

UKRAINIAN MEDIA LANDSCAPE – 2015



KAS
POLICY PAPER

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FOREWORD

The Konrad Adenauer Foundation (Konrad Adenauer Stiftung: KAS) has got 80 International Offices which are realizing projects in 120 countries of the world. One of the basic strategies regarding this activity consists in giving support to democratic and independent media outlets.

The significant contribution in training programmes for Ukrainian journalists is offering scholarships to young people that can be used by them for taking up courses or practice at one of the media outlets in Germany.

The first-level Ukrainian partner the KAS Office is working with in media domain is the Academy of Ukrainian Press. In cooperation with this institution we are conducting round tables, workshops and other events where the representatives of press, radio, television and Internet-editions can improve their theoretical knowledge and practical skills level. Within the framework of 'Social Journalism School', hundreds of journalists have learned how to analyze, reasonably estimate and present information on different issues, describing things accurately as they really are. In particular, it concerns such topics as the European integration, energy sector, climate protection... Considering the events in several cities of Eastern Ukraine, where the military activities were going on, the practical workshops were conducted which pertained to journalistic profession during the political and martial conflict. Such events are often being held involving the prominent German media experts.

One of the Foundation objectives to work with journalists lies in providing the thought diversity presence in Ukrainian media outlets. In this context, there exists some gap connected with the oligarchic influence on media. Nonetheless, the thought diversity in Ukrainian media is not still completely lost. After the protests in Kyiv known as the Euromaidan which took place two years ago, Ukrainian society is waiting for the new priorities acceptance and the new quality of national media. It is a pleasure to point out that the Konrad Adenauer Foundation is also engaged in changes currently happening in this domain.

Gabriele Baumann

The Head of the Konrad Adenauer Foundation Office in Ukraine

UKRAINIAN MEDIA LANDSCAPE – 2015

Ukrainian media landscape – 2015: analytical report / edited by Valeriy Ivanov. – Kyiv.: KAS, AUP, 2015.

Ukrainian media landscape is the analytical report that is tracing media development trends in 2014-2015. It contains the reflections of structures and Ukrainian media market. The special emphasis is placed on media activity in terms of martial conflict. The joint efforts of Ukrainian prominent media experts resulted in preparation of this report.



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The authors are responsible for information given in chapters.

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INTRODUCTION

This analytical report is covering the years of the most severe trial in Ukrainian history. Not only physical space served as the arena of war escalation. Another space, the virtual one, suffered from the same fierce battles. Moreover, the ceasefire was out of the question here.

Ukrainian journalists turned to be not ready for the war. So, it could not be different as nobody of us was expecting so tragic course of events at that time. The absence of special action skills under shelling or poor ability to give the first medical aid were not the only points in this matter. What is more important, there was a lack of understanding regarding that, how media should work on native territory during the martial conflict. Is it allowed to practice symmetrical answers? Do Ukrainian media have to respond similarly when Russian media use propaganda? Should one hide information about the losses and everything in general that would reveal weakness and unpreparedness of the Defense Ministry for regular military operations? Is it appropriate to broadcast the numerous ATO and National Security and Defense Council messages or, perhaps, one should check if they are true and reliable? Is hate speech relevant and reasonable if it is directed to the enemies and their supporters?

Unfortunately, Ukrainian media community has not found a common solution in these matters till now, however, too much depends on it. Finally, the western journalistic proverb 'The truth dies first in war' may be absolutely applicable to Ukrainian situation.

It must be admitted that Ukrainian journalists do not check information thoroughly enough. This is the basic reason why confidence rating of Ukrainian media is dramatically falling. According to 'Ukrainian Society' monitoring data held in 2014 by NAS Institute of Sociology of Ukraine, 25,2% of Ukrainian people trust in Ukrainian media when 45,4% - do not. These results were completely different in 2013 when 37% trusted in media and 28,6% - did not. Moreover, the lack of confidence is increasing from the minimal level in the West of the country (24% distrust against 41,2% of confidence, considering that the western region of Ukraine is the only one where the level of confidence in Ukrainian media has been saved as in 2013) to the maximal level in Donbas region (68,3% distrust against 5,7 % of confidence).

So, what has happened? Why did Ukrainian media loose the confidence just in the most difficult time? The basic function of media is informing. If journalists do not give information or it is doubtful, they cannot enjoy confidence any more. Unfortunately, this has been happening in the East of Ukraine. People living there, speaking metaphorically, 'look out of the window', that means, they have a possibility to be informed from relatives or friends about real events. So, when this physical reality does not coincide with the virtual one, received from media, they are certainly disappointed. The reason for it consists not only in the intensive lie (for example, statement that Ukrainian warriors do not shell the civil residential points that is repeated like a mantra by Ukrainian media after the government), but in a smaller one (when, for instance, it was informed about great explosion in the centre of Mariupol; the disproof of it by local police was already given till evening, but Ukrainian big TV channels presented this fabulous explosion as in news).

There are actually two motives for it. On the one hand, there is so called journalism of loyalty when a journalist is choosing from the whole news stream only that what reflects his country in a good manner, as he believes. Here belong appeals not to criticize the power in time of war as well as the long concealment of crimes done by some volunteer battalion fighters. On the other hand, there exists some ordinary incompetence and laziness. The information must be checked! Otherwise, it does not have a right to emerge in media. But it

is much easier to dub the posts in social networks because one can find more sensations there, though, mostly false.

Is it possible to return confidence? Yes. It is necessary to work honestly and proficiently for this. There are examples of such work. It is difficult but required. Otherwise, who needs journalism which is deprived of confidence?

Valeriy Ivanov

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First, since 1991, after declaration of independence, Ukraine found itself in war in 2014. The annexation of Crimea by Russia and martial conflict in the East, where Russian Federation is taking active part, completely changed the life of the country, and, consequently, put Ukrainian media under new conditions. These conditions caused new challenges which had to be faced by Ukrainian journalists. First of all, it refers the threat to journalists' lives and challenges to the freedom of speech.

Security of journalists and breaking their professional rights

2014 was the most difficult year for journalistic work in Ukraine (as for Ukrainians as for the foreigners): 7 dead, 33 kidnapped, 47 arrested [According to 'Telekrytyka' monitoring data].

'In 2014, Ukraine fell down on place 129 according to 'Reporters without borders' rate. It is the worst period in Ukrainian history since obtaining independence in 1991. Cruel and retributive measures against the protesters led all in all to overthrow of Viktor Yanukovich. The further military actions in the Eastern region caused violence spreading and other violations against journalists' [1, 2]. That what is emphasized on in its international organization's report.

Ukrainian journalists had to work in extreme conditions the whole year, being under the pressure of power during the Revolution of Dignity and, afterwards, under the pressure of different actors in Crimea and in the Eastern Ukraine.

'Reporters without borders' draw the attention in their report particularly to proclamation of 'separate republics' by 'pro-Russian activists who do not recognize central government because of its European position' and facts that 'journalists became their targets, were attacked directly or not allowed to the territory controlled by the militants'.

For the first half of 2015 'Telekrytyka' found out 115 cases of breaking journalistic rights (460 cases for the whole previous year). 40 such cases were connected with using physical violence against journalists. The level of violence against journalists has been reduced to some degree comparing with the previous year (for the whole former year 'Telekrytyka' found out 278 such cases. This year, there is obstruction of access in the first place among all types of violation – 44 cases. Here belong non-admission to public sessions and non-responsiveness to inquiries. For the whole 2014 year the monitoring of 'Telekrytyka' found out 100 such cases). Political pressure is in the third place of rights breaking. 16 times have journalists been insulted by officials or some non-adequate decisions and laws have been accepted making journalistic work much more difficult [3].

In the first half-year, two journalists were also killed: 'Sievodnya' (Today) newspaper cameraman Sergii Nikolayev was wounded mortally in Pisky village; the scandalous journalist Oles Buzyna was killed in Kyiv. The violation of journalistic rights on the territory of annexed Crimea and in non-controlled by the government Eastern regions is also worth telling.

Crimea. After annexation of Crimea, Russia began to hold to the total riddance policy directed to Ukrainian mass media in Crimean information space. So, last year in spring a number

of media outlets were closed and all independent journalists had to move to continental Ukraine because of Russian power pressure.

The Journalists Protection Committee prepared the report under expressive title 'The choice of Crimean journalists: emigration or Russian censorship' about press freedom status in Crimea [4].

For example, after the annexation of Crimea, 'Chornomorska TRK' ltd. stopped its coverage. Afterwards, the Crimean-Tatar channel ATR experienced repressions. The journalists of these channels had to move to Kyiv and renew the newsrooms' work in the capital. Now they are broadcasting via satellite. Nowadays, there is not any Ukrainian media outlet on the peninsula that would inform objectively about the events in Ukraine. As for the Crimean power, (particularly, the chief of Crimean Public Chamber, Hryhorii Ioffe), it is encouraging Crimean media to use propaganda strategies in their work in order to resist so called 'anti-Russian propaganda' held by Ukrainian media [5].

East. In the Eastern Ukraine, on the territories under the 'DPR/LPR' militants' control, a lot of media outlets (both press and channels) were closed as well because of physical threat to lives of journalists from these editorial offices. Many journalists were captured by militants. In return, after taking the buildings of local channels under their control on these territories, the militants started creating their own media (for instance, 'Luhansk 24 channel', 'Novorossia' agency, etc.).

Lots of journalists from Donetsk and Luhansk regions along with their families had to move to other Ukrainian regions, including Kyiv. Some of them are Oleksii Matsuka, Denis Kazanskyi, Serhii Ivanov, Oleksiy Bryzh and many others. This situation encouraged new media initiatives creation and development that are directed to inform citizens from Eastern Ukraine. The most famous are 'Donbas. Reality program (broadcasting on the Radio Sloboda), 'Hromadske Telebachennia Donbasu' (Donbas Public Television), web-site 'Chetvortaya vlast' (The forth power) under the link vlada.io.

The absence of necessary working skills in terms of war or conscious ignorance of safety rules also caused the great number of journalists who suffered during the first conflict phase in the East. Some time later, the situation began to level off. Different civic organizations are currently conducting trainings on security issues and informing on conflicts for journalists who are working in hot zones. Moreover, the accreditation system is implemented for journalists who are working in ATO zone. However, till this time, there is a problem with insurance for journalists who are delegated to the East by editorial offices.

Challenges to the freedom of speech

In 2014, new political reality emerged on the background of which Ukrainian media had to work. Real war, information war including Russian propaganda as its element, economic crisis became the main basic factors of journalistic work formatting in 2014 and 2015 till this time. Since the beginning of Crimea annexation and war in the East, one must balance every day between democratic values protecting and informational security challenges. This situation does not encourage the freedom of speech expanding. We are concentrating on the basic challenges to Ukrainian media environment for the reason that precisely this critical approach provides an opportunity to evaluate the real state of affairs in the national media space.

