



Albania: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	4
Media Ownership.....	6
Results.....	8
Conclusion.....	14

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Albanian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Albania's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Albanian media ownership initially appears transparent, as the government runs a publicly available database of registered business entities and their owners. However, online outlets are not required to report funders and restrictions on ownership reporting are applied unevenly, so the true owners of Albanian media are often hidden.¹ Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Albania.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile were collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in

¹ "Albania 2019: Media Sustainability Index." International Research and Exchanges Board. Published 2020.

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-albania.pdf>

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

Albania, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when available (e.g., Alexa³), as well as the Albanian National Business Center, survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Albania as of September 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and reach of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Albania's media landscape is via Russian state-owned media (see Table 1). Only one of the eleven Russian state-owned media outlets we tracked has a physical presence in Albania, which provides the Kremlin with a very weak channel to directly communicate with, and ultimately influence, Albanian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Albania, but does not speak to how well-consumed each outlet is by Albanian citizens.

³ Alexa is an online analysis tool. AidData staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Albania, 2021

Television		Print		Radio		News Agency	
Russia I	✗	Rossiyskaya Gazeta	✓	Sputnik	✗	TASS	✗
Russia 24	✗					Sputnik	✗
Russia K	✗						
RTR-Planeta	✗						
TV Centre	✗						
Channel One	✗						
RT	✗						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Albania by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. According to a NATO study, television and online outlets are the top consumed mediums for information in Albania and therefore likely more influential, while radio and print media are seldomly consumed.⁴ While we make no claims about the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite Rossiyskaya Gazeta being the only Russian state-owned media outlet present in Albania, it does not appear in the top five print outlets.

⁴ Svetoka, Sandra and Tihomira Doncheva. "Russia's Footprint in the Western Balkan Information Environment: Susceptibility to Russian Influence." NATO Strategic Communications Centre of Excellence. Published October 2021.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Albania. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵

Table 2: Top Albanian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Radio Televizioni Shqiptar (RTSH)	Gazeta Panorama	Top Albania Radio	gjirafa.com
2	TV Klan	Gazeta Shqiptare	Club FM	panorama.com.al
3	Top Channel	Gazeta Shekulli	Radio Tirana 1	balkanweb.com
4	Vizion Plus	Koha Jone	ABC News Radio	syri.net
5	ABC News	Mapo	TV Klan Radio	abcnews.al

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Albanian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this list but ranked highly by local experts include the television station News 24, print outlet Gazeta Shqip, and the online outlet Gazeta Express (gazetaexpress.com).

⁵ Television, Print and Radio Sources: We calculated television, radio and print rankings using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Media Ownership Monitor Albania (2017), Mediabuzz.org’s Albanian Media List (2020), Reporter.al’s Television Market analysis (2019), and the European Union’s “Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans” Report (2020). Online Source: Alexa, April 2021.

Media Ownership

Table 3 lists the ownership information of top Albanian media outlets by medium (television, newspaper, radio, and online). Albanian media ownership on paper is fairly transparent, as registration of traditional media owners in the public National Business Center database is required by law. However, online outlets are not required to register their owners and enforcement of the laws is often uneven, leading to some gaps in effective legislation and hidden ownership.⁶ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Albanian state-owned media is color-coded blue. In Albania, one owner had suspected or known ties to the Russian government, and no outlets had direct Russian ownership. As such, this profile has one red color-code and two designations of state-owned media.

Table 3: Ownership of top Albanian media outlets by share

No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Radio Televizioni Shqiptar (RTSH)	Government of Albania		100
	2	TV Klan	Klan TV JSC	Aleksandër Frangaj	60
				Alba Gina	40
	3	Top Channel	Top Media Group	Vjollca Hoxha	20
				Sara Hoxha	20
				Redia Hoxha	20
				Lorela Hoxha	20
				Itan Hoxha	20
	4	Vizion Plus	Edil AI Group	Artan Dulaku	33.3
				Adrian Dulaku	33.3
Genci Dulaku				33.3	
5	ABC News	Klan TV JSC	Aleksandër Frangaj	50	

⁶ "Albania 2019: Media Sustainability Index." International Research and Exchanges Board.

				Alba Gina	50
Newspaper	1	Gazeta Panorama	Panorama Group LLC	Irfan Hysenbelliu	100
	2	Gazeta Shqiptare	Focus Group LLC	Bashkim Hysenbelliu	100
	3	Gazeta Shekulli	UNIPRESS LLC	Koço Kokëdhima	90
				Dionis Heqimi	5
				Sadik Llapashtica	5
4	Koha Jone	Koha Jone LLC	Nikoll Lesi	100	
5	Mapo	Mapo Media LLC	Arlind Alikaj	100	
Radio	1	Top Albania Radio	Top Albania JSC	Zhuljeta Lamaj	20
				Vjollca Hoxha	16
				Sara Hoxha	16
				Redia Hoxha	16
				Lorela Hoxha	16
				Itan Hoxha	16
	2	Club FM	Club Muzikor JSC	Arben Bylykbashi	74
				Olta Reka	26
	3	Radio Tirana 1	Government of Albania		100
4	ABC News Radio	Klan TV JSC	Aleksandër Frangaj	50	
			Alba Gina	50	
5	TV Klan Radio	Klan TV JSC	Aleksandër Frangaj	60	
			Alba Gina	40	
Online	1	gjirafa.com	Gjirafa Inc.	Mergim Cahani	Majority
				Ercan Canhasi	Minority
				Diogjen Elshani	Minority
				Esther Dyson	Minority
				Ondrej Bartos	Minority
				Philip Staehelin	Minority
				Kosovo Innovation Center	Minority
	Rockaway Capital Investors	Minority			
	2	panorama.com.al	Panorama Group LLC	Irfan Hysenbelliu	100
3	balkanweb.com	Focus Group LLC	Bashkim Hysenbelliu	100	
4	syri.net	"Open Information Center" NGO	Clirim Peka	Unknown	
			Other	Unknown	
5	abcnews.al	Klan TV JSC	Aleksandër Frangaj	50	
			Alba Gina	50	

Results

Television

Television is the most popular news medium in Albania.⁷ While the most-watched television outlet is the state-run Radio Televizioni Shqiptar, the next four most-watched television channels are all privately owned. Many of these private owners have ties to political figures and own other top media outlets as well.⁸

The second most-viewed television station is TV Klan, a part of the Klan TV JSC conglomerate. Owned by Aleksandër Frangaj and his wife Alba Gina, Klan TV JSC owns top outlets in both Albania and Kosovo, including ABC News, Klan Kosova, TV Klan, Klan+, and TV Klan Radio. Frangaj was a former journalist and helped develop Koha Jone, one of the first independent newspaper outlets founded after the fall of communism. Now, as a media mogul, media watchdogs report that Frangaj is known for playing to the government's interests and is reportedly rewarded for showing incumbent political figures in a positive light, regardless of which party is in charge.⁹ Under Klan TV JSC, Frangaj and Gina also own ABC News, the fifth most-viewed television station in Albania, after purchasing it from Redi Sata in 2019.

The third most-viewed television station is Top Channel, owned by the Hoxha family, another key media family. Dritan Hoxha founded Top Media, which also includes the newspaper Gazeta Shqip, Top Albania Radio, and DigitAlb. Following his death in 2008, his wife Vjollca Hoxha and their four children received equal shares of ownership in Top Media Group. Like Frangaj, Dritan Hoxha was a controversial figure, famously getting into a legal battle over satellite broadcasting rights with Prime Minister Sali Berisha. Top Channel

⁷ "Albania Profile - Media." BBC. Published February 11, 2020.
<https://www.bbc.com/news/world-europe-17680734>

⁸ "Albania 2019: Media Sustainability Index." International Research and Exchanges Board.
<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-albania.pdf>

⁹ "Frangaj Family." Media Ownership Monitor Albania. Published March 15, 2018.
<https://albania.mom-rsf.org/en/owners/individual-owners/detail/owner/owner/show/frangaj-family/>

reportedly covered former Tirana Mayor and current Prime Minister Edi Rama in a positive light, in opposition to the Berisha government.¹⁰

The fourth most-viewed television station is Vizion Plus, owned by the Dulaku brothers. Like the Frangaj and Hoxha families, the three Dulaku brothers reportedly have ties to politicians, particularly Prime Minister Edi Rama and the Socialist Party of Albania.¹¹ The relationship developed as a result of the Dulaku's construction business, which required building permits from former Tirana Mayor Edi Rama's office. For favorable business contracts, now-Prime Minister Rama received positive reporting from the Dulaku's Vizion Plus.¹²

Aside from the government-run RTSH, four of the top five Albanian television stations are controlled by centralized media conglomerates with ties to current or former governments. These findings support the claim that concentration of media ownership in Albania is rather consolidated, with wealthy, politically connected elites controlling the vast majority of the Albanian media space.¹³

Print

Print media ownership follows a similar pattern to television outlets, with high ownership concentration around political elites. For example, Albanian business mogul Irfan Hysenbelliu owns the top two most-read newspapers, Gazeta Panorama and Gazeta Shqiptare. The National Business Council reports that Bashkir Hysenbelliu, Irfan's cousin, owns Focus Group and therefore Gazeta Shqiptare; however, observers report that Irfan is the true owner of Focus Group in addition to his holdings over Panorama Group.¹⁴ Hysenbelliu is not publicly

¹⁰ Van Gerven Oei, Vincent. "Cellphone Comment Puts Spotlight Back on Rama's Villa." Exit News. Published October 1, 2019.

<https://exit.al/en/2019/01/10/cellphone-comment-puts-spotlight-back-on-ramas-villa/>

¹¹ "Dulaku Family." Media Ownership Monitor Albania. Published February 21, 2018.

<https://albania.mom-rsf.org/en/owners/individual-owners/detail/owner//dulaku-family/>

¹² "KKT Approves Clientelist Permit for Another Tirana Skyscraper." Exit News. Published December 14, 2017.

<https://exit.al/en/2017/12/14/kkt-approves-clientelist-permit-for-another-tirana-skyscraper/>

¹³ Mucollari, Stiv. "Erosion of Media Pluralism in Albania." Democratic Erosion: Suffolk University. Published April 20, 2019.

<https://www.democratic-erosion.com/2019/04/20/erosion-of-media-pluralism-in-albania-by-stiv-mucollari/>.

¹⁴ "Irfan Hysenbelliu." Media Ownership Monitor Albania. Published January 22, 2018.

<https://albania.mom-rsf.org/sq/pronesia/pronaret/detail/owner/owner/show/irfan-hysenbelliu/>.

tied to any Albanian government or party, but his dominant holdings in the media and other sectors give him a significant share of the Albanian media space.¹⁵

The third most-read print media outlet is Gazeta Shekulli, majority owned by Albanian businessman and politician Koço Kokëdhima with minority shares from businessmen Dionis Heqimi and Sadik Llapashtica. Kokëdhima, one of the wealthiest Albanian citizens, founded Shekulli in 1997 as a part of his business empire, and has owned the outlet since. Kokëdhima's background is inherently political, as he was elected to be First Secretary of the youth branch of the Albanian Labor Party from 1984 to 1991, and then elected to be a Member of Parliament under the Socialist Party of Albania in 2013.¹⁶ However, in 2016, Kokëdhima's electoral mandate was declared void by the Albanian government due to his businesses benefitting from state funds while he held a position in parliament.¹⁷ Following this denouncement, Kokëdhima's position has remained largely as an influential businessman since 2017. According to a few sources, Kokëdhima has a number of business ties to the Russian government, and some speculate that he operates in Moscow's interests in Albania.¹⁸ As for Heqimi and Llapashtica, the minority owners of Shekulli, both own shares of other businesses in the energy and trade sectors, but AidData staff found no clear ties between them and Albanian politicians or the Russian government.¹⁹ It is worth noting that despite Kokëdhima's suspected ties to the Russian government, the content of Gazeta Shekulli does not appear to outwardly promote pro-Russian sentiments.

¹⁵ Karaj, Vladimir. "Last TV Shows Critical of Albanian Govt are Cancelled." Balkan Insight. Published August 29, 2019. <https://balkaninsight.com/2019/08/29/last-tv-shows-critical-of-the-government-are-closed-down-in-albania/>.

¹⁶ "Nga Flori Bruqi : Koço Kokëdhima, si u ngjit ish zyrtari i Rinisë së PPSH në piramidën e biznesit, pastrimi i parave me rusët." Agjencioni Floripress. Published September 14, 2017. <https://floripress.blogspot.com/2017/09/nga-flori-bruqi-koco-kokedhima-si-u.html>.

¹⁷ "Heqja e mandatit të Kokëdhimës, zbardhen prapaskenat e votimit." Gazeta Panorama. Published May 10, 2016. <http://www.panorama.com.al/heqja-e-mandatit-te-kokedhimes-zbardhen-prapaskenat-e-votimit/>.

¹⁸ "Adriatik Doci: Ilir Meta adhuresi i fshehtë i Koço Kokëdhimës, një koincidence me emrat e fëmijëve, flirti me rusët dhe një çarkore e SHBA." Shqiptarja.com. Published October 18, 2021. <https://shqiptarja.com/lajm/ilir-meta-adhuresi-i-fshehte-i-koco-kokedhimes-nje-koincidence-me-emrat-e-femijeve-flirti-me-ruset-dhe-nje-qarkore-e-shba>.

¹⁹ "Unipress LLC." Media Ownership Monitor Albania. Published January 26, 2018. <https://albania.mom-rsf.org/en/owners/companies/detail/company/company/show/unipress-llc/>.

The fourth most-read print media outlet is Koha Jone. Founded by Nikollë Lesi, Koha Jone was one of the original independent media sources after the fall of communism. Koha Jone's ownership changed many times, as founder Nikollë Lesi entered politics and could not legally retain ownership over the newspaper. As a result, he sold the newspaper to former editor and current media mogul Aleksandër Frangaj. However, in 2013 Lesi repurchased Koha Jone following stints as the Chairman of the Christian Democratic League of Albania, a Member of Parliament, and Deputy Minister of the Ministry of Youth, Culture, Tourism and Sport. Lesi remains the owner today.²⁰

Arlind Alikaj bought Mapo, the fifth most-read newspaper in Albania, from Henri Cili in 2019. Alikaj is a relative unknown to the media space, and his name only appears on official documents for ownership of Mapo Media LLC. However, InfoPress and other outlets have speculated that the true owner of Mapo is Beqir Nuredini, the former Mayor of Rrogozhina.²¹ Nuredini is infamous in Albania for corrupt activities during his time as mayor.²² This trend highlights media concentration of top Albania outlets in the hands of political elites.

Radio

Many of the same names from top television and print outlets appear in top Albanian radio ownership. Frangaj and his wife own ABC News Radio and TV Klan Radio, the fourth and fifth most-consumed radio stations. The Hoxha family owns 80% of Top Albania Radio, with Zhuljeta Lamaj, the widow of assassinated business mogul Vajdin Lamaj, holding the remaining 20%.²³

²⁰ Zguri, Rrapo. "Relations between Media and Politics in Albania." Friedrich-Ebert-Stiftung. Published 2017. <https://library.fes.de/pdf-files/bueros/albanien/14001.pdf>

²¹ "Henri Çili shet gazetën "Mapo", ja kush është pronari i ri me lidhje politike." InfoPress Albania. Published January 7, 2019. <http://infopressalbania.com/2019/01/07/henri-cili-shet-gazeten-mapo-ja-kush-eshte-pronari-i-ri-me-lidhje-politike/>

²² "Abuzimi me pronat në Spille/ Prokuroria dy vite burgim për ish-kryebashkiakun Nuredini." In-Front.org. Published March 23, 2021. <https://in-front.org/abuzimi-me-pronat-ne-spille-prokuroria-dy-vite-burgim-per-ish-kryebashkiaku-n-nuredini/>

²³ Vajdin Lamaj was assassinated in 2005 and held positions as the President of the Albanian Boxing Federation and the Vice President of Top Albania Radio. He also owned transport and restaurant businesses. <https://albania.mom-rsf.org/sq/pronesia/pronaret/detail/owner/owner/show/zhuljeta-lamaj/>

The two remaining radio stations are the second most-listened-to outlet, Club FM, and the third most-listened-to outlet, state-owned Radio Tirana 1. Club FM is predominantly a hit music radio station. Initially founded in 1999 by two Greek nationals and two Albanian nationals, only one founder, current Club FM CEO Arben Bylykbashi, remains. The two Greek nationals donated their shares, half to Bylykbashi and half to Olta Reka, a main host of the morning show “The Morning Club” on Club FM.²⁴ Bylykbashi bought out the other founder and now holds a 74% stake in the company, with Reka holding a 26% stake.

Radio ownership continues to show that political elites dominate the media ownership landscape in Albania. Former politicians and wealthy families with political connections own the vast majority of traditional media outlets.

Online

The Albanian government does not require the ownership of online media to be public, nor does it restrict the potential owners of online media outlets.²⁵ As a result, ownership of online media is opaque and true ownership is often hidden.

The top most-visited online media outlet is Gjirafa.com, a news aggregation site that pulls Albanian-language news from all over the internet. Founded by Mergim Cahani, Ercan Canhasi, and Diogjen Elshani, Gjirafa resembles a Western-style start-up, and has received significant investments from Western venture capital firms, including from American investor Esther Dyson, Czech investor Ondrej Bartos, American entrepreneur Philip Staehelin, Czech firm Rockaway Capital, and the incubator Kosovo Innovation Center. Due to the desire to attract investment and the regulations of other businesses attached to Gjirafa, ownership of this news aggregation platform was clearer than other online outlets.

