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RUSSIA

In 2015, the Russian government continued its march to re-establish Russia as one of the leading world powers—through support to self-proclaimed republics in Eastern Ukraine, a grand scale celebration of the 70th anniversary of the victory in World War II, and military action against ISIS in Syria. Fixation on the notion that Russia must withstand negative external pressure dominated internal policy. Active application of the law on foreign agents, adoption of the law on unwanted international organizations, the law limiting international ownership in Russian media companies, the law that requires media companies to report receipt of international funding to regulatory authorities—all aim to curb international influence on internal affairs.

The authorities leaned heavily on the state media—which dominates the Russian media sector—to promote their viewpoints. “The main function of media is to adequately inform society so that an informed public might control the authorities. At present, a majority of media is very effectively performing the absolute opposite task—feeding untrue information to the public, which gives authorities control over society,” said prominent Russian journalist Nikolay Svanidze in a lecture delivered in 2015.

The ability of independent media to inform the public is limited by a number of laws, including quite broadly interpreted anti-extremism provisions. In 2015, President Putin passed a decree that classified Russian military losses in peacetime during special operations as a state secret. Russian media lawyers noted that this decree seriously restricts the ability of media to cover the military.

The Russian economy was hit by a crisis triggered by EU and US sanctions imposed in 2014 as well as falling oil prices. The media sector suffered sharp blows: over the first nine months of 2015, television and radio lost 19 percent of advertising revenue, and newspapers lost 25 percent. Independent media, which do not receive state funding, were starved to the brink of survival.

With a handful of exceptions, Russia’s media sector does not score in the “near sustainability” range as measured by the MSI indicators. The only areas where Russia consistently meets many aspects of MSI indicators include free entry into the journalism profession, efficient facilities and equipment, production of news by private media, the availability of short-term training, and the development of ICT infrastructure. A number of indicators received scores in the “unsustainable” range. Libel is covered by the criminal code. Self-censorship flourishes. State media do not reflect the views of the political spectrum and serve the authorities rather than the public interest. Distribution of government subsidies and advertising are non-transparent, unfair and distort the market.

*Due to laws restricting NGO activity and contacts with U.S.-based NGOs, the participants in the Russia study will remain anonymous. This chapter was developed by a Russian journalist in December 2015 after a series of structured interviews with colleagues in the media sector.*

# RUSSIA at a glance

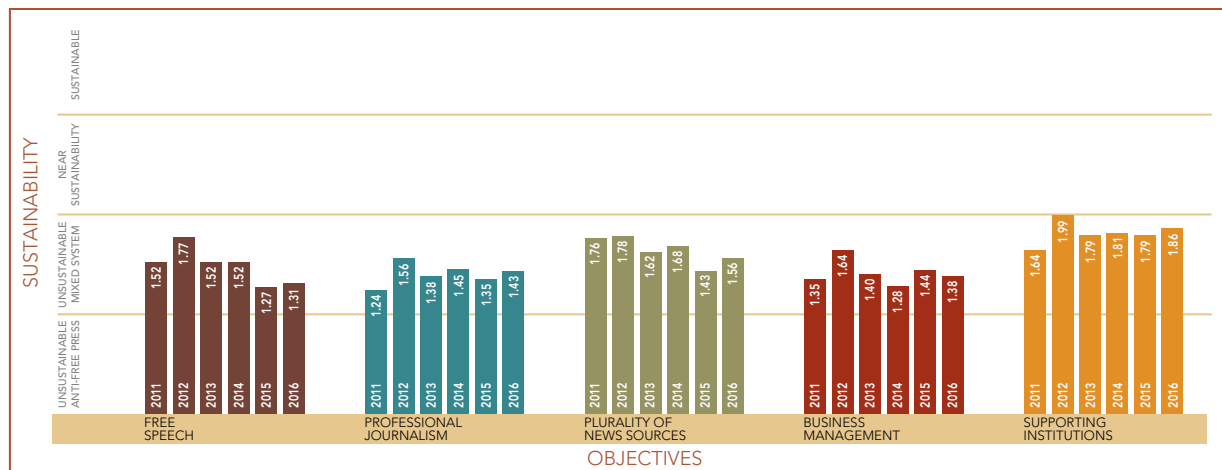
## GENERAL

- > Population: 142,423,773 (July 2015 est., *CIA World Factbook*)
- > Capital city: Moscow
- > Ethnic groups (% of population): Russian 77.7%, Tatar 3.7%, Ukrainian 1.4%, Bashkir 1.1%, Chuvash 1%, Chechen 1%, other 10.2%, unspecified 3.9% (2010 est., *CIA World Factbook*)
- > Religions (% of population): Russian Orthodox 15-20%, Muslim 10-15%, other Christian 2% note: estimates are of practicing worshipers; Russia has large populations of non-practicing believers and non-believers, a legacy of over seven decades of Soviet rule (2006 est., *CIA World Factbook*)
- > Languages (% of population): Russian (official) 96.3%, Dolganc 5.3%, German 1.5%, Chechen 1%, Tatar 3%, other 10.3% note: shares sum to more than 100% because some respondents gave more than one answer on the census (2010 est., *CIA World Factbook*)
- > GNI (2014-Atlas): \$1.931 trillion (World Bank Development Indicators, 2016)
- > GNI per capita (2014-PPP): \$24,710 (World Bank Development Indicators, 2016)
- > Literacy rate: 99.7% (male 99.7%, female 99.6%) (2015 est., *CIA World Factbook*)
- > President or top authority: President Vladimir Putin (since May 7, 2012)

## MEDIA-SPECIFIC

- > Number of active media outlets: Print: 25,781 newspapers, 31,714 magazines; Radio Stations: 3,182; Television Stations: 3,761 (Federal Agency for Press and Mass Communication, 2015)
- > Newspaper circulation statistics: Top three general interest daily newspapers by circulation: *Metro* (1.899 million), *Rossiyskaya Gazeta* (896,700), *Moskovski Komsomolets* (738,600) (TNS Russia National Readership Survey, May – October 2015)
- > Broadcast ratings: Top three national TV channels by audience Russia 1 (14.5%), Channel One (13.4%), NTV (10.3%) (TNS Russia TV Index, 2015)
- > News agencies: ITAR-TASS (state), Russia Today (state), Interfax (private)
- > Annual advertising revenue in media sector: RUB 209 billion (\$3.68 billion, Association of Russian Communication Agencies, 2014)
- > Internet Users: 84.4 million users (2014 est., *CIA World Factbook*)