1. Information war and Russian propaganda

By the time of Crimea annexation and military operations in the East, long-term Russian information policy preceded which was aiming at 'the Russian world' construction and Soviet identity revival (despite the fact that it is a real paradox) out of Russian border zone. This policy was intended to influence population of the post-Soviet countries who are most comfortable with Russian language, so, first of all, it concerned Ukraine. Information attacks worked against any Ukrainian governmental initiatives to come out of mental and ideological post-Soviet space borders. These informational attacks grew into regular since the beginning of the protests in Kyiv Maydan and later on they turned into the real information war, where Russian media outlets (with a few exceptions) became propaganda instruments.

On the 9th of December, 2013, Russian President, Vladimir Putin is creating by his order 'Russia today' international agency (which is comprised of such Russian-speaking media as RIA News, Sputnik news agency with multimedia hubs in dozens of countries and streaming in 30 languages), general director of which was appointed Dmitrii Kiseliov. The basic task of the agency as well as Russia Today TV channel is external propaganda. These media which are working in different languages and in different countries successfully imposed their biased interpretation of events in Ukraine to the western audience. It was allocated 6, 48 billions of rubles (more than \$150 millions) for 'Russia Today' International Information Agency and 15, 38 billions of rubles (more than \$360 millions) for RT TV channel from the budget [6].

The whole Russian media system (with a few exceptions of opposition media outlets) was working for the Russian-speaking audience. Russian annual media monitoring conducted by NGO 'Telekrytyka' demonstrated that they finally stopped working in accordance with journalistic ethics and professional standards and turned to propaganda field drawing their attention from the internal to external problems. Fakes, hate speech directed against Ukrainians and everything Ukrainian (particularly, such lexicon as 'Ukrainian punishers', 'junta', 'fascists', 'rightsextuals', 'ukrops', etc.), manipulative interpretation of political processes in Ukraine, representation of events only from the single position of one conflicting party, references to some anonymous or not confirmed sources, in particular, using testimony of the so-called fictitious 'witnesses' – this long enumeration of instruments – used by Russian media is certainly not complete. During 2014, they created a stable enemy image from Ukraine that is proved by the number sociological surveys of Russian public opinion which was conducted by 'Levada Centre'.

Russian propaganda influenced directly Ukrainian media too because they used to refer to Russian media as reliable information sources in their work. At some moment, it became clear that media which spread fake information are not worth using as a source. Thus, in March, 2014 the movement 'Stop Censorship!' and media NGOs addressed journalists with the appeal not to present Russian pro-government media information concerning the events in Ukraine. Other foreign editorial offices were offered to send their own correspondents to Ukraine and Russian journalists were asked not to misinform their nation and the world [7].

However, there is still a number of Ukrainian media on the central and regional levels [8], which because of ignorance or even consciously represent Russian messages so often. In particular, media experts had many questions concerning objectivity of presenting events in Ukraine by 'Komsomolskaya Pravda' (Komsomol Truth), media holding 'Vesti' (News) or '112 Ukraine' TV channel, for example.

The real separatist media network which legitimated illegal 'DPR' and 'LPR' was formed on the territories in the East, uncontrolled by Ukrainian government. Among them, for instance, 'Luhansk 24' TV channel, newspapers 'Novorossia', 'the XXI century', a number of Internet sites [9].

People who consumed information from either Russian, or separatist media outlets were sensual to the Russian propaganda messages. Thus, according to sociological survey conducted by NGO 'Telekrytyka' in February, 2015 among local citizens in 5 regions: Kharkiv, Odesa, Kherson, Donetsk and Luhansk (including districts which were not under Ukrainian control at the time of survey), the acceptance of Russian media messages was significantly higher on the captured territories of the East than by respondents on another side of the frontier. 49% called Maydan as 'fascist revolt', 67% consider that its reason was oligarchic collusion and manipulations of the USA (on the territories under the governmental control – 19% and 46% respectively). However, 41% agree on its acceptance as national revolution, 47% consider the refusal from integration with Europe as one of the reasons (68% and 58% from Ukrainian side). The majority (66%) thinks, that the main consequences of Maydan are Crimea annexation, martial conflict in Donbas and economic crisis in Ukraine. 15% do not agree with this [10].

Aggressive Russian propaganda caused the number of Ukrainian media projects emergence which are aimed at denouncing myths and exposing fakes. The examples of this are the initiative of Kyiv Mohyla journalism school students and alumni called StopFake (started its activity on the 2nd of March, 2014) as well as analytical group of Dmytro Tymchuk 'Informational resistance' (started working in Facebook during annexation of Crimea and launched its own web-site later on). Moreover, at the central TV channels Ukrainian journalists began to denounce fake news spread by Russian media outlets.

2. Attempts undertaken by the state to withstand Russian propaganda using prohibitions

The intensive manner of Russian propaganda was increasing at the same time with war activity escalation in the Eastern Ukraine. Despite the lack of relative practice, Ukrainian government had to find responding mechanisms. These mechanisms were not always successful as they based on prohibition policy. It turned additionally to Russian propagandists' advantage in the West and during their work with people on the occupied territory. Furthermore, from the very beginning, such reaction caused criticism of international media organizations which claimed to protect freedom.

Thus, in August 2014, the National Television and Radio Broadcast Council in Ukraine proclaimed the list of 15 Russian channels which were banned for retranslation in the country because of war and violence propaganda. The list was made on the basis of National Council and Kyiv District Administrative Court decisions. According to the document, the following Russian channels were banned for retranslation in broadcasting and cable networks: 'Piervyi Kanal' (The First Channel, International Network), 'RTR -Planet', 'NTV -Mir' (NTV World), 'Russia-24', TVCI, 'Russia-1', NTV, TNT, 'Petersburg-5', 'Zvezda' (Star), 'Ren TV', 'RBK TV', Life News, Russia Today, 'Istoriya' (History).

On the 2nd of December, 2014, the Ministry of informational policy was created. The post of Minister was occupied by a former director of 'The 5th Channel', the Member of Parliament from Petro Poroshenko political block – Jurii Stets. Creation of this entity divided active society

into two parts: the first one thought that such organization will defend Ukraine against Russian propaganda, when the second one expressed their fears that the Ministry will set some censorship for Ukrainian media outlets. However, the half-year activity of the Ministry did not demonstrate enough efficiency neither in a struggle against Russian propaganda, nor in the integrated governmental communication policy building that is required in war conditions.

On the 2nd of April, 2015, Petro Poroshenko, the president of Ukraine signed the law approved by Verkhovna Rada (The Highest Council, Ukrainian Parliament) on the 5th of February 'About changes to some Ukrainian laws regarding Ukrainian TV and radio broadcast space informational protection' (the bill #1317). Herewith, the part of Russian movies and serials are not allowed to show in Ukraine.

Moreover, Ukrainian state finds it necessary to create its own foreign broadcast channel that would inform the foreign audience. There exists such a private channel: in August 2014 started Ukraine Today – English language streaming TV channel of '1+1 media' group.

Though, in February 2015, the Minister of information policy announced foreign broadcast channel creation called 'Ukraine Tomorrow' (on the basis of BTB and UTR). In June, 2015 the bill 'About social streaming system' was published and it caused the serious wave of criticism by media experts due to ambiguity of goals, foreign broadcast program, its audience and financing [11].

So, talking about systematic information policy strategy, it is absent. The officials from different ministries and agencies often substitute the notion of information policy to counter-propaganda or governmental PR. However, neither PR nor counter-propaganda will solve the problems that Ukraine is currently facing. The contemporary state information policy should be the result of making compromise by different interested parties and only in this case it can be effective.

The alternative to the policy of prohibitions and non-systematic counter-propaganda should become final creation of social streaming system, media literacy systematic implementation in schools and universities, providing support to Ukrainian information production (cinematography, TV programs, books, etc), new government communication strategy building which should necessarily include communication with people (differential approach to different groups and regions), non-conflictive manner of communication within the government and with the world [12].

3. Media oligarchization

Ukrainian central TV Channels (which function as the basic source of social and political news for population till this time according to various sociological surveys) like the number of leading printed and online media belong to the great financial and industrial groups which treat media not as a relevant business but as the way of influence on the policy and one's own business interests protection. Currently, the most influential media groups at the TV market remain Dmytro Firtash/Serhii Liovochkin (Inter), Ihor Kolomoyskyi (1+1), Viktor Pinchuk (ICTV, New channel, STB) and Rinat Akhmetov ('Ukraine'). Regarding printed/online/radio, these are holdings UMH (of Serhii Kurchenko) and 'Vesti'. All these media owners have their personal political interests which are changing simultaneously with political conditions and it is reflected at once in editorial policy of media outlets (for example, 'Telekrytyka' monitoring is recording permanent wars between oligarchs, Ihor Kolomoyskyi and Dmytro Firtash directly in news coverage of their TV channels).

In war conditions, when advertisement market fell significantly down, the dependence of media on subsidized oligarchic budgets only increased in the same way as the dependence on editorial policy conducting. Thus, according to ZenithOptimedia agency, Ukrainian advertisement market reduced in 2015 to twice – to \$382 millions (the lowest indicator for the last 10 years) [13]. Such situation will certainly ensure the loyalty of journalists to the great holding owners' policy (on the background of working places disappearing).

Therefore, de-oligarchization should be one of the key reforms in media sector. Though, this process does not mean nationalization of media resources or their division between new oligarchs who are loyal to the current government. De-oligarchization means new transparent rules on the media market which would deprive oligarchs of the opportunity to use media as the instrument of pressure or influence.

4. Significant quality downfall of journalistic activity

From the first glance, this challenge can seem not so considerable. The situation was so before the war in the East. However, information war which is occurring simultaneously with the real one requires the specific proficiency, moral and ethical qualities from every journalist. Despite of having a great number of universities which prepare journalists and many training opportunities, the journalists don't know how to work following the standards, especially in war conditions.

The quality of Ukrainian journalism significantly fell down. It can be explained by the following reasons:

- Poor basic education;
- Reluctance to refer to self-education, low reading culture;
- Ignorance of basic professional standards;
- Decreasing of the requirements level to journalistic materials in editorial offices.

For this reason, Ukrainian journalists often use unchecked information sources, forget about the balance, use subjective and evaluative statements in news, and fall into excessive emotions. In war conditions, such incompetence can cost life to Ukrainian fighters and ordinary civilians who live in the conflict zone.

Therefore, the urgent issue consists in formulating rules of conflict presenting in the East by means of media self regulation but not due to legislative prohibitions (as offered by some Members of Parliament, in particular, with the 2050a bill that is implementing war censorship of the operative headquarters and that is opposed by Ukrainian media organizations).

Summing up, Ukrainian media are currently working under new conditions that make them face new challenges and take additional responsibility but also make it possible to change media market rules

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General information

In 2014-2015, Ukrainian press experienced hard crisis times caused by external as well as by internal factors. The events in Crimea and in the East of Ukraine and decreasing the purchase capacity of people belong to external factors, when the internal include general advertising market falling, low journalistic proficiency level and inability to respond to the time challenges and situation in the country.

No changes occurred in the registration and printed media regulation procedures in Ukraine in the last years. Press activities are regulated by the laws ‘About the printed media (press) in Ukraine’, ‘About information’, ‘About the governmental support to media and social insurance for journalists’. Since April, 2013, the registration of publications with national, regional and foreign forms of distribution is conducted by the State Registration Service, and the registration of those with local form of distribution is conducted by the structural unities of the central departments of Justice under the Ministry of Justice. Data about printed media registration are included in the printed mass information means and information agencies state list as entities of information activity <http://dzmi.informjust.ua/>.