However, for the remaining top online media sites, ownership either falls into the same familiar names or is difficult to track down. Irfan Hysenbelliu owns both Panorama.com.al and Balkanweb.com, the second and third most-visited online

²⁴ “Club Muzikor JSC.” Media Ownership Monitor Albania. Published February 8, 2018. <https://albania.mom-rsf.org/en/owners/companies/detail/company/company/show/club-muzikor-jsc/>

²⁵ “Albania 2019: Media Sustainability Index.” International Research and Exchanges Board.

outlets, as subsidiaries of his Panorama Group and Focus Group. Aleksandër Frangaj and his wife own Abcnews.al, fifth most-visited online outlet, under Klan TV JSC. The fourth most-visited outlet, Syri.net, is highly opaque. Officially, journalist Clirim Peka and a board of unnamed journalists own Syri.net; however, most reports attribute the ownership of Syri.net to former Prime Minister and current Member of Parliament Sali Berisha's son, Shkelzen Berisha.²⁶ Both Sali and Shkelzen Berisha have been labeled as corrupt by the US State Department, and they are barred from entering the US.²⁷ As a result, it is not surprising that the former Prime Minister's son reportedly controls a top consumed outlet with hidden ownership.

The lighter restrictions on online media in Albania allow for powerful political elites like Berisha to control top media outlets without legal consequences. Online media has similar issues to traditional media, namely media ownership concentration around political elites. However, when coupled with an additional layer of opacity that traditional media does not have, Albanian online media outlets provide a potential channel for undetected influence.

Conclusion

In this brief, we have presented an overview of the domestic media ownership of top outlets and the presence of Russian state-owned media in Albania. The collected data highlight two trends in Albanian media. First, media ownership is highly concentrated around those with ties to political elites. Second, Russia and other external actors appear to have relatively few active channels to influence the Albanian media space.

²⁶ "Balla akuza: Të hapen hetimet për Gërdecin, Shkelzen Berisha i përfshirë në krim shtetëror." Java News. Published September 17, 2020. <https://javanews.al/balla-akuza-te-hapen-hetimet-per-gerdecin-shkelzen-berisha-i-perfshire-ne-krim-shteteror/>; "Portali i Financuar nga Familja Berisha-Meta Replikon me Blushin ne jemi nje Fondacion Intelektualesh qe Smarrim para nga Asnje Politikan." Gazeta Tema. Published March 26, 2020.

<https://www.gazetatema.net/2020/03/26/portali-i-financuar-nga-familja-berisha-meta-replikon-me-blushin-ne-jemi-nje-fondacion-intelektualesh-qe-smarrim-para-nga-asnje-politikan/>

²⁷ "Public Designation of Albanian Sali Berisha Due to Involvement in Significant Corruption." U.S. Department of State. Published May 19, 2021.

<https://www.state.gov/public-designation-of-albanian-sali-berisha-due-to-involvement-in-significant-corruption/>

Albanian media ownership is centered around a few politically connected families. Out of the top five media outlets for each medium, the Frangaj family owns five outlets, the Hysenbelliu family owns four outlets, and the Hoxha family owns two outlets. In fact, Albanian media monitoring site Telemetrix suggests that nearly 59% of the total audience share of television, radio, and print media is owned by the Frangaj, Dulaku, Hoxha, and Hysenbelliu families.²⁸ Most of the remaining outlets are also owned by political elites, including former politicians Koço Kokëdhima, Nikollë Lesi, and Beqir Nuredini, and the son of former Prime Minister and current MP Sali Berisha. Ultimately, only two outlets are owned by journalists or individuals without political ties: the hit music station Club FM and news aggregator start-up Gjirafa.com. This political consolidation of media outlets provides potential channels for internal and external actors to influence the public.

While this major potential channel of influence exists in Albania, there is little indication of other channels for Russian influence in Albania. Only one Russian state-owned outlet, an office for Rossiyskaya Gazeta, exists in Albania. For media owners, only Koço Kokëdhima, Albanian businessman and owner of Gazeta Shekulli, has ties to Russian oligarchs and the Russian government, though this has not appeared to result in pro-Russian content in Gazeta Shekulli. The Albanian government also actively opposes Russia on the Kosovo-Serbia conflict, leading to potential public mistrust of the Russian government. As a result, Russia appears to hold little direct influence in the Albanian media space. In sum, despite some opportunities through media concentration by political elites, the Russian government has few channels to influence the Albanian public through media ownership.

²⁸ Mucollari, Stiv. "Erosion of Media Pluralism in Albania." Published April 20, 2019.

Armenia: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	2
Russian Media Footprints.....	3
Top Media Outlets.....	4
Media Ownership.....	6
Results.....	8
Television.....	8
Print.....	10
Radio.....	11
Online.....	12
Conclusion.....	13

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia

Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Armenian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Armenia's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Armenian media ownership data is fairly transparent due to a public government business registry (e-register.am). While this site is currently online, it was publicly unavailable from mid-2020 until early 2022, meaning that in recent years there have been large periods of time where ownership data was opaque. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Armenia.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.¹ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Armenia, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Zenith, Alexa²), as well as the Armenian government business registry, survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Armenia as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Armenia's media landscape is via Russian state-owned media (see Table 1). Ten of the eleven Russian state-owned media outlets we tracked have a physical presence in Armenia, which provides the Kremlin with a strong channel to directly communicate with, and ultimately influence, Armenian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Armenia, but does not speak to how well-consumed each outlet is by Armenian citizens.

² Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Armenia, 2021

Television		Print		Radio		News Agency	
Russia I	✓	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✓						
TV Centre	✓						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Armenia by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. Television is the most-consumed medium in Armenia, though the younger population prefers online outlets.³ This preference likely makes TV and online outlets more influential, while radio and print media are less consumed. While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of many Russian state-owned media outlets in Armenia, no Russian media appears in the top five outlets for any medium.

³ "Armenia Profile - Media." BBC. Published January 14, 2020. <https://www.bbc.com/news/world-europe-17404535>.

AidData used a weighted average of media consumption survey rankings from 2017 to present to determine the top media outlets in Armenia. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most-consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁴

Table 2: Top Armenian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Shant TV	Aravot	RFE/RL (Azatutyun)	News.am
2	ArmeniaTV	Haykakan Zhamanak	Public Radio of Armenia	Azatutyun.am
3	H1 (Public Television of Armenia)	ArmenPress	Radio Aurora	Mamul.am
4	Kentron TV	Hetq	Radio Van FM	1in.am
5	ArmNews TV	Hraparak	Hay Radio	Shamshyan.com

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Armenian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the newspaper 168 Zham, the radio stations Russkoe Radio and Armenian National Radio, and the online outlets a1plus.am and aravot.am.

⁴ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: the Advanced Public Research Group’s Media Survey (2019), the International Republican Institute’s Public Opinion Survey (2019/2020), IREX’s Media Sustainability Index (2019), Rank.am’s online rankings (2021), and CRRC Armenia’s Media Consumption and Media Coverage of Reforms in Armenia report (2019). Online: Alexa, April 2021.

Media Ownership

Table 3 lists the ownership information of top Armenian media outlets by medium (television, newspaper, radio, and online). Following the 2018 Velvet Revolution, the new political landscape has dramatically altered media ownership in Armenia, creating a rapidly changing media space and encouraging ownership transparency.⁵ While 2010 legislation prevented politicians from owning media outlets, the laws in Armenia were unevenly enforced and political elites dominated media ownership before the revolution. However, following the revolution, stronger enforcement of the laws on media ownership began, forcing some changes to the ownership of top media outlets.⁶ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Armenian state-owned media is color-coded blue. In Armenia, one owner had suspected or known ties to the Russian government, and no top outlets had direct Russian ownership. As such, this profile has one red color-code and three designations of state-owned media.

Table 3: Ownership of top Armenian media outlets by share

 No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Shant TV	Shant LLC	Arthur Yezekyan	52
				Aram Armenovich Mnatsakanyan	48
	2	ArmeniaTV	Panarm LLC	Robert Hovhannisyan	100

⁵ “Armenia Profile - Media.” BBC. Published January 14, 2020.

⁶ Nahapetyan, Alina. “The challenges of Armenia’s media landscape.” New Eastern Europe. Published November 14, 2021. <https://neweasterneurope.eu/2021/11/14/the-challenges-of-armenias-media-landscape/>

	3	H1	Government of the Republic of Armenia	100
	4	Kentron TV	Multi Media-Kentron TV CJSC	Sedrak Arustamyan 100
	5	ArmNews TV	Qaryak Media CJSC	Arman Saghatelyan 25 Samvel Farmanyan 25 Karen Bekaryan 25 Mihran Hakobyan 25
Print	1	Aravot	Aravot Daily LLC	Aram Abrahamyan 100
	2	Haykakan Zhamanak	Dareskizb LLC	Kim Sarkisovna Mkrtchyan 70 Hayk G. Gevorgyan 20 Petros Stepanovich Makeyan 10
	3	ArmenPress	Government of the Republic of Armenia	100
	4	Hetq	Investigative Journalists of Armenia NGO	Edik Baghdasaryan 100
	5	Hraparak	Hraparak Daily LLC	Armine Ohanyan 90 Sevak Grigoryan 10
Radio	1	Radio Azatutyun	Government of the United States	100
	2	Public Radio of Armenia	Government of the Republic of Armenia	100
	3	Radio Aurora	Aurora Media Holding	Michael Janpoladyan 100
	4	Radio Van FM	Odensnus AB Radio Van LLC	Gevorg Nalbandyan 49 David Hovsepyan 36 Shushanik Arevhatyan 10 Hrant Gohar Yeghiazaryan 5
	5	Hay Radio	Radio Hay LLC	Anahit Tarkhanyan 100
Online	1	News.am	Armenian News-NEWS.am	Armenika Kiviryan 100

Information-Analytical Agency				
2	Azatutyun.am	Government of the United States		100
3	Mamul.am	Social Media LLC	Sevag Melikyan	100
4	1in.am	First News LLC	Arman Babajanyan	50
			Anahid Shahinyan	50
5	Shamshyan.com	Shamshyan Media LLC	Gagik Shamshyan	100

Results

Television

Television remains the most-consumed media in Armenia: 72% of Armenians watch at least one nationally broadcast television program every day.⁷ The top television channels consist of a mix of private and public ownership. The change in ownership trends between pre-Velvet Revolution and post-Velvet Revolution is highly apparent in television outlets. Political elites and politicians that dominated the pre-2018 Armenian media space are significantly less powerful than they were previously.

The most watched television outlet in Armenia is Shant TV, founded by journalist Arthur Yezekyan. Yezekyan remains a majority owner of the outlet today, with a minority stake owned by Aram Mnatsakanyan. Prior to the revolution, the minority stake owner was Armen Minas, who was tied to Russian-Armenian billionaire Samvel Karapetyan, as well as other wealthy political elites in the Kocharyan government.⁸ Today, political elites no longer own shares in Shant TV, highlighting the changes from 2018 to present. According to a 2022 IRI poll, Shant TV is one of the most trusted outlets in Armenia today.⁹

ArmeniaTV, the second most-watched television outlet, also underwent major changes pre- and post-revolution. Initially part of the 2012 conglomerate PanArmenian Media

⁷ "Media Consumption and Media Coverage of Reforms in Armenia," Media Initiative Center. Published August 2019. https://www.crrc.am/wp-content/uploads/2019/03/MICE-Report-2019_.pdf.

⁸ Baghdasaryan, Edik. "Media Moguls: On the Trail of Armenian TV Owners." Hetq.am. Published July 5, 2010. <https://hetq.am/en/article/45873>.

⁹ "Public Opinion Survey: Residents of Armenia." International Republican Institute. Published January 31, 2022. <https://www.iri.org/resources/public-opinion-surveyresidents-of-armenia/>

Group (PAMG), ArmeniaTV was controlled by some of the most influential political elites. PAMG owned both ArmeniaTV and ATV, as well as Tert.am, Lav Radio, ArmNews, and a number of other outlets across mediums. Armenia's third president, Serzh Sargsyan, was reportedly a significant shareholder of these outlets until 2019, when PAMG was split and divided between a number of owners. Following the collapse of PAMG, Russian media mogul Artur Janibekyan became the sole owner of ArmeniaTV;¹⁰ however, according to the business registry, Robert Hovhannisyan is the 100% beneficiary of ArmeniaTV through PanArm LLC. Hovhannisyan is likely an intermediary owner for Janibekyan, who is the head of Gazprom-Media, one of the largest Russian entertainment media holdings. An Armenian entertainment and media producer in Russia, Janibekyan controls Russian outlets TNT, NTV, TV-3 and 2x2. This change highlights that, while Armenian politicians and political elites have been prevented from consolidating media outlets, foreign actors and wealthy elites still hold power in the Armenian media space.

The third-most watched television is H1 TV, run by the Armenian government.

Kentron TV, the fourth most-watched television outlet, is owned by Sedrak Arustamyan. However, Gagik Tsarukyan, founder and leader of the opposition Prosperous Armenia political party, founded and reportedly still controls the outlet through Arustamyan.¹¹ Arustamyan himself was arrested for bribery and corruption charges, but released on bail in December 2020.¹²

Similarly, ArmNews TV, the fifth most-watched television outlet, is owned by Qaryak Media CJSC, a media holding group founded and owned by four former Republican parliamentarians. While these former politicians no longer hold office, their presence

¹⁰ "Media holding PanArmenian Media Group collapsed, Artur Janibekyan became the owner of 'Armenia TV' and 'Radio Jan.'" Novosti Armenia. Published February 8, 2019. <https://newsarmenia.am/news/society/mediaholding-panarmenian-media-group-raspalsya-artur-dzhani-bekyan-stal-vladeltsem-armenia-tv-i-radi/>

¹¹ Yeghiazaryan, Saten. "Armenia June 2021 elections: a guide to media landscape." Jam News. Published June 16, 2021. <https://jam-news.net/armenia-june-2021-elections-a-guide-to-media-landscape/>

¹² Mamulyan, Araks. "Yerevan Court Grants \$98,000 Bail to Multi Group LLC Director Sedrak Arustamyan." Hetq.am. Published December 3, 2020. <https://hetq.am/en/article/125000>.

controlling top media outlets could lead to the potential for changes to ArmNews TV's narrative to fit their former party's agenda.

In sum, while many changes have been made to decentralize and diversify Armenia's media space since the Velvet Revolution, political elites still play a role in the top television outlets. Additionally, some Russian influence is apparent in the ownership of top Armenian television outlets, such as Artur Janibekyan's control of ArmeniaTV.

Print

Print circulation and readership is on the decline in Armenia.¹³ Due to decreasing revenues, many print outlets rely on state funding in order to remain operational or have switched to fully online content. In line with state presence in the print sector, the state-owned newspaper ArmenPress is the third most-consumed print outlet.

Despite the role that the government of Armenia has played in financing print media outlets, many respected journalists wholly own the newspapers that they founded. For example, long-time journalist Aram Abrahamyan founded and fully owns Aravot, the most consumed print outlet in Armenia. Edik Baghdasaryan owns and operates the fourth most-consumed outlet Hetq through the "Investigative Journalists" NGO. Armine Ohanyan, the founder and editor-in-chief of Hraparak, the fifth most-consumed newspaper, owns 90% of the newspaper, with Sevak Grigoryan owning the remaining 10%.

However, like television, political elites still have a presence in the print sector. Haykakan Zhamanak, the second-most read newspaper, is politically linked to current Prime Minister, Nikol Pashinyan. Although he stepped down as editor-in-chief in 2012 following his election to parliament, Pashinyan's wife, Anna Hakobyan, took his place as editor and remains in that position now. The owners of Dareskizb LLC, the parent company of Haykakan Zhamanak, are reported through Armenia's business registry;

¹³

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-armenia.pdf>

however, media reports claim that the Pashinyan family remains the owner of Haykakan Zhamanak and exerts political influence on the newspaper.¹⁴

While the majority of print outlets are owned by journalists, there are potential vulnerabilities for foreign or domestic political influence in the declining print space. Many print outlets in Armenia are reliant on state subsidies or external financing in order to continue operating, providing channels for foreign influence.¹⁵

Radio

Like television and print, radio ownership in Armenia is beginning to look more diverse and less controlled by political elites. However, the top two outlets are owned by two governments: the top consumed radio station is Azatutyun Radio, the Armenian branch of the US government-funded Radio Free Europe, and the second most-consumed radio station is the Armenian state-owned Public Radio of Armenia.

Like the print sector, many journalists own the radio stations that they created. For example, the third most-consumed radio station is Radio Aurora, wholly owned by founder and journalist Michael Janpoladyan. The fifth most-consumed station is Hay Radio, wholly owned by founder and journalist Anahit Tarkanyan. The fourth most-consumed radio station is Radio Van FM, which is partially owned by founder and director Shushanik Arevhatyan. However, the majority of the outlet is owned by Odensnuss AB, a Swedish tobacco company owned by Gevorg Nalbandyan. Additionally, the remaining shareholders are David Hovsepyan and Hrant Yeghiazaryan, who are relative unknowns in the Armenian media space.

In sum, top Armenian radio outlets are largely owned by their founders and fairly free from political elites. Notably, some foreign influence is present in Armenian top radio

¹⁴ Yeghiazaryan, Saten. "Armenia June 2021 elections: a guide to media landscape." Jam News. Published June 16, 2021.

¹⁵ "Armenia 2019: Media Sustainability Index." International Research and Exchanges Board. Published 2019.

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-armenia.pdf>

stations, as Gevorg Nalbandyan is a Swedish-Armenian member of the diaspora and Radio Free Europe is owned by the US government.

Online

Top online outlets follow similar ownership trends as traditional media, where most outlets are owned by journalists, though some ownership by political elites exists. Like radio, the online version of Armenia's branch of Radio Free Europe is the second most-visited online outlet, Azatutyun.am.

As with other media categories, journalists control many of the top online outlets. The top most-consumed online outlet is News.am, wholly owned by editor-in-chief Armenika Kiviryan. According to a 2022 IRI poll, News.am is also the most trusted domestic online outlet among the Armenian population.¹⁶ A long-time journalist, Kiviryan formerly worked for Russian media outlets Regnum and Russkaya Mysl. Additionally, photojournalist Gagik Shamshyan founded and owns Shamshyan.com, the fifth most-consumed online outlet.