## MEDIA SUSTAINABILITY INDEX: RUSSIA



## MEDIA SUSTAINABILITY INDEX 2016: OVERALL AVERAGE SCORES



### CHANGE SINCE 2015

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

**Unsustainable, Anti-Free Press (0-1):** Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

**Unsustainable Mixed System (1-2):** Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

**Near Sustainability (2-3):** Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

**Sustainable (3-4):** Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

Scores for all years may be found online at [http://www.irex.org/system/files/EE\\_msiscsres.xls](http://www.irex.org/system/files/EE_msiscsres.xls)

## OBJECTIVE 1: FREEDOM OF SPEECH

### Russia Objective Score: 1.31

Russia considerably meets only two out of nine indicators of the Freedom of Speech objective. Access to and use of local and international news and news sources as well as access to the journalism profession are not restricted in any way. But free speech is not valued. Access to public information is complicated. Libel is a criminal code case.

The Russian Constitution and the Media Law guarantees free speech on paper, and interfering with and obstructing the work of journalists counts as a criminal offence. At the same time, the society and even the journalism community do not place a high value on freedom of speech and media freedom. Many journalists believe that they should protect the interests of the state (that is, of the authorities rather than the country), and engage in propaganda rather than news, commented one of the panelists.

Sociologists, for example the director of the Levada-Center Lev Gudkov, report that over the past 25 years since the fall of the Soviet Union the structure of the government and major social institutions, including military, judicial, law enforcement and education systems, barely changed and mostly retained their totalitarian nature. Much of the society still feels the trauma of the loss of the powerful Soviet

#### LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

##### FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets' access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

state, and thus welcome any demonstration of power by the Russian authorities like "bringing Crimea back to Russia" or Russian military involvement in Syria.

The media sector also retained many characteristics of the Soviet times. A majority of media outlets belong to and are funded by the authorities, and serve government interests rather than the public. Few opposition and independent media outlets fit well into this system, and must operate under mounting pressure. Legal restrictions on media content continue to grow: media are not allowed to carry "extremist" materials, cover methods of producing drugs and committing suicide, or provide information about underage victims of violence. The law enforcement bodies interpret extremism quite broadly: for example, publication of World War II photos that include Nazi symbols can be considered Nazi propaganda. Two violations of these restrictions in the course of a year give media authorities the right to revoke the registration of the media and to bring the case to court, demanding the closure of the media outlet.

The authorities block online media and blogs for a number of reasons, including appeals to engage in unauthorized public meetings, riots and extremism. Publication of information about a planned meeting not authorized by the authorities can be interpreted as an appeal, and publication of a religion-related caricature can be interpreted as extremism.

The cost of non-compliance with the growing number of restrictions has also increased. Over the past three years, the size of fines that can be imposed on media outlets has soared up to 10 times as high, and several fines would be enough to close a small media outlet.

Media lawyers express concern that the increasing number of restrictions on media appear politically driven. "Extremism and inciting hatred were never allowed, but now the *Roscomnadzor* (the agency that oversees Russian media) is ready to qualify a caricature featuring religious figures as manifestation of extremism...At the same time, outside of the political news domain, free speech is unrestricted: there are no legal barriers to critical television programs like *Revizorro* (which shows negative aspects of restaurant and hotels operation)," said Olga Pleshanova, head of the analytical department of the legal company *Infralex* in a *Kommersant* interview.<sup>1</sup> Several panelists also noted that the media have more freedom to cover topics that do not intersect with the priority interests of the authorities.

<sup>1</sup> "Смирительные Законы." *Media Rights Protection Center*. Jun. 4, 2015. [www.mmdc.ru/news-div/site-news/smiritelnye\\_zakony/?year=2015&month=6](http://www.mmdc.ru/news-div/site-news/smiritelnye_zakony/?year=2015&month=6)

The Russian people are more concerned about their economic well-being than political freedoms, including free speech. In the course of the 2015 survey conducted by the Levada Center, 46 percent of Russian citizens said that they would be ready to forego free speech and the right to travel abroad without restrictions if the state guaranteed them decent salaries and pensions.

According to the joint study conducted in 2015 by the Center for Global Communications Research and Russian Center for Public Opinion Research, 49 percent of Russian citizens believe that Internet content including foreign media (45 percent of respondents) and other foreign websites (38 percent) should be censored, while only 10 percent said that Internet should be free from censorship. This correlates with the fact that 42 percent of respondents believed that foreign states were using the Internet against Russia. If access to Internet was blocked, most of the respondents would not see it as a violation of their rights but a complication of communications with family and friends and the purchase of goods. "Russian society has one peculiar feature. When it comes to free speech and political rights, a majority of citizens support them to some extent. But as soon as people get the feeling that democratic freedoms may become a threat to the country's stability, Russians are ready to accept restrictions to these freedoms," commented Tatiana Stanovaya of the Center for Political Technologies.<sup>2</sup>

Registration of print media is straightforward and transparent. Anyone can file an application with *Roscomnadzor*, and pay a registration fee. A registration fee for national print media is RUB 6,500 (less than \$100), or RUB 3500 (about \$50) for regional media outlets. However, amendments to the Media Law, which went into effect January 1, 2016, prohibit foreign citizens and companies as well as Russian companies with foreign ownership to register and run media in Russia as well as to own more than 20 percent of shares of a media outlet. Previously, the only limitation applied to foreigners was that they could not own more than 49 percent of shares of national television and radio stations. According to *Roscomnadzor*, these amendments should have affected about 150 television and radio stations and about 1,000 print media.<sup>3</sup>

Licensing is required only for broadcast media. There are very few independent television and radio stations that offer news programming. TV2, an independent television company from Tomsk, Siberia, lost its license near the end of 2014, after it was denied access to a state-owned

transmitter. In 2015, the independent Crimean Tatar community television channel *ATR* was denied a Russian broadcasting license and had to halt regular broadcasting, and closed its office in Simferopol (it now broadcasts via satellite from Kiev). As a result, the Tatar-language news options in Crimea were reduced considerably. These facts indicate that licensing of broadcast media are not apolitical and do not serve the public interest.