According to the registration service data in 2013-2014:

	2013		2014	
	Totally	for 2013	Totally	For 2014
Registered (undergoing updated registration) printed means of mass information that belongs to the local distribution sphere	9420	681	8938	474
Refused in registration (undergoing updated registration) to printed media	147	135	199	24
Acknowledged certificates on the state registration (undergoing updated registration) of printed mass information means:				
expired	545	1073	1514	450
invalid	109	42	213	44

One of the tendencies that was observed during the last years consisted in printed editions publishing delay.

Since the beginning of 2014, a number of printed editions announced their closing: ‘Zhenskii zhurnal’ (Women magazine), ‘Kontrakty’ (Contracts), ‘Istorii Zvionzd’ (Stories of stars), ‘Serial’, ‘Vzgliad’ (Point of view). Some of these editions remained their activity in online versions.

In March, 2014 the newspaper ‘Kommersant-Ukraine’ closed with scandal due to the attempts to bring censorship in action by Russian publishers. Ukrainian version of the newspaper ‘Zhyzn’ (Life) stopped its activity for political reasons.

In this period business ‘Investgazeta’ newspaper and weekly journal ‘2000’ stopped their publishing and started working on-line. In February, 2015, the last business newspaper ‘Kapital’ stopped its printed publishing. Cost reduction leads to disappearance of some editions

from retail trade. So, since January 2015, 'Uryadovyi Kuryer' (Governmental courier) newspaper stopped its retail trade sale and is distributed by subscription.

Significant reduction of editions with local registration was caused by political events in Ukraine. After the annexation of Crimea by Russian Federation nearly all local ARC editions either had to register as Russian till the 1st of April, 2015, or stop their publishing on Crimean territory. Due to the events in Eastern Ukraine, a great number of editions stopped their publishing in Donetsk and Luhansk regions.

One more tendency is outgoing of printed edition foreign owners from Ukrainian market. If in previous years it concerned only general political editions, in recent time it is typical to the glossy segment of press market as well. In March 2014 Sanoma Media Ukraine holding closed two glossy magazines – the women magazine Sensa and the monthly magazine Casaviva. Final Sanoma's leaving Ukrainian market happened in November 2014 after closing 4 glossy magazines Esquire, National Geographic, 'Home fireside' and Men's Health, as well as two more, 'Cosmopolitan Ukraine' and Harper's Bazaar, – holding was able to sell Hearst Shkulev Ukraine to publishing house.

For the last two years, the tendency of printed media online portals active development and rapid online audience increasing remained, especially on the regional level. Online audience of successful regional editions is often greater than a circulation and audience of one printed edition and often interacts with the printed version audience. Online resources increasing led also to more profits from the network component of media companies.

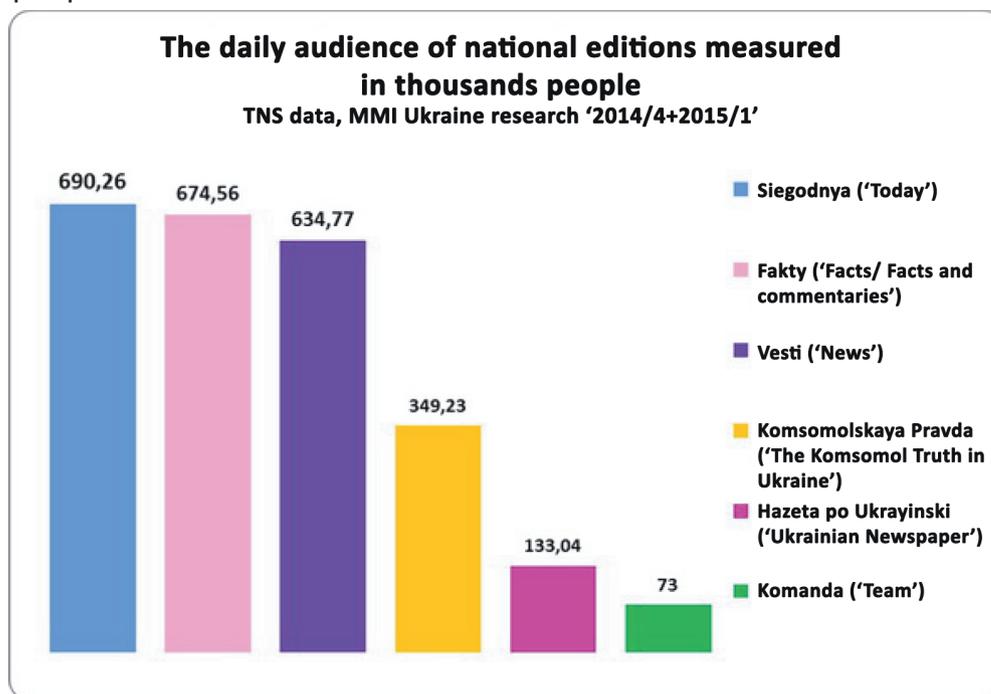
After the change of government in Ukraine, the municipal press reforming processes covering 518 regional and local newspapers of municipal property were restored. Their one circulation contains 2 millions 349 thousands copies that covers about two-thirds of Ukrainian subscription market. According to Derzhomtele-radio (state municipal entity of television and radio broadcasting), 33,9% of municipal editions work for 21% profit without any subsidies from local budgets and their general annual profit takes up to 286,7 millions UAH that covers about one third of the local press market in Ukraine, 4631 specialists work in editorial offices, a half of them are journalists. At the same time, in 2015 about 80 million of UAH were allocated from Ukrainian budgets of different levels for supporting editions of municipal property. Additional subsidies from the state budget in 2014-2015 are given in the table below:

Budget expenditures	Funds administrator	2015	2014
Presenting Verkhovna Rada of Ukraine activities on television and radio broadcasting; financial aid to 'Holos Ukrayiny' (Ukrainian voice) newspaper and 'Viche' (Assembly) magazine editions.	Verkhovna Rada Secretariat	26 millions 342,1 thousands	21 millions 306,1 thousands
Financial aid to 'Uryadovyi curyer' (Governmental courier) newspaper	The Cabinet of Ministers Secretariat	4 millions 489 thousands	4 millions 169 thousands
Financial aid to editions covering economic issues and ensuring government purchases web-portal functioning.	The Ministry of Economic Development and Trade of Ukraine	3 millions 69,7 thousands	2 millions 390,6 thousands
Financial aid to cultural topic printed editions, newspapers in the languages of national minorities, financial aid to the touring activity of national performers.	The Ministry of Culture of Ukraine	7 millions 890 thousands	8 millions 460,9 thousands

On the 17th of June, Verkhovna Rada Committee on freedom of speech and information policy issues supported the bill 'About reforming state and municipal printed mass information means'. According to the bill, it is expected that reforming printed mass information means and editorial offices is carried out in two stages: the first one should be implemented during the year from the day when the law comes into force, and the second one should be realized during next two years. On the first stage, the printed media and editorial offices reforming is carried out if these structures appealed with corresponding petitions and were included in the list approved by The Cabinet of Ministers of Ukraine and Derzhomtelradio (state municipal entity of television and radio broadcasting). On the second stage, the reform of printed media and editorial offices which were not reformed at the first stage is carried out.

Circulation, distribution and publishing system

Such problems as non-transparent circulations and the lack of certification system for editions remain in the press market development. Both national and regional editors are not interested in disclosure of their editions' real circulation. The most of editions indicate over-estimated circulation manipulating at the advertisement market in this way. Therefore, the audience survey data and information about the subscribed editions are used for circulation market evaluation. The general trend of recent years became both retail and subscription circulation falling. According to sociological data, the audience of one daily publication largest number does not exceed 700 thousand people that are rather few for a country with 45 millions of people.



According to the state periodicals circulation enterprise 'Press', more than 2127 titles of printed editions were included to 'Ukrainian publications index in 2015' and 1469 of them can be subscribed to and received abroad.

Among the general quantity of editions that are distributed in 2015, newspapers cover 42, 9%, magazines and journal-type periodicals – 55, 7%, books - 0,7 %, electronic editions – 0,7 %.

The number of publication indexes in CIS countries and far abroad that are distributed by the 'Foreign editions index for the first half of 2015' makes 6 440, newspapers – 7,5%, magazines – 91,6%, books – 0,9%.

General amount of Ukrainian editions included in index is less up to 12% than it was suggested for subscribing in the first half of 2014. Less number of Ukrainian editions included in the index for 2015 is caused by several factors. Firstly, it is related to periodicals publishing delay considering difficult social and economical situation in 2014. Secondly, the annexation of Crimea and conducting anti-terrorist operation on the territory of Donetsk and Luhansk regions (about 30 editions from these regions are not published according to subscription) led to this.

In accordance with subscription results for 2015, 11 millions 822, 31 thousands copies of national and foreign editions are subscribed, that makes 72,4 % out of the general single circulation level for the 1st of January, 2014 (16 mmillions 330,79 thousands copies). Foreign periodicals subscribed editions for the 1st of January, 2015 made 6, 75 thousands copies but it does not influence press market significantly.

Thus, subscribed editions fell more than by one quarter for a year. At the same time, in comparison with the subscribed editions of 2011 (19 millions 154 thousands copies), general subscribed circulations falling for four years made more than 40%.

The share of subscribed national, local and foreign editions in general circulation of 11 millions 822, 31 thousands copies approved for 2015 makes:

- national editions – 64,2 %;
- local editions – 35,7 %;
- foreign editions – 0,1 %.

Significant reduction in subscribed periodicals concentration can also be observed. Thus, in 2015:

- for one Ukrainian citizen – 0,28 copies (in 2014 – 0,34 copies);
- for one family – 0,83 copies (in 2014 – 1,03 copies).