The third most-consumed online outlet is Mamul.am, wholly owned by Social Media LLC, an advertising company. Sevag Melikyan is the sole owner of Social Media LLC, though his background is relatively unknown. Mamul.am is also among the most trusted online outlets in Armenia.¹⁷

1in.am, or "First News" is the fourth most-consumed online outlet. Arman Babajanyan, former member of parliament and the current leader of the "For the Republic" political party, is the founder and partial owner of First News. Like other former politicians, Babajanyan's outlet has the potential to bias information in favor of his political views. AidData could find no additional information about the co-owner of First News, Anahit Shahinyan, with regard to the media space.

¹⁶ "Public Opinion Survey: Residents of Armenia." International Republican Institute. Published January 31, 2022.

¹⁷ "Public Opinion Survey: Residents of Armenia." International Republican Institute. Published January 31, 2022.

In sum, the ownership of online outlets is similar to traditional media, as most outlets are owned by journalists, with the presence of former politicians like Babajanyan and advertising companies like Social Media LLC. While it is easier for online outlets to co-opt Russian narratives or Russian state content than traditional media, no top online owners had ties to the Russian government.

Conclusion

In this brief, we have presented an overview of the domestic media environment of Armenia. The collected data highlight two major trends in Armenian media. First, though Russia has many avenues to directly communicate with the Armenian population, the owners of most top outlets do not appear to have ties to Russia. Second, while media ownership has become significantly more transparent since the Velvet Revolution, political elites still own shares in media outlets that are often obscured.

To address the first trend, Russian state-owned channels are abundant in Armenia, with ten of eleven state-owned outlets available in the country. Additionally, Russian entertainment content is often rebroadcast in Armenia, providing Russia with another channel to influence the Armenian population.¹⁸ However, with the exception of Artur Janibekyan, the owner of ArmeniaTV and head of Gazprom-Media, most top media owners do not have apparent ties to the Russian government. As a result, while Russian content has many channels for Armenians to consume, most Armenians prefer to consume domestic outlets.

Second, even with transparency laws, many current and former politicians still remain influential in the creation of media content through obscured ownership. Prime Minister Nikol Pashinyan and leader of the Prosperous Armenia Party Gagik Tsarukyan both have influence over top media outlets in Armenia. Former parliamentarian Arman Babajanyan controls 1in.am and four former Republican parliamentarians control

¹⁸ "Findings of Mass Media Monitoring in Armenia." Analytical Centre on Globalization and Regional Cooperation. Published 2019.
https://eesri.org/wp-content/uploads/2019/04/2019-04_Armenia-Media-Monitoring-2-ACGRC_PB-ENG.pdf.

ArmNews TV and Tert.am through Qaryak Media Group. As a result, while many top outlets are owned by journalists, some outlets are owned by political elites. This provides a further vulnerability for the Russian government to exploit, as politicians are more susceptible to Russian influence than journalists and may rely on Russian narratives to promote their political agenda.

In sum, while Russian state media outlets have an extensive presence in Armenia, few top media owners have ties to the Russian government. However, channels for influence of the media, through owners with Russian ties and political elites, remain available for foreign actors to exploit. Additionally, while the Velvet Revolution has changed Armenia's media ownership to foment more diversity, some political ownership exists through opaque channels.

Azerbaijan: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	9
Radio.....	11
Online.....	12
Conclusion.....	13

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia

Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner,
Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Azerbaijani media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may permeate narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to flesh out entry points for Russian influence through elites and media owners. By better understanding Azerbaijan's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Azerbaijan remains one of the least transparent countries in the Europe and Eurasia region.¹ A complex web of shell companies and proxy owners obscure who really owns and de facto controls Azerbaijan's domestic media market. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Azerbaijan.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Azerbaijan, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ Bak, Mathias. "Overview of Corruption and Anti-Corruption in Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine." Published July 4, 2020.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Zenith, Alexa³), as well as Turkish business registries, survey data and media watchdog sources, and other open source data. This profile includes data for the entire country of Azerbaijan and does not separate out any information that may differ in breakaway regions, such as Nagorno-Karabakh.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Azerbaijan as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Azerbaijan's media landscape is via Russian state-owned media (see Table 1). Nine of the eleven Russian state-owned media outlets we tracked have a physical presence in Azerbaijan, which provides the Kremlin with a potent channel to directly communicate with, and ultimately influence, Azerbaijani citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a basic footprint of Russian state-owned media presence in Azerbaijan, but does not speak to how well-consumed each outlet is by Azerbaijani citizens.

³ Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Azerbaijan, 2021

Television		Print		Radio		News Agency	
Russia 1	✓	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✓						
TV Centre	✓						
Channel One	✗						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Azerbaijan by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. According to a European Union opinion poll, television and internet are the most consumed mediums for information in Azerbaijan and are therefore likely more influential, while radio and print media are less consumed.⁴ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of nine measured Russian state-owned media outlets in Azerbaijan, none of the tracked Russian state media appears in the top five outlets for any medium.

⁴ "Opinion Survey 2020: Azerbaijan." EU Neighbors East. Published June 16, 2020. <https://euneighbourseast.eu/news-and-stories/opinion-polls/opinion-survey-2020-azerbaijan/>.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Azerbaijan. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most-consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵

Table 2: Top Azerbaijani media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	ATV	Azerbaijan	Azad Azerbaijan Radio	Oxu.az
2	Xezer TV	Bizim Yol	İctimai Radio	yenicag.az
3	AzTV	Yeni Müsavat	Radio 106 FM	Qafqazinfo.az
4	İctimai Televiziya (İTV)	The Azeri Times	Media FM	Haqqin.az
5	ARB TV	525 Qəzet	Avto FM	musavat.com

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Azerbaijan outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this list but ranked highly by local experts include the television channel ANS TV, the print outlet Internews Azerbaijan, the radio stations ASAN Radio and Azadliq Radiosu, and the online outlets meydan.tv, 1news.az, azadliq.info, and azertag.az.

Foreign media is limited in Azerbaijan, and live broadcasts from foreign media outlets are against the law. However, foreign outlets in Azerbaijan are available via cable and satellite packages. AidData staff partially used Nielsen ratings from the Azerbaijani

⁵ Television, Print and Radio sources: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Business Insight's "Most Listening Radio Channels Research Report" (May 2020), IREX's Media Sustainability Index (2019), and media reports on official Nielsen ratings from Fins.az (2017), Facemark.az (2018), and Fed.az (2020). Online sources: Alexa, April 2021

government to determine the top national outlets. Viewership of foreign channels was not reported publicly under the most recent ratings and was not available after 2018. These ratings were outdated and did not significantly affect the overall rankings in this report; however, it is worth noting that the Turkish outlets Star TV and TV8, as well as the Russian state-owned outlet Channel One, were among the most-consumed outlets in Azerbaijan in 2018.⁶ In 2020, research from Ilgar Seyidov noted that Turkish and Russian channels are preferred and predominantly consumed by the Azerbaijani population, who seem to largely distrust national media.⁷ As a result, the influence of foreign outlets is likely understated in the top outlets of this report and in official Azerbaijan government media consumption rankings.

Media Ownership

Table 3 lists the ownership information of top Azerbaijani media outlets by medium (television, newspaper, radio, and online). Azerbaijan remains highly secretive about media ownership and has no public central database that tracks media outlets or media owners. According to one Azerbaijani media expert interviewed by AidData staff, ownership on paper means very little in Azerbaijan, as media outlets will often name individuals that are not the true owners or are only partial owners as the sole owner of the outlet. This lack of transparency about who owns domestic outlets has two important repercussions with the potential to undercut the resilience of Azerbaijan's media sector. Absent mandatory public disclosure of ownership, conflicts of interest, and financing, media outlets are more vulnerable to both domestic corruption and foreign influence, as their owners can more easily conceal their ties with domestic and foreign organizations or governments. Further examples of ownership ties and relationships are discussed in the following section.

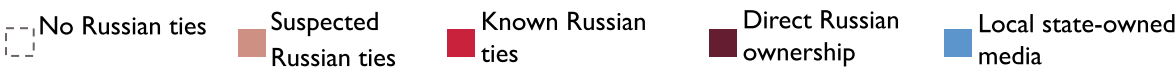
In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian

⁶ "Azərbaycanlılar ən çox hansı kanala baxır? – Reytinq." Facemark.az. Published July 31, 2018. <https://www.facemark.az/site/news/8529/azerbaycanlilar-en-cox-hansi-kanala-baxir-reytinq-8529.html>.

⁷ Seyidov, Ilgar. "As quiet as a mouse": Media use in Azerbaijan" Communications, vol. 45, no. s1, 2020, pp. 893-911. <https://doi.org/10.1515/commun-2020-0021>.

ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Azerbaijani state-owned media is color-coded blue. In Azerbaijan, no owners had suspected or known ties to the Russian government, and no top outlets had direct Russian ownership. As such, this profile has no red color-coded outlets and four designations of state-owned media.

Table 3: Ownership of top Azerbaijani media outlets by share

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
					
Television	1	ATV	Azad Azərbaycan Müstəqil Teleradio Kompaniyası	Unknown	Unknown
	2	Xezer TV	"Xəzər TV" Məhdud Məsuliyyətli Cəmiyyətinin	Unknown	Unknown
	3	AzTV	Azerbaijan Television and Radio Broadcasting CJSC (Government of Azerbaijan)		100
	4	İctimai Televiziya (İTV)	Public Television and Radio Broadcasting Company (Government of Azerbaijan)		100
	5	ARB TV	ARB Media Group	İsmet Səttarov	Unknown
Print	1	Azərbaycan	Government of Azerbaijan		100
	2	Bizim Yol	Bizim Yol LLC	Bəhəddin Həziyev	100
	3	Yeni Məsəvat	Yeni Məsəvat Media Group	Rauf Arifoglu	100
	4	Azeri Times	AzeriTimes.com LLC	Ziya İbrahim	100
	5	525 Qəzet	525 LLC	Rəşad Məjid	100
Radio	1	Azad Azərbaycan Radio	Azad Azərbaycan Müstəqil Teleradio Kompaniyası	Unknown	Unknown

	2	İctimai Radio	Public Television and Radio Broadcasting Company (Government of Azerbaijan)		100
	3	Radio 106 FM	Azad Azərbaycan Müstəqil Teleradio Kompaniyası	Unknown	Unknown
	4	Media FM	Digital Media LLC	Nigar Mehdiyeva Rustam Aliyev Anara Ismayilova Aysel Akbarova	Unknown Unknown Unknown Unknown
	5	Avto FM	Pro Media Group	Unknown	Unknown
Online	1	Oxu.az	Global Media Group	Elnur Abdullayev Gazi Karadag	Majority Minority
	2	yenicag.az	Yeni Cag Media Group	Agil Alasger	100
	3	Qafqazinfo.az	"Qafqazinform MMC" Limited Liability Company	Elbrus Arud	100
	4	Haqqin.az	"For Human Rights" Public Union	Eynulla Fatullayev	100
	5	musavat.com	Yeni Musavat Media Group	Rauf Arifoglu	100

Results

Television

While television is the most-consumed medium in Azerbaijan,⁸ Azerbaijan lacks a diversity of owners in top television outlets. According to IREX's Media Sustainability Index, all top television channels in Azerbaijan are either owned directly by the government or by private companies with ties to ruling political elites.⁹ Additionally, ownership opacity of print and broadcast media is backed by law and protects the mechanisms of clandestine control over media outlets. Media legislation passed in

⁸ "Opinion Survey 2020: Azerbaijan." EU Neighbors East. Published June 16, 2020.

⁹ "Azerbaijan 2016: Media Sustainability Index." International Research and Exchanges Board. Published 2016.

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2016-azerbaijan.pdf>.

2012 allows companies to withhold information about ownership structure, severely limiting ownership transparency in Azerbaijan.¹⁰ Due to these systems of opacity, owners of television outlets are difficult to determine.

The presence of the Azerbaijani government in the television sector is apparent. The third and fourth most-watched outlets in Azerbaijan, AzTV and Ictimai TV, are state-owned outlets. Additionally, a deeper look into the fifth most-watched outlet, ARB TV, clearly shows the fingerprints of the Azerbaijani government. Ismet Sattarov, longtime Director and Head of ARB Media Group, is also the Chairman of the National Television and Radio Council (NTRC), the main broadcast regulator in Azerbaijan. Sattarov has clear ties to the Aliyev government, as he formerly worked for the Heydar Aliyev Foundation, the private charitable foundation of the former president of Azerbaijan and father of the current president, Ilham Aliyev.¹¹ While Sattarov is confirmed to be a stakeholder in ARB TV, it is unknown if he is the sole shareholder of the channel.

The management of the second most-consumed television channel, Xezer TV, also has clear ties to the government. While he is no longer in charge of the company, the rise of Shamkhal Hasanli to President of Xezer TV in January 2016 highlights the level of government control over the television sector. Hasanli is the son of Ali Hasanov, head of the social-political department of the Azerbaijani Presidential Administration, and Sona Veliyeva, a voting member of the NTRC. However, Hasanli was subsequently fired from the position and replaced with Azerbaijani showman Murad Dadashov in July 2020.

For outlets where ownership could be determined, all of the owners of top television outlets are either directly or indirectly tied to the current Azerbaijani administration. However, most of the ownership remains opaque. The true owners of both top outlets, Azad Azerbaijan TV (ATV) and Xezer TV, are unclear. While local news outlets report on the presidents of these two broadcasters, Azer Khalilov and Murad Dadashov

¹⁰ "Azerbaijan: Concerns Regarding Freedom of the Media and Freedom of Expression." Human Rights Watch. Published November 2, 2012.

<https://www.hrw.org/news/2012/11/02/azerbaijan-concerns-regarding-freedom-media-and-freedom-expression>.

¹¹ "Ismet Sattarov headed the National Broadcasting Council (NBC)." Turan.az. Published April 6, 2020.

<https://www.turan.az/ext/news/2020/4/free/politics%20news/en/122970.htm>

respectively, ownership stakes in these major media outlets are indeterminate. While none of the owners that we were able to identify had ties to the Russian government, the opaque ownership structure and government control of television channels provides potential vulnerabilities for foreign influence.

Print

Print media, particularly independent print media, is nearly non-existent in Azerbaijan.¹² Even some of the top print media outlets recorded in our rankings have recently ceased to produce print versions and have fully moved to online circulation, such as the second most-read newspaper, Bizim Yol.¹³ AidData staff have determined that many print owners continue to have influence in the Azerbaijani media space and have decided that recording top print outlet ownership is valuable. Our rankings rely on a weighted average of the past five years to produce a more comprehensive picture, rather than relying on a current snapshot, meaning that some print outlets that have ceased printing are still in our top rankings. However, it is worth noting that these newspapers predominantly rely on online readership in Azerbaijan and not print circulation. Currently, many print media outlets in Azerbaijan are wholly reliant on state funding in order to survive, meaning that many top print outlets are either owned directly by the government or by private companies with ties to ruling political elites.¹⁴ Following this trend, the top most-consumed newspaper in Azerbaijan is the state-owned outlet "Azerbaijan."

The second most-read newspaper, Bizim Yol, was founded by current editor-in-chief Bahaddin Haziyeu. Though Bizim Yol has moved to a solely online format, the newspaper was influential in its print format. Haziyeu is a long-time journalist, and has been subject to harassment by the Azerbaijani government, most recently in July

¹² "Space for Free Media in Azerbaijan Shrinking, Journalists Say." Voice of America. Published May 7, 2020. https://www.voanews.com/a/press-freedom_space-free-media-azerbaijan-shrinking-journalists-say/6188888.html.

¹³ "'Bizim Yol' un çap versiyası dayandı." Bizim Yol. Published January 31, 2019. <https://www.bizimyol.info/az/news/139684.html>.

¹⁴ Seyidov, Ilgar. "'As quiet as a mouse': Media use in Azerbaijan" Communications, vol. 45, no. s1, 2020, pp. 893-911.

2021.¹⁵ The third most-read newspaper is Yeni Musavat, the newspaper of journalist and politician Rauf Arifoglu. Formerly a member of the opposition Musavat Party, Arifoglu started Yeni Musavat to support his political ideology. Currently, Yeni Musavat is largely pro-government, following Arifoglu's departure from the Musavat Party; however, like Haziyeu, the government also spied on Arifoglu as revealed in July 2021.¹⁶ While Haziyeu and Arifoglu are longtime journalists and the founders of these newspapers, the final owners and beneficiaries of their newspapers are likely tied to the state. Print media heavily relies on state funding to remain afloat and the true ownership structure is highly opaque, meaning that while journalists are presented as "owners," they are likely not the principal beneficiaries of their own newspapers.

The fourth most-read newspaper in Azerbaijan is the Azeri Times, a New York-based newspaper with a large online presence created by Ziya Ibrahim, a member of the Azerbaijani diaspora. Little is known about Ziya Ibrahim, and the ownership structure of the newspaper is entirely opaque.

Finally, the fifth most-read newspaper in Azerbaijan is 525 Qezet, founded and run by longtime journalist Rashad Majid. Majid has held positions in government before, including most recently as a member of the Management Board of the Azerbaijan Press Council, a regulatory body for media in Azerbaijan.¹⁷ Through his roles, Majid has ties to the Azerbaijani government. It is possible, but unlikely, that Majid is the final beneficiary of 525 Qezet, as reliance on state funding and pressure by the Azerbaijani government in the print sector has resulted in few independent newspapers. However, his ties to the government may mean that it is more likely that he owns his newspaper, as opposed to Haziyeu's or Arifoglu's alleged ownership of their respective newspapers.

No final beneficiaries could be determined for any privately owned print outlet in Azerbaijan, though the identified founders and proxy owners provide some insight into the mechanisms of state control over print media in Azerbaijan. As noted above, the opaque ownership structure of traditional media in Azerbaijan highlights potential

¹⁵ "Bahaddin Haziyeu." Journalists for Justice. Published July 19, 2021. <https://jfi.fund/jfi/bahaddin-haziyeu/>.

