable – a research strategy that would be unlikely to produce any new valuable knowledge. Instead, I focus on two cases of ownership change that occurred relatively unnoticed by the general public and did not result in striking change of editorial position right away. Those are REN TV television network and RSN news radio station.

REN TV was founded in 1997 by television journalist Irena Lesnevskaia and her son Dmitry. After it had risen to popularity as a national-level channel, it was purchased from its founders by Bertelsmann's RTL (bought 30% share), steelmaker Severstal and energy company Surgutneftegaz (35% each) in 2005. Yet, since 2006 structures controlled by bank "Rossiya" and its main stakeholder Yuri Kovalchuk have been gradually consolidating shares of REN TV stake, ending up at 68 per cent share in early 2008. Together with 5 Kanal and a number of other influential print and electronic media outlets, REN TV was then incorporated into newly created National Media Group. However, it was not until June 2011 when NMG managed to acquire RTL's share and establish full operational control over the television network (Kiselyova 2011). I regard the fact that between 2008 and 2011 a considerable share

of the stake was owned by an international media holding, as a possible cause for mitigating the expected ownership effects on content. Therefore, I will count June 2011, a point when full financial and operational control over the channel was concentrated by the allegedly state-controlled National Media Group, as a reference point marking the ownership change.

RSN (Russkaya Sluzhba Novostei, Russian News Service) is a news radio station that originated in the Russian Radio news department. Starting from early 2014, it has been a permanent leader of the most-cited radio station rating, as measured by Medialogia. In 2012, its audience exceeded 500,000 people (Radiportal.ru 2012). Since its emergence as a separate news radio station in 2005, it has belonged to the private media holding Russian Media Group. In July 2011, a few months ahead of parliamentary elections, 100 per cent of RSN was purchased by Kovalchuk's National Media Group (Okorokova 2011).

Although the radio industry is out of the scope of the analysis presented in Chapter 2, there are a number of reasons to consider the case of RSN within a current chapter. Despite the fact that radio hasn't been a major segment of the media system in 21st century Russia, it holds a considerable and remarkably stable portion of media market in terms of both audiences and advertising revenues. The share of audience is larger in cities like Moscow and Saint Petersburg. Between 2010 and 2013, the national daily radio audience persisted at the level of 37-40 million people, exceeding a quarter of the population (RBC Daily 2013). One more point is that nature, structure and format of audiovisual TV content is not drastically different from those of audio content broadcast by radio stations. It renders possible to apply similar logic while inferring the relationships between ownership change and content outcomes for both TV and radio. Finally, RSN is a somewhat rare case of a single-moment 100 per cent stake acquisition, which eliminates possible concerns about minority shareholders' influence.

3.2 Data and Methodology

One basic assumption underlying the current analysis is that each media outlet has a relatively coherent and coordinated position towards the political powers and public issues that are in the scope of its reporting. This unspoken stance is more or less universally shared by the journalists, newscasters, and the editors, and therefore is reflected in the content that the outlet produces. It might be perceived as the equilibrium of organizational pressures and constraints, professional and social values, and outside influences coming from interest groups, authorities, and owners of the particular media outlet. If the new owner is politically motivated, he or she influences the editorial stance by putting more pressure with some degree of success. Over time, the change or its absence has to be visible in the outlet's content.

In order to trace the shift in editorial stances, I analyze the content that media outlets have produced one year before and one year after the event of ownership change. The delay is supposed to account for the time that adjusting to new policies might take. The period of observation was initially set as one month, but in some instances it had to be extended in order to include sufficient numbers of news items related to the topic of interest. Since I am interested in the way incumbent and opposition politicians are represented, I look at all the news pieces produced by the outlets that feature relevant political figures. For analyzing the stance towards the government, I consider the texts that mention Vladimir Putin; for the opposition – those that mention Alexey Navalny. Since RSN was acquired by National Media Group in early July 2011, the observation periods for Putin are June 2010 and June 2012. For Navalny, the first observation period is from November 2010 to January 2011, since the number of his mentions before November 2011 is insufficient. The second one is June 2012. In the REN TV case (changed ownership in June 2011), it is June 2010 and June 2012 for Putin; and from June to December 2010 and from June to August 2012 for Navalny.

The data are retrieved from Medialogia – an automated system of media monitoring with a comprehensive daily updated database of more than 24,000 media outlets, including the transcripts of radio and television programs (Medialogia n.d.). Medialogia allows for searching of the relevant publications by so-called “objects” of interest, which include not only literal mentions, but also all the other ways in which they could be named. For instance, if the search is run by object “Vladimir Putin”, the results feed will also contain the publications which have only the key words “Russian president” or ironic “Tsar Vladimir”.

The choice of particular analytical tools which I apply in each of the cases is heavily dependent on type of the data. The messages produced by the outlets being considered differ in length, language, tone, and who the speakers and narrators are. In each case, I lay out the observed properties of the data and classify the news items. I then outline a particular set of methods for every case, among which are thematic analysis, discourse analysis, semantic analysis, frame analysis, or a combination of those.

In course of this study, I coded 442 news items. In order to check the stability of the coding, the same protocol was applied to the content at two points in time, with a period of 5 days between them (Riffe et al. 2014). The intracoder reliability coefficient was 0.96 (426/442), which is considered to be satisfactory.

3.2.1 RSN

RSN is a radio news station. It airs short newscasts containing several political, economic and social news items each, every 10 or 15 minutes. During the day, these items recur in many newscasts. Each item is also posted as a piece of text in a newsfeed on the radio station’s website (once). Newscasts intersperse with musical tracks and longer programs, usually talk shows, which are either analytical or entertaining. Transcripts of talk shows are posted on their website as well. Observation of collected data suggests the following

categorization of message types, including the criteria for assigning them to different tone categories.