The government requires media outlets to register as businesses. Market entry is unlimited, except for foreign-owned media companies. These limitations became effective in 2016, but caused many major foreign publishing houses to leave Russia in the course of 2015. In addition, in 2015 Russia adopted a law that requires all media to report to authorities any funding received from international or foreign organizations as well as Russian NGOs recognized as foreign agents.

Before 2015, Russian media enjoyed some tax breaks, e.g. they had to pay smaller social tax on staff salaries. In 2015, the government took away these perks. Overall, panelists who own and manage media outlets consider the taxes they pay fair. At the same time, the independent media face unfair competition from state-owned media that receive funding from the state budget but also draw revenue from advertising and circulation sales.

In 2015, the Glasnost Defense Foundation registered three cases of journalists who were murdered or died from injuries after violent attacks (two in Crimea and one in Khakassia). There were 65 registered cases of assaults on journalists and bloggers and two cases of damage to the offices of media outlets (one in Crimea, where the office of the Tatar language *Yany Diunya* was looted, and one in the Ivanovo region, where the office of *Rodnaya Nova* was set on fire). Most often journalists, especially television crews, are attacked in the process of collecting information.

Crimes against journalists do not stir public outcry, and largely go unnoticed. The panelists expressed concern that crimes related to professional activities of journalists are not investigated vigorously—a concern shared across the Russian journalism community. For example, in November 2015 one of the delegates of the III Media Forum of the Northern Caucasus region reminded participants that none of the murders of prominent journalists in the region were investigated and prosecuted.

Russian laws do not differentiate between state and private media, and equally protect their editorial independence. In reality, state media are controlled by authorities and serve their interests by presenting only their point of view. In February 2015, the Glasnost Defense Foundation reported that journalists working for the regional state newspaper

<sup>2</sup> Stanovaya, Tatiana. "Inside the Anti-Freedom Networks." *Institute of Modern Russia*. Aug. 10, 2015. <http://imrussia.org/ru/аналитика/политика/2376-в-сетях-несвободы>

<sup>3</sup> "Restricting Foreign Participation in The Russian Media." *Roscomnadzor*. 2015. [http://rkn.gov.ru/docs/1Prezentacija\\_seminar.pdf](http://rkn.gov.ru/docs/1Prezentacija_seminar.pdf)



*Murmansky Vestnik* wrote a letter to the Murmansk regional legislature complaining that editorial materials were reviewed and vetted by the regional administration. After this review, some editorial materials were never published, and some were changed without the approval of their authors.

Libel is a criminal code case. Libel is not punished by prison sentences, but an offender faces a fine ranging from RUB 0.5-5 million (while the average salary in Russia is about RUB 33,000 per month) or 160-480 hours of community service. "But public officials rarely lodge libel cases against journalists. They prefer to use defamation laws, because they place the burden of proof on the media and allow claims for financial compensation for moral damage," commented one of the panelists. In 2014 in Russia, there were about 1,000 defamation cases lodged against journalists. "We faced a couple defamation cases this year, which is the about the same as in the previous years, said one of the panelists, the editor of an independent online media outlet. The courts handle the cases very professionally and without prejudice; we have not lost a single case."

Journalists have preferential rights of access to information: public officials have to respond to their requests for information within seven days, while they are allowed 30 days to respond to requests from citizens. Information about public budgets and procurement is now available online, which to some extent has improved access to information. But problems remain. The panelists were concerned that responses to media requests for information are often very perfunctory. It is very difficult to obtain a commentary from public officials, and journalists are requested to go through press offices. Authorities often give preferential access to information to loyal media and bloggers. "There are several bloggers in our city. If they are loyal to police, they get information easily," while outlets deemed disloyal do not fare so well, commented one of the panelists.

Journalists, especially those working for independent media, are regularly denied accreditation by state agencies. In 2015 the All-Russia People's Front, a coalition of Russian NGOs led by President Putin, started the review of accreditation practices used by regional and municipal authorities. For example, they found that the legislature of the Ryazan region did not have any rules for media accreditation, leaving it up to the heads of committees to allow or deny journalists access to committee meetings. The administration of the Belgorod region had accreditation rules, but these rules limit the number of journalists who can get accreditation to 30 people and grant the press office the right to deny accreditation to thematic media, in violation of the Media Law.

Media access to local and international news sources is unrestricted. Media are allowed to reprint and rebroadcast news from both local and international media. In some media, a significant share of content is made of reprinted materials. Online media encourage users to share their materials via social networks. Thus, the corresponding indicator received one of the highest scores under the Freedom of Speech objective.

Entry to the journalism profession is free. The entrance to journalism schools is not controlled and is based on merit. Journalism education is not a prerequisite for getting journalism and editorial jobs. But several panelists were concerned that introduction of the state-approved professional standards for journalists and editors in 2016 may change this situation.

## OBJECTIVE 2: PROFESSIONAL JOURNALISM

### Russia Objective Score: 1.43

Russia considerably meets only two out of eight indicators of the Professional Journalism objective: coverage of key events and issues, and modern and efficient facilities and equipment for gathering, producing, and distributing news. But in the state media—which make up the bulk of the media—reporting is not fair, objective, and well-sourced, and self-censorship is flourishing.

The Russian media sector is divided into three uneven parts. A vast majority of media outlets belong to the authorities and pro-government businesses. They operate as a propaganda branch of the state, and present only state point of view. There is a small group of oppositional media that present an alternative the point of view. "Oppositional media were more visible this year," noted one of the panelists. "They write about themes and topics that are not covered by state media. Yet they are also biased, because they present only the part of the story that is not covered by state media."