¹⁶ "Azerbaijan suspected of spying on journalists using Israeli Pegasus spyware." JAM News. Published July 19, 2021.

<https://jam-news.net/azerbaijan-suspected-of-spying-on-journalists-using-israeli-pegasus-spyware/>

¹⁷ "Rashad Majid." Report.az. Published 2018. <https://report.az/en/person/rashad-majid/>.

vulnerabilities for foreign influence. While no clear foreign influence was identified amongst the founders and proxy owners of the newspapers, the true beneficiaries of these outlets is unknown, providing a clear avenue for undetected influence.

Radio

Like television and print media, radio in Azerbaijan is opaque, state-controlled, and centralized around the same major companies. The second most-consumed radio station is the public station Ictimai Radio, controlled by the government of Azerbaijan. The most-consumed and third most-consumed media outlets, Radio Azad Azerbaijan and Radio 106 FM, are both owned by the wholly opaque Free Azerbaijan Independent Television and Radio Company (Azad Azərbaycan Müstəqil Teleradio Kompaniyası), which also owns top television outlet ATV. While Azer Khalilov is known to be the president and director of the company, the ultimate beneficiaries of Azad Azerbaijan are unknown.

The fourth most-consumed radio station is Media FM, which is owned by Digital Media LLC. Digital Media LLC was founded by Nigar Mehdiyeva, the daughter-in-law of Ramiz Mehdiyev, longtime head of the Presidential Administration of Azerbaijan, and a powerful ally of the Aliyev government. Mehdiyeva founded Digital Media LLC along with Anara Ismayilova, the first Director of Media FM, and Aysel Akbarova. However, Ismayilova was eventually replaced as director by Rustam Aliyev, the director and owner of Antenna Television and Radio Company.¹⁸ As a result, the Mehdiyev family directly owns Media FM, with deeper connections to Antenna Television and Radio Company, providing some insight into how powerful politicians control the traditional media space.

Lastly, the fifth most-consumed radio station is Avto FM, owned by Pro Media Group (PMG). The ownership structure of this company is completely opaque as well, continuing the trend of ownership opacity. The only clear owners of top radio stations in Azerbaijan are the government of Azerbaijan and the Mehdiyev family, which is a part of the current regime. As noted, opacity of ownership and clear government

¹⁸ "Ramiz Mehdiyevin biznes imperiyası - ŞOK SİYAHİ." IfadeTV. Published September 3, 2020. <http://ifadetv.com/1818-ramiz-mehdiyevin-biznes-imperiyasi-sok-syah.html>.

control over the media opens channels to foreign influence in the Azerbaijani media space.

Online

Online outlets are an increasingly important medium of information in Azerbaijan. While the government has attempted to censor some foreign and opposition media online, online outlets remain less controlled by the state than traditional media.¹⁹ However, political elites still have a strong presence in top online outlets. For example, the most-visited online outlet in Azerbaijan is Oxu.az, owned by Global Media Group, an Azerbaijan-based media company registered in Turkey. Majority owner Elnur Abdullayev is a former Chief of the State Automobile Service of Azerbaijan and has ties to the state oil company of Azerbaijan (SOCAR) as well.²⁰ Global Media Group, in addition to owning Oxu.az, owns a number of Turkish and Azerbaijani television stations, including Haber Global, highlighting the presence of political elites in the media space.

Additionally, some online outlets follow the same form of proxy control as print outlets. Rauf Arifoglu, founder of the fifth most-consumed online outlet Musavat.com, and Eynulla Fatullayev, founder of the fourth most-consumed online outlet Haqqin.az, are both pro-government journalists. It is unlikely that either of these founders are the true beneficiaries of the outlets, and particularly not Fatullayev, who spent four years in prison before transitioning his newspaper into an ally of the Aliyev government.²¹ As such, through both censorship and traditional tactics, the government of Azerbaijan has increased its control of online outlets.

However, when it comes to the second and third most-consumed online outlets, Yenicag.az and Qafqazinfo.az, government control is less apparent. Yenicag.az owner Agil Alasger and Qafqazinfo.az owner Elbrus Arud are both journalists and share less

¹⁹ "Space for Free Media in Azerbaijan Shrinking, Journalists Say." Voice of America. Published May 7, 2020.

²⁰ Gokdemir, Orhan. "SOCAR'ın sakar kraliçesinin aşırı acıklı hikayesi." SolTV. Published August 1, 2020. <https://haber.sol.org.tr/yazar/socarin-sakar-kralicesinin-asiri-acikli-hikayesi-11034>.

²¹ Kucera, Joshua. "Azerbaijan: Government Watchdog Transforms Into Attack Dog." Eurasianet. Published March 16, 2017.

<https://eurasianet.org/azerbaijan-government-watchdog-transforms-into-attack-dog>.

direct connections to the Azerbaijani government than other broadcast or print media owners. However, Yeni Cag remains a print outlet as well, meaning that Alasger may be subject to further pressures from the Azerbaijan government. In sum, while the Azerbaijan government has less control over the online media space, many top online outlets in Azerbaijan are still subject to censorship and other mechanisms of control by the regime.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of Azerbaijan. The collected data highlight two trends in Azerbaijani media. First, the opaque and government-controlled nature of the media environment of Azerbaijan creates vulnerabilities to foreign influence. Second, foreign influence plays a significant role in the media environment of Azerbaijan and may be understated in top media rankings.

The opacity of media ownership in Azerbaijan is defended by law and is intended to protect from institutional corruption by members of the Azerbaijani political elite. However, this structure may have unintended consequences in protecting owners with foreign ties or foreign interests. Under the current opaque system, foreign money can more readily infiltrate the media market, allowing foreign narratives and influence to permeate through the Azerbaijani population undetected.

Additionally, the influence of foreign outlets, predominantly Turkish and Russian outlets, is likely understated in reports of the media consumption habits of Azerbaijani citizens. Government control over traditional media has led to an increased reliance on foreign and online outlets for non-government news, which means that foreign governments may have a larger direct audience in Azerbaijan than previously realized. Nine Russian state-owned media outlets are available in Azerbaijan, even if they are not allowed to broadcast live, meaning that Russian influence is present.

In sum, the Azerbaijan media environment provides significant channels for Russian government influence. Through top-down means, such as leveraging political power to influence Azerbaijani politicians that own media outlets, or through bottom-up means,

such as directly influencing the Azerbaijani population online, the Russian government has many potential avenues to manipulate media narratives in Azerbaijan.

Belarus: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	8
Television.....	8
Print.....	9
Radio.....	10
Online.....	12
Conclusion.....	14

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Belarusian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Belarus' domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Belarus remains one of the least transparent countries in the Europe and Eurasia region.¹ Outside of the many state-owned media outlets, a complex web of Russian and Belarusian shell companies obscures who owns and de facto controls the domestic media market. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Belarus.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Belarus, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ Bak, Mathias. "Overview of Corruption and Anti-Corruption in Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine." Published July 4, 2020.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Zenith, Alexa³), as well as survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Belarus as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Belarus' media landscape is via Russian state-owned media (see Table 1). Seven of the eleven Russian state-owned media outlets we tracked have a physical presence in Belarus, which provides the Kremlin with a strong channel to directly communicate with, and ultimately influence, Belarusian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Belarus, but does not speak to how well-consumed each outlet is by Belarusian citizens.

³ Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alex.com/siteinfo>.

Table 1: Russian state-owned media in Belarus, 2021

Television		Print		Radio		News Agency	
Russia 1	✓	Rossiyskaya Gazeta	✓	Sputnik	✗	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✓						
TV Centre	✗						
Channel One	✗						
RT	✗						

In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure. Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In Belarus, the republishing of Russian state media content is widespread. Most domestic state-run outlets directly retransmit Russian state media content. However, according to a recent survey conducted by Chatham House, trust in these outlets is low, with only 19% of Belarusians stating that they trust domestic state-owned media outlets.⁴ As a result, despite the high availability of Russian state media outlets and content, most Belarusians do not wholly trust these news sources.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Belarus by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. Television is the most consumed medium in Belarus, though online media is consumed by 74% of Belarusians under age 35.⁵ While we make no claims about the exact influence of each individual outlet, we can assume that

⁴ Astapenia, Ryhor. "Belarusians' views on the political crisis - Nov 2021." Chatham House. January 20, 2022. <https://www.chathamhouse.org/2022/01/belarusians-views-political-crisis>.

⁵ "Annual Survey Report: Belarus." European Union Neighbors - East. Published March 2020. <https://euneighbourseast.eu/news-and-stories/opinion-polls/opinion-survey-2020-belarus/>.

outlets that reach higher numbers of consumers have greater potential to influence more citizens. While the Russian state-owned media that we tracked do not appear in the top outlets for Belarus, a number of top Belarusian media outlets repurpose Russian state media content. Other Russian state and privately owned media outlets dominate the Belarusian media market, including Komsomolskaya Pravda, Gazprom-Media’s Humor FM, Russkoe Radio, and Russian Planet (Rusplt.ru).

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Belarus. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁶ Komsomolskaya Pravda in Belarus and Tut.by have both been included in these rankings, despite their forced shutdowns by the government of Belarus.⁷ These outlets will be further discussed in the analysis section.

Table 2: Top Belarusian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	NTV-Belarus	Sovetskaya Belorussiya - Belarus Segodnya	Autoradio	Tut.by
2	ONT	Komsomolskaya Pravda in Belarus	Radio Roks	Onliner.by
3	Belarus 1	Argumenti i Fakty v Belorussii	Humor FM	Kp.by
4	RTR Belarus	Narodnaya Volya	Unistar Radio	Kp.ru

⁶ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Zenith's Market & Media Intelligence database: Share of viewing - individuals (%) 2018, Zenith's Market & Media Intelligence database: Circulation (000s) 2018, Zenith's Market & Media Intelligence database: Peak time adult audience (000s) 2018, and IREX's Media Sustainability Index (2019).

Online: Alexa, April 2021

⁷ "News website of Komsomolskaya Pravda in Belarus blocked." BelSat TV. Published September 29, 2021.

<https://belsat.eu/en/news/29-09-2021-news-website-of-komsomolskaya-pravda-in-belarus-blocked/>.

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Belarus outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlets list but ranked highly by local experts include the radio stations Radio BA and Hit FM, and the online outlets Belapan.com and Charter97.org.

Media Ownership

Table 3 lists the ownership information of top Belarus media outlets by medium (television, newspaper, radio, and online). Media ownership in Belarus is highly centralized between the government and government-affiliated elites, and true media owners are often obscured through a complex web of shell companies. According to a European Parliament report, over 80% of radio stations and 45% of television stations in Belarus are directly owned by the government.⁸ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Belarusian state-owned media is color-coded blue. In Belarus, 16 owners had suspected or known ties to the Russian government, and 6 outlets had direct Russian ownership. As such, this profile has 34 red color-codes and 7 designations of state-owned media.

⁸ Przetacznik, Jakub and Linda Tothova. "Media environment in Belarus." European Parliamentary Research Service. Published February 2022.

Table 3: Ownership of top Belarusian media outlets by share

 No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	NTV-Belarus	National State Television and Radio Broadcasting Company of the Republic of Belarus		100
	2	ONT	Ministry of Information of the Republic of Belarus		100
	3	Belarus 1	National State Television and Radio Broadcasting Company of the Republic of Belarus		100
	4	RTR-Belarus	Ministry of Information of the Republic of Belarus		100
	5	STV	Government of the Republic of Belarus		100
Print	1	Sovetskaya Belorussiya - Belarus Segodnya	Government of the Republic of Belarus		100
	2	Komsomolskaya Pravda in Belarus	Komsomolskaya Pravda Publishing House JSC	Sergei Rudnov	Majority
				Vladimir Sungorkin	
				Vitaly Krivenko	
				Sergei Orlov	
				Grigory Berezkin	
				Arkady Evstafiev	
Elena Ovcharenko					
		Vladimir Mamontov			
		CJSC BelKP-Press	Marina Statsenko	Minority	
3	Argumenty i Fakty v Belorussii	Municipal Government of Moscow		100	
4	Narodnaya Volya	Narodnaya Volya LLC	Iosif Syaredzich	100	
5	BelGazeta	BelGazeta LLC	Kirill Zhivolevich	Majority	
			Yury Karetnikov	Minority	

Radio	1 Autoradio	"Vashe Televidenie" LLC	Valery Kravchuk	Unknown
	2 Radio Roks	Editorial Office of the Radio Station Radio Roks-M LLC	Unknown	Unknown
	3 Humor FM	"Vashe Televidenie" LLC	Valery Kravchuk	Unknown
	4 Unistar Radio	Belarusian State University		Unknown
		Media Invest GmbH	Harald Albrecht Georg Bogner	Unknown Unknown
5 Russkoe Radio	Federal State Unitary Enterprise Gosconcert		100	
Online	1 Tut.by	Tut by Media LLC	Evgenia Chernyavskaya	Majority
			Kirill Voloshin	Minority
			Lyudmila Chekina	Minority
			Marina Zolotova	Minority
			Ksenia Ivanova	Minority
	2 Onliner.by	Onliner LLC	Ksenia Shuravko	51
			Vitaly Shuravko	49
	3 Kp.by	Komsomolskaya Pravda Publishing House JSC	Sergei Rudnov	Majority
			Vladimir Sungorkin	
			Vitaly Krivenko	
			Sergei Orlov	
			Grigory Berezkin	
Arkady Evstafiev				
Elena Ovcharenko				
Vladimir Mamontov				
	CJSC BelKP-Press	Marina Statsenko	Minority	
4 Kp.ru	Komsomolskaya Pravda Publishing House JSC	Sergei Rudnov	45.2	
		Vladimir Sungorkin	4	
		Vitaly Krivenko	Unknown	
		Sergei Orlov	Unknown	

		Grigory Berezkin	Unknown
		Arkady Evstafiev	Unknown
		Elena Ovcharenko	Unknown
		Vladimir Mamontov	Unknown
		Sergei Gordeev	59.4
		VTB Bank	15.5
5 Rusplt.ru	PIK Group	Kirill Pisarev	9.3
		PJSC PIK (Public)	9.03
		Promsvyaz Capital BV	6.77

Results

Television

Television is the most consumed outlet in Belarus.⁹ All of the top five television outlets in Belarus are owned and operated by the Government of Belarus. The National State Television and Radio Broadcasting Company of Belarus operates NTV-Belarus and Belarus-1, while the Ministry of Information operates STV, ONT and RTR-Belarus. All five channels utilize some Russian state media content. For example, ONT rebroadcasts a doctored version of Russia's Channel 1, as well as some content from other Russian federal channels, including NTV, TNT, and RTR-Planeta. According to the Republic of Belarus' official website, Belarus.by, ONT only produces 46% of its own content, with the remaining 54% aired from Russia's Channel 1.¹⁰ NTV-Belarus also rebroadcasts Russia's NTV, while RTR-Belarus repurposes broadcasts from RTR-Planeta in Russia.¹¹

⁹ "Annual Survey Report: Belarus." European Union Neighbors - East. Published March 2020.

¹⁰ "Belarusian TV channels encouraged to rely on national platform." Belarus.by. Published April 10, 2018.

https://www.belarus.by/en/press-center/press-release/belarusian-tv-channels-encouraged-to-rely-on-national-platform_i_0000077617.html

¹¹ Szostek, Joanna. "Russian influence on news media in Belarus." Communist and Post-Communist Studies: Volume 48, Issues 2–3, June–September 2015, Pages 123-135

<https://core.ac.uk/download/pdf/296209831.pdf>.

While Russian state media are present both in a direct and rebroadcast format, they are not broadcast live in Belarus, to allow the Belarusian government to censor unwanted content.¹² Additionally, while Belarusian state-owned media often rely on Russian content, a significant portion of content in Belarus is still produced domestically, allowing the Belarusian government to directly influence the population.¹³

Print

Print media remains widely used in Belarus, with 61% of Belarusians consuming print media.¹⁴ The high use of newspapers may be a result of the high private ownership of print media in Belarus, which according to a European Parliament report is over 70% privately owned.¹⁵ However, the most-consumed print outlet in Belarus is the state-owned outlet Belarus Segodnya.

The second most-consumed outlet during our study period is Komsomolskaya Pravda in Belarus. A partial subsidiary of the Russian newspaper Komsomolskaya Pravda (KP),¹⁶ in August 2020, the Belarusian government forced domestic publishing houses to cease printing the newspaper version. In September 2021, the Belarusian government blocked the website domestically as well, effectively eliminating KP in Belarus from the Belarusian audience.¹⁷ KP in Belarus has been included on our list despite its effective closure, as multiple surveys ranked the newspaper among the top most-consumed outlets in the country, even after the Belarusian government blocked its print version. The third most-consumed print outlet is Argumenty i Fakty v Belorussii. Like KP, Argumenty i Fakty is an owned subsidiary of the Russian Argumenty i Fakty, though the Belarusian editor-in-chief Igor Nikolaevich Sokolov and his team produce the majority

¹² "Belarus Profile - Media." BBC. Published June 8, 2021.

<https://www.bbc.com/news/world-europe-17941331>

¹³ Przetacznik, Jakub and Linda Tothova. "Media environment in Belarus." European Parliamentary Research Service. Published February 2022.

¹⁴ "Annual Survey Report: Belarus." European Union Neighbors - East. Published March 2020.

¹⁵ Przetacznik, Jakub and Linda Tothova. "Media environment in Belarus." European Parliamentary Research Service. Published February 2022.

¹⁶ Szostek, Joanna. "The Mass Media and Russia's 'Sphere of Interests': Mechanisms of Regional Hegemony in Belarus and Ukraine." *Geopolitics* (2018), 23:2, 307-329, DOI: 10.1080/14650045.2017.1402298.