1. Short factual messages. These are texts that contain information about some event, initiative or official statement on an issue. Their length ranges from 23 to 219 words, but the mean size is around 50-70 words. These messages do not contain any comments or evaluations (rather than those that are newsbreaks themselves), serving merely as brief reports of the events. Factual messages are usually counted as neutral, since their content has no judgmental component. However, there are a number of exceptions. Those are the cases when the nature of the event or statement itself represents an actor being considered in a positive/negative light outright. It might be usually detected by the title of the news item, for instance, “Putin will help to establish a new kindergarten for children with special needs”. Such instances must be considered in order to account for the agenda-setting power of the Russian mainstream media, when the topics and events that are reported are carefully picked to portray a particular actor in a certain way. It is natural to expect such kind of conduct in this news radio format.

2. Commentaries and opinions on issues. These texts are usually longer than the factual items, from 57 to 414 words. They report the positions of experts or other political actors on events, issues, conflicts and statements in the form of indirect speech. The whole message is considered as positive towards the actor if the text contains only support or endorsement of their actions, statements, ideas, or professional qualities in the context of the reported situation, uncontested by the rival opinion. The same criteria apply to the negative evaluation: the text has to contain one-sided criticism or mock the actor being considered. Neutral are those comments which have no clear slant towards one of the sides. Items with two rival viewpoints represented are counted as neutral as well. If an item has a neutral and a positive/negative comment represented, it is counted as positive or negative, respectively.

3. Talk shows/interviews. Transcripts of analytical programs that contain discussions involving actors being considered. All the texts of this type that are present in a sample are conversations between a host and a single expert, which renders it possible to apply the same tools as in point (2) to assign the expert's evaluation to the neutral, positive or negative domain.

Given the classification above, I can now lay out the algorithm applied to the RSN data. As a first step of my analysis, each news item is assigned to one of three aforementioned categories. Then, applying the criteria outlined, I code each item as positive, neutral or negative towards the actor being considered. For factual messages, I look at the topics which rendered items positive or negative, in order to indicate whether there is an agenda that was put forward in order to portray the actor in a more favorable or unfavorable way. In the case of commentaries, I look at the particular speakers whose opinions are broadcast, since there is a well-established pool of pro-government and opposition newsmakers. Speakers are regarded as pro-governmental if they are either representatives of state bodies or the ruling party, or if they are political experts affiliated with one of the 20 think tanks represented in the monthly "Analytical centers rating" made by Politanalitika project (MOMRI 2015). I consider speakers as pro-opposition if they represent either one of the political parties or movements that are pronouncedly critical of the government, or if they are directly affiliated with the leaders of the opposition. Speaking about long interviews, it is also useful to indicate who the speakers are, while the richness of the narrative usually allows for reconstruction of recurrent themes and the conduction of semantic analysis.

3.2.2 REN TV

The REN TV data set consists of news pieces from a single program – Novosti 24 (News 24), a half-an-hour-long news show which is aired four times a day. There are usually several people whose speech is recorded: a newscaster, who makes an introduction and often

a conclusion; a reporter, who comments on location; and the speakers relevant for a particular issue. In case of very short factual items, there might be just a newscaster. Yet, the bulk of the texts represent multiple speakers, and the average length of a unit of text is more than 300 words. Initial examination of the data showed that newscasters' and reporters' narratives sometimes contain judgemental statements or wordings that might be identified as frames, suggesting the relevance of semantic analysis, which will be central for understanding the editorial position towards certain political actors. Unlike the RSN case, where the editorial stance was indicated through relatively indirect means such as choice of topic and speaker, in the REN TV data, I encountered opinionated messages that were produced and delivered by editorial staff. However, this fact does not render useless the examination of the positive-neutral-negative messages ratio (as measured by the same criteria as in RSN case), who the "external" speakers are, as well as the tone of their comments. Once again, I consider one-sided messages as positive or negative if there was no alternative viewpoint represented; an item is considered as neutral if both sides of the conflict are given the floor. It is also often insightful to take a look at the themes with regard to which a political figure is mentioned, so thematic analysis will be applied as well.

3.3 Analysis

3.3.1 RSN

Vladimir Putin. June 2010 and June 2012

In June 2010, Putin served as a Prime Minister of the Russian Federation. He had to leave the presidential office in 2008 due to the constitutional prohibition against one person serving more than two terms in a row. Dmitry Medvedev, a former head of Putin's administration, was inaugurated as president in May 2008, and the period under review is in the middle of his term. As it is visible from Table 1, the news pieces that mention Putin are spread quite evenly between all the major policy domains. It is quite indicative that a quarter

of all the messages deal with international issues. This marks the fact that even after leaving the position of head of state, Putin was still represented as an active player in the arena of international politics.

Category	Positive	Neutral	Negative	Overall
Short factual	0	43	0	43
Commentaries	3	2	0	5
Interviews	0	0	0	0
	3	45	0	48
Topics				
Domestic Affairs	12			
Foreign Affairs	12			
Welfare, culture & sports	9			
Economy	13			

Table 1. V. Putin's representation by RSN in June 2010

As to the tone of the coverage, findings suggest that the bulk of the news items were short, factual and neutral. There were only five items containing commentaries, of which three were positive towards Putin. All positive comments were triggered by a publication of Putin's support rating by the country's biggest sociological agency. The results of the poll showed an 8 per cent decrease in support compared to January 2010. In three publications marked as positive, four experts (three pro-governmental and one independent) elaborated on why these figures did not reflect the actual level of support, claiming that Putin enjoyed as much popularity as before: *"if we look at those figures separately from the overall data, a decrease of six to seven percent seems horrific. But if we look at the overall support rates – these figures are fantastically high. We have to look at the overall rates, which are high and solid"*⁵; or that this was a short-term decrease determined by the authorities' strategic considerations: *"In summer there is traditional political demobilization, when people go on holidays. Plus, a pause might be caused by a certain leadership's strategy. In early 2011 a*

⁵ K. Simonov. RSN, 11.06.2010. Here and further, for the original Russian quotations, see Appendix B.

new electoral cycle starts, and then the support is to be mobilized. Right now there is no need in that⁶". All such claims were not contested by any alternative interpretation of the poll's results.