Another small group is made of independent private media, both national and local, that adhere to principles of fair, objective, and well-sourced journalism. Practicing this kind of journalism in Russia is difficult. "It is easier now than it was the Soviet times, but still it is very difficult. I have already told many times—and have irritated some people by doing so—that at present there is no journalism in Russia. There is no fourth estate that would really influence the situation and draw attention of authorities to the things that go wrong. Practicing journalism is difficult, given that the officials are somewhat authoritarian and directly or indirectly control media," said Vladimir Pozner, one of the

most prominent Russian journalists, in October 2015.<sup>4</sup> “The segment of independent media is shrinking. But the quality of journalism in this segment is getting better, because people understand that reputation is invaluable,” noted one of the panelists.

One of the concerns raised by panelists this year was that many journalists engage in politics and openly express their political opinions, especially through their blogs and in social media. Another concern was that because of declining advertising and circulation revenues, media outlets had to lay off journalists and reduce their working hours. This has already had a negative effect on the quality of materials in small local media. The content of local state newspapers is comprised mostly of press releases coming from state agencies, often taken verbatim. Small independent newspapers still try to cover all sides of the story, but their number of sources is dwindling.

In 1994, the Russian Union of Journalists established the Russian Journalist’s Professional Ethics Code, which is in line with ethical standards developed by international professional journalist associations. There is a jury tasked to settle ethical conflicts within the journalist community. At the same time, many journalists are not even aware about the existence of this code, and the overall observance of ethical standards in the media is low. “Ethics is unpopular because Russian journalists stopped caring about their reputation. Journalists either do not give it a thought, or work under conditions where their reputation does not

<sup>4</sup> “Просто в Париже мне комфортней.” Lenta.ru. Oct. 15, 2015. <http://lenta.ru/articles/2015/10/15/pozner/>

#### JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

##### PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well-sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption and retain qualified personnel within the media profession.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exist (investigative, economics/business, local, political).

matter,” commented one of the panelists. “When journalists work in propaganda, they become partisan, in clear violation of professional ethics,” said another panelist.

Self-censorship has become a common practice. “Journalists more and more try to play it safe and avoid the most important topics,” commented one of the panelists. Another panelist noted the economic reasons for self-censorship: “Local newspapers can openly criticize federal authorities. But they are careful when they cover the local situation, because local authorities can create economic troubles, e.g. reduce funding, for them. On the other hand, national newspapers, for example state newspaper Rossiyskaya, periodically publishes critical materials about regional governors, but would never criticize federal authorities.” The corresponding indicator received the lowest score in Objective 2.

The panelists were evenly split on whether journalists cover all key events and issues in the country. But they all agreed that this coverage, especially in national media, is largely one-sided and serves the interests of authorities. Media is used to move the focus of public attention from internal issues like high inflation and the declining economy to the situation in Ukraine and Syria. “Media cover what authorities want them to cover. A lot of social issues like health care, education and social services are not covered, said one of the panelists. However, at the local level, the situation is better. Even municipal newspapers cover most of the local problems. And this is the result of the influence of the local independent media, according to the panelists. At the same time, there are events that are completely ignored by the state media. For example, near the end of 2015 the Anti-Corruption Foundation, run by opposition activist Alexey Navalny, published a report and a video that presented findings of an investigation into suspected illicit actions of Russian Attorney General Yuri Chaika and his family. Major independent media and some independent media outlets in the region covered the report, which was also widely circulated on the Internet and on social media. More than four million people watched the video within a month after it was posted on YouTube. The state media ignored the report.

Panelists did not see a direct connection between the level of pay and corruption; they believe that corruption depends instead on the editorial policies of media outlets. The pay levels for media professionals vary considerably. National media based in Moscow pay considerably better than media outside the capital. In 2015, the website planerka.org analyzed the salaries offered by media outlets seeking to hire journalists and editors. The average journalist received a salary of RUB 22,800 per month, while editors on average received RUB 30,600. This falls below the average Russian salary of about RUB 33,000 per month in 2015. In Moscow,

salaries are considerably higher. The average salary offered to a journalist in Moscow was RUB 42,900 per month, RUB 45,200 for an editor. But these salaries are lower than average salaries in Moscow of about RUB 63,000. “The differences in salaries of journalists are very high. Over the past several years, I see a consistent trend that experienced journalists leave media to take jobs in press offices where pay is higher and the level of stress is lower,” commented one of the panelists.

Several panelists also noted that in the course of 2015, declining revenues forced many media outlets to lay off journalists or reduce them to part-time. Some journalists who lose their jobs in media turn to blogging and try to make their living by placing paid ads in their blogs.

The amount of news content on television and radio is increasing, but panelists expressed concern that it is often pseudo news disguising state propaganda. “Television channels have launched more political and news-related talk-shows. But this is propaganda rather than real discussion of news. Authorities need to make citizens to see the world their way. As the economic and social situation in the country gets worse, they need to draw the public attention away. And new programs serve this purpose. They do not talk about retirement benefits, health care or education; they focus on what happens abroad,” commented one of the panelists.

In 2015, the propaganda television talk shows became more sophisticated. “Initially they were quite simple and provided only a singular point of view, ignoring the alternative ones. Now, the approach has changed. On every show, there are one or two guests that present an alternative to the official point of view. And these are smart people who can present their point of view well. But as the television hosts and all other guests are against them, they always appear to lose in the discussion,” noted prominent Russian journalist Nikolay Svanidze in a lecture delivered in 2015.<sup>5</sup>

Russian media have sufficient facilities and equipment for production and distribution of news. Due to the development of new technologies, equipment for news production became affordable. Smartphones help journalists produce and distribute news effectively, noted the panelists. Another panelist noted that the costs of website development have decreased dramatically.