¹⁷ "News website of Komsomolskaya Pravda in Belarus blocked." BelSat TV. Published September 29, 2021.

of content locally.¹⁸ In 2014, the Municipal Government of Moscow became the sole owner and operator of Argumenty i Fakty, highlighting a Russian government-owned media in the top consumed print outlets of Belarus.¹⁹

Two opposition newspapers round out the top five print outlets in Belarus. Narodnaya Volya is the fourth most-consumed newspaper, followed by BelGazeta. Narodnaya Volya was founded by journalist and editor-in-chief Iosif Syaredzich in 1995. BelGazeta is currently majority owned by long-time journalist and editor-in-chief Kirill Zhivolevich, with Director of BelGazeta Yury Karetnikov owning a minority stake. Like many opposition newspapers and journalists, Narodnaya Volya and BelGazeta have been harassed by the Belarusian government through a number of different methods. Most recently, along with KP in Belarus in August 2020, the Belarusian government blocked the print of Narodnaya Volya and BelGazeta, forcing the newspapers to release their copies solely online.²⁰

In sum, top print outlets in Belarus have more diverse content and ownership than top television outlets. However, as noted by the forced government closure of KP in Belarus, as well as the forced print stoppages of Narodnaya Volya and BelGazeta, the Belarusian government is willing and able to censor content that it does not like in print outlets.

Radio

The ownership structures of top radio outlets in Belarus is highly opaque compared to print media. According to a European Parliament report, radio in Belarus is heavily state-controlled, with over 80% of radio stations owned by the government of

¹⁸ Szostek, Joanna. "The Mass Media and Russia's 'Sphere of Interests': Mechanisms of Regional Hegemony in Belarus and Ukraine." *Geopolitics* (2018), 23:2, 307-329, DOI: 10.1080/14650045.2017.1402298.

¹⁹ Szostek, Joanna. "The Mass Media and Russia's 'Sphere of Interests': Mechanisms of Regional Hegemony in Belarus and Ukraine." *Geopolitics* (2018), 23:2, 307-329, DOI: 10.1080/14650045.2017.1402298.

²⁰ "The printed version of Brestskaya Gazeta suffered the fate of Narodnaya Volya, BelGazeta, Svobodnye Novosti Plus." *Brestskaya Gazeta*. Published January 19, 2021. <https://www.b-g.by/society/pechatnuyu-versiyu-brestskoy-gazetyi-postigla-uchast-narodnoy-voli-belgazyi-svobodnyih-novostey-plyus/>.

Belarus.²¹ Nearly all of the top radio stations in Belarus are spin-offs of radio stations in Russia, which may or may not be affiliated with the Belarusian versions.

Autoradio, the most-consumed radio station, and Humor FM, the third most-consumed station, are both owned by Vashe Televidenie LLC, a company that is ultimately 50% owned by Trio Media LLC. Trio Media LLC runs all advertising for all Vashe Televidenie subsidiaries and is owned by Sergei Teterin, Olga Minets, and AMG Inform LLC.²² Sergei Teterin has ties to President Alexander Lukashenko, and is the former Assistant to the President and Director of Belarus' National Olympic Committee. Olga Minets, a popular singer in Belarus known as Alesya, is married to Leonid Minets, the owner of BelMuz TV and AMG Inform LLC.²³ The director of Vashe Televidenie LLC is Valery Kravchuk, for whom only some information can be found. While the complete ownership structure of Vashe Televidenie LLC is unclear, powerful elites connected to the Lukashenko government benefit from ownership of the top radio outlets.

The second most-consumed radio station is Radio Roks, a rock music station. The ownership structure of Radio Roks is unclear. Some sources claim that Radio Roks is owned by a private Belarusian company, while others claim that Russian organizations own the outlet.²⁴ Both Russia and Ukraine have their own radio stations that are also called Radio Roks, although they do not appear to be openly affiliated. Ultimately, no reliable ownership data was available for Radio Roks in Belarus.

The remaining outlets have foreign ownership. The fourth most-consumed station, Radio Unistar, was created in 2000 as a joint venture between Belarusian State University and Media Invest GmbH, a German company. While BSU is a public university, little government influence seems to penetrate the content of Radio Unistar, which airs mostly pop music and pop culture news. Russkoe Radio, the fifth most-consumed radio station, rebroadcasts content from Russkoe Radio in Russia

²¹ Przetacznik, Jakub and Linda Tothova. "Media environment in Belarus." European Parliamentary Research Service. Published February 2022.

²² "Sergey Teterin and singer Alesya are co-owners of TNT-International." Nasha Niva. Published March 15, 2019. <https://nashaniva.com/?c=ar&i=227050&lang=ru>.

²³ "How members of the Yarmolenko family became shadow media tycoons in Belarus." Nasha Niva. Published July 26, 2019. <https://nashaniva.com/?c=ar&i=234472&lang=ru>.

²⁴ "Who owns the popular FM stations in Belarus?" Svaboda. Published January 18, 2019. <https://www.svaboda.org/a/29717321.html>

owned by a Russian state organization, FSUE Gosconcert. The Belarus version is registered to the same private company address as Radio Roks;²⁵ However, the Belarusian Russkoe Radio website claims it is owned by Russian Media Group, a media conglomerate in Russia acquired by Russian state-owned FSUE Gosconcert.²⁶

Like television, both the Russian and Belarusian governments own shares in the top radio outlets in Belarus. Radio is highly opaque, likely due to the complexity of hidden ownership of top outlets by political elites connected to the Lukashenko government and/or Russia.

Online

Across the Europe and Eurasia region, top-viewed online media sites tend to be independently owned more often than traditional media. For the top two online outlets in Belarus, that trend remains true. Tut.by, the most viewed online news site in Belarus, gained popularity for its coverage of the 2020 anti-government protests. However, following the protests in late 2020, Lukashenko's government arrested or exiled the owners of Tut.by and banned the site, which is no longer accessible in Belarus.²⁷ Currently, Evgenia Chernyavskaya, the daughter of Tut.by founder Yuri Zisser and current majority stakeholder, lives in Tel Aviv, though the Lukashenko regime has arrested her mother, Yulia, and a number of journalists.²⁸ Minority owners Kirill Voloshin and Ksenia Ivanova both remain abroad as well. The two other minority shareholders, Lyudmila Chekina and Marina Zolotova have been arrested by Belarusian authorities. As such, the status of Tut.by as a top independent news source in Belarus is in jeopardy. Tut.by has remained among top outlets on surveys conducted after the government shutdown of the website, meaning that Belarusians continue to access Tut.by or at least still view the outlet as highly influential. One potential explanation for

²⁵ "Who owns the popular FM stations in Belarus?" Svaboda. Published January 18, 2019.

<https://www.svaboda.org/a/29717321.html>

²⁶ "Сергея Кожевникова уволили с поста гендиректора Русской медиагруппы." RBC.ru. Published August 10, 2015. https://www.rbc.ru/technology_and_media/10/08/2015/55c899b49a7947624ab886c5.

²⁷ "Belarus Slaps 'Extremist' Label On Popular News Sites." Radio Free Europe/Radio Liberty. Published August 13, 2021. <https://www.rferl.org/a/belarus-tutby-zerkalo-banned/31409535.html>

²⁸ "'Nobody is safe' in Belarus, says independent media heiress behind Tut.by." France 24. Published May 27, 2021.

<https://www.france24.com/en/live-news/20210527-nobody-is-safe-in-belarus-says-independent-media-heiress-behind-tut-by>

this phenomenon is that virtual private networks (VPNs) are often used in Belarus to avoid blocked websites and government censorship, though these routing websites have started to be attacked by the government as well.²⁹

Onliner.by, the second-most visited online news site in Belarus, is also independently owned. Now-divorced couple Vitaly and Ksenia Shuravko own the full enterprise, which focuses on lifestyle, fashion, and technology news rather than politics. According to a Bolshoi article, Onliner.by models itself after a Silicon Valley start-up and seems to use journalism to build an “onliner” lifestyle.³⁰

The Russian and Belarusian versions of Komsomolskaya Pravda (KP) are both in the top visited news sites in Belarus, though Kp.by was blocked by Belarusian authorities in September 2021.³¹ The sole difference between Kp.by and Kp.ru is that CJSC BelKP-Press, a partial subsidiary of Komsomolskaya Pravda Publishing House, publishes Kp.by, whereas KPPH publishes Kp.ru directly. The ownership of Komsomolskaya Pravda is complex and highly opaque, making it difficult to confirm exact names of owners or their share holdings. KP in Belarus is mostly owned by KPPH, but it also has minority shareholders in Belarus, including longtime director Marina Statsenko.

The final top online outlet is Rusplt.ru, or Russian Planet, a Russian media site owned by Morton Construction Company. A major construction contractor in Russia, Morton was purchased by PIK Group, one of the largest real estate conglomerates in Russia. As a result, PIK Group is the parent company of Russian Planet. PIK Group held an IPO in 2007, leading to partial public ownership of the company. Former Russian senator, Sergei Gordeev, remains the majority shareholder, with Russian state-owned VTB Bank owning the next highest percentage. Founder of PIK Group, Kirill Pisarev owns a minority stake, and the rest of the shares were purchased publicly.

²⁹ Przetacznik, Jakub and Linda Tothova. “Media environment in Belarus.” European Parliamentary Research Service. Published February 2022.
[https://www.europarl.europa.eu/RegData/etudes/BRIE/2022/698922/EPRS_BRI\(2022\)698922_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2022/698922/EPRS_BRI(2022)698922_EN.pdf).

³⁰ “Vitaliy Shuravko, owner of onliner.by: ‘Do real things.’” Bolshoi.by. Published 2013.
<https://bolshoi.by/persona/onliner-vitalij-shuravko/>.

³¹ “News website of Komsomolskaya Pravda in Belarus blocked.” BelSat TV. Published September 29, 2021.

In sum, online outlets are susceptible to Russian and Belarusian government influences. The Belarusian government shut down both Tut.by and Kp.by as a result of their reporting on the 2020-2021 Belarus protests. Affiliates of the Russian government control both Kp.ru and Rusplt.ru. As a result, while some online outlets still remain independent, state control of online media in Belarus remains a fundamental issue.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of Belarus. The collected data highlight two trends in Belarusian media. First, Russian state-owned media dominates the media market in Belarus. Second, Belarus' domestic media ownership is top-heavy, government-influenced, and very opaque, which may create further opportunities for malign influence, be it foreign or domestic.

Many Russian state-owned outlets operate directly within Belarus; however, most Belarusians consume Russian state media through Belarusian intermediaries, which are able to tailor Russian broadcasts that better fit the Belarusian narrative. All five of the top television outlets in Belarus rebroadcast Russian state-owned television. Similarly, Russian state-owned media constitute two of the five top radio stations in Belarus. Outside of the Russian government, major Russian media outlets, such as Komsomolskaya Pravda and Russian Planet, make up a large share of the Belarusian media market. As a result, Russia has many strong channels for influence in Belarus.

The remaining outlets that do not rebroadcast Russian content or are not Russian-owned are mostly government owned or influenced. The state-run Belarus Segodnya is the most circulated newspaper in Belarus and Radio Unistar could be influenced through the public Belarusian State University. In addition, independent outlets that cross the government have been targeted, as the most read news site, Tut.by, was shut down for its coverage of the Belarusian protests. As such, the Belarusian government extends considerable influence over independent media as well.

In sum, the Russian government has a number of strong channels for influencing Belarus' media. Centralized media ownership, heavy state control, and the presence of Russian state media outlets and media content provide a clear picture of heavy Russian influence in the Belarusian media space.

Bosnia and Herzegovina: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	4
Results.....	6
Television.....	6
Print.....	8
Radio.....	9
Online.....	9
Conclusion.....	10

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Bosnian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Bosnia and Herzegovina's (hereafter Bosnia) domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Segmented along ethnic and political lines, the media market in Bosnia is quite complex, even compared to other countries in the region. It is also highly opaque: less than half of the top media outlets appeared in public business registries, and many outlets have gone through ownership changes in recent years with little public information released. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Bosnia.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.¹ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Bosnia, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Zenith, Alexa²), as well as Bosnian business registries (Pravosudje.ba), business profiles, survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Bosnia as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Bosnia's media landscape is via Russian state-owned media (see Table 1). Six of the eleven Russian state-owned media outlets we tracked have a physical presence in Bosnia, which provides the Kremlin with a channel to directly communicate with, and ultimately influence, Bosnian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Bosnia, but does not speak to how well-consumed each outlet is by Bosnia citizens.

² Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Bosnia, 2021

Television		Print		Radio		News Agency	
Russia I	✓	Rossiyskaya Gazeta	✓	Sputnik	✗	TASS	✗
Russia 24	✓					Sputnik	✗
Russia K	✗						
RTR-Planeta	✓						
TV Centre	✓						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Bosnia by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. Television is the most popular medium in Bosnia.³ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Notably, none of the Russian state-owned outlets (previously identified in Table 1) were among those with the highest market share.

AidData used a weighted average of media consumption survey rankings from 2017 to present to determine the top media outlets in Bosnia. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media

³ "Bosnia-Herzegovina profile - Media," BBC News, 11 February 2020, <https://www.bbc.com/news/world-europe-17211939>.

outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁴

Table 2: Top Bosnian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	FTV	Dnevni Avaz	Federalni	Avaz.ba
2	BHT	Oslobodjenje	Radio Republike	Klix.ba
3	Nova BH	Euroblic	BH Radio	Hercegovina.info
4	OBN	Nevazisne novisne	BN Radio	Nezavisne.com
5	BN TV	Glas Srpske	RSG Radio	Rtvbn.com

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Bosnian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the television stations RTRS, Federalna TV, and Al Jazeera Balkans, along with online outlets Buka.com, Balkans.aljazeera.net, and Blic.rs

Media Ownership

Table 3 lists the ownership information of top Bosnian media outlets by medium (television, newspaper, radio, and online). Bosnian media ownership is not well

⁴ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Zenith (2018), IREX’s Media Sustainability Index (2019), the International Republican Institute’s Public Opinion Survey (2018), Prism Research’s “Eurobarometer Public Opinion in Bosnia and Herzegovina” (2010), the International Programme for the Development of Communication’s “Assessment of Media Development in Bosnia and Herzegovina” report (2016), and Radio-televizija Federacije Bosne i Hercegovine (2018). Online: Alexa (April 2021) and NATO Strategic Communications Centre of Excellence’s “Russia’s Footprint in the Western Balkan Information Environment” reports (2021)

documented and few regulations exist regarding media outlets. Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Bosnian state-owned media is color-coded blue. In Bosnia, no owners had suspected or known ties to the Russian government, and no outlets had direct Russian ownership. As such, this profile has no red color-coding and five designations of state-owned media.

Table 3: Ownership of top Bosnian media outlets by share

No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)	
Television	1	FTV	Radio-Televizija Federacije Bosne i Hercegovine		100	
	2	BHT 1	Radiotelevizija Bosne i Hercegovine		100	
	3	Nova BH	United Group	BC Partners		52.3
				Senior management at BC Partners		38.5
				Kohlberg Kravis Roberts (KKR)		6.8
				EBRD		2.4
	4	OBN	Open Broadcast Network	Ivan Čaleta	100	
	5	BN TV	RTV BN	Vladimir "Vlado" Trišić	100	
Newspaper	1	Dnevni Avaz	Avaz-Roto Press	Azra Radončić	100	
	2	Oslobodjenje	MIMS Group	Mujo Selimovic	100	
	3	Euroblic	Ringier Group	La Mobiliere	12.5	

		MIMS Group	Ringier Family	37.5
			Marc Walder	12.5
	Oslobodjenj e		Kohlberg Kravis Roberts (KKR)	17.8
		Axel Springer ⁵	CPPIB	6.5
			Friede Springer	11.3
	Mapo	Mapo Media LLC	Mathias Döpfner	11
			Axel Sven Springer	2.5
	Gazeta Tema	Tema	Ariane Melanie Springer	0.5
			Friede Springer Foundation	0.5
	4	Nezavisne novine	NIGD DNN	Unknown
			Unknown	Unknown
	5	Glas Srpske	NIGD DNN	Unknown
			Unknown	Unknown
	1	Federalni	Radio-Televizija Federacije Bosne i Herzegovine	100
	2	Radio Republike Srpske	Radio Televizija Republike Srpske	100
Radio	3	BH Radio	Radiotelevizija Bosne i Hercegovine	100
	4	BN Radio	RTV BN	Vladimir "Vlado" Trišić
				100
	5	RSG Radio	RSG Group	Adnan Osmanagic
				100
	1	Avaz.ba	Avaz-Roto Press	Azra Radončić
				100
	2	Klix.ba	Intersoft	Dario Simic
				Unknown
			Mario Simic	Unknown
	3	Hercegovina. info	Unknown	Josip Budimir
				Unknown
Online				Unknown
	4	Nezavisne.co m	NIGD DNN	Unknown
				Unknown
	5	Rtvbn.com	RTV BN	Vladimir "Vlado" Trišić
				100

⁵ Shares are rounded to the nearest tenth.

Results

Television

The two most popular television stations in Bosnia are state-owned channels FTV and BHT. In 2005, Bosnia passed the Law on the Public Broadcasting System of Bosnia and Herzegovina enshrining the need for three public service broadcasters: one that would be considered the national level broadcaster and two that would appeal to the separate populations living within the country. BHT is operated by the national level broadcaster Radiotelevizija Bosne i Hercegovine (BHRT). FTV is operated by the public broadcasting service for the Federation of Bosnia and Herzegovina, Radio-Televizija Federacije Bosne i Hercegovine (RTVBiH). The third public broadcaster is Radio Televizija Republike Srpske (RTRS), which broadcasts for the Republika Srpska. RTRS runs a television channel of the same name that is also popular but did not make our list of top outlets.⁶

Nova BH, formerly known as Pink BH until 2018, is the third most popular television channel. Nova BH is currently owned by the United Group. The majority shareholder of this group of primarily foreign investors is British private equity firm BC Partners, while US-based Kohlberg Kravis Roberts (KKR) owns a minority share. KKR is also an owner of the Bosnian newspaper imprint Euroblic.⁷

The fourth most-consumed television outlet, OBN is a commercial network solely owned by Ivan Caleta.⁸ A Croatian by birth, Caleta has reportedly adopted Bosnian citizenship. Lastly, BN TV, a television channel popular with Bosnian-Serbs, is another television channel with a single owner: Vladimir "Vlado" Trisic. Trisic also owns the

⁶ Law on the Public Broadcasting System of Bosnia and Herzegovina, http://www.sze.hu/~smuk/Nyilvanossag_torvenyek_east_south_eur/Jogforr%C3%A1sok/M%C3%A9dia/BiH%20PublicBroadc%20SYSTEM%20LAW%2078-05.pdf.