In 2012, Putin returned to the presidency. A day before his inauguration, which was scheduled on 7 May 2012, the opposition leaders mobilized their supporters for a large-scale protest demonstration in Moscow. It resulted in violent clashes with the police, and several participants were arrested and accused of attacking police officers. The investigation was launched to check whether the clashes were the result of intentionally organized "provocations" (Novaya gazeta 2012). These events became a reason for passing a new legislation which severely toughened the regulation of mass demonstration, introducing much higher fines and more grounds for arrest and imprisonment of those who violated the new rules.

This law was introduced by Putin, passed all the necessary parliamentary procedures and was signed by the president in June 2012, during the period of observation. The bulk of the discussion in the media, which produced positive and negative comments during this period, reflects on the introduction of this law, which was widely regarded as Putin's own reaction to those violent events. The pro-regime experts praised the new law as enhancing the security of peaceful demonstrators: *"For those people who take part in peaceful actions, there is no problem. For those who want to use these public events to organize the provocations, assaults, and disorders, the new norms are reasonable prevention measure⁷"*. All nine "positive" commenters come from the pro-government category. Yet, those speakers who criticize the law cannot be assigned to an opposition category. They represent either the President's Human Rights Council or parliamentary parties other than "United Russia" – so-called "systemic opposition", which is only nominally the opposition. None of the critiques

⁶ D. Badovskiy. RSN, 11.06.2010.

⁷ S. Zheleznyak. RSN, 08.06.2012.

come from “non-systemic opposition” – those political forces that actually protest and, therefore, are directly affected by the law.

Category	Positive	Neutral	Negative	Overall
Short	3	148	0	151
factual				
Comment	9	15	4	28
aries				
Interviews	1	0	0	1
	13	163	4	180
Topics				
Domestic	74			
Affairs				
Foreign	72			
Affairs				
Welfare,	19			
culture & sports				
Economy	15			

Table 2. V. Putin’s representation by RSN in June 2012

As it is clear from the descriptive statistics presented in Table 2, a year after the ownership change, RSN increased coverage of Putin significantly, from 48 to 180 items during the month of June, which is a 3.75 times more frequent. It would be reasonable to object that this difference could have been the result of the position that he held—it is natural in a political system such as Russia’s to give more air to the president than to the prime minister. Therefore, the number of publications related to President Putin in June 2012 has to be compared with the respective figure for President Medvedev in June 2010. This ratio is 180 to 121, which is a thirty per cent increase. However, there is little evidence that it is an actual shift in editorial policy rather than the result of, for instance, June 2012 being richer in events and newsbreaks than June 2010. As to the topic domains, domestic and foreign politics remained equally dominant, whereas the number of messages related to welfare and economy decreased. This change might also be explained by the switch of offices: economy and welfare are the “technical” issues with which the head of the executive branch deals more than the head of state.

All in all, the findings that are presented above do not suggest that the ways in which Vladimir Putin's actions were covered by RSN a year before and a year after the change of ownership are drastically different. The bulk of the news items are short factual ones in both periods. The number of those news items which contain judgmental components increased proportionally to the increase of the overall number of publications. The floor is mostly given to pro-government or neutral commentators. The only aspect in which there was a significant increase is the overall number of news items that mention Putin. However, this might have been caused by any of the external factors for which it is impossible to control within the framework of the current study.

Alexey Navalny. November 2010 – January 2011 and June 2012

Alexey Navalny is a lawyer and an opposition politician who has been well-known in Russia since at least 2009. He became famous as a fighter against corruption after conducting a number of investigations of severe corruption cases in state corporations and making them widely known through his blog. He eventually came to prominence as a politician and started to be considered in Russia and abroad as a considerable threat to Vladimir Putin (Kaminsky 2012). Since 2010, there have been a number of criminal suits against him in process, putting him under constant threat of being imprisoned. One of the most prominent representatives of the "non-systemic" opposition, he was one of those who organized protest actions on 6 May 2012.

During the first period of observation, Navalny had just published the results of his investigation of utter malfeasance that took place in the state-owned pipeline monopoly Transneft. This is the sort of content of most of the short factual news items that mention him. Several negative comments that were detected come from state-affiliated speakers: Transneft's CEO, a representative of Auditing Chamber that was also involved in Transneft's corruption case, and a police official who started to investigate the very first criminal case of

swindling against Navalny. A look at the interviews section seems to provide a more unexpected insight. Two out of five contain negative evaluations of Navalny. Both interviews are with the same Auditing Chamber officer that had already criticized him in one of the news items from the commentary section. In those interviews, the speaker repeatedly argued that the purpose of Navalny's investigation was to draw public attention to him. He also stressed the fact that Navalny was living in the United States, implying that it is questionable whether such a person could really care about Russia's interests: *"I think that one of his rationales was to draw attention to himself by showing that the Auditing Chamber sues someone who lives in the US"*⁸.

Category	Positive	Neutral	Negative	Overall
Short factual	0	9	0	9
Commentaries	0	0	3	3
Interviews	3	0	2	5
	3	9	5	17
Topics				
Whistleblowing activities	9			
Political leadership	2			
Legal actions against Navalny	6			

Table 3. A. Navalny's representation by RSN in November 2010 – January 2011

More striking is that there were three talk shows whose guests were independent experts who explicitly endorsed Navalny and his political activities. M. Kononenko, one of the pioneers of the Russian Internet, a journalist and an author, called Navalny *"a new political leader"*, who is *"fresh and shining"* and *"interesting to watch"*⁹. Journalist and TV host M. Maksimovskaya claimed that Navalny was *"Our Russian Assange (...), who publishes the materials that the public have to be aware of, but they are not"*¹⁰. Famous businessman E. Chichvarkin told the radio host that he wished Navalny to *"continue lending*

⁸ V. Goreglyad. RSN, 24.11.2010.