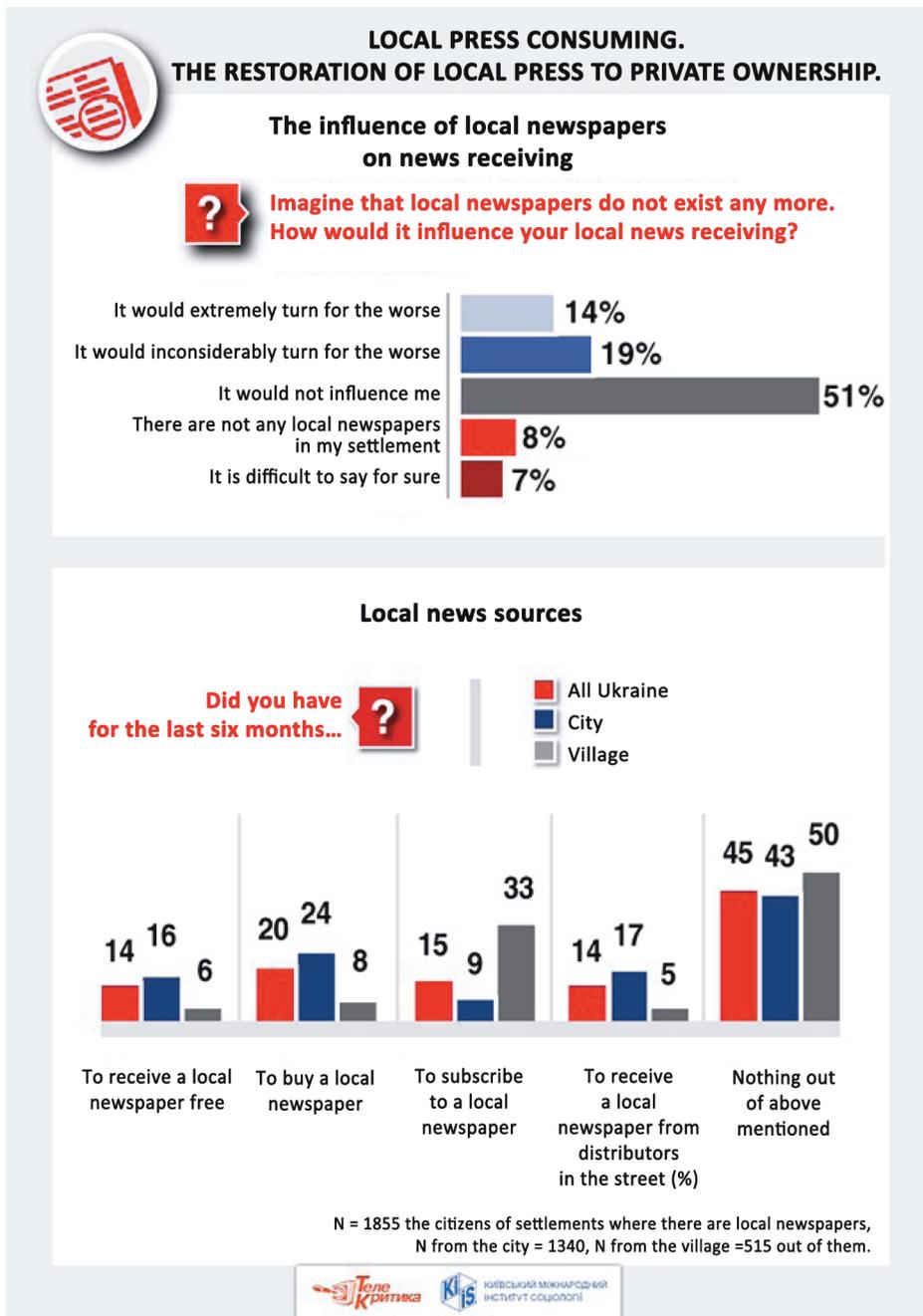
It is worthy of not, that subscription for 2014 was conducted before the annexation of Crimea by Russian Federation. General single circulation of editions without those published in Crimea in January 2014 made 15 millions 745, 55 thousand copies. Taking this figure into consideration, the subscription level in 2015 makes 75,1 % out of the previous year. The part of editions in AR Crimea in general single circulation made 3,6 %.

It is evident that circulation falling is mostly influenced by social and economic decline in the country than by the loss of territories where subscription was conducted.

It should be also mentioned that there are less local editions in the subscription though particularly local editions would have to provide information about local news and events for people.

Among the reasons of such printed editions falling it is reasonable to refer to the world tendencies for edition form transformation and the ways of distribution as well as non-compliance of the local editions content to the audience needs and migration of the local news consumers to internet-media and social networks. Thus, according to the sociological survey conducted by Kyiv International Institute of Sociology in May-June, 2015, 51% of respondents answered that if local newspapers disappear, it will not affect their capacity to find out

local news. At the same time, local press and internet media as the sources of information about local news became nearly equal and make 32 % and 29 % respectively.



Thus, about one third of respondents discovered local news from press. However, only 30% of them (and 14 % of all respondents) consider that the absence of local printed editions would significantly worsen their capacity to find out local news. Consequently, local newspapers do not play an important role for most Ukrainians: they are read but this is not the only and not the single information source.

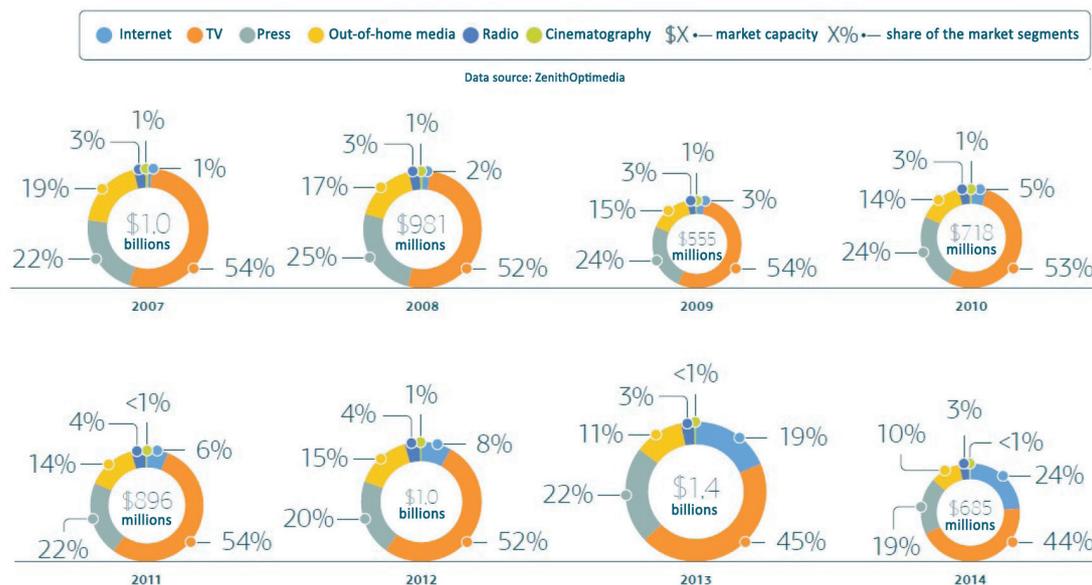
Printed editions cutback caused structural changes in the press distribution system. Retail trading centers diversify the assortment by relative production and currently not newspapers or magazines but telephone cards, stationary and other relative production make more profit in the retail trade system. Press publishing system in Ukraine is also in decline due to printed editions falling and price increase for printing services that made profitability in this domain nearly impossible.

Advertising market

The situation at advertising market has significantly broken down. In 2014, general advertising market reduced from \$1, 4 billions to 685 millions and according to Zenith Optimedia prediction, it will reduce in 2015 up to decade minimum and will make \$382 millions. \$60 millions can be received by newspapers and magazines, though, in 2013 printed press market sector reached up 300 millions.

UNDER THE MICROSCOPE

The advertisement market capacity in Ukraine



© Infographics <http://nv.ua/>

The National Advertisement Coalition's data, published at the end of 2014, were somehow different: they were more optimistic. However, press suffered most from advertising market falling in 2014 and newspaper advertising market experienced the worst downturn – 37% if operating absolute figures.

The only rising up segment in media advertising market became internet – increase by 5%. According to the National Advertisement Coalition, in 2015 Internet will remain the only segment which will be continually increasing by 9%.

The amount of press advertising market in Ukraine for 2013-2014 according to the National Advertisement Coalition

	Annual results of 2013, millions UAH	Annual results of 2014, millions UAH	% changes of 2014 to 2013
Press, totally	2 497	1 670	- 33%
Newspapers	1 143	720	- 37%
Magazines	1 354	950	- 30%

These figures indicate that press sphere can hardly exist at this time. The further cutback of circulation and editions is predicted. Both national and regional publishers are looking for the opportunities to minimize expenditures by means of publishing frequency reducing, removing colored pages, making fewer headlines in the edition. Moreover, publishers are searching for profit increase opportunities using online services, alternative distribution systems creation, etc.

RADIO BROADCASTING

Over the last year, Ukrainian radio broadcasting was trying to find balance between policy and business. This was happening during the annexation of Crimea, military activity, further commercialization and consolidation of the market, social radio broadcasting creation, modern media technologies and online proposals engagement.

Crimean 'Radio-Leader' station with 15 years successful practice at the market was closed because it could not receive the license in accordance with Russian law. JFK Ukraine Company in Crimea was forced to stop its radio research due to activity cessation of local radio companies. New editorial policy appeared in the state 'Radio Crimea' company. All these changes led to significant reshuffling in Ukrainian media landscape. First of all, it influenced advertising market which, apart from this, suffered a lot from martial conflict in the East of Ukraine as a number of powerful advertisers in Donetsk and Luhansk regions stopped their advertising campaigns.

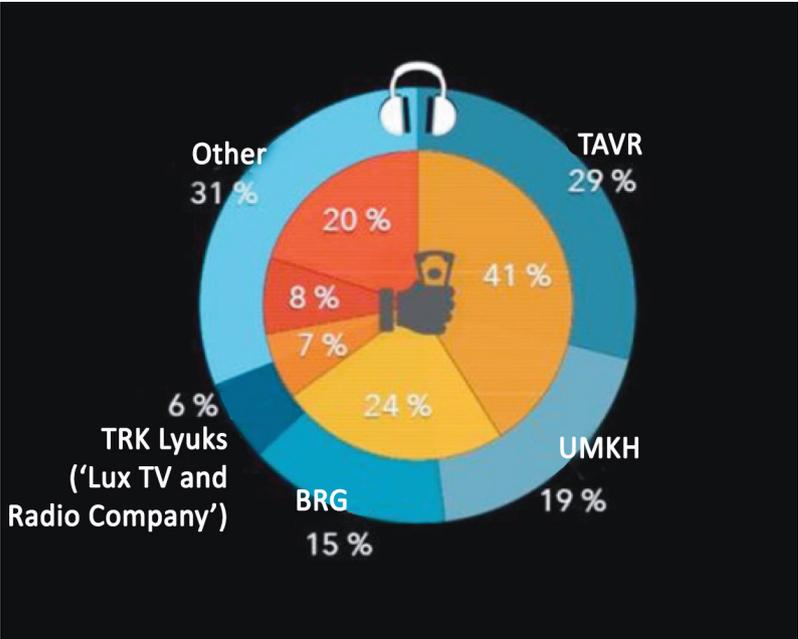
In this context, it is worthy to mention the decision of Russian radio station 'Russkoye radio' to dissociate itself from Ukrainian radio network 'Russkoye radio - Ukraine' because of the live broadcasting campaign conducted by it on raising funds in order to supply Ukrainian army with body armor vests. In response, 'Russkoye radio - Ukraine' assured that it will follow the position of Ukraine in future as well and there were not and will not be any live broadcast failure. Moreover, previously there was significant Russian musical content at this one and many other radio stations but later they refused from those performers who announced anti-Ukrainian slogans, supported annexation of Crimea and military actions conducted by Russian Federation in the East of Ukraine. For example, the head of 'TAVR media' radio group Ihor Chernyshov mentioned that after annexation of Crimea such singers as Valeria and Joseph Kobzon disappeared from his radio stations. The head of Business Radio Group Board, Anatolii Yevtukhov informed that he removed from live broadcasting all those who supported a well-known petition to Putin, in particular, Oleg Gazmanov, 'Lyube' band and other.