⁷ "KKR sells majority stake in United Group, SBB has new co-owner," B92, 27 September 2018, <https://www.b92.net/biz/vesti/srbija/kkr-prodao-vecinski-udeo-junajted-grupe-sbb-ima-novog-suvlasnika-1448907>.

⁸ "Ivan Caleta takes over OBN television," Oslobodjenje, 23 November 2019, <https://www.oslobodjenje.ba/vijesti/ekonomija/ivan-caleta-preuzima-obn-televiziju-509414>.

radio station BN Radio and online outlet Rtvbn.com. Trisic has been an outspoken opponent of Bosnian Serb President Milorad Dodik.⁹

While the most popular television outlets are state-owned, they serve different purposes and appeal to different populations. There is some cause for concern about foreign ties in the top television outlets, with Nova BH being owned by UK and US partners and OBN's Caleta being tied to Croatia, as foreign actors can present a vulnerability for the domestic media market. Overall, the top television outlets do represent a diverse mix of political viewpoints, even if there is some centralized ownership.

Print

The majority of Bosnia's top print outlets appear to be wholly owned by prominent families. Bosnia's newspaper with the highest circulation is Dnevni Avaz, owned by Azra Radoncic of Avaz-Roto Press. Azra Radoncic is the ex-wife of prominent politician Fahrudin Radoncic, who many believe still controls the company.¹⁰ Radoncic has served as Minister of Security and ran for President on multiple occasions as part of the Union for a Better Future of BiH (SBB) party. Dnevni Avaz's online edition, the website Avaz.ba, is also the top online outlet in the country.

The second most popular print outlet is Oslobodjenje, owned by prominent Bosnian businessman Mujo Selimovic. Mujo Selimovic is the son of a wealthy businessman (Hilmo Selimovic) who owns several Bosnian companies including the Sarajevo Brewery.¹¹ Both father and son are connected to the Party of Democratic Action (SDA). The online edition of Oslobodjenje is also popular in Bosnia.

Euroblic, the third most-popular print outlet, is the only top print outlet not owned by a prominent Bosnian family. The Bosnian version of the Serbian paper Blic, Euroblic is

⁹ "Director of BN Television Vlado Trisic for BUKU," <https://www.6yka.com/novosti/direktor-bn-televizije-vlado-trisic-za-buku-straha-od-milorada-dodika-nem-a-na-njegove-napade-smo-navikli>.

¹⁰ Peace Institute (2014), p. 132: Media Integrity Matters: Reclaiming public service values in media and journalism. <https://www.mirovni-institut.si/wp-content/uploads/2014/08/media-integrity-matters.pdf>.

¹¹ CIMA (2016), p. 7: Captured News Media. <https://www.cima.ned.org/wp-content/uploads/2016/06/CIMA-Balkans-Captured-Media.pdf>.

owned by Swiss publishing organization Ringier Axel Springer Media AG. KKR, who is a shareholder of television channel Pink BH, is also a shareholder of Euroblic.

The fourth most popular outlet, Nezavisne novine, was previously owned by prominent war journalist Zeljko Kopanja, who died in 2016. It is unclear who owns the newspaper since his death, though his son has been reported as stepping in as director.¹² At the time of his death, Kopanja also owned the fifth most popular outlet, Glas Srpske. Other shareholders may own minority stakes in both outlets, but it is unclear what those shares may be and who those shareholders are.

In the print sector, there are many cases of ownership being obscured. From ownership being registered to family members, as is the case with Dnevni Avaz, or limited information about particular owners being available to the public, as is the case with Nezavisne novine and Glas Srpske, it is unclear who truly controls much of the print media in Bosnia.

Radio

The radio sector in Bosnia is dominated by the state-owned public broadcasters. Each of the three public broadcasters is represented in the top outlets. The most consumed outlet is Federalni, operated by RTVBiH. The second most consumed outlet is Radio Republike Srpske, operated by RTRS. Rounding out the public broadcasters is the third most consumed radio outlet, BH Radio, operated by national level operator BHRT.

The fourth most consumed radio station is BN Radio. BN Radio is owned by Vlado Trisic, who also runs BN TV and the online outlet Rtvbn.com.

Lastly, the fifth most popular radio station in Bosnia is Radio Stari Grad (RSG Radio). RSG Radio is part of the RSG Group that runs one other radio station along with providing marketing and production services.¹³ RSG Radio is owned by Adnan

¹² "Čestitke RTRS-u iz javnih institucija i preduzeća u Srpskoj." RTRS. April 19, 2019. <https://lat.rtrs.tv/vijesti/vijest.php?id=334442>.

¹³ RSG Media, <https://rsgmedia.ba/o-nama/>.

Osmanagic, who has remarked on occasion that he views RSG Radio as an outsider in the Bosnian radio market.¹⁴

The radio medium in Bosnia is dominated by state-owned broadcasters, who run the three most popular radio stations in the country. Additionally, all but one outlet, RSG Radio, is affiliated with an outlet that appears in another medium. Ownership of top Bosnian radio stations is centered around the same names as other top outlets, decreasing the diversity of news content across mediums.

Online

Online outlets share relatively centralized ownership with other mediums, as many of the top outlets in other mediums additionally operate as a website. These include the most popular site Avaz.ba, followed by the fourth and fifth most popular sites Nezavisne.com and Rtvbn.com. Avaz.ba is the online edition of Dnevni Avaz and is owned by Azra Radoncic. Nezavisne.com is the online outlet of Nezavisne novine, which is believed to be owned by the Kopanja family. Rtvbn.com is the online version of BN TV, owned by Vlado Trisic.

The second most consumed online outlet in Bosnia is Klix.ba, which is co-owned by brothers Dario and Mario Simic, who started the site in 2000 as an online-only outlet. Klix.ba is known as an engaging media outlet for fielding a large number of consumer comments on its website.¹⁵

Rounding out the list is the third most popular online outlet, Hercegovina.info. Little information about the ownership of this website could be found.¹⁶ Hercegovina.info did publish on its site a short news blurb about one of its reputed co-owners, Josip Budimir, but the identity of other owners and their potential ownership shares remains opaque.¹⁷

¹⁴ "Osmanagic: Radio Stari Grad survived because it was an outsider," Radio Slobodna Europa, 30 January 2017, <https://www.slobodnaevropa.org/a/intervju-adnan-osmanagic-rsg/28266226.html>.

¹⁵ "News Portals," Konrad Adenauer Stiftung, <https://www.kas.de/en/web/balkanmedia/news-portals>.

¹⁶ "Who are the owners of the most influential private media in BiH," Grad Busovaca, 10 March 2016, <https://grad-busovaca.com/tko-su-vlasnici-najutjecajnijih-privatnih-medija-u-bih/>.

¹⁷ "New co-owner of the Hercegovina.info portal," 28 May 2019, <https://www.hercegovina.info/vijesti/bih/novi-suvlasnik-portala-hercegovina-info-zelimo-biti-vodeci-portal-hrvata-u-bih-164422/164422/>.

Unlike each of the other media sectors, all of the top online outlets have a different owner. However, there are several instances, including Avaz.ba, Nezavisne.com, and Hercegovina.info, where ownership information is not available or is obscured. Additionally, many of the online outlet owners also own outlets in other media sectors, meaning that ownership is centralized across top news outlets and the overall diversity of news content is limited.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of Bosnia. The Kremlin's channels to exert malign influence via Bosnian media appear to be relatively limited. Russian state-owned media is less widely consumed in Bosnia, and the Kremlin does not appear to have an overt ownership stake in the country's top television, print, radio, or online media outlets. In fact, the foreign ownership links we identified were most often Western European or US-based investors. However, the absence of a strong regulatory environment to mandate transparent disclosure of ownership of Bosnia's media outlets means that we could be undercounting potential Kremlin or other foreign linkages that are obscured from view, especially given the high rate of turnover in media ownership in recent years.

This opacity regarding media ownership has an additional repercussion—it increases the vulnerability of Bosnian citizens to potential bias in domestic reporting. This risk is exacerbated by the high degree of segmentation in the Bosnian media market, as the majority of domestic media outlets are connected to wealthy local business owners or political elite, which tend to orient their reporting to appeal to a specific ethnic group or political party, rather than a broader and more diverse constituency. Additionally, the centralization of ownership among top outlets could mean increased vulnerability to foreign, malign influence, as the small groups of owners who own large shares of the Bosnian media market could be targeted.

Lastly, the dominance of state broadcasters in both the television and radio markets should be noted. Bosnia does have three public broadcasters representing diverse population interests. However, having significant media power in the hands of the state could be a cause for concern, especially on politically sensitive issues.

Georgia: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	3
Russian Media Footprints.....	4
Top Media Outlets.....	5
Media Ownership.....	7
Results.....	9
Television.....	9
Print.....	13
Radio.....	15
Online.....	16
Conclusion.....	17

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia

Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner,
Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Georgia media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Georgia's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Georgia's media ownership is relatively transparent, though ownership of top outlets often concentrates across mediums. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Georgia.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.¹ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Georgia, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when available (e.g., Alexa²), as well as Georgia's public business registry, media watchdog sources, and other open source data. This profile includes data for Georgia proper and

¹ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

² Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic.
<https://www.alexa.com/siteinfo>.

does not separate out any information that may differ in breakaway regions such as Abkhazia and South Ossetia.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Georgia as of 2021. This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Georgia's media landscape is via Russian state-owned media (see Table 1). Nine of the eleven Russian state-owned media outlets we tracked have a physical presence in Georgia, which provides the Kremlin with a strong channel to directly communicate with, and ultimately influence, Georgian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Although the top Russian television and news agencies all have a presence in Georgia, the top newspaper and radio outlets do not. Since Georgians get most of their information from television,³ the Kremlin could consider it as a prime medium for releasing its content. In sum, Kremlin media maintains a fairly strong presence within Georgian borders. Table 1 provides a footprint of Russian state-owned media presence in Georgia, but does not speak to how well-consumed each outlet is by Georgian citizens.

³ Keshelashvili, et al. (2021) Georgia: An Information Ecosystem Assessment. Part One: Context, Infrastructure, Regulation, and Revenue. Internews, p. 6. URL: <https://internews.org/resource/georgia-information-ecosystem-assessment/>. Accessed February, 25, 2022.

Table 1: Russian state-owned media in Georgia, 2021⁴

Television		Print		Radio		News Agency	
Russia I	✓	Rossiyskaya Gazeta	✗	Sputnik	✗	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✓						
TV Centre	✓						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Georgia by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. Television remains the most consumed medium for important information like domestic political news, Covid-19 information, and international affairs, though younger audiences are increasingly turning to social media and the Internet.⁵ While we cannot know the exact influence of each individual outlet,

⁴ While we did not find evidence that Rossiyskaya Gazeta circulates in Georgia, we found evidence that Russia Beyond the Headlines (RBTH), a printed supplement created by Rossiyskaya Gazeta, is placed in other newspapers in the country.

⁵ International Republican Institute's Center for Insights in Survey Research (2021) "Public Opinion Survey: Residents of Georgia (February 2021)." URL: <https://www.iri.org/resources/new-poll-amid-political-crisis-georgians-show-concerns-over-economy-and-covid-19/>. Accessed February 25, 2022. Caucasus Research Resource Center/National Democratic Institute (2020) "Public Attitudes in Georgia: Results of June 2020 Survey." URL:

we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of many Russian state-owned media outlets in Georgia, none appears in the top five outlets for any medium.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Georgia. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁶

Table 2: Top Georgian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Imedi	Kviris Palitra	Fortuna FM	Ambebi.ge
2	Mtavari Arkhi	Rezonansi	Radio Imedi	Interpressnews.ge
3	Rustavi 2	Asaval-Dasavali	Georgian Radio	Palitravideo.ge
4	GDS TV	Alia	Radio Palitra	On.ge
5	TV Pirvelli	Akhali Taoba	Abkhazetis Khma	Kvirispalitra.ge

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Georgian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the television station Channel

<https://www.ndi.org/publications/results-june-2020-public-opinion-polls-georgia>. Accessed February, 25 2022.

⁶ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: the International Republican Institute (2021), Internews (2021), the Caucasus Research Resource Center (2020), TVMR GE (Nielsen) (2020), the Center for Media, Data, and Society (2019), IREX's Media Sustainability Index (2019), Transparency International (2019), the Caucasus Research Resource Center (2017), Media Landscapes, Maia Mikashavidze (2017).

Online: AidData Media Survey (2021), Alexa (April, 2021), Top.ge (2021), IREX's Media Sustainability Index (2019), Media Landscapes, Maia Mikashavidze (2017).

1(GPB), the radio station Radio Ar Daidardo, and online outlets Netgazeti.ge and Primetime.ge.

Media Ownership

Table 3 lists the ownership information of top Georgian media outlets by medium (television, newspaper, radio, and online). The 2004 Law on Broadcasting (Chapter XII, Articles 60-62) limits concentration of media ownership and mandates ownership transparency. Nonetheless, we find owners with ties to more than one outlet in at least two mediums. Some outlets have owners with murky ties to Georgia’s political elite that create opportunities for hidden influence. We discuss further examples of ownership ties and relationships in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Georgian state-owned media is color-coded blue. In Georgia, no media owners had suspected or known ties to the Russian government, and none had direct Russian ownership. As such, this profile has no red color-code and one designation of state-owned media.

Table 3: Ownership of top Georgia media outlets by share

 No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Imedi TV	Imedi TV Ltd.	Irakli Rukhadze	Majority
				Other shareholders	Minority
	2	Mtavari Arkhi	Main Channel, Ltd.	Zaza Okuashvili	40
				Bakur Jakhaia	37
			Nika Gvaramia	12	

			Nikoloz Sisauri	3
			Giorgi Rurua	2.5
			Marie Ana Rurua	2.5
			Manana Sanadze	1
			Teimuraz Vasilidze	1
			Giuli Alasania	0.75
			Nikolozi Alasania	0.25
	3 Rustavi 2	Rustavi 2 TV	Kibar Khalvashi	100
	4 GDS TV	GDS TV LLC	Irakli Rukhadze	Majority
			Other shareholders	Minority
	5 TV Pirveli	First TV Ltd.	Vakhtang Tsereteli	100
Print	1 Kviris Palitra	Palitra Media	Irakli Tevdorashvili	75
			Zaza Buadze	25
	2 Rezonansi	Rezonansi Daily Newspaper Ltd.	Zurab Macharadze	100
	3 Asaval-Dasavali	Asaval-Dasavali Publishing House Ltd	Lasha Nadareishvili	100
	4 Alia	Alia and Kviris Kronika Newspapers Ltd.	Giorgi Bregvadze	100
	5 Akhali Taoba	Akhali Taoba Newspaper Ltd.	Ioseb Goginashvili	45
			Zurab Beridze	40
			Medea Sanaia	10
			Beka Goginashvili	5
	Radio	1 Fortuna FM	Radio Holding Fortuna	Guram Chigogidze
2 Radio Imedi		Georgia Media Production Group	Irakli Rukhadze	Majority
			Other shareholders	Minority
3 Georgian Public Broadcasting (GPB)		Government of the Republic of Georgia		100
4 Radio Palitra	Palitra Media	Irakli Tevdorashvili	75	

			Zaza Buadze	25		
	5	Abkhazetis Khma	Media Holding Ltd.	Nino Chkheidze	100	
	1	Ambebi.ge	Palitra Media	Irakli Tevdorashvili	75	
	3	balkanweb.com	Focus Group LLC	Zaza Buadze	25	
	2	Interpressnews.ge	Palitra Media	Irakli Tevdorashvili	75	
				Zaza Buadze	25	
	3	Palitravideo.ge	Palitra Media	Irakli Tevdorashvili	75	
				Zaza Buadze	25	
Online				Nodar David	25	
				Giorgi Jibladze	25	
		4	On.ge	On.ge Ltd.	Zurab Gumbaridze	12.5
					Giorgi Lifonava	12.5
					Mikheil Mshvildadze	12.5
					Irakli Saghinadze	12.5
		5	Kvirispalitra.ge	Palitra Media	Irakli Tevdorashvili	75
					Zaza Buadze	25

Results

Television

Television is by far the most consumed media in Georgia, with 88% of Georgians identifying it as their main information source.⁷ Georgia's top television outlets are all privately held, with no state-owned media making the list. While Table 3 reveals some ownership diversity in Georgia's top television outlets, this has not prevented escalating

⁷ Keshelashvili, et al. (2021) Georgia: An Information Ecosystem Assessment. Part One: Context, Infrastructure, Regulation, and Revenue. Internews, p. 6.

political polarization. Members from the ruling Georgian Dream party refuse to appear on or engage with several outlets with critical views.⁸

Irakli Ruzhdze, through his asset management and recovery firm Hunnewell Partners, is the principal owner of the first and fourth most-watched Georgian television outlets: Imedi TV and GDS TV, respectively.⁹ Imedi TV is owned directly by Teleimedi LLC, while GDS TV Ltd. directly owns GDS TV. Both companies, in turn, are owned by Georgian Media Production Group, which Ruzhdze and his partners own through the Dutch firm Media Finance Group BV.¹⁰ Reports suggest partners of Ruzhdze control a minority share.¹¹ Ruzhdze only recently became the owner of these outlets, along with popular Maestro TV (not in our top media list), after they were sold by previous owner Inna Gudavadze.¹² Media watchdogs considered Imedi closely aligned to elites and the pro-Georgian Dream party while Gudavadze owned the outlet, and it appears to have

⁸ IREX (2021) Georgia: Vibrant Information Barometer, p. 8. URL: <https://www.irex.org/resource/vibrant-information-barometer-vibe>. Accessed February 25, 2022.