⁹ M. Kononenko. RSN, 07.01.2011.

¹⁰ M. Maksimovskaya. RSN, 05.01.2011.

*himself to freedom of speech*¹¹”. The fact that out of seventeen Navalny’s mentions five were talk shows, indicates that during the period being observed, Navalny, a harsh critic of the Russian authorities, was the subject of multiple discussions aired on RSN. The fact that in those discussions opposite viewpoints were present, and expressing support for Navalny was not a singular occurrence, shows that there were no restrictions on discussing topics and personalities that were “uncomfortable” to the authorities.

In June 2012, the picture changed. As can be seen in Table 4, Navalny ceased to be a topic of discussion in the talk shows and lengthy interviews. Almost all the items that mention him pertain to the news about house-checks, interrogations and other investigative proceedings within the criminal cases against him, as well as new suits that were coming. None of these mentioned his anti-corruption investigations, although they were systematic and never stopped for a long time. The opinions of him expressed on RSN air were all negative.

Category	Positive	Neutral	Negative	Overall
Short factual	0	30	0	30
Commentaries	0	0	4	4
Interviews	0	0	0	0
	0	30	4	34
Topics				
Whistleblowing activities	2			
Political leadership	6			
Legal actions against Navalny	26			

Table 4. A Navalny’s representation by RSN in June 2012

Thus, in the case of the representation of Alexey Navalny and his activities, a shift in editorial policy was detected. His anti-corruption work was no longer mentioned in newscasts, and, more importantly, he was no longer discussed on analytical talk shows, despite remaining a prominent political figure. The reason for this could be the change of policy

¹¹ E. Chichvarkin. RSN, 10.12.2010.

towards those who were invited to those talk shows as guests. Although it is unclear whether this shift resulted exclusively from RSN becoming a part of National Media Group, it offers a solid ground to claim that the ownership factor is likely to have contributed to the indicated change.

3.3.2 REN TV

Vladimir Putin. June 2010 and June 2012.

Regarding representation of Vladimir Putin in REN TV newscasts, I concentrate on a new type of analysis, which seems to me the most fruitful in this context—identifying what might be called frames in newscasters’ and reporters’ speech. In this study, by “frames” I understand quite the same as what Druckman (2001) calls “emphasis frames”—messages that focus on particular aspects or qualities of an issue or an event, thus simplifying reality in a way that portrays an actor of interest in a certain way. The reason is that the algorithm of identifying tone of mentions and recurring themes, that has been used so far, falls short to fully capture the complexity of the TV data and the character of changes observed in it. Still, I begin with laying out tone and themes ratios.

Category	Positive	Neutral	Negative	Overall
Newscasts	0	29	0	29
Topics				
Domestic Affairs	9			
Foreign Affairs	5			
Welfare, culture & sports	4			
Economy	11			

Table 5. V. Putin’s representation by REN TV in June 2010

All of twenty-nine items mentioning Putin in June 2010 them deal with routine issues of the prime minister’s work and do not involve any judgments or evaluations in newscasters’ and reporters’ narratives. No pieces containing frames are detected as well.

Category	Positive	Neutral	Negative	Overall
Newscasts	23	47	0	29
Topics				
Domestic Affairs	15			
Foreign Affairs	36			
Welfare, culture & sports	9			
Economy	10			

Table 6. V. Putin’s representation by REN TV in June 2012

In contrast, out of seventy news items from June 2012, almost one-third were assigned to the positive category. The prevalent thematic domain was foreign affairs, although this may be explained by a vast number of significant international events in which Putin took part during the period of observation, such as G20 and Shanghai Cooperation Organization summits. It is remarkable that among positive messages, thirteen were identified as containing at least seven frames (some of them appeared in more than one news piece). The narratives in the second period of observation (June 2012) were pronouncedly more lengthy and the language was often figurative, in many instances going beyond meagre factual reports. The following table itemizes the frames that were identified (for the original Russian quotations, see Appendix B).

#	Speaker	Original formulation	Context	Message implied
1	Reporter	<i>"In some sense this [the fact that Putin started a series of his official visits to foreign countries in Belarus] is a matter of pride for official Minsk. If it wasn't so, president Lukashenko wouldn't have gone against the protocol, coming directly to the ramp to meet the President".</i>	Vladimir Putin has started a chain of official meetings with the heads of European states by briefly visiting Belarus. President Lukashenko is known as the one who often practices minor deviations from the protocol to show hospitality, so this instance is not an exceptional occurrence.	Highlights the honors with which Putin was received by Belorussian leadership and speculates how proud they were. Putin is shown as an admired and influential actor in international arena. (Recurrent in 2 newscasts).
2	Newscaster	<i>"Francois Hollande supported Vladimir Putin's statement that a Syrian crisis has to be resolved politically. However, France will insist that Asad leaves his office. Russia has different priorities: its main objective is stabilizing the situation and securing peace".</i>	Presidents of France and Russia Francois Hollande and Vladimir Putin met to discuss the military conflict in Syria.	Hollande's position is juxtaposed to Putin in a manner implying that Hollande pursues political aims, while Putin wants just the peace, i. e. Putin's firm position is humane rather than strategic.
3	Newscaster	<i>"Today in Saint Petersburg Vladimir Putin stood up for the journalists against the EU authorities. Russian president, although in a diplomatic manner, let them know that they'd better not do that again".</i>	In course of the Russia-EU summit in Saint Petersburg, Putin recalled the episode that happened a few days earlier while he visited Berlin: the journalists of presidential pool for some reason were give one-day	Putin does not tolerate even the small instances of disregard from the Western partners, and he is always capable of stringently defending