However, inspite of the annexation of Crimea and military activity in Eastern Ukraine, radio ratings remained almost unchanged. Three leaders in average weekly coverage according to JfK Ukraine on request of 'Radio Committee' intersectoral industrial association in late 2014 were not changed: 'Hit FM', 'Shanson' and 'Russkoye Radio - Ukraine'.

The head of Radio Expert advertising agency, Alla Frolova pays attention to the fact that 'Top-10 radio stations were not changed throughout the year, though having a little rotation with each other'. 'Although, it was extremely difficult year not only for media but for all inds of business, radio demonstrates not bad achievements in the sphere of listeners' demand', - such is the analysis of situation by Oksana Shchavel, 'TAVR media' radio group marketing-director.

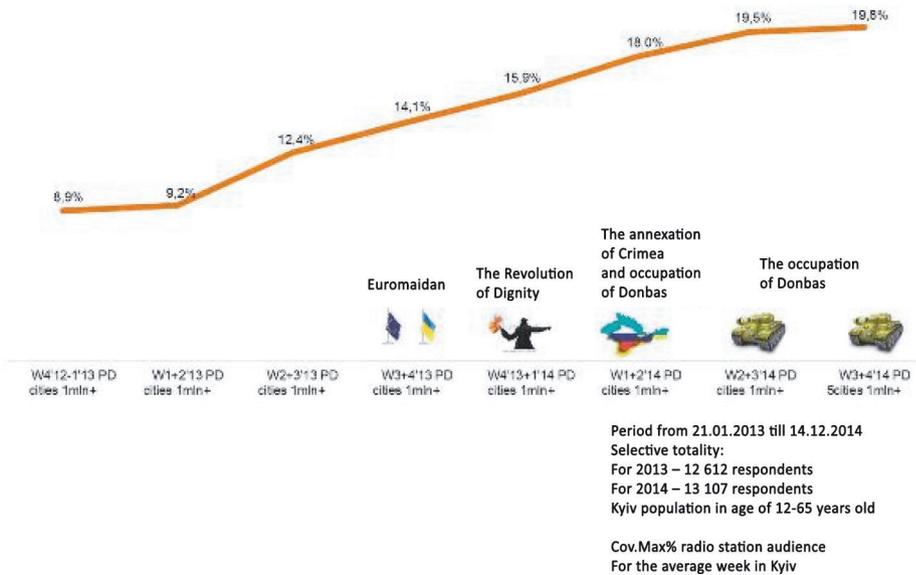
In general, situation with Ukrainian radio broadcasting mostly remains stable. Nearly 120 sate and commercial mostly networking radio stations can be found in Ukraine. Every week, 83% of Ukrainians from 12 to 65 years are listening to the radio (in comparison, radio in US covers 92% of the audience, in Great Britain - 89%). The most part of the radio audience is concentrated in two great holdings 'TAVR Media' ('Russkoye radio - Ukraine', 'Hit FM',

Kiss FM, 'Melodiya' (Melody), ROKS and Relax) and UMH ('Autoradio', 'Nashe radio' (Our radio), 'Retro FM', 'Europa Plus', 'Holos Stolytsi' (Capital voice), 'Jam FM', 'Lounge FM' and 'Pyatnytsia' (Friday)). These two holdings gather 65 % of all advertisement budgets. Other two giant players at the market are Business Radio Group ('Shanson', 'Lyubimoye radio' (Favorite radio), DJFM, 'Perets FM' (Pepper FM), 'Business radio' and 'Rabinovich FM') and Luks ('Luks FM' and 'Radio 24') [1].



However, an interesting tendency can be traced in Ukraine when niche stations' rating is rising up for the reason that stressful situation in the country gives a good opportunity for particular format companies to dissociate themselves from other media which present much about war and ther negative information. For the last year, the Relax ('TAVR Media') and LoungeFM (UMH) indicators increased more than twice working in the 'easy listening' and Soft AC formats.

PAADIO KOMITET Radio Relax weekly coverage dynamics in Kyiv, CovMax%



Ukrainian radio streaming market research became industry. 'Radio Committee' intersectoral association, which was created in 2007 in order to start the single sectoral audience research and later covered the greatest Ukrainian radio holdings, at the beginning of 2015 united 5 more advertising agencies (Publicis Groupe, 'ADV Ukraine' group, Group M, UMG and Radio Expert). Thus, almost all the biggest market players met under the one roof and radio became media industry as it comes already to strategic development of this sector while internet popularity is increasing and TV market has a smart budget to its disposal. Radio became effective and not expensive media that is measured qualitatively.

'Ukrainian media holding' marketing director, Yulia Reznichenko considers that industrial research provide argumentation so that the advantages of radio over media concurents could be spoken over. Furthermore, the efficiency of media plans enables to negotiate with clients argumentatively. In her opinion, Ukrainian radio market became civilized precisely thanks to industrial research. As for the companies which do not use radio listening data in their activity, they can hardly be regarded as true market players. TAVR radiogroup marketing director, Oksana Shchavel also thinks that officially- acquired from 'Radio Committee' research using will make the market more transparent and, consequently, increase the level of confidence in it. As she says, amateur times are over and advertisers' confidence is very important for radio stations as well as the possibility to work proficiently and transparently [2]. Summing up, commercial radio broadcasting market in Ukraine became business that is based on monopolization and consolidation.

As for the state and social radio broadcasting sectors, during the last year considerable changes also happened that enables to reveal some progress in consolidation unity creation, namely, National Radio Company of Ukraine and regional radio committees. On the 7th of April, 2015, a number of symbolic events for Ukrainian media environment happened in Mystetskyi Arsenal (Art Arsenal, Kyiv art gallery): The President of Ukraine, Petro Poroshenko signed the law 'About some changes to some Ukrainian laws regarding Social television and radio broadcasting in Ukraine'. Afterwards, the logo of the 'First National' channel and Ukrainian radio call signs were changed in live streaming. The project of social radio broadcasting was presented in this way. The first radio channel will become generally informative with an embedding of show discussions. The second one, being orientated predominantly on the audience of youth, will contain experimental innovative broadcasting. The third one will become typical cultural channel a characteristic to the most European analogues. Such consolidation unity creation in a radio broadcasting system was developing not so easy and caused some misunderstanding in regional media system. However, as it was mentioned by media expert Taras Shevchenko: 'From new amendment to the law about social broadcasting will gain mostly regions. Regional TV and radio channels are really able to become an objective information source, completely deprived of local power influence. It is also positive that the President decided to make PR on the basis of signing this law. Now, it is important for him that the law will function!'

One more conspicuous phenomenon on the radio broadcasting market was creation in 2013 and successful promotion of 'Public radio' as Ukrainian non-governmental organization aimed at Ukrainian independent radio streaming foundation. 'Public radio' crew consisting of Andrii Kulykov, Natalia Sokolenko, Serhii Andrushko, Iryna Slavinska, Oleksandr Buziuk, Ilona Dovhan, Kyrylo Lukerenko and other, works on volunteer basis and does not receive regular funding. However, it took up responsibility to act following the public speaker standards and promote a complete public broadcasting system creation in Ukraine. 'Public radio

is prepared for the future regular broadcasting on the Public radio channel. This future 24 hours informational and analytical channel could become not only one of the first turning to the public broadcasting visual results but also a specific ground where the working models in other social broadcasting structural units would be experimented. We offered such partnership mode also last year. And we did it'. – reported Andrii Kulykov, radio station announcer and emphasized that all programs of 'Public radio' correspond to social speaker mission and his standards. It refers also to everyday Russian language program 'Donbas Chnionicles' which is being prepared by the editorial office above all for the citizens of Eastern Ukraine.

An important trend at the Ukrainian radio market became emergence of more radio stations following 'conversational radio' format, in particular, 'Radio Vesti' that is broadcasting mainly for the East and North Ukrainian audience. Its appearance in Ukraine caused an ambigious reaction of the public because the owner of radio station, 'Multimedia-invest' holding is conducting the pro-Cremlin editorship, manipulating with facts, interpretation and negative/positive balance, as it was mentioned by chief-editor of 'Telekrytyka', Natalia Lihachova [3]. As the demonstrative one can consider appearance of this radio station in Kyiv and operating at the frequency previously controlled by another radio station, 'Radio 24' that belongs to TRK 'Lyuks' media holding and stands on pro-Ukrainian ground. In the context of the frequency division by conversational radio stations, it is worth to refer to 'Radio Era' which, despite of loosing some audience in Donetsk and Luhansk regions and in Crimea, remains to be an influential broadcaster as it has been controlling all its FM-frequencies, particularly in the East of Ukraine.

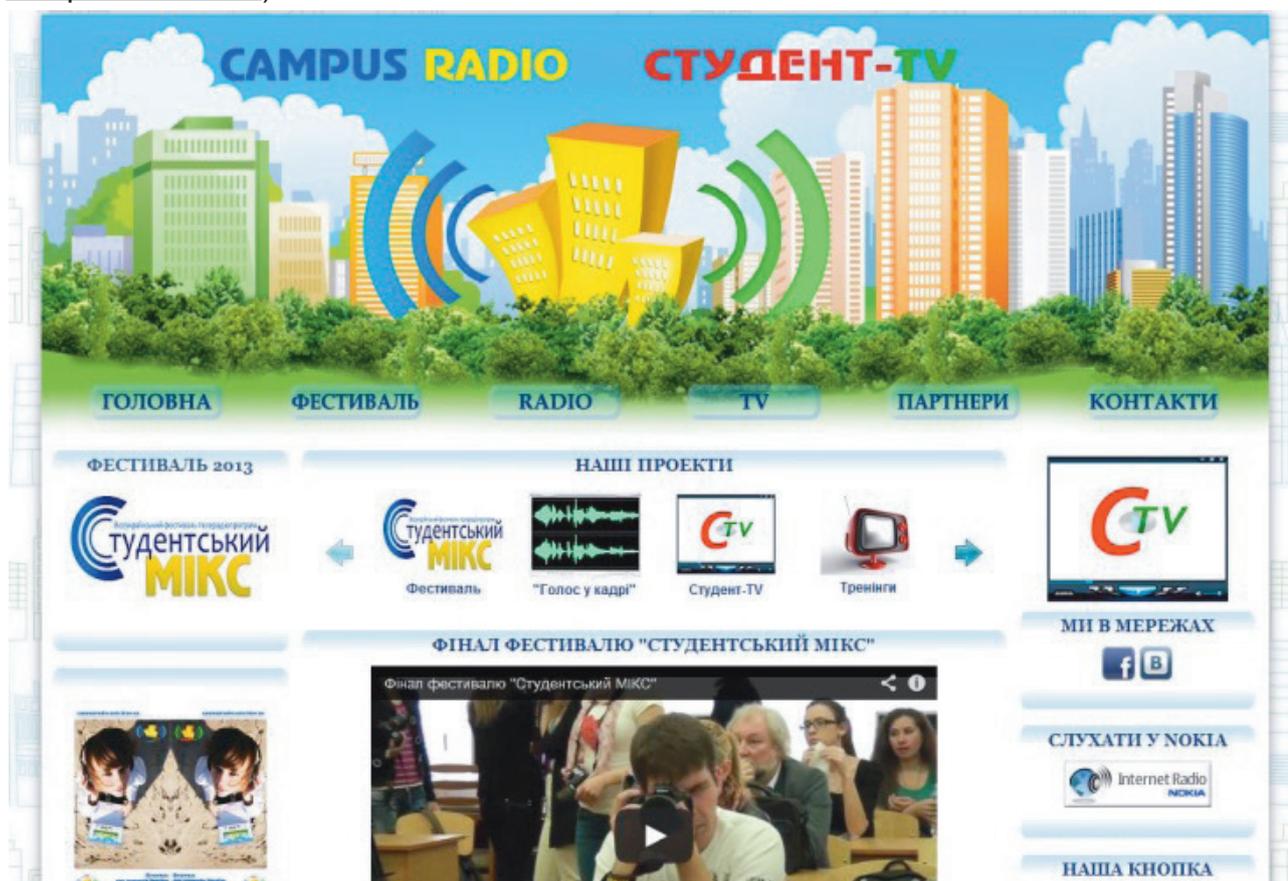
According to Zheneva convention decision, 2015 year in Ukraine had to become the final one in the switch to digital broadcasting, however, currently it turned to be unreal because of its expensive value. Ukrainian radio industry is generally skeptical about a switch to digital broadcasting format but it is studying and offering the development for other radio broadcasting strategies. Among them:

- a) online-broadcasting;
- b) multiplatform decisions;
- c) hybrid radio.