⁹ Taktakishvili, Natio. "The buyer of TV Imedi and GDS TV is known," Business Media Georgia. Published January 29, 2021. URL: <https://bm.ge/en/article/amiran-gamyrelidze-restornebis-mimart-solidaruli-var/74552>. Accessed February 25, 2022.

¹⁰ Recent reports of litigation in the Netherlands and the United Kingdom suggest the ownership is being challenged, but sources unanimously indicate Ruzhdze fully controls the outlets. See (i) "Dutch court has granted pre-judgment attachment of the interests businessman Irakli Rukhadze and his partners have in a foundation, owning 100% of TV 'Imedi.'" Business Media Georgia. Published October 20, 2021. URL: <https://bm.ge/en/article/dutch-court-has-granted-pre-judgment-attachment-of-the-interests-businessman-irakli-rukhadze-and-his-partners-have-in-a-foundation-owning-100-of-tv-imerdi/93602>. Accessed February 25, 2022; (ii) Tkeshelashvili, Shota. "UK court to determine the multi-million sum Irakli Rukhadze and his business-partners have to pay to recovery partners and Revoker LLP." Forbes. Published October 20, 2021. URL: <https://forbes.ge/en/uk-court-to-determine-the-multi-million-sum-irakli-rukhadze-and-his-business-partners-must-pay-to-recovery-partners-revoker-llp/>. Accessed February 25, 2022.

¹¹ These unnamed partners likely include Igor Alexeev and Benjamin Marson, founding partners of Hunnewell Partners along with Ruzhdze. See <https://www.hunnewellpartners.com/our-team/>. Alexeev and Marson also appear as defendants along with Ruzhdze in trial over ownership of Media Finance BV, the Dutch firm that owns Georgian Media Production Group LLC. See "Dutch court has granted pre-judgment attachment of the interests businessman Irakli Rukhadze and his partners have in a foundation, owning 100% of TV 'Imedi.'" Business Media Georgia. Published October 20, 2021.

¹² Taktakishvili, Natio. 'Holder company of TV Imedi for sale.' Business Media Georgia. Published January 29, 2021 URL: <https://bm.ge/en/article/holder-company-of-tv-imerdi-for-sale/74529>. Accessed February 25, 2022.

retained this leaning.¹³ A 2019 poll found Imedi the most trusted television outlet in Georgia.¹⁴

The second and third most popular television channels, Mtavari Arkhi and Rustavi 2 respectively, share a connected past. Mtavari Arkhi is directly owned by Main Channel, Ltd., which is in turn owned by several shareholders, with Zaza Okushvili (40%), Bakur Jakhiaia (37%), and Nika Gvaramia (12%) holding the largest shares. Seven others hold the remaining 11%, with no person holding more than 3% among those seven. Kibar Khalvashi owns 60% of Rustavi 2 outright and effectively controls the remaining 40% share through his ownership of Panorama Ltd. In 2006, Khalvashi was coerced into selling his share of Rustavi 2 by former Georgian president Mikheil Saakashvili. However, he reclaimed his owner's stake after Georgia's Supreme Court restored ownership to him in a 2019 decision.¹⁵

Shortly after this court decision, Rustavi 2 dismissed several journalists, including former Director General Nika Gvaramia. Various NGOs active in the Georgian media space released a statement in 2019 worried that shifting staff, including new management, and the firing of several journalists at Rustavi 2 eroded critical opposition to the government.¹⁶ As a result of the firings, Gvaramia and other former Rustavi 2 journalists and staff started Mtavari Arkhi in 2019 to provide an opposition voice in the Georgian media. Gvaramia also has ties to Georgian politics as a member of the Parliament of Georgia and brief stints as Minister of Education and Science and Minister of Justice in the 2000s. He is currently the lawyer of former Georgian president Mikheil Saakashvili,¹⁷ who is now serving a six-year sentence after being convicted of

¹³ IREX (2021) Georgia: Vibrant Information Barometer, p. 4, 8. Accessed February 25, 2022. <https://www.irex.org/sites/default/files/pdf/vibe-georgia-2021.pdf>

¹⁴ The Caucasus Research Resource Centers (2019) NDI: Public attitudes in Georgia, November-December 2019. URL: <https://www.caucasusbarometer.org/en/nn2019ge/codebook/>. Accessed February 25, 2022.

¹⁵ Antidze, Margarita. "Europe's human rights court rules against owners of Georgian pro-opposition TV channel in ownership row." Reuters. Published July 18, 2019. URL: <https://www.reuters.com/article/us-georgia-politics-tv-court-idUSKCN1UD1YY>. Accessed February 25, 2022.

¹⁶ See statement [here](#), signed by Transparency International Georgia, Georgian Democracy Initiative, and Center for Research Journalism and Economic Analysis, among others.

¹⁷ "Lawyer: Saakashvili was Recognized as a 'Victim' by Ukrainian Prosecutor General's Office." Georgia Today. Published February 11, 2022. URL:

abuse of power.¹⁸ Giuli Alasania, Saakashvili's mother, is also a minority owner of the outlet. Gvaramia himself remains entangled in an ongoing trial after a 2019 indictment on charges of misuse of funds while at Rustavi 2.¹⁹ Mtavari Arkhi is the second most trusted media outlet in Georgia behind Imedi TV.²⁰

The fifth most popular television outlet is TV Pirveli, owned by Vakhtang Tsereteli through First TV Ltd. The outlet started in 2015 and focused on sports programming, but later expanded to other content including news, education, and general entertainment. Tsereteli's father was convicted of money laundering in January 2022; defendants in the case claimed the investigation stemmed from the station's critical coverage of the government.²¹ The government denies the case was politically motivated.

Georgian ownership of top television channels remains fairly diverse, with the exception of two top outlets that share the same owner: Imedi TV and GDS TV. While ownership is transparent, Imedi TV and GDS TV's ownership transfer from Inna Gudavadze to Irakli Ruzhdze and his partners could only be confirmed through media reports. However, our difficulty in ascertaining the current ownership through official sources may simply be a function of the ongoing legal process. In addition, several owners have close ties to political figures and parties. These cozy relations present problems for mitigating outside influence, should foreign malign influences compromise these political figures and seek to influence an outlet's narratives.

<https://georgiatoday.ge/lawyer-saakashvili-was-recognized-as-victim-by-ukrainian-prosecutor-generals-of-fice/>. Accessed February 26, 2022.

¹⁸ "Saakashvili Convicted Of Abuse Of Power, Sentenced In Absentia." RFE/RL's Georgian Service. Published June 29, 2018. URL:

<https://www.rferl.org/a/saakashvili-convicted-of-abuse-of-power-sentenced-in-absentia/29327555.html?flags=mailer>. Accessed February 26, 2022.

¹⁹ "Former General Director of Rustavi 2 presented charges." First Channel (1TV). Published August 9, 2019, URL: <https://1tv.ge/en/news/former-general-director-of-rustavi-2-presented-charges/>. Accessed February 26, 2022.

²⁰ The Caucasus Research Resource Centers (2019) NDI: Public attitudes in Georgia, November-December 2019.

²¹ Shoshiashvili, Tata. "TBC bank founder and Georgian opposition leader found guilty of fraud." Open Caucasus Media. Published January 12, 2022. URL: <https://oc-media.org/tbc-bank-founder-and-georgian-opposition-leader-found-guilty-of-fraud/>. Accessed February 25, 2022.

Print

Only about 14% of Georgians identify newspapers as their main source of information.

²² Like television, print media boasts diverse ownership, though all five top outlets have different owners. Overall, newspaper ownership is quite transparent, with owners easily identified through both official government records and reports from media and NGO watchdogs that identify the same owners.

Palitra Media owns Kviris Palitra, the most-circulated print outlet in Georgia. Palitra is a large media corporation that owns a number of outlets in various mediums, including the TV channel Palitra News and the online outlet Interpressnews.ge. The company also has other interests in the marketing, internet-commerce, and web development sectors, in addition to owning Biblusi, a popular bookstore chain. According to Georgia's public business registry, Irakli Tevdorashvili (75%) and Zaza Buadze (25%) own Palitra Media. Buadze and Tevdorashvili do not appear to have overt foreign ties or close ties to Georgian political parties. However, a Transparency International report noted that politician Dimitri Kumsishvili worked as the director of Kviris Palitra before joining the government as Georgia's First Deputy Prime Minister and Minister of Economy and Sustainable Development in the 2010s.²³ Kumsishvili is currently a member of the Georgian Dream party.

Rezonansi is the second most-circulated print outlet. It is directly owned by Rezonansi Daily Ltd., which is owned by Zarub Macharadze. Macharadze co-founded the paper in 1990 as a Russian-language outlet before switching to the Georgian language in 1992. Despite its history of publishing in Russian, we found no overt foreign ties between Macharadze and Russia.

Asaval-Dasavali is the third most-circulated newspaper and is owned directly by Asaval-Dasavali Publishing House, itself owned by Lasha Nadareishvili. The paper has a reputation for publishing hate speech against various ethnic, religious, LGBTQ, and

²² Keshelashvili, et al. (2021) Georgia: An Information Ecosystem Assessment. Part One: Context, Infrastructure, Regulation, and Revenue. Internews, p. 6.

²³ Tsetskhladze and Gogiashvili (2018) Who Owns Georgian Media? Transparency International, p. 22. URL: https://transparency.ge/sites/default/files/media_mplobeloba-e_1.pdf. Accessed February 25, 2022.

political groups,²⁴ as well as more recently spreading misinformation about the Covid-19 vaccine.²⁵ It also promotes anti-US and anti-NATO content.²⁶ Macharadze also owns the Georgian News Agency and is a board member of the Georgian Press Association.

Alia is the fourth most popular newspaper in Georgia. It is directly owned by Alia Holdings, which is owned by Giorgi Bregvadze. While Bregvadze does not have overt or obvious domestic or foreign ties, newspapers from Alia Holdings have been found to publish content that fuels anti-Western attitudes in Georgia.²⁷ The European Commission Against Racism and Intolerance (ECRI), based on the Media Development Foundation's study, cites outlets from Alia Holdings as having homophobic and xenophobic editorial policies.²⁸ Finally, Akhali Taoba is the fifth most-consumed print outlet, owned directly by Akhali Taoba Newspaper Ltd., which is then owned by four shareholders: Ioseb Goginashvili (45%), Zurab Beridze (40%), Medea Sanaia (10%), and Beka Goginashvili (5%). We find no overt political ties, foreign or domestic, among Akhali Taoba's owners.

Overall, we find the top print outlets to have fairly diverse and transparent ownership. This is perhaps reflected in a recent Internews sentiment analysis of Georgian print media, that found all five outlets discussed above to be without serious bias for or against any particular political party in their content from February and March 2021 (the time just after the November 2020 Parliamentary Elections in Georgia).²⁹ We do find,

²⁴ Giorgi, et al. (2020) Media Influence Matrix: Georgia. Central European University's Center for Media, Data and Society, p. 69. URL: <https://cmds.ceu.edu/sites/cmcs.ceu.hu/files/attachment/basicpage/1425/mimgeorgiafullreport2020.pdf>. Accessed February 25, 2022.

²⁵ "The Anti-Vaccination Movement and Russian Propaganda." Institute for Development of Freedom of Information. Published May 5, 2020. URL: https://idfi.ge/en/anti-waxer_movement_and_russian_propaganda. Accessed February 25, 2022.

²⁶ Giorgi, et al. (2020) Media Influence Matrix: Georgia. Central European University's Center for Media, Data and Society, p. 31.

²⁷ Giorgi, et al. (2020) Media Influence Matrix: Georgia. Central European University's Center for Media, Data and Society, p. 31.

²⁸ Council of Europe: European Commission Against Racism and Intolerance (ECRI), ECRI Report on Georgia (Fifth Monitoring Cycle): Adopted December 8, 2015, March 1, 2016, CRI (2016), 2: pp. 16-16, URL: <https://www.refworld.org/docid/584e8b914.html>. Accessed February 25, 2022.

²⁹ Kviris Palitra, Rezonansi, and Akhali Taoba covered all major political parties mostly neutrally, while Alia and Asaval-Dasavali covered all major political parties with mainly negative coverage (though this negative coverage did not seem to have a bias). See Internews Georgia (2021) Study and Research on

however, several outlets with single shareholders. Since multi-stakeholder ownership structures are more difficult to compromise, this lack of within-outlet ownership diversity creates a potential vulnerability for foreign, malign actors to influence content.

Radio

Radio is the least consumed media in Georgia, with only 13% of Georgians listing it as their main source of information.³⁰ The most popular outlet is Fortuna FM, which is directly owned by Radio Fortuna FM. Radio Fortuna FM is jointly owned by Tamar Chigogidze (38.9%), Zura Chigogidze (38.9%), and Zamira Chigogidze (22.2%). While predominantly an entertainment station playing a wide variety of popular music, it also provides a news service each hour.

The second most popular station is Imedi Radio, directly owned by Imedi Holding. Like other companies in the Imedi family, it is directly owned by Georgian Media Production Group Ltd, which is owned by Irakli Rukhadze and his partners. Georgian Public Broadcasting (GPB), the third most consumed radio station, is state-owned, with the Georgian government owning 100% of the firm. This is one of the outlets with which the Georgian Dream party will engage, suggesting close ties to the country's ruling politicians.³¹

The fourth most popular station is Radio Palitra, owned by the Palitra Media firm which is ultimately owned by Irakli Tevdorashvili (75%) and Zaza Buadze (25%). Abkhazetis Khma, the fifth most listened to station, is directly owned by Media Holding Ltd., which Nino Chkheidze (100%) ultimately controls. Chkheidze does not appear to have overt foreign or domestic political ties.

In sum, we find the radio sector in Georgia has diverse ownership, with all top-five outlets having five different owners. In addition, the process of finding information on radio ownership in Georgia is transparent and easy using the government's public

Election Media Coverage for the 2020 Parliamentary Elections in Georgia, p. 3. URL: https://mediamonitor.ge/uploads_script/accounts/2 - INTERNEWS GEORGIA - PRESS 04.2021-EN.pdf. Accessed February 25, 2022.

³⁰ Keshelashvili, et al. (2021) Georgia: An Information Ecosystem Assessment, Internews, p. 6.

³¹ IREX (2021) Georgia: Vibrant Information Barometer, p. 4, 8.

business registry. While we do not find foreign ties, we observe at least two outlets with close relationships with the currently ruling Georgian Dream party—Imedi Radio and GPB. This poses some vulnerability to foreign, malign influence for some of the most-consumed radio content.

Online

About 36% of Georgians use news websites and apps as their main source of information.³² Palitra Media owns the top three news sites in Georgia: Ambedi.ge, Interpressnews.ge, and Palitravideo.ge, respectively. It also owns the fifth most popular online outlet, Kvirispalitra.ge, the online version of its top-ranked print outlet Kviris Palitra. Like other Palitra Media holdings, these web portals are directly owned by Palitra Media Holding's Irakli Tevodrashvili (75%) and Zaza Buadze (25%).

The fourth most popular site is On.ge, which is owned directly by On.ge Ltd. Though information on the website's "About Us" section provides outdated documentation,³³ Georgia's public business registry provides up-to-date information on its ownership structure. Two other companies own On.ge Ltd: Formula Production Ltd. (50%) and Society Omedia Media (50%). Formula Production's ownership structure includes shareholders Mikheil Mshvildadze (25%), Irakli Saghinadze (25%), Zurab Gumbaridze (25%), and Giorgi Lifonava (25%). We also find Society Omedia Media's owners are Giorgi Jibladze (50%) and Nodar David (50%). Formula Production's owners have other relevant ties in the media sector. Mshvildadze and Gumbaridze own InterMedia, an advertising firm that Transparency International Georgia reported as having a monopoly on the Georgian advertising market in 2017 through advertising contracts with both Imedi and Rustavi 2.³⁴ Gumbaridze is the General Director of Formula TV, a station that he alleges has come under state pressure over critical coverage of

³² Keshelashvili, et al. (2021) Georgia: An Information Ecosystem Assessment, Internews, pg. 6.

³³ See <https://on.ge/about>. Accessed February 25, 2022.

³⁴ Tsetsckhladze, et al. (2018) The Georgian Advertising Market in 2017: Trends and Challenges. Transparency International Georgia, p. 9.

Georgian authorities.³⁵ Regarding On.ge's other owners from Society Omedia Media, we find no overt political or business ties.

The online medium in Georgia has the least ownership diversity among its top five outlets. Four of the five top outlets we examine are held by Palitra Media. The one outlet Palitra Media does not own, On.ge, does boast a diverse list of owners, but some owners have ties to other media-related firms with some level of influence in Georgia's media space. Given the lack of ownership diversity in the online medium, the narratives that Georgians consume on web portals are highly vulnerable to foreign, malign influence.

Conclusion

In this brief, we have identified several avenues by which foreign actors, including but not limited to the Kremlin, might influence the media landscape in Georgia. The most direct path to influence is via Kremlin-owned media outlets operating in Georgia, specifically Kremlin-owned TV and news agencies. However, our analysis reveals two additional indirect paths that may contribute to the vulnerability of Georgian media to foreign influence, including (i) the concentration of ownership in web portals and television and (ii) cross-medium ownership concentration.