			visas. The visit turned out to exceed 24 hours, and the journalists were worried about possible complications on border.	the interests of his compatriots. (Recurrent in 2 newscasts).
4	Reporter	<i>“In politics, just as in theater, the art of making a pause is crucial; sometimes silence speaks louder than words. State Duma hastily passed a scandalous rallies legislation, Council of Federation took less than an hour to approve it. And only President doesn’t introduce new laws in a rush. This one was signed only after two days”.</i>	A controversial law, introducing new rules of regulating mass actions and severely increasing fines for breaking them, caused a massive resentment in a society and the liberal media. After quickly passing both chambers of the parliament, it was expected to be signed by the president right away, but for two days it didn’t happen. This pause caused much confusion in public.	This piece explains a two-day pause in signing a controversial law, claiming that during that time it was carefully considered by Putin. Unlike other state institutions, such as parliament, he always takes deliberate decisions.
5	Reporter	<i>[A visit finished] by a traditional meeting with the military personnel. [They reported that] the salaries were paid accurately, and the service housing was provided. It seems like it is not only by means of combat equipment that Vladimir Putin is going to push the Air Force to the new level. By the way [speaking about the military equipment], the defense industry gentlemen, you’d better not infringe state contracts!”</i>	Putin visited the barracks of a detached helicopter regiment in Sebastopol to decorate a unit with an order. He gave a speech about the plans on further Air Force development, including supplying it with the newest aircrafts, and spoke to the personnel.	President Putin is the one who is responsible for significant improvement in welfare of the Air Force servicemen. He is also capable of forcing the defense industry to provide all the military equipment in due time (there were problems with that during Medvedev presidency). (Recurrent in 2 newscasts).
6	Reporter	<i>“On the first day of summit American president had his picture taken with Vladimir Putin”.</i>	Within a framework of G20 summit in Los Cabos, Mexico, Vladimir Putin had a meeting with Barack Obama, during which they were photographed together. In Russian language, this wording is usually used for situations when some ordinary person is photographed with someone significant or famous; in this case, sequencing in the sentence is crucial.	Barack Obama was greatly honored to be photographed together with Vladimir Putin. (Recurrent in 5 newscasts).
7	Newscaster	<i>“This event is no more called a “Russian Davos”, since it</i>	Introducing the Saint Petersburg Economic	Vladimir Putin is a key figure at any

		<i>is more prestigious. A number one person at Saint Petersburg Economic Forum will be Vladimir Putin”.</i>	Forum, the newscaster states that this event became more respected than its counterparts, since Putin was its “number one person”. However, the forum was officially presided by one of the ministers, while Putin just delivered an opening speech.	event he takes part in, irrespective of degree of his involvement.
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Table 7. Frames in V. Putin’s representation by REN TV in June 2012

As can be seen from Table 5, a considerable portion of reports that regarded President Putin and his activities (13 out of 70), contained evaluations and judgements that portrayed him in an advantageous manner. Most of them contributed to constructing his image as a powerful and well-respected figure in international politics, who advocates for the morally desirable settlement of international conflicts without any political strings attached, and is capable of securing the values and interests of Russia against any other power in the world. A number of opinionated pieces pertained to the domain of domestic issues as well, portraying the president as a person who always takes deliberate decisions and who is strong enough to make sure that his orders are properly enforced. Compared to June 2010, this is a considerable change in the way Putin’s image was framed. It shifted from mainly factual and neutral-tone messages to extendedly narrated and sometimes opinionated ones. The absence of any alternative opinions expressed by newscasters or reporters during the period of observation justifies the suggestion that this is an editorial position.

Alexey Navalny. June – December 2010 and June – August 2012

Over the span of six months of the first period of observation, from June to December 2010, Navalny received little coverage on REN TV air—only fourteen news items mentioned him. All those pieces pertained to the issue of corruption. Navalny was mentioned with regard to either the results of his anti-corruption investigations or to the launch of his new project RosPil—a web portal designed as a tool for monitoring and reporting cases of corruption.

Category	Positive	Neutral	Negative	Overall
Newscasts	5	9	0	14
Topics				
Whistleblowing activities	14			

Table 8. A Navalny's representation by REN TV in June – December 2010

Four news items which were identified as opinionated contained REN TV reporters' narratives praising the idea of this project and affirming that it was timely and necessary: *"The website was created not by professional corruption fighters, but by now-famous blogger and lawyer Alexey Navalny. For what reason? Because pensioners, doctors and school teachers struggle to survive, while the swindlers in power purchase another villa, yacht or God only knows what else"¹²*. Although fourteen news items is an insufficient sample to draw any inferences from, it is noteworthy that no negative comments or editorial opinions were detected, whereas positive editorial opinions were present.

The data from summer 2012 give more room for analysis. The agenda here is totally different from the 2010 sample: out of overall fifty items, thirty-eight deal with different investigative procedures that Navalny and his associates were being exposed to within a number of different criminal suits. The number of negative evaluations is significant, but positive ones are present as well.

Category	Positive	Neutral	Negative	Overall
Short factual	6	30	14	50
Topics				
Whistleblowing activities	2			
Political leadership	10			
Legal actions against Navalny	38			

Table 9. A Navalny's representation by REN TV in June – August 2012

It is also worth mentioning that Navalny and his adherents were often represented as speakers, commenting on the proceedings of legal activities. In total, the number of Navalny's

¹² REN TV, Novosti 24, 09.12.2010.

and his associates' comments that were aired amounted to twenty-three, whereas those who were critical of the opposition leader spoke only ten times. This is, however, compensated by the fact that REN TV newscasters and reporters on aggregate expressed more negative than positive opinions of Navalny.

All in all, Navalny and his supporters were not only given air as interviewees in the newscasts, but also appeared two times more frequently than those officials, public figures and experts who were critical towards the opposition politician. By no means does it resemble Navalny's complete elimination from the discussion of public issues that was observed in RSN air a year after the ownership change. As to the slanted judgements that were conveyed by REN TV newscasters and reporters, the negative ones seem to be dominant. However, this dominance is not overwhelming, and the share of positive judgements is considerable as well. This proportion might be explained by the character of the agenda: most of the news items reported on Navalny's criminal charges for swindling and embezzlement. More importantly, the presence of positive evaluations, as well as the array of speakers, suggests that there was no systematic bias against Navalny during the second period of observation, and his activities were covered more or less equally from all sides. There is no reason to claim that a year after the channel became a part of National Media Group, it became significantly more critical of Navalny or excluded him from the air.