Concerning online broadcasting, every Ukrainian live broadcast radio station of all owener-ship types, format and classification is currently provided with a web-version and data-flow streaming broadcast. The boost of online-broadcasting is still held off due to the slow 3G Internet realization in Ukraine, though, in case of its successful realization, radio-consumers will be able to listen to Internet radio in an automobile. However, when these technologies start functioning, thousands FM-stations will join hundreds of those currently operating that are broadcasting exceptionally in Internet. Among them, there are not only amateur but also semi-professional stations, for instance, student radio stations and radio projects: 'Campus Radio Ukraine' at Taras Shevchenko Kyiv national university (<http://campusradio.univ.kiev.ua/>), 'KPI Radio' of 'Kyiv politechnical institute' national technical university of Ukraine (<http://r.kpi.ua/>), 'Radio SumDU' of Sumy national university (<http://sumdu.edu.ua/ukr/radio>), 'Radio VTSU' of Kharkiv railway university (<http://vtsu.org.ua/>), 'Youth radio' and 'Radio K:) BIT' of 'Kyiv Mohyla Academy' national university (<http://molode.com.ua/> and <http://www.radiokvit.com.ua>), 'UKUpochtsi radio' (stands for English as 'Common radio' and the first 3 capital letters probably denote Ukrainian¹) of Ukrainian Catholic University (<http://ucu.edu>).

¹ Translator's note

ua), 'OST Radio' of 'Ostroh Academy' national university (<http://www.oa.edu.ua>), 'Engineer radio' of the Radio technique, connection and instrumentation engineering institute (<http://inrtzp.vntu.edu.ua>) and other.



Multiplatform decisions include radio visualizing as the listeners wish not only to listen to but also 'watch' the radio. Therefore, radiostations dub the live broadcast on cameras and use YouTube. For example, 'Russian radio - Ukraine' has 600 subscribers. 'Hit radio' and 'Radio Svoboda' (Freedom) have a little bit less of them.

Hybrid radio, which combines Internet and FM radio advantages, is actively used by smartphone and auto receiver users. According to BBC research in October, 2014, nearly two thirds of mobile telephones owners who were interviewed consider attractive the hybrid radio idea that is finally decisive while choosing a smartphone. Hybrid radio means more coverage of the audience, mobile apps orientated to radio signal listening. Due to such apps, the smartphone owners can not only listen to favorite songs, news, programs but also watch video on the screens. They also have a possibility easily to move to radio station web-site, receive information about the spokespersons, see the weather forecast, download music, create individual playlists, etc. Among Ukrainian FM-stations, such mobile apps belong to 'Radio Roks', 'Lyuks FM' and 'Radio 24', for example.

All these new technologies are currently profitable therefore it will be reasonable to mention Ukrainian greatest business Internet projects. Here belongs so-called network online-radio as several radio channels of different formats are operating on one web-site. Live broadcasting cannot obviously function following this strategy that's why the choice diversity is attracting the creators of online networks. Every channel on such web-site has its own button, so it may look like the typical analogue of a live broadcast receiver. However, no matter which

channel has been chosen, the consumer will nonetheless stay on the basic station page. As the typical example can serve MyRadio.ua station that is broadcasting from Vinnytsia and it is founded in 2008 on RIA media holding basis. The company motto sounds like 'Switch on your music!' It has 15 format channels: 'Hard Rock' channel offers hard-n-heavy style music, 'Ukrainian Hit' channel offers modern Ukrainian music, 'Russian Rock' channel – Russian rock music, 'Pop Hit' – hot rhythmic hits, 'Acid Jazz' channel is half improvisation music, 'World Hit' channel offers hit-parade tops, 'Blues' channel is keen on typical jazz and blues, 'Shanson' channel offers so-called 'city romance' and 'jeal music'; 'Rock&Roll' channel is broadcasting Rock&Roll; 'Lounge' channel – light, background music, 'Dance Club' channel offers pop dance music; 'Trance & Progressive' channel – dance electronic music; 'Russian Hit' – representatives of Russian stage; 'RnB' channel is keen on dance music; 'Electro House' is basically broadcasting pop electronic music.

One more interesting example of the network station can be MJoy Multimedia (<http://mjoy.ua/>) information portal which started in 2009 in Lviv. It is stated on the web-site that 'MJoy Multimedia' is Ukrainian company which deals with new broadcasting forms, complex multimedia production and new media for business services implementing. It combines classical traditions of audio-visual product creating with innovational approaches. The basic activity areas: MJoy Radio, MJoy Production, MJoy Music, and also Ukrainian-Polish Radio School (practical education training center).

Summing up, for the century of Ukrainian radio history, it faced with media concurents which finally became its partners: since 1939, television as mass media type, since 1992, online and mobile technologies. Radio gave drama and format division to television, consequently, the TV serials and specialized channels appeared. Mobile telephone industry as well as Internet became successful business due to the radio sound opportunities and functional peculiarities. Thanks to Internet and mobile telephone industry, radio has visualized itself nowadays, it became 'visible' and TV succeeded as a good promotion and development partner. Therefore, be Ukrainian radio in any media situation or social difficulties, involving any strategies and functions, facing with any powerful concurents or partners, if it all attracts at least one potential listener or consumer, it means real achievements and success for radio broadcasting as a important actor in Ukrainian media landscape.

[1] 'Hit FM', 'Shanson' and 'Russian radio – Ukraine' finished the year as leaders of radio live broadcast: // <http://www.nam.org.ua>.

[2] 'Radio Committee' will give access to GFK data only for those agencies which invest in the radio audience research: <http://www.telekritika.ua>

[3] Natalia Lihacheva. 'Inter' as the mirror of hybrid media space in Ukraine 'Mediasapiens': <http://osvita.mediasapiens.ua/>

TELEVISION

Television remains the most popular mass media type in Ukraine. Particularly, according to the Horshenin Institute survey results in 2013 (before Maydan that caused increased boom of the Internet audience), 58,2% of Ukrainians received news most from television.

More than 75% of TV media market belongs to 4 leading media groups: 'Inter' (owners: Dmytro Firtash and Serhii Liovochkin), 1+1 (Ihor Kolomoyskyi), StarLightMedia (Viktor Pinchuk) and 'Ukraina' (Rinat Akhmetov). Currently, all channels which are included in the top-10 and the average audience quantity of which makes more than 2% belong to these holdings. The challenge of niche TV channels was responded by TV groups using start up and rebreeding of their own topical, satellite and cable casting broadcasters, the format and structure of which are constantly being changed and supplemented. Apart from top-of-the-range TV channels ('Inter', 'Ukraina', '1+1', STB and ICTV), the top 10 also consists of New Chanel (StarLightMedia), NTN, Mega and K1 ('Inter'), '2+2' and 'TET' ('1+1').

After the short increase of interest to independent (here means those, which do not belong to 4 previously mentioned leading TV groups) informational channels – the 5th channel, news channel 24, 'Espresso -TV', their indicators fell down again except for '112-Ukraina'. Among the channels which do not belong to the greatest TV groups, it is the single one having an audience quantity more than 1% and is approaching to the top-10 list. The real owner of this channel is unknown; according to the inquiry in 2013-2014, its founder was the Minister of Domestic Affairs in Azarov's government, Vitalii Zakharchenko. At this time, despite of supposed change of the owner, '112- Ukraine' is often accused of hidden anti-Ukrainian propaganda. New owners of the TV channel, according to the information from media, are the Members of Parliament Serhii Kaplin, Serhii Liovochkin, Oleksandr Onyshchenko.

Since the 1st of January, 2014, the TV audience measurement on request of Industrial Television Committee is conducted by Ukrainian Nielsen International Company affiliate. For the previous 10 years, GFK Ukraine company was people measurement panel operator.

TV channels watching indicators for five months, 2015 (January - May)

	People of age 4+, all Ukraine	
	Rate, %	Quantity, %
TOTAL	18,85	100,00
OTHER	3,20	16,98
Inter	2,51	13,36
1+1	2,15	11,38
Ukraina	1,80	9,53
STB	1,42	7,51
ICTV	1,37	7,25
New channel	0,91	4,83
NTN	0,89	4,74
TET	0,57	3,03
2+2	0,54	2,88

Plusplus	0,42	2,25
K1	0,32	1,68
Pixel	0,31	1,65
112 Ukraina	0,29	1,51
Mega	0,28	1,50
Enter Film	0,21	1,12
The 5 th channel	0,20	1,08
NLO-TV	0,18	0,97
The First/Era	0,17	0,90
M1	0,15	0,79
QTV	0,12	0,61
24 channel	0,09	0,48
K2	0,09	0,46
Espresso TV	0,07	0,38
Tonis	0,07	0,37
Bigudi	0,07	0,35
Zoom	0,06	0,34
UBR	0,05	0,26
Indigo TV	0,04	0,23
Sontse	0,03	0,18
Malyatko TV	0,03	0,17
UNIAN	0,03	0,15
Ru Music	0,03	0,14
M2	0,03	0,14
Football 1	0,03	0,14
Discovery Channel	0,02	0,12
O-TV	0,02	0,11
Football 2	0,02	0,10
Music Box UA	0,01	0,07
TLC	0,01	0,06
The First Automobile	0,01	0,03
The First Business	0,00	0,02

Source: TV audience research (TV- panel) that was conducted by Nielsen company on request of Industrial TV committee (monitoring – ‘Communication alliance’). The data are suitable for people elder than 4 years old. The selective totality covered all Ukraine. The given data represent rate and quantity indicators. For more details about indicators and target audience selection see in ITK glossary: <http://tampanel.com.ua/ru/about/glossary/>

Audience structure according to the TV signal reception type

Basic reception type	% of TV households in Ukraine
Analog broadcast	24,4%
Digital broadcast	8,0%
Cable	36,3%
Satellite	29,4%
IPTV/MMDS/other	2,0%

Source: Introductory research conducted by Kyiv international institute of sociology on request of Industrial YV committee in the period from January, 17, 2014 – February, 03, 2015.