Quality niche reporting exists, but it is rare. “Quality analytical reporting is possible only under conditions of editorial independence, but independent media are few,”

<sup>5</sup> “The Journalist Nikolai Svanidze: Major Media Have Taken on the Role of the Ideological Department of the Central Committee of the CPSU.” 7x7. Jul. 15, 2015. <http://old.7x7-journal.ru/item/63774>

“The segment of independent media is shrinking. But the quality of journalism in this segment is getting better, because people understand that reputation is invaluable,” noted one of the panelists.

noted one of the panelists. “There are some journalists who specialize in certain topics, but most of them report very superficially. Even theater and book reviews are declining,” said another panelist.

Investigative reporting is also rare because it is time consuming and expensive. The very concept of what constituted investigative reporting is diffuse. Criminal reporting, tabloid/paparazzi journalism, and coverage of the results of investigations conducted by law enforcement agencies are often seen as types of investigative journalism. Sometimes the “limits” are stretched even more, e.g. to include “investigations” of paranormal phenomena.

Still, there are journalists who deliver high-quality investigative reports. For example, *Pskovskay Gubernia* investigated the story of Russian paratroopers who died in combat in Ukraine and were secretly buried in Pskov, and a journalist from St. Petersburg investigated an abandoned nuclear waste site in the Leningrad region.

### OBJECTIVE 3: PLURALITY OF NEWS

Russia Objective Score: 1.56

Russia considerably meets three out of eight indicators of the Plurality of News objective: citizens’ access to domestic or international media is largely unrestricted, private media produce their own news, and media cover local, national, and international issues. But state media, which make up the majority of Russian media, serve the authorities rather than the public interest. Still, some alternative viewpoints can be found in independent media, mostly print, online, and on social media channels.

According to *Roscomnadzor*, there are about 80,000 media outlets in Russia—including television, radio, print and online. Through Russian Post, people can subscribe to about 15,000 newspapers and magazines. According to Yandex research, there are 4,500 online media. In 2015, one of the major national cellular companies launched a service that offers mobile users access to e-versions of newspapers.



**“At present, civic discussions are concentrated on Facebook. But social networks considerably diffuse this discussion, as it is more difficult to create a discussion platform. The groups are separated, and discussions continue within groups of friends.”**

Research conducted by Levada-Center shows that about 50 percent of Russian people do not have access to sources of alternative viewpoints, and rely only on information provided by state-owned federal television channels. Approximately 30-40 percent of people have access to media presenting alternative viewpoints, and 10-15 percent use only independent media, according to this research.

Levada-Center also reports that television remains the main source of information for Russian people: 45 percent watch television news and analytical programs on a regular basis, and 47 percent do it occasionally. For about half of the Russian population, television is the only source of information: 46 percent never or rarely read news online, 52 percent do not listen to news programs on the radio, and 58 percent do not read newspapers. Among television channels, people usually watch news at the four state-owned channels: Channel One (78 percent), Russia-1 (66 percent), NTV (51 percent) and Russia-24 (41

percent). In the radio sector, key sources of news also belong to the state: Radio Russia (15 percent) and Mayak (15 percent). Only nine percent of the population report listening to Echo of Moscow, the oldest Russian radio station that offers a plurality of viewpoints, for news. In the print sector, the major sources of information are private national newspapers Argumenty & Factly (20 percent) and Komsomolskaya Pravda (11 percent), while 19 percent of people get news from local newspapers. The main online source of news is YandexNovosti (27 percent), which aggregates news from online news sources.

One of the panelists noted that four major state television channels that receive both state funding and advertising revenue provide programs of a very high technical quality, creating high audience expectations in this respect. Independent television channels like Dozhd in Moscow and regional outlets that must operate under serious financial constraints fall short of these expectations and lose the audience.

Another panelist noted that since 2012, blogs were progressively filling a role as the source of information to social networks: “At present, civic discussions are concentrated on Facebook. But social networks considerably diffuse this discussion, as it is more difficult to create a discussion platform. The groups are separated, and discussions continue within groups of friends.”

Access to domestic and international media is not restricted. A majority of panelists believe that Russia considerably met the corresponding indicator. People in major cities still have better access to media than people in the rural areas, but falling costs of Internet subscriptions (including mobile Internet) and mobile devices that allow for Internet access helps to reduce this gap. According to the Public Opinion Foundation, 66 percent of Russians go online at least once a month. In urban areas, Internet access is about 70 percent (75 percent in Moscow and St. Petersburg); in rural areas, it is 55 percent.

Still, Levada-Center data shows that relatively few media consumers (10 percent in Russia in general and 21 percent in Moscow) seek information from several (more than three) independent sources, which would allow them to compare information. One of the panelists, the director of a regional private media house, noted that in 2015 more people became interested in analytical materials: “I see that more people are reading long texts on our website. As the text provides analysis of the economic situation in the region or regional strategy, there are more people who read it and read the whole of it.”

Several panelists noted that language could be a barrier to access to foreign media. People with lower incomes also face

#### MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

##### PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens’ access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources
- > The media provide news coverage and information about local, national, and international issues.

economic barriers to access media. Levada-Center research to some extent supports this: the share of affluent people (those who can afford expensive consumer goods) is higher among those who use several sources of information: 65 percent compared to 40 percent for all of the population.

State media does not reflect the views of the political spectrum and engages in propaganda rather than news production. A majority of panelists believe that Russia did not even minimally meet the parameters of corresponding indicator, giving that indicator the lowest score for Objective 3. There is public television, but it “does not cover politics. They cover culture, education. This is a nice channel, but it is absolutely apolitical,” commented one of the panelists.

Major national news agencies Russia Today and ITAR-TASS belong to the state and are not editorially independent. They are well equipped and provide a variety of services, including high quality video and infographics. Services are available both by subscription and on ad hoc basis. Various media outlets, including independent outlets, use their services; Russia Today and ITAR-TASS also have websites open to the public.

“There are quite a few news agencies in the regions. But they do not distribute news by subscription. And it is difficult to know if they are editorially independent. State media holding companies in regions now establish their own information agencies, but they definitely do not provide objective news,” said one of the panelists. These news agencies usually operate as online media and don’t provide news by subscription. Another panelist noted that there were several cases when independent media outlets had to close their print editions due to declining revenues, they turned into online news agencies. The independent TV2 that lost its television license in the end of 2014 maintained part of its editorial team to produce new via TV2 online news agency.