3.4 Discussion

The findings of this study indicate that in both cases there was a change in editorial position in the expected direction. However, none of the outlets being considered showed a comprehensive shift in attitudes towards both Vladimir Putin and Alexey Navalny at the same time. In the RSN case, there was a difference between the way Navalny was covered, but little change was observed in Putin's representation. As to REN TV, it was other way around: whereas Putin enjoyed much more favorable representation after the change of ownership,

Navalny was still present in the air, and his activities seem to be covered without clear systematic bias. This suggests that there is at least no universal formula to predict what the policies adopted after the ownership change would look like: the content of the new equilibrium depends on multiple factors and is heavily dependent on the particular case. However, the simultaneous change of editorial political positions in two media outlets merged by National Media Group nearly at the same time provides solid grounds on which to argue that these mergers were motivated not exclusively by economic considerations, but by political ones as well.

There are also a number of problems with establishing causal relations between ownership change and shift in editorial stance by exclusively examining the media content. The first group of them pertains to the internal properties of the media organizations. Some editors and journalists are more resistant to external pressures than others and might not want to adopt the new policies that new owners seek to impose. The content produced by such outliers might distort the overall picture. Thus, it would be useful to complement the content analysis with looking at whether the ownership change was accompanied with a reshuffle of personnel, and who were the author and narrator of the content being analyzed.

The second group of concerns pertains to the measurement of editorial position. One of the biggest problems is the dynamics of political figures' public images over time: in 2010, Putin was prime minister, whereas in 2012 he was president. Navalny in 2010 was mainly associated with anti-corruption initiatives, while in 2012 it was more political activities and criminal cases against him with relation to which he was mentioned. The agenda that is dominant during the period of observation might also determine the tone of publications. However, in further studies, these shortcomings might be overcome by randomizing the samples of texts (for instance, by observing several periods) and expanding the number of key figures and issues analyzed.

Despite the abovementioned limitations, the qualitative analysis of media messages conducted in this study proved to be capable of capturing the essential change in media outlets' editorial positions. It has demonstrated that there was a difference in how key political actors were represented over time, and allowed for arguing that this change occurred as a result of media outlets' ownership change. These findings are largely consonant with the claims of the majority of Russian media system researchers, such as Becker, Khvostunova and Vartanova. As they have contended, in Putin era concentration of media ownership by the state served as an instrument for limiting pluralism of opinions, separating critics of the regime from large audiences, and representing the incumbent leaders in advantageous way. These effects were observed in media outlets that were acquired by a privately owned media holding, which is formally independent from the state. It provides evidence justifying claims of those scholars who have argued that corporate media ownership concentration, of which the National Media Group is an example, is merely another organizational form of consolidating state-controlled media outlets.

Conclusion

Using a combination of political economy analysis, which relied mainly on causal narrative, and media content analysis, I have attempted to revisit the problem of media ownership concentration in the contemporary Russian media system. Consideration of the extant theoretical approaches revealed that the dominant view of the media concentration in Russia considers it primarily as a means of reinforcing the political status quo by eliminating all viewpoints alternative to that of the state from the mass media with highest audience reach. While limited pluralism exists within the entertainment media sector, the coverage of politics and social life is monopolized by state-controlled organizations. Dominance of the informal norms and robust ties between political and business elites might make even private media corporations serve these political ends.

All these key points were supported by the findings in the current study. In accordance with Becker's neoauthoritarian media system model, it turned out that there was a sharp distinction between the two segments of the national TV industry. In the one that specializes solely in entertainment, rules of fair market competition and private and even foreign ownership are tolerated. The segment that delivers hard news turned out to be eventually fully controlled by the state through the gradual process of ownership concentration. This process unfolded in several stages, when the key TV audience changes coincided with the NTV network takeover in 2001 and the emergence of the National Media Group in 2008. The results of the national TV audience dynamics analysis were striking: as they have illustrated, since 2001, the state exercised financial control over broadcasters that delivered hard news to 92 per cent of the national TV audience; since 2008, this figure was never below 99 per cent. These findings suggest a straightforward answer to my first research question: throughout the period of observation, the state's strategic policy of broadcast media ownership consolidation resulted in seizing almost full financial control over the media outlets delivering hard news to

the majority of Russian television viewers. Therefore, Becker's notion of the establishing state control over television as one of the crucial features of neoauthoritarian media system might be specified: the state seeks to establish full and comprehensive control.

The results of media outlets' content analysis were also consistent with the theories advanced by the major Russian media system researchers. Both of the outlets that were fully acquired by the National Media Group exhibited recognizable shifts in coverage of major political figures in the way it was expected. This reinforces Khvostunova's claims regarding private media conglomerates such as NMG as merely proxies for pursuing the will of the authorities when it comes to the coverage of politics. Indication of such a shift suggests that the mechanisms of informal influences, whose efficacy was stressed by Vartanova, are actually at work. Combined with the pre-Putin TV history overview, it also provides evidence for Sparks' claims that in media systems like Russia's, both state and large corporate media concentration posit a threat to media pluralism and objectivity. Without proper checks on the exercise of communicational power, in both cases the media might become vulnerable to political instrumentalization.

In the current study, media content analysis was used to detect the change in editorial position as a result of ownership change in the context of the Russian media system. This experience suggested a number of methodological developments for further research. In order to better capture the ownership effects reflected in media content, data have to be collected from multiple periods of time, in order to compensate for the possible influences of the agenda that might be dominant during a single period of observation. It is also advisable to pay special attention to the dynamics of editorial staff, since one of the primary ways of influencing the content outcomes by the new owners is by replacing journalists and editors with those who are more likely to comply with the new requirements. On the other hand, it is possible that despite the pressures imposed by the new owners, the content produced by a

journalist representing the old team might not reflect the general shift in the editorial stance. Also, the robustness of the results of the current study might have been improved by supplementing the methods that have been used with expert interviews.