Television receives also the most of profits from advertisements: according to the wide national advertisement coalition (<http://www.adcoalition.org.ua/adv/statistics>), TV ad market in 2015 will make 3,93 billions UAH. The advertisement market downfall in 2014 reached 20% and stopped in 2015 and according to predictions, the previous year level will be held. However, the tendencies demonstrate step by step audience and advertisement budgets division in favor of Internet that, on its behalf, is stimulating online TV channels and their video-podcasting development.

2014-2015 years are remembered at the advertisement market thanks to some legislative initiatives designed to improve the capacity of TV channels to deal with advertising sales:

- In June, 2014, Verkhovna Rada passed the law 'About making changes to Ukrainian law 'About advertisements' # 1322-VII' that particularly enabled to make ad units more frequent and shorter as well as to break children programs and news by advertisements.
- In May, 2015, Verkhovna Rada approved the law 'About making changes to Ukrainian law 'About advertisements' (concerning ad quantity that is spreading on TV and radio)' that removed advertising quotas in 24 hours extent of TV channels broadcasting and reduced the ad quotas during an hour from 20% (12 minutes) to 15% (9 minutes) of live broadcast time.
- Again, in May, 2015, another law was approved 'About making changes to some Ukrainian legislative acts (concerning ads broadcasting (relaying) in programs of foreign TV and radio organizations)'. This law forbade the ad relaying on Russian channels in Ukraine and legalized so-called adopted channels list made by Television and Radio Broadcasting National Council (further, the National Council).

In 2014, 3 powerful extra-market factors made impact on television in Ukraine:

- **Occupation** of the part of Ukrainian territory. Russian occupants and terrorists switched off the most Ukrainian channels broadcasting and changed them for Russian and local ones. Therefore, so-called 'other TV' quantity increased among general television indicators especially in the Eastern regions (the quantity of TV channels that are not selected into participation in TV audience panel measuring).
- **Switching of Russian TV channels**, relayed by cable and satellite operators. In July, 2014, the National Council in a court pursued prohibition of TV channels 'The First Channel. Worldwide Network', 'Russia 24', 'NTV Mir', 'RTR Planet' and 'TVC International' relaying. Later on, such channels as 'Star', 'REN-TV', 'RBK-TV', 'Lifenews', 'Russia Today', 'History' and other were also included into this list. The audience selective totality of these channels before prohibition could reach 6-7%. Currently, these channels are present at the grey and black market sectors (in unlicensed operators' packages and pirates, they remain open in satellite, available in live broadcast on the occupied territories), however, Russian channels are switched off from the people metre panel and their indicators are counted now as 'other TV' the total quantity of which increased;
- **Political upheavals** (Maydan, war, elections) stimulated demand on news, panel discussions and real time television. Informational TV channels also increased and on-line broadcasters such as hromadske.tv as well as web-sites and social networks picked up the traditional television audience. At the same time, the war and tragic events temporarily influenced the program policy of family TV channels: some of them declared refusal from entertainment projects in 2014 explaining that it is not appropriate time for this.

A salvation for TV business on the peak of economic crisis brought elections that nourished the market with funds from legal and underground advertisement budgets. However, it would be unfair to talk about television as profitable business. In spring, 2015, an unprecedented case in Ukrainian TV market history occurred: TBi channel which was broadcasting through cable in all Ukraine stopped its activity because of financial hardship. Although, in a few weeks, the channel which belonged to the Member of Parliament, David Zhvaniya according to non-official sources, renewed its broadcasting with new top-management and program conception. It is unknown who became a new owner: the initiatives of Ukrainian lawmakers to bring more transparency to media ownership are still not effective.

Regulation

The intentions of the National Council to deregulate the branch and induce it to self-regulation experienced fiasco from two reasons: Firstly, there was an absence of consensus in the issues concerning self-regulation between broadcasters who were involved in oligarch wars between their owners. Secondly, the state gives more priority to national interests rather than to informational security and resistance to propaganda.

The National Council that almost completely changed its personnel in 2014 and recently created Ministry of Information Policy are attempting to influence TV broadcasters' program policy. In particular, Verkhovna Rada approved the law 'About making changes to some Ukrainian laws concerning Ukrainian TV and radio space security' (# 159-VIII) that limits showing Russian propaganda serials about militaries and police guard as well as other cinema production of Russian origin created after the 1st of January, 2014. However, in practice this law will evidently not limit Russian-Ukrainian co-production in Ukrainian TV and radio space that can complicate resistance to anti-Ukrainian propaganda.

There is some sad experience in this connection: the National Council submitted a number of warnings in 2014-2015, in particular, to 'Inter' and '112 Ukraina' for presence of anti-Ukrainian propaganda in live broadcast and providing broadcast for terrorists. However, these warnings did not cause any real sanctions and were cancelled in case with 'Inter'. According to Olha Herasymyuk, the member of National Council, attempts of regulatory body to take up the functions of an area discussion moderator and help broadcasters create general rules for self-limiting and step by step refusal from Russian content have not still led to any productive results. Formally, Ukrainian law does not suppose discrimination mechanism of precisely Russian content that is interpreted as 'European'. Currently, there are attempts of lawmakers to remove Russian product from European completely (bill # 2766 'About making changes to Ukrainian law about television and radio broadcasting' concerning European programs definition). In return, top-manager of family TV channels, the program content of which is based on Russian serials, announced for several times in public that this content is not propagandistic and emphasized on impossibility to change it with something else in the nearest perspective. However, there are some exceptions: '1+1' TV channel almost completely refused from Russian content and is substituting it with its own production serials. Though, another channel of '1+1' group – 2+2 is going on to show mainly Russian serials. TV channels management is frequently acting according to conjecture: for example, ICTV channel has demonstratively refused from showing tapes with the actor Mykhayil

Porechenkov after his shooting with the machine gun at Ukrainian positions in Donetsk in front of cameras.

According to different evaluations, Ukrainian TV channels in 2013 spent from \$65 till \$300 millions buying Russian content. This sum has been naturally reduced due to the advertisements market decrease and economic crisis, though, the content of Russian production remains the basic rate making product for such TV channels as 'Inter', 'Ukraina' and 'ICTV'. Oksana Panasivska, TV producer considers that inappropriate content of state-aggressor during the war against Russia could be substituted with some cheap talk shows of own production.

Digital

In accordance with 'Zheneva-2006' regional agreement, Ukraine had to substitute analog television with digital one completely till the 17th of June, 2015. However, there is not technological opportunity for carrying out this duty. Partially, it is explained by economic crisis, partially by misapplication of the previous government, consequences of which are not solved by current governors. In 2010, it the state entrusted 'Zeonbud' private company with digital television infrastructure development and administration functions, though, this organization has rather non-transparent ownership structure and it has actually monopolized the market. Manipulations with licenses for broadcasting, fares for 'Zeonbud' services for broadcasters put the digital television development back. According to the national TV and radio information space development plan, switching off analog television will occur not till the 17th of June 2015 but start from this date. Actually, as Olena Cherysha, the Member of National Council is evaluating, disconnection from analog signal in some regions will occur in March 2016. The deadline for analog television shutdown in Ukraine, as she predicts, will be in 2018 like in Russia where the complete upgrade to digital TV was delayed to this period. Before switching off analog television, it is necessary to provide at least 95% of population with digital signal coverage ('Zeonbud' network, as experts assess, covers not more than 70% of population); to provide vulnerable people with digital signal receivers (set top boxes) and equip the market with not expensive set top boxes for retail realization; to ensure digital broadcasting licenses for those TV companies which have analog broadcasting licenses but lost in previous digital competitions (there are about 130 of such broadcasters in Ukraine); demonopolize the digital broadcast television services market (share or nationalize 'Zeonbud' or give the license to an alternative to 'Zeonbud' digital network operator – state radio broadcasting, radio communication and television business concern).

Public broadcasting

The state television reforming is one of not numerous models of positive changes that occurred after Maydan. Having made use of the moral advantage after the change of government and promises given by new governance to democratize media branch, environment of media activists achieved their presence in live broadcast of National TV and radio company, 'Public television' and 'Public radio' respectively. At the position of NTK general director was appointed 'Mediaport' Kharkive online publication founder, Zurab Alanasiya, whose applying was lobbied by media environment. The state television edi-

torial policy, that traditionally had served interests of local and central governments, was changed. According to 'Telekrytyka' public organization monitoring, the news of 'The First Channel' are reaching the highest progress in following standards, and in most of regions, state regional TV companies make news more proficiently than commercial broadcasters.

Public (Ukrainian law prefers the term 'social') television and radio broadcasting that was attempted to emerge since 1997, has finally appeared at least on the legislative level. On the 19th of March, 2015, Verkhovna Rada approved the law 'About social television and radio broadcasting in Ukraine' in the second reading. In accordance with this law, on the basis of National TV and radio company, regional TV and radio companies and other state broadcasters, a public joint stock company 'National Public TV and Radio Company of Ukraine' (further, NPTU) will be created. Though the only shareholder of this newly created company is the Cabinet of Ministers, this ownership form aims to safeguard the editorial policy of NPTU from economic impact of government. NPTU funding is supposed to make 0,2 % from the state budget of Ukraine.

This attempt to create public broadcasting is still more productive than all previous, though, it is also followed by rather serious challenges. Reforms in state television face with resistance and sabotage both from the great army of personnel who wish to keep their job place and state officer status, and from politicians – 'state protectors'.

There is especially fierce resistance to reorganization in regions where state regional TV and radio companies with 500 team-workers in each one have merged for long with local government as well as business and they don't have a desire to turn into compact public broadcaster's production-branches. NPTU chairman's effort is directed to changing TV channel program content and it became really more qualified. However, critics are reasonably drawing attention to the audience quantity reducing at the 'First Channel' from 2, 11 % in 2013 till 0, 78% in April 2015 as the channel is orienting to 'Facebook audience' and receiving such indicators. Many questions concerning restructuring, property regulations, modernization, and above all – human resources reestablishment at the state TV companies still remain without answers.

Policy

Television remains an instrument and environment of political battle (particularly, before elections). According to 'Telekrytyka' monitoring results, the period, when information services of the most TV channels were trying to work following professional standards, began at the end of February and finished at the beginning of June, 2014. The president elections that took place in May, 2014, were the first for ten years without mass compromising material emissions, hidden ads and political PR in TV news. However, before the elections to Parliament in October, the news was full of jeansas (hidden ads) and manipulation activity returned to its 'pre-revolutional' level.