A majority of private television channels in the regions operate as partners of national television channels and rebroadcast their programs. Still they usually produce their own news programs with regional and local news. The same is true for private radio stations. Private newspapers, both national and local, also produce their own news. The content of private independent local media differs considerably from that of the state media, and often these media are the main source of alternative news and viewpoints in their markets. A majority of panelists thought that Russia met the corresponding indicator. Its score is the highest for the Plurality of News Objective.

The state is the major media owner in Russia. “The state has consolidated control over all major media—at the federal, regional and municipal levels. And the information function of these media was reduced to relaying the point

of view of authorities and state companies,” commented one panelist. All-Russian State TV and Radio Company owns five national television channels, plus five national and more than 80 regional radio stations. The state also owns 51 percent of shares of television Channel One, national newspapers *Rossiyskaya Gazeta* and *Parlamentskaya Gazeta*, and two major news agencies. Gazprom-Media holding company, a subsidiary of the state Gazprom company, owns national television companies NTV and TNT, satellite television company NTV-PLUS, five radio stations including Echo of Moscow, Publishing house Seven Days, and online video hosting platform Rutube. National Media Group, the largest private media holding company owned by state-affiliated businesses, has a stake in Channel One (25 percent), TV and Radio Company Petersburg – Channel Five, national REN-TV (68 percent), the national *Izvestia* (73.2 percent), radio *Russkaya Sluzhba Novostey* (100 percent), and *METRO-Petersburg* (100 percent).

As mentioned above, in late 2014, Russia adopted a law limiting foreign ownership in Russian media companies to 20 percent, and the law went into effect January 1, 2016. As a result, in the course of 2015 foreign publishers were selling their Russian media assets. For example, Bonnier Group sold 80 percent of its shares of Delovoy Petersburg to the Russian company Fort Group, which runs 11 trade centers in St. Petersburg. Fort Group is owned by Maxim Levchenko and Boris Paikin. The latter worked at the head of one of Gazprom’s subsidiaries until 2013. In 2015, Delovoy Petersburg reported that owners of Fort Group were close to Gazprom management and Russian authorities. Axel Springer sold its Russian subsidiary that publishes *Forbes* as well as several glossy magazines to Russian businessman Alexander Fedotov. In an interview to RBC, Fedotov said that *Forbes* was too politicized and he wanted it to adjust its focus and cover only business and economic issues and avoid political topics.

Ownership of small local media is less transparent, but media consumers are not interested in this kind of information. “Nobody cares. The information culture of the majority of the population is low, and people do not pay attention to this kind of thing,” commented one of the panelists.

Russian media also do not reflect a broad spectrum of social interests. “The spectrum is rather limited. Media predominantly focus on the activities of authorities. The coverage of issues such as gender and minorities are plagued with stereotypes. Even where there are minority language media, their distribution is restricted to the minority covered and they never reach to the rest of the population,” commented one of the panelists. “A variety of social interests is reflected only minimally. A broad spectrum is reflected by social media, rather than regular media.

There are several reasons for this, including propaganda and political engagement, so there is no space left for other things,” noted another panelist.

In Russia, to a certain extent due to the size of a country made of 85 regions, there is a traditional “division of labor” between national and local media. The former focus on national and international news, while the latter cover mostly local news and issues. As a result, people have very little information about events in other regions. Coverage of international news is patchy and one-sided. In 2015 international news coverage focused on Ukraine, the Russian military operation in Syria, and the conflict with Turkey over the Russian warplane shot down near the border with Syria.

#### OBJECTIVE 4: BUSINESS MANAGEMENT

Russia Objective Score: 1.38

Russia does not considerably meet any of seven indicators of Objective 4, according to the panelists. In 2015, the whole media sector suffered from the economic crises that started in 2014 after the US and EU imposed economic sanctions against Russia, and the situation worsened in 2015 because of rapidly falling oil prices. In 2015, the Russian economy fell by about four percent, and national currency considerably depreciated; demand for consumer goods fell by about 10 percent. Advertising sales fell even more. According to the Association of Russian Communication Agencies, over the first nine months of 2015 television and radio lost 19 percent

#### MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

##### BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

of its advertising revenue, while newspapers lost 25 percent. The Association of Press Distributors, meanwhile, reported that newsstand sales dropped more than two percent, and subscription sales decreased by six percent. Newspapers also faced rising newsprint costs and the growth of subscription distribution costs as the state discontinued subscription subsidies the Russian Post, the major subscription operator in Russia.

These negative developments considerably undermined the economic viability of independent media outlet, driving them to the edge of survival. Many media had to lay off staff or reduce their working hours. Several publishers discontinued production of newspapers and retained only online media.

“All media outlets that do not belong to the state or oligarchs have to operate efficiently, because they need to make money to sustain themselves. These media prepare and follow business plans, and hire highly qualified professionals. But these media are a minority,” noted one of the panelists. State media, which make up a majority of the media sector, are less concerned about efficiency. A majority of panelists believe that Russia did not considerably meet the corresponding indicator.

In the course of 2015 the sources of media revenue were drying up. “Before the crisis the situation was okay, but now it is getting progressively worse. We are rapidly losing sources of revenue,” commented one of the panelists, the head of small local independent newspaper. “Local businesses that were our main source of advertising revenue are closing down. We just do not have advertisers any more,” noted another panelist.

Many print media also lost circulation revenue. For example, according to Association of Press Distributors, the independent *Vedomosti* lost 20 percent of its subscription circulation, while the state *Rossiyskaya Gazeta* lost 11 percent. At the same time, some independent local newspapers managed to retain circulation, even though they had to increase copy prices.