Yet, not all the findings could be explained by the theoretical frameworks at hand. Although the expected political slants were detected in the content of both REN TV and RSN, they were never present in the coverage of both the authorities and the opposition at the same time. In the REN TV case, for example, massive presence of the opposition leader Alexey Navalny as a speaker a year after the channel's full acquisition by NMG, contradicts the idea of full elimination of the government's adversaries from the air. Irregularities like this one suggest that the theory of the ownership concentration effects in neoauthoritarian media systems has to be refined. Explaining instances that do not follow the expected logic might be one of the directions of the future research on the topic. Other suggestions include expanding the scope of ownership concentration analysis to include other media industries such as radio, print press, and most importantly, electronic media.

Appendix 1: Top-20 national-level Russian TV channels' audience, 2000-2014

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
PERVIY KANAL	27,0	27,7	28,8	25,6	25,7	23,0	21,2	21,0	20,8	18,9	17,9	16,8	13,7	13,8	14,5
ROSSIYA	17,6	18,7	19,5	19,6	20,0	22,5	19,5	17,0	17,2	17,1	16,2	15,3	13,3	12,9	13,2
NTV	17,9	12,6	14,1	12,9	11,9	11,2	12,9	13,9	13,2	13,9	15,2	14,3	14,0	12,7	11,2
TNT	3,8	3,1	3,6	5,3	6,6	6,6	5,9	6,7	7,2	6,9	7,1	7,6	7,6	7,1	6,8
5 KANAL (active since 01.10.2006)	0,0	0,0	0,0	0,0	0,0	0,0	0,1	0,7	1,1	1,9	1,9	3,1	5,3	5,8	5,6
STS	5,2	6,3	6,6	9,1	9,8	10,3	10,2	8,8	8,8	8,8	8,4	7,5	6,7	6,6	5,8
REN TV	3,9	4,8	5,4	5,4	5,2	4,9	4,2	4,4	4,5	4,9	4,3	4,4	5,2	5,1	4,1
TV TSENTR	2,6	2,5	2,2	2,6	2,6	2,5	2,6	3,0	2,9	3,2	3,3	2,9	2,6	2,9	3,1
ROSSIYA 24 (since 29.01.2007)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,4	0,9	0,9	0,8	0,9	0,9	1,2	3,1
TV-3	0,0	0,0	1,7	1,8	1,9	1,9	2,3	2,3	2,8	2,8	2,4	2,0	2,5	2,7	2,5
DOMASHNIY (since 01.03.2005)	0,0	0,0	0,0	0,0	0,0	1,0	1,4	1,9	2,2	2,2	2,2	2,3	2,6	2,5	2,4
ROSSIYA 2 (since 26.07.2004)	0,0	0,0	0,0	0,0	0,9	1,8	2,5	1,9	2,1	1,7	1,9	1,9	2,3	2,3	2,3
ZVEZDA (since 27.03.2006)	0,0	0,0	0,0	0,0	0,0	0,0	0,3	0,7	1,1	1,3	1,7	1,6	1,8	2,1	2,3
DISNEY (since 31.12.2011)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	2,3	1,7	1,5
DTV VIASAT / PERETS (since 17.10.2011)	0,0	0,0	0,4	0,9	1,3	1,5	1,7	1,8	1,8	1,9	1,9	1,7	2,1	1,9	1,6
MTV / PYATNITSA (since 01.06.2013)	0,6	0,9	1,1	1,3	1,4	1,1	1,1	1,0	1,0	1,0	0,9	0,7	0,8	1,0	1,3
ROSSIYA KULTURA	0,6	0,8	1,5	1,9	2,3	2,5	2,5	2,4	2,1	2,0	1,8	1,7	1,6	1,6	1,3
MUZ TV / U (c 16.09.2012)	0,7	0,6	0,7	1,0	1,2	1,0	1,4	1,4	1,0	0,8	1,0	1,1	1,0	1,0	0,9
2X2 (c 01.08.2008)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,2	0,6	0,7	0,8	0,8	0,8	0,8
EURONEWS	0,0	0,0	0,0	0,1	0,2	0,2	0,2	0,2	0,2	0,2	0,2	0,2	0,2	0,2	0,2

Source: TNS Russia

Appendix 2: List of the quotations in Russian

Page number	Source	English translation	Original Russian formulation
24	V. Putin, Annual State of the nation address, 2000.	Economic inefficiency of the bulk of the media makes them dependent on their owners' and sponsors' commercial and political interests. It allows them to use the media as a tool of retaliation on their adversaries, and sometimes even make them a means of mass disinformation, a means of fighting against the state	Ведь экономическая неэффективность значительной части средств массовой информации делает их зависимыми от коммерческих и политических интересов хозяев и спонсоров этих средств массовой информации. Позволяет использовать СМИ для сведения счетов с конкурентами, а иногда – даже превращать их в средства массовой дезинформации, средства борьбы с государством.
41	K. Simonov. RSN, 11.06.2010	If we look at those figures separately from the overall data, a decrease of six to seven percent seems horrific. But if we look at the overall support rates – these figures are fantastically high. We have to look at the overall rates, which are high and solid	Если мы посмотрим цифры в отрыве от общих показателей, то падение в шесть-семь процентов выглядит чудовишно. Но если мы посмотрим на общие показатели доверия, то это цифры фантастически высокие. Надо смотреть на общие показатели поддержки, а они по-прежнему достаточно высокие и солидные.
41	Badovskiy. RSN, 11.06.2010	In summer there is traditional political demobilization, when people go on holidays. Plus, a pause might be caused by a certain leadership's strategy. In early 2011 a new electoral cycle starts, and then the support is to be mobilized. Right now there is no need in that.	У нас традиционно летом происходит определенная политическая демобилизация, когда все отдыхают. Плюс - пауза может быть связана и с определенной стратегией власти. В начале 2011 года начнется новый избирательный цикл, когда нужно будет проводить новую политическую кампанию, обращаться к обществу за поддержкой, мобилизовывать эту