Table 1. General amount of materials containing violation of professional standards that can indicate to biased production (censorship) peculiarities:

Channel	January 2015	October 2014	September 2014	July 2014	May 2014	March 2014	January 2014
'Inter'	33	65	16	31	14	19	53
'Ukraina'	22	48	17	12	9	11	29
ICTV	12	39	14	10	14	10	27
'1+1'	9	21	8	7	2	9	31
STB	4	13	6	8	2	4	6
New Channel	-	12	6	4	8	3	13
The 5th Channel	6	11	6	5	6	7	12
The First National	7	10	7	8	5	18	66

The most manipulations and hidden ads are releasing news and political programs from two central TV channels: 'Inter' and 'Ukraina'. Both of them are directing all their propagandistic effort to 'Oppositional alliance' political party promotion the 'shareholders' of which are Serhii Lyovochkin and Rinat Akhmetov, owners of TV channels. Presence of 'Oppositional alliance' representatives in the live broadcast on these channels is disproportionately frequent and the government criticism is presented without following the balance of thoughts standard. The government and 'Narodnyi Front' (People's front) party associated with it made several unsuccessful attempts of pressure on 'Inter' on their behalf.

One of the most conspicuous tendencies in TV space in 2014-2015 years became so-called oligarch war – open confrontation between Ihor Kolomoyskyi and 'coalition' of Dmytro Firtash, Serhii Lyovochkin, Rinat Akhmetov and Viktor Pinchuk, that was developing in TV broadcast.

The struggle for more impact on state monopolies moved into informational space in May, 2014 and after a while TV news of '1+1', 'Inter', 'ICTV', 'STB' and 'Ukraina' channels were full of black PR and compromising materials against oligarchs, their business and political projects. Thus, instead of censorship and political dictatorship of Yanukovich regime, secured by oligarchic loyalty, the 'censorship pluralism' of oligarchic television appeared when every TV channel is creating a manipulating picture of the world to its owner advantage.

Introduction

In 2014-2015, Internet and social media continued their fast-moving development in Ukraine getting ahead of printed mass media and radio as social discussion platforms by the influence criterion. More than 20 million of Ukrainian citizens use Internet for communicating with friends, entertainment, news search and purchases. However, TV, as the communication channel, influence level is getting ahead of Internet covering much more audience. At the same time, the further development of television is caused by its gradual convergence with online platforms.

In the context of Ukrainian-Russian war in Donbas, Internet is carrying out several important functions, in particular, consolidation of users and communication in the information war period. By means of Internet tools, Ukraine is also getting evidence of Russian army presence on Ukrainian territory, journalists and bloggers are monitoring Russian soldiers in Ukraine using geo-location in Instagram, published photos in Vkontakte social network and video in YouTube. Technologies and online-platforms help consolidate Ukrainian users for fund raising and network activism in order to resist to Russian aggression in Donbas and Crimea.

According to Gemius [1] research, conducted in June, 2014, 18,8 million of Ukrainian citizens out of more than 45 million population had access to Internet. The audience increase made 12% a year. Nearly 90% of users are served in Internet every day.

After the change of political regime in February, 2014, the new Ukrainian government does not practice freedom restrictions in Internet at all. Citizens have free access to the network and for the previous year not any central censorship was detected. At the same time, in the first half of 2015, it was noted that police officers' actions caused to seizure of services from one Internet provider under the pretext of 'struggle against terrorism'. It temporarily blocked several Ukrainian online media activity.

In December, 2014, the government created Ministry of Information Policy, the state affiliation dealing with information policy coordination in Ukraine and international arena. The heads of newly created Ministry put the goal to look for the answers to Russian propagandistic attacking messages against Ukraine. However, the Ministry's activity caused negative reaction on behalf of media environment as journalists worried that the Ministry would influence their editorial policy introducing censorship in war conditions.

However, Russian threat in information space is quite understandable. Russia is applying the arsenal of propaganda and misinformation strategies against Ukraine. Bots and trolls (paid Internet users whose aim is to misinform and distract the users' attention from popular topics) are being actively used. DDoS attacks against Ukrainian government web-sites and online media web-sites are frequent. Ukrainian media outlets are becoming more and more present in international network. Editorial offices of key online media such as Ukrayinska Pravda (Ukrainian Truth), Liga.net, LB.net, Podrobnosti.ua, 'Dzerkalo Tyzhnya' (Weekly Mirror), 'Obozrevatel' (Observer) are currently operating on modern updated web-sites visited by the hundred thousands of users daily.

Access to Internet

For the last five years, the Internet audience in Ukraine is constantly increasing. According to the mentioned Gemius data, in June, 2014, 18,8 millions of Ukrainian citizens had access to Internet. In 2014, its increase slowed down in comparison with 2013. If in 2013, the audience increased by 20%, in 2014, this percentage made 12 % of users. At the same time, the users are online more frequent – nearly 90% use Internet every day. Women are more active in the network, they make 50,8 % of all users, men comprise 49,2 %. According to the age groups, the most numerous are users in the age of 25-34 years – 30% of all users, 25,8 % – in the age of 14-24 years and 21,1 % – in the age of 35-44 years. The Internet audience spread by the city residents and village district inhabitants. The access to broadband Internet remains cheap comparing with other countries – in average, monthly abonent rent does not exceed \$10.

In May, 2015, the number of Ukrainian active Internet users made 21,8 million of people – it is evident from the results of new research conducted by Factum Group Ukraine company [2].

Social media influence

40 millions of the user profiles were registered in 4 greatest social networks in Ukraine in August, 2014 – so are the data of Yandex Ukraine research [3]. The prominent role in number of users played Russian social networks – Vkontakte (27 millions of profiles) and Odnoklasniki (11 millions of profiles) 3,2 millions of profiles were registered in Ukrainian segment of Facebook. The number of accounts in Twitter increased by one and a half times since the beginning of 2013 reaching the indicator of 430,000 accounts – data taken in August, 2014. In March, 2015, Watcher [4] pointed out that the number of Ukrainian Facebook users reached 4 millions.

On the background of social media development, especially Facebook and Twitter, the opinion leaders, including politicians, started active registration of their accounts in social media for informing the audience several years ago. Nowadays, Facebook is the central platform for social discussions in Ukraine, These discussions continue living due to central media – screenshots of messages published in Facebook are rapidly spreading in TV news and online media. Politicians and journalists are the most popular users of Ukrainian Facebook in 2015. Public Facebook profile sections updating by the Minister of Domestic Affairs, Arsen Avakov, is followed by 315,000 users of this social network.

The influence of social media on public life in Ukraine was demonstrated also in case with discussion on the Facebook usage policy. In April-June, 2015, some top Ukrainian Facebook users were banned by service administration for the reason of violating terms of service usage. The users rejected any accusations in violation and started a public campaign demanding to create 'Facebook Ukrainian office'. The appeal to Facebook founder, Mark Zuckerberg, was supported even by the president of Ukraine, Petro Poroshenko [5].

Online media in digital era

For the period of 2013-2014, Ukrainian online media significantly strengthened their presence in the network and discovered new audiences. For example, since the beginning of the war in Donbas, the audience of the greatest online media, Ukrainian Truth increased from 1 million to 3 millions of daily viewers, the number of unique users from 300,000 to 1 million, as it is evident from SimilarWeb.com.

In response to the market development in the period of the end of 2013 and for the whole 2014, dozens of new online media started their activity. These Internet resources reached rather high operational results. Web-site attendance rate in 2015 (unique users in a monthly period of activity) is available below:

Espresso.TV – <http://espresso.tv/> – 6,5 millions;

New Time – <http://nv.ua/> – 5 millions;

Inforesist.org – <http://inforesist.org/> – 3,5 millions;

Hromadske TV – <http://www.hromadske.tv/> – 3 millions;

Apostrophe – <http://apostrophe.com.ua/> – 2 millions;

4 Vlada – <http://vlada.io/uk/> – 0,8 millions;

Insider – <http://www.theinsider.ua/> – 0,5 millions.

The rapid development of Ukrainian Internet media is not an easy process. Receiving online profits (monetization) remains the key challenge to mass media management. Long-awaited shift has taken place in mobile Internet market. Since May, 2015, mobile operators in Ukraine gave their clients the access to mobile Internet according to 3G technology. The high speed of 3G format Internet will change the market as mobile internet usage increasing is supposed that, consequently, will lead to emergence of new actors and more competitiveness at the online media market. Already today, 52% of Internet users in the USA are reading news via mobile telephones and tablets, so are the data of ComScore research [6].

Online trends

‘The move to online’ is one of the key trends for mass media market in Ukraine and in the world. If media were earlier classified in categories of press, television and online media, today such classification is less relevant. The platforms are joining: printed media and TV channels are creating online platforms and launch communication in social media adapting the content to online environment requirements. As an example, ‘Novoye vremya’ (New Time) magazine together with the web-site www.nv.ua, ‘1+1’ TV channel together with www.TSN.ua web-site are demonstrating successful move to online section.

Social media became crucial in public society functioning in Ukraine. Twitter, Facebook and YouTube demonstrated efficiency in consolidation of active Ukrainian citizens for the last two years. Social media help in coordination of efforts made by hundreds volunteer groups, enable to trace Russian media manipulation methods and follow the activity of Russian troops in Ukraine.

Facing with propagandistic war against Russia, Ukraine is looking for effective channels of international society informing about the events in Ukraine. English language TV channel Ukraine Today release in live broadcast enables to communicate with the world due to round the clock broadcasting and web-site (<http://uatoday.tv/>) activity. www.StopFake.org web-site launch gives journalists an opportunity to investigate Russian manipulation strategies and debunk false messages of the official Russian media.

Conclusions

Taking rapid development of new technologies and increased Internet impact into consideration, Ukrainian media landscape is also changing. On the one hand, media industry is strengthening its presence in Internet expecting more profits from online production. On the other hand, the news consumption ways are changing: users are moving from web-sites to social media, changing computers for mobile gadgets. Since 3G mobile Internet technology is launched in Ukraine, users will consume more information being online taking part in quicker media development process.

The current conflict between Russia and Ukraine has visually demonstrated that online media are sensitive to manipulations and hate speech. Russia is actively using propaganda and manipulations by means of Internet technologies and social media that represents a challenge to democracy in Ukraine. In response, Ukrainian government created the Ministry of Information Policy. However, the efficiency of this newly created Ministry in countering Russian propaganda is doubtful, the role of civil society in opposing propaganda is more productive.

In terms of democratic management, Internet gives citizens more opportunities to follow the governmental activity. Thanks to the access to public data and work with users, investigative journalists can expose violations and corruption. In the coming years, Internet will remain the motive force for transformation of government, business initiatives development (start-ups, online business) and maintenance of civil society in Ukraine.

[1] <http://watcher.com.ua/2014/08/19/audytoriya-ukrayinskoho-internetu-spovilny-la-sviy-rist-za-rik-zrosla-lyshe-na-12/>

[2] <http://watcher.com.ua/2015/06/12/59-ukrayintsiv-korystuyutsya-internetom/>

[3] http://download.yandex.ru/company/Yandex_on_UkrainianSMM_Summer_2014.pdf

[4] <http://watcher.com.ua/2015/03/30/za-rik-ukrayinska-audytoriya-facebook-zrosla-na-25/>

[5] <https://www.facebook.com/petroporoshenko/posts/620914074709655>

[6] <http://www.comscore.com/Insights/Presentations-and-Whitepapers/2014/The-US-Mobile-App-Report>

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