In 2015, the Russian advertising market was negatively affected by economic crisis and restrictions imposed by government, e.g. the ban of advertising on paid television channels. There are estimates that because of legal restrictions in 2015, only federal television channels have lost about RUB 50 billion of advertising revenue.<sup>6</sup> And Russian

<sup>6</sup> Druzhinin, Andrey. “Advertising Market 2015-2016: Results and Prospects.” Sostav.ru. Dec. 29, 2015. [www.sostav.ru/publication/reklamnyj-rynok-2015-2016-itogi-i-perspektivy-20487.html](http://www.sostav.ru/publication/reklamnyj-rynok-2015-2016-itogi-i-perspektivy-20487.html)

legislators came up with new initiatives to impose more restrictions on media advertising, including proposed bans on advertising of processed food products and pharmaceuticals.

In the course of 2015, the structure of advertising content changed. While the advertising of food brands fell by 22 percent, beauty goods by 30 percent, and soft drinks by 15 percent, pharmaceutical companies hardly cut their advertising and became the leading advertisers in Russia. Ads of pharmaceutical products now account for about 20 percent of advertising market, retail companies. According to TNS, the top Russian advertisers are global companies: Novartis, Mars Russia, Procter & Gamble, PepsiCo, Reckitt Benckiser. Major Russian advertisers include pharmaceutical companies and mobile operators.

The only growing segment of the market is contextual advertising (up 17 percent over the first nine months of 2015). The most problematic segment of the market is print media. Advertising specialists believe that the problems in this segment could be attributed to the lack of cooperation between print media, inadequate pricing policies and deficiencies in working with advertising agencies and clients.<sup>7</sup>

According to the Association of Russian Communication Agencies, the Russian advertising market is controlled by 10 major advertising agencies that are part of five global advertising groups. In 2014, these 10 agencies managed 65.3 percent of all advertising budgets.<sup>8</sup> On the local markets, advertising agencies play a less prominent role. According to one of the panelists they account for 7-10 percent of the market, so media outlets directly market themselves to advertisers.

The amount of advertising in Russian media is legally restricted: it cannot exceed 15 minutes per hour on television, 20 percent of air time per day on the radio, 40 percent of space in non-advertising print publications. Declining advertising and circulation sales revenues force media managers to seek other sources of revenue, including government subsidies.

In 2015, the Russian budget allocated about RUB 398 million for subsidies to print media to support their social projects. RUB 83 million were earmarked for national press, and RUB 270 million for the regional and local press. Subsidies were to be distributed on a competitive basis by the Russian Press

Agency. As of October 2015, the Agency had disbursed RUB 286 million for 719 social projects of 547 print media. According to one of the panelists familiar with the process, the competition for these subsidies was transparent and fair. At the same time, All-Russia People's Front publicly raised concerns that the application procedure was too complicated and laborious, deterring many small media from applying.

Panelists also expressed concern about the so-called information service contracts that authorities make with media. In essence, under these contracts media produce advertorial materials covering the activities of authorities. The content of these materials is usually approved by state press offices. But when these materials are published or go on air, they are usually not marked as advertising or advertorials. "Information service contracts are the most common type of subsidy to media at present. The awarding of these contracts is non-transparent and plagued with corruption, and it undermines the economic viability of the media that do not apply for them," noted one of the panelists. The corresponding indicator received the lowest score within Objective 4.

Marketing research is used mostly by large national media companies that work with major advertisers and advertising agencies. "Large sustainable media-holding companies commission and use marketing research, while the rest of the media do not ... State companies do not really need this kind of information, because they receive money from the state budget regardless. And private media cannot afford marketing research," commented one of the panelists.

TNS Russia and Synovate Comcon are two major players in the media measurement market. Both measure television and radio broadcast ratings and press readership. Their data is recognized by advertisers, but media outlets show more suspicion. One of the limitations of the existing media measurement system is that it covers only cities with a population above 100,000 people.

Print run figures are controlled and verified by the National Circulation Service and Circulation Audit Bureau. The National Circulation Service publishes a blacklist of media outlets that overstate their circulation numbers. In 2015, about 960 Russia print media certified their print runs. At the same time, nobody verifies the circulation sales, which is seen as one of the limitations for advertising in press.<sup>9</sup>

<sup>7</sup> Druzhinin, Andrey.

<sup>8</sup> "10 Largest Agencies in Russia Control More than Half of Advertising Budgets." *Vedomosti*. Jul. 14, 2015. [www.vedomosti.ru/technology/articles/2015/07/14/600435-10-krupneishih-agentstv-v-rossii-kontroliruyut-bolshe-polovini-reklamnih-byudzhetrov](http://www.vedomosti.ru/technology/articles/2015/07/14/600435-10-krupneishih-agentstv-v-rossii-kontroliruyut-bolshe-polovini-reklamnih-byudzhetrov)

<sup>9</sup> "6 Major Media Market Trends in Russia." *Sostav.ru*. Dec. 21, 2015. [www.sostav.ru/publication/6-glavnykh-trendov-rynka-reklamy-v-presse-20353.html](http://www.sostav.ru/publication/6-glavnykh-trendov-rynka-reklamy-v-presse-20353.html)

## OBJECTIVE 5: SUPPORTING INSTITUTIONS

Russia Objective Score: 1.86

Russia considerably meets five out of eight indicators of Objective 5. As a result, the score for this objective scored the highest among the five MSI Objectives. At the same time, professional associations remain weak, and problems with media distribution continue.

Television and radio companies are united via the National Association of TV and Radio Broadcasters (NAT), which celebrated its 25th anniversary in 2015. The largest press association is the Guild of Press Publishers (GIPP). GIPP includes over 400 members that account for about 80 percent of the Russian press. Both associations cooperate with international trade associations, conduct trade fairs, provide analytical, information and training services to their members, and try to lobby the Russian government to advance the interests of their members. Operation of these two associations is funded by membership fees and state grants.

While membership in NAT and GIPP is open, membership in the Alliance of Independent Regional Publishers (ANRI) is conditioned on the criteria of editorial independence and is open only to private media outlets based outside Moscow that publish high-quality general interest newspapers. In 2015, ANRI members suffered from declining advertising and circulation sales, and about 10 members had to discontinue their membership because they lacked the money to pay their fees. Membership fees collected by ANRI are never

sufficient to cover operating expenses, so it must seek grants and state contracts to organize national media conferences.