			массовую поддержку. А сейчас в этом нет никакой необходимости.
41	S. Zheleznyak. RSN, 08.06.2012	For those people who take part in peaceful actions, there is no problem. For those who want to use these public events to organize the provocations, assaults, and disorders, the new norms are reasonable prevention measures.	Для тех людей, которые хотят принимать участие в мирных акциях, в мирном протесте, нет никаких проблем. Для тех, кто намеревается использовать мероприятия для организации провокаций, для нападения на людей, на организацию беспорядков, нормы являются здоровыми профилактическими мерами.
44	V. Goreglyad. RSN, 24.11.2010	I think that one of his rationales was to draw attention to himself by showing that the Auditing Chamber sues someone who lives in the US.	Я думаю, одна из целей и состоит, что обратить на себя внимание, что Счетная палата вступает в судебные процессы с неким человеком, проживающим в США.
44	M. Kononenko. RSN, 07.01.2011	“Aa new political leader”, who is “fresh and shining” and “interesting to watch”.	“Оформилось несколько новых политических лидеров”; “Навальный и Чирикова - они такие свеженькие, блестящие! Это очень интересно! Я буду на них смотреть”.
44	M. Maksimovskaya. RSN, 05.01.2011	Our Russian Assange (...), who publishes the materials that the public have to be aware of, but they are not.	Наш русский Ассанж - это блогер Навальный, который публикует материалы, которые должны знать граждане, но которые не знают
44	E. Chichvarkin. RSN, 10.12.2010	(...) continue lending himself to freedom of speech.	Я ему, честно говоря, желаю (...) служить дальше свободе слова.
47	REN TV reporter, Novosti 24, 01.06.2012	In some sense this [the fact that Putin started a series of his official visits to foreign countries in Belarus] is a matter of pride for official Minsk. If it wasn't so, president Lukashenko wouldn't have gone against the protocol, coming directly to the ramp to meet the President	В чем-то даже предмет гордости для официального Минска иначе не заявлял бы перед визитом премьер Белорусского правительства о том, что сильно волнуется. Да и не шел бы президент Лукашенко вопреки протоколу встречать Президента Путина прямо к

			трапу.
47	REN TV newscaster, Novosti 24, 02.06.2012	Francois Hollande supported Vladimir Putin's statement that a Syrian crisis has to be resolved politically. However, France will insist that Asad leaves his office. Russia has different priorities: its main objective is stabilizing the situation and securing peace.	Франсуа Олланд также поддержал заявление Владимира Путина о том, что сирийский кризис должен быть урегулирован политическим путем. Однако Франция будет настаивать на уходе Асада с его поста. У России другие приоритеты: главное - чтобы ситуация в стране стабилизировалась и наступил мир.
47	REN TV newscaster, Novosti 24, 04.06.2012	Today in Saint Petersburg Vladimir Putin stood up for the journalists against the EU authorities. Russian president, although in a diplomatic manner, let them know that they'd better not do that again.	Сегодня в Санкт-Петербурге Владимир Путин вступился за журналистов перед властями Евросоюза. Президент России, хоть и дипломатично, но дал понять, что так властям ЕС делать больше не стоит.
48	REN TV reporter, Novosti 24, 08.06.2012	In politics, just as in theater, the art of making a pause is crucial; sometimes silence speaks louder than words. State Duma hastily passed a scandalous rallies legislation, Council of Federation took less than an hour to approve it. And only President doesn't introduce new laws in a rush. This one was signed only after two days.	В политике, как и в театре, искусство держать паузу является одним из важнейших, и иногда молчание красноречивей всяких слов. Вот и Госдума так торопилась принять скандальный закон "О митингах", что заседала до полуночи. А Совету Федерации потребовалось на это меньше часа. И только Президент не принимает законы впопыхах. Вот и этот пролежал у него на столе 2 дня и только сегодня Владимир Путин его подписал.
48	REN TV reporter, Novosti 24, 14.06.2012	[The visit finished] by a traditional meeting with the military personnel. [They reported that] the salaries were paid accurately, and the service housing was provided. It seems like it is not only by means of	И традиционной беседой с военными. А как с зарплатой - выплачивают, а с жильем - выдали, служебное. Просто выводить авиацию на новый уровень Владимир Путин, кажется, собрался

		combat equipment that Vladimir Putin is going to push the Air Force to the new level. By the way [speaking about the military equipment], the defense industry gentlemen, you'd better not infringe state contracts!	не просто техникой (...) Кстати, господа из оборонной промышленности только попробуйте не выполнить оборонзаказ.
48	REN TV reporter, Novosti 24, 19.06.2012	On the first day of summit American president had his picture taken with Vladimir Putin.	А вот американский президент в первый день саммита сфотографировался с Владимиром Путиным.
48	REN TV newscaster, Novosti 24, 21.06.2012	This event is no more called a "Russian Davos", since it is more prestigious. A number one person at Saint Petersburg Economic Forum will be Vladimir Putin.	Его уже не называют "Русским Давосом", потому что он авторитетнее. Персоной №1 на петербургском форуме станет Владимир Путин.
51	REN TV reporter, Novosti 24, 09.12.2010	The website was created not by professional corruption fighters, but by now-famous blogger and lawyer Alexey Navalny. For what reason? Because pensioners, doctors and school teachers struggle to survive, while the swindlers in power purchase another villa, yacht or God only knows what else.	Сайт создан не профессиональными борцами с коррупцией, а теперь уже знаменитым блоггером и юристом Алексеем Навальным. Зачем? Затем, что пенсионеры, врачи и учителя находятся на грани выживания, в то время как жулики у власти покупают очередную виллу, яхту или еще черт знает что.

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