Trade associations are not particularly powerful, but being a member gives media outlets a support network. "If a media outlet faces problems with the authorities in its region, and other members write letters in support of this media outlet to the governor, it helps a lot," commented one of the panelists.

A majority of panelists expressed skepticism about the work of Russian Union of Journalists (RUJ), the only professional association of Russian journalists. "Journalists do not particularly trust the Union of Journalists. At the same time, it has established some very progressive self-regulatory mechanisms, e.g. the Public Board where people and organizations can lodge complaints against media. But very few people know about this institution," commented one of the panelists. RUJ conducts a broad range of activities: training, journalist competitions and festivals, production of professional publications including the magazine *Journalism and Media Market*. There is a hotline for journalists seeking to protect their rights. RUJ attempts to protect the rights of media, journalists and NGOs supporting free speech, e.g. by making public statements, but the authorities mostly ignore these efforts.

NGOs supporting free speech and independent media are few. In the course of 2015, the leading media NGOs—the Glasnost Defense Foundation, the Center for Protection of the Rights of Media, and Novosibirsk and St. Petersburg Institute for Press Development branches, were investigated by authorities and were designated as foreign agents (that is, NGOs that receive foreign funding and engage in political activity). Substantial fines were imposed upon all organizations that did not voluntarily register as foreign agents. All organizations appealed the designation, and the Institute for Press Development – St. Petersburg actually won an appeal in the Supreme Court. Still, NGOs continue to operation.

In 2014, the Russian businessman Boris Zimin established the Foundation for Russian Media Support, known as Sreda. The Foundation intended to provide direct financial support to high-quality Russian independent media to address the problem that there is "a very strong cohort of state media that take more and more of media space, and a weak independent media sector," as Zimin explained in one of his interviews. In February 2015, Sreda awarded RUB 22.5 million to nine media outlets, including TV2, television channel *Dozhd*, *Pskovskaya Gubernia* and *Svobodny Kurs*. But in the summer of 2015, Sreda had to stop operating after being labeled a foreign agent, because its funding was coming from abroad endowment established by Zimin's family.

### SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

#### SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.



The media industry is not satisfied with the quality of journalism degree programs. During the NAT International Congress that took place in Moscow in summer 2015, the Deputy Minister of Communication and Mass Media noted that while Russia has too many journalism schools, their graduates are unqualified to work in media. "Academic programs in the classic universities focus on fundamental education; they provide knowledge rather than practical skills," commented one of the panelists.

The quality of journalism education is connected with the qualification of teachers who provide this education. "There are universities where journalism schools are well funded. They establish multimedia classes and well-equipped newsrooms. But they do not have teachers capable of using this equipment and training students. Still, some solid practice-oriented programs emerge where there are teachers with a lot of practical media experience," said one of the panelists. The best journalism programs exist in capital cities—Moscow and St Petersburg, where schools are able to invite the best media practitioners to work with students. "But I see that in other universities, the generation of Soviet teachers is gradually leaving and being replaced by people who are familiar with modern media. Another positive change is that the state educational standards for journalists now include multimedia journalism, though investigative journalism is still not part of the curriculum," commented another panelist.

One of the panelists expressed concern about the values that journalism schools instill in the students: "I asked students about how they see their role as journalist. The response was that they should shape public opinion," rather than inform people. Thus, journalism education also contributes to the fact that many Russian journalists fail to see the difference between news and propaganda.

Short-term training opportunities are offered by universities, NGOs and private companies. NGOs are still able to offer training to a limited number of journalists for free. Others provide training on a paid basis, but the use of modern technologies, e.g. offering training via webinars, reduces the costs and makes training more affordable to media outlets. But as the revenue of media outlets dries out, their ability to send staff to paid training diminishes. One of the panelists also noted that as media have been forced to minimize the number of staff, they could not send people to training any more because their work could not be reallocated.

Sources of media equipment and printing facilities are apolitical, not monopolized, and unrestricted. Printing firms are sufficient and efficient enough to support the media. But the situation with the newsprint grew more problematic in 2015, when Russian sources of newsprint raised their

prices by 10-15 percent. Depreciation of the ruble made the export of newsprint more profitable, and increasing exports resulted in a deficit of newsprint in the domestic market.

Channels of media distribution remain restricted; thus the corresponding indicator received the lowest score within Objective 5. The model of transition to digital broadcasting proposed by the authorities anticipated that regional television channels would be distributed on a paid basis by cable operators. But the ban for paid channels to carry advertising adopted in the end of 2014 made cable distribution economically unviable. In the course of 2015, the authorities and regional television companies were discussing distribution models that would allow regional television to survive.

The network of press kiosks continued to decrease: according to the Association of Press Distributors, in 2015 three percent of existing kiosks were closed. In addition, some kiosks were relocated from high traffic areas on the streets to quiet areas inside residential blocks, where press sales were slower. National retail networks remained closed to local newspapers. As a result, in 2015 the number of copies sold dropped by 15 percent and newsstand sales dropped by 2.2 percent.

The subscription market is highly monopolized. The main subscription operator is the Russian Post. In 2015 government stopped subsidizing subscription operations of the Russian Post, and raised subscription prices. As a result, subscription circulation dropped by 16 percent, and subscription sales fell by six percent.

The existing information and communications technology (ICT) infrastructure sufficiently meets the needs of the media industry. According to the Ministry of Communications and Mass Media, 33 percent of the Russian population uses cable television, and 31 percent uses satellite television. Broadband and mobile Internet is available to a majority of the population. There are still differences between cities and rural areas and between regions; providers start introducing new technologies and offer better prices in the more populated areas. For example, people in major Russian cities already have access to high-speed 4G networks. The cost of Internet access, both broadband and mobile, in the Far East still exceeds the European part of Russia, although the corresponding indicator received the highest score within Objective 5.

## List of Panel Participants

*Due to laws restricting NGO activity and contacts with U.S.-based NGOs, the participants in the Russia study will remain anonymous. This chapter was developed by a Russian journalist in December 2015 after a series of structured interviews with colleagues in the media sector.*