First, four of the top five online outlets are concentrated in the hands of one firm: Palitra Media. This lack of ownership diversity in top Georgian web portals makes narratives in this medium especially vulnerable to foreign malign influence. With the increase in use of the Internet and smartphones to get news, this development is particularly concerning for the future of the Georgian media landscape. Television also presents some concerning ownership concentration. Businessman Irakli Rukhadze and his partners own two of the top television outlets, including the most watched and

³⁵ "Car used by Georgian broadcaster Formula TV vandalized." Committee to Protect Journalists. Published April 13, 2021. URL: <https://cpj.org/2021/04/car-used-by-georgian-broadcaster-formula-tv-vandalized/>. Accessed February 28, 2022. "Georgia's independent TV channels allege state pressure." France 24. Published April 12, 2019. URL: <https://www.france24.com/en/20191204-georgia-s-independent-tv-channels-allege-state-pressure>. Accessed February 28, 2022.

most trusted one—Imedi TV. Rukhadze, a US citizen and Georgian native, also owns a minority stake in Georgia’s largest mobile communications company Magti.³⁶ Coupled with the Kremlin television presence in Georgia, this medium carries a concerning level of vulnerability for foreign influence in the country.

Second, we find that cross-medium ownership of top outlets exists in a rather noticeable way. Palitra Media Holding owns at least one of the most consumed media outlets in three of the four mediums we examine: print, radio, and online. This includes one in print, one in radio, and four online for a total of six or 30% of all top-consumed media in Georgia. Additionally, Irakli Rukhadze and his partners control two top television channels and one top radio station. Between Rukhadze and Palitra Media, 45% of the ownership is concentrated in top outlets across mediums in Georgia. This concentration of ownership across mediums increases the amount of vulnerable content, should a malign foreign influence co-opt the firm’s editorial position. A fully compromised Palitra media, for example, could have huge implications for the narratives that Georgians consume.

Though these channels of potential vulnerability are cause for concern, we find other positive developments. When journalists and anchors from the news desk at Rustavi 2 left after perceived politically-motivated firings, they created their own television channel with the intentions of providing an opposition perspective to the Georgian media space. Mtavari Arkhi has become competitive, and boasts a great diversity of owners. This ownership diversification among top media increases resilience to malign foreign influence in Georgia’s media space.

³⁶ “Dutch court has granted pre-judgment attachment of the interests businessman Irakli Rukhadze and his partners have in a foundation, owning 100% of TV ‘Imedi.’” Business Media Georgia. Published October 20, 2021.

Kosovo: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	10
Radio.....	12
Online.....	13
Conclusion.....	14

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia

Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner,
Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Kosovar media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Kosovo's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Laws that require media ownership transparency do exist in Kosovo, yet owners of media are not always known to the public.¹ Currently, the Independent Media Commission (IMC), Kosovo's media oversight and regulation body, only requires broadcaster outlets in television and radio to declare ownership. The Press Council of Kosovo, a non-governmental, self-regulatory body, requires its print and online outlet members to disclose ownership information but participation in this body remains voluntary. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Kosovo.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Kosovo, and then identified a list

¹ IREX (2021) Kosovo: Vibrant Barometer Information, pg. 7. URL: <https://www.irex.org/sites/default/files/pdf/vibe-kosovo-2021.pdf>.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

of the top-ranked outlets in terms of overall consumption. We then used this information to gather ownership data from available sources, including Kosovar government registries (e.g., IMC and the Kosovo Business Registration Agency), survey data, media watchdog sources, and other open source data.³

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Kosovo as of 2021. This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Kosovo's media landscape is via Russian state-owned media (see Table 1). Two of the eleven Russian state-owned media outlets we tracked have a physical presence in Kosovo, which provides the Kremlin with a weak channel to directly communicate with, and ultimately influence, Kosovar citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Kosovo, but does not speak to how well-consumed each outlet is by Kosovo citizens.

³ Due to a lack of data, we were unable to use cross-country sources, like Zenith's Market & Media Intelligence database for traditional media reach and Alexa for web traffic.

Table 1: Russian state-owned media in Kosovo, 2021

Television		Print		Radio		News Agency	
Russia I	✗	Rossiyskaya Gazeta	✗	Sputnik	✗	TASS	✗
Russia 24	✗					Sputnik	✗
Russia K	✗						
RTR-Planeta	✗						
TV Centre	✗						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Kosovo by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation.⁴ Although Kosovo has one of the highest internet penetration levels in Europe,⁵ television remains the most frequently used medium for political news and information.⁶ While we cannot know the exact influence of each

⁴ Since all top media are Albanian-language outlets, we do not include any Kosovar Serb outlets that produce content in Serbian.

⁵ Kosovo Digital Agenda Observatory (2021) Country Report and Roadmap for Digital Agenda advancement in Kosovo, p. 12. URL: <https://opendatakosovo.org/wp-content/uploads/2021/12/Kosovo-DAO-2021.pdf>. Accessed February 28, 2022.

⁶ Center for Insights in Survey Research. Public Opinion Survey: Residents of Kosovo (September 3-18, 2021). International Republican Institute, p. 54. URL: <https://www.iri.org/resources/iri-kosovo-poll-shows-strong-desire-among-youth-to-leave-dim-views-on-economy-and-corruption-strong-support-for-western-institutions/>. Accessed February 28, 2022.

individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Kosovo. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁷

Table 2: Top Kosovar media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	RTK	Koha Ditore	Radio Dukagjini	Gazetaexpress.com
2	RTV21	Kosova Sot	Radio Kosova	Telegrafi.com
3	Klan Kosova	Zëri	Radio Kosova	Koha.net
4	Kohavision (KTV)	Bota Sot	Radio 21	Kosovapress.com
5	T7	Epoka e Re	Radio Blue Sky	Insajderi.com

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Kosovar outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the television channel TV Dukagjini, the newspaper Gazeta Express, the radio station Radio K4, and the web portal Botasot.info.

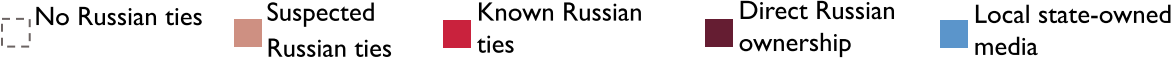
⁷ We calculated television, radio, print, and online rankings using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Alban Zeneli Report (2020), the European Union (EU) Mission in Kosovo (2019), IREX's Media Sustainability Index (2019), the University for Business and Technology Kosovo (UBT) Knowledge Center (2019), Digital Media (EU Report) (2018), and the Kosova Rehabilitation Centre for Torture Victims (KRCT) (2017).

Media Ownership

Table 3 lists the ownership information of top Kosovar media outlets by medium (television, newspaper, radio, and online). In 2005, before Kosovo declared independence from Serbia, the Independent Media Commission was created to require broadcasters to declare ownership. The Kosovo Press Council requires a similar declaration for print and online media firms, though participation in this non-governmental organization is voluntary. As a result of these institutions, the ownership of many of these outlets was relatively transparent. Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Kosovo state-owned media is color-coded blue. In Kosovo, no owners had suspected or known ties to the Russian government, and none had direct Russian ownership. As such, this profile has zero red color-coded outlets and four designations of state-owned media.

Table 3: Ownership of top Kosovar media outlets by share



Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	RTK 1	Government of the Republic of Kosovo		100
	2	RTV21	Company 21	Aferdita Saraçini-Kelmendi	60
	3	Klan Kosova	Company 21	Eugen Saraçini	20
				Forin Kelmendi	10
				Xheraldina Vula	10
	3	Klan Kosova	KGO Media Investment Ltd.	Kushtrim Gojani	100
4	Kohavision (KTV)	Koha Group	Flaka Surroi	100	

Print	5 T7	MediaWorks	Berat Buzhala	100
	1 Koha Ditore	Koha Group	Flaka Surroi	100
	2 Kosova Sot	Interpress Company	Ruzhdi Kadriu	100
	3 Zëri	Zëri Publishing Enterprise	Remzi Ejupi	50
			Lazim Destani	50
	4 Bota Sot	Media Print	Xhevdet Mazrekaj	100
5 Epoka e Re	Muhamet Mavraj B.I.	Muhamet Mavraj	100	
Radio	1 Radio Dukagjini	Dukagjini Group	Ekrem Lluka	100
	2 Radio Kosova 1	Government of the Republic of Kosovo		100
	3 Radio Kosova 2	Government of the Republic of Kosovo		100
	4 Radio Blue Sky	Government of the Republic of Kosovo		100
	5 Radio 21	Company 21	Aferdita Saraçini-Kelmendi	60
Eugen Saraçini			20	
Forin Kelmendi			10	
Xheraldina Vula			10	
Online	1 Gazetaexpress.com	MediaWorks	Berat Buzhala	100
	2 Telegrafi.com	Telegrafi	Gentian Lluka	100
	3 Koha.net	Koha Group	Flaka Surroi	100
	4 Kosovapress.com	A.L. Kosova Press SH.P.K.	Skënder Krasniqi	100
	5 Insajderi.com	Insider, L.L.C	Vehbi Kajtazi	50
Parim Olluri			50	

Results

Television

Television is the most consumed and trusted medium in Kosovo.⁸ State-run outlet RTK 1 is the most watched television channel in the country. While it remains popular among Kosovars, RTK 1's funding relies entirely on state coffers, which makes it vulnerable to political influence.⁹

The second most watched outlet is RTV21, which is majority owned by the Saraçini-Kelmendi family through Company 21. Aferdita Saraçini-Kelmendi holds the largest share (60%) of Company 21, followed by her brother Eugen Saraçini (20%), and her husband Forin Kelmendi (10%). Xheraldina Vula, a long-time collaborator and business partner of Saraçini-Kelmendi, owns the remaining 10%. Company 21 also owns other program service providers, including 21 Plus, 21 Popullore, 21 MIX, 21 Junior, 21 News Business, and the TV21-Kosovo web portal. RTV21 Macedonia operates in neighboring North Macedonia and has the same ownership structure.

The owners of RTV21 seem to have close ties to the United States. Early donors to the media outlet were USAID and the US-based Open Society Institute Media Program.¹⁰ Saraçini-Kelmendi also serves as a board member of both the Kosovo Committee at the Kosovo American Education Fund and the American Chamber of Commerce in

⁸ Information on consumption from Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, p. 13. URL:

<http://tacso.eu/wp-content/uploads/2020/09/Sustainability-of-Professional-Journalism-in-WB-Study-National-Data-Overview-KOSOVO-final.pdf>. Accessed February 28, 2022. Information on trust from National Democratic Institute (2021) Kosovo: Public Opinion Survey, April 2021. URL:

<https://www.ndi.org/publications/ndi-kosovo-public-opinion-poll-april-2021>. However, an expert interviewed by AidData staff suggested this trust is more heavily concentrated in the older generation, with younger citizens less trusting of broadcast television.

⁹ IREX (2019) Kosovo: Media Sustainability Index, p. 5. URL:

<https://www.irex.org/resource/vibrant-information-barometer-vibe>. Accessed February 28, 2022. State funding also comes through USAID, so the USG indirectly provides partial support for KTV.

¹⁰ Berisha, Isuf (2015) Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency. Peace Institute, p. 5. URL:

https://mediaobservatory.net/sites/default/files/Media%20Ownership%20and%20Finances%20in%20Kosovo_0.pdf. Accessed February 28, 2022.

Kosovo. These ties keep her connected to the Kosovar diaspora, particularly in the United States.

The third most consumed television outlet is Klan Kosova. Officially, KGO Media Investment Ltd. owns the outlet, and KGO Media is directly owned by Kushtrim Gojani. However, its ownership structure lacks transparency, with multiple sources suggesting partial ownership by the Devolli Group.¹¹ Though we cannot confirm an ownership stake, the Devolli Group did donate a building to the Klan Kosova channel sometime between 2013 and 2015, with renovations worth 2.4 million euros.¹² BalkanInsight recently reported that the Devolli Group owns firms in various sectors through shell companies in order to avoid being penalized for exceeding the number of tax breaks allowed to a single owner on clean energy.¹³ Also, the Devolli Group is one of the main business supporters of the Democratic Party of Kosovo (PDK), and Klan Kosova is perceived as reporting on the PDK favorably.¹⁴

The fourth most watched outlet is KTV, also known as Kohavision TV. Flaka Surroi directly owns KTV through the Koha Group. Her brother Venton Surroi founded the outlet but transferred ownership to his sister Flaka in 2004 when he founded the political party ORA. ORA has since merged with the Democratic League of Kosovo, a seat-holding party in the legislative assembly.

The Koha Group has other media and telecommunications holdings, including Arta TV, the daily newspaper Koha Ditore, popular news portal Koha.net, the Koha Print printing plant, Koha Publishing House and the internet service provider Koha Net. In the past, the Koha Group has been openly supportive of Vetëvendosje, a Kosovar

¹¹ Hoxha, Abit (2020) Media Landscape in Kosovo: Hate and Propaganda Influences. Resilience, p. 6. URL: <https://kosovotwopointzero.com/en/resilience-for-media-free-of-hate-and-disinformation/>. Accessed February 29, 2022.; Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, pg. 8; Berisha, Isuf (2015) Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency. Peace Institute, pg. 6.

¹² Berisha, Isuf (2015) Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency. Peace Institute, pg. 16.

¹³ Prebreza, Visar and Jeta Xharra. "Unclean Energy: The Kosovar Who Would Own the Sun." BalkanInsight. Published June 2, 2020. URL: <https://balkaninsight.com/2020/06/02/unclean-energy-the-kosovar-who-would-own-the-sun/>. Accessed February 28, 2022.

¹⁴ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 7.

political party also active in Albania.¹⁵ In the April 2021 national elections, Vetëvendosje won a majority in the legislative assembly and the current Albanian Prime Minister Albin Kurti is a member.

The fifth most consumed outlet is T7, whose ownership is unclear. While Kosovo's business registration and Kosovo's Independent Media Commission registry currently list MediaWorks as its direct owner, identifying the ultimate owner remains difficult. Kosovo's business registration lists A.B.C. Management as MediaWorks' owner but does not provide further information. However, a 2020 report commissioned by the European Union¹⁶ and Kosovo's Independent Media Commission registry points to Berat Buzhala as MediaWorks' ultimate owners.¹⁷ Given firmer evidence points to Buzhala, we list him as T7's ultimate owner. Buzhala was a former deputy of the Democratic Party of Kosovo and is still visible as an active member. MediaWorks also owns the popular Gazeta Express Internet news portal.

In sum, we find the ownership of top Kosovar television channels diverse, though difficult to identify at times. Each of the the top-five outlets does seem to have a different owner, which promotes diversity of narratives and ideas in Kosovar television content and increases resilience to influence on television content. Despite difficulties caused by the Covid-19 pandemic, new private channels like K10 and ATV have recently entered the market, furthering this diversity.¹⁸ However, outlet ownership by a single owner and murky or overt political ties do leave some outlets less resilient, as a

¹⁵ In Albania's April 2021 elections, Vetëvendosje supported three candidates for the Albania Assembly. See Taylor, Alice. "Albanian Election Live Blog: Morning." Exit News. Published April 25, 2021. URL: <https://exit.al/en/2021/04/25/albanian-election-live-blog-morning/>. Accessed February 28, 2022.

¹⁶ Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, p. 8.

¹⁷ Reports from Macedonian sources suggest ABC News Albania purchased T7 and Gazeta Express in 2020, though these reports name Klodjan Allajbeu as the station's ultimate owner: (i) "Shitet Gazeta Express dhe TV T7, ja kush janë pronarët e rinj." Almakos. Published June 6, 2020. URL: <https://almakos.com/ekskluzive-lajmi-i-fundit-shitet-gazeta-express-dhe-tv-t7-ja-kush-jane-pronaret-e-rinj/>. Accessed February 28, 2022; (ii) "Shitet Gazeta Express dhe TV T7, ja kush janë pronarët e rinj." Tetova 1. Published June 6, 2020. URL: <https://tetova1.com/lajmi-i-fundit-shitet-gazeta-express-dhe-tv-t7-ja-kush-jane-pronaret-e-rinj/>. Accessed February 28, 2022. AidData's own research on Albanian media ownership found that ABC News Albania is owned by Aleksandër Frangaj (50%) and Alba Gina (50%). With tepid evidence linking T7 to either of these owners, we present Berat Buzhala as the outlet's owner but note this opacity.

¹⁸ IREX (2021) Kosovo: Vibrant Barometer Information, p. 3.

malign foreign actor would need only to compromise a single individual or the political party tied to the outlet to influence its content.

Print

Newspapers in Kosovo have the least reach among the four major mediums.¹⁹ The print market has generally shrunk in Kosovo since the more dynamic post-war period, when international investors directed large sums of money into the country's media development. Low revenues and widespread access to the Internet have since weakened print media in the country.²⁰ However, newspapers backed by big companies continued to circulate in the country until the Covid-19 pandemic forced print outlets to shut down circulating physical newspapers and operate strictly online.²¹ While it is unclear when circulation will resume, we proceed with our analysis using the most recently available circulation data. The analysis also shows that some print media owners are owners of other businesses and use their paper to advocate and advance their own interests.

The most circulated newspaper is *Koha Ditore*, which is owned by Koha Group and its owner Flaka Surroi, discussed above. The second most circulated paper is *Kosova Sot*, directly owned by Ruzhdi Kadriu through Interpress Company. Besides *Kosova Sot*, Interpress Company owns other media-related firms, including a publishing house and Top Kosova Radio. Kadriu promotes his businesses through his newspaper, including negative coverage against anyone perceived to threaten his business interests.²² In 2014, *Kosova Sot*'s editor-in-chief Margarita Kadriu—daughter to owner Ruzhdi—was elected as a member of the Kosovo Assembly for the Democratic Party of Kosovo. She subsequently switched to the Independent Party and is no longer employed by the daily. USAID and the Open Society Institute supported *Kosova Sot* in Kosovo's early, post-war years.²³

The third most circulated paper is *Zëri*, owned by *Zëri Publishing Enterprise*, which in turn owns a number of other outlets in other mediums, including online media outlet

¹⁹ Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, pg. 8.

²⁰ Berisha, Isuf (2015) Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency. Peace Institute, p. 8, 10.

²¹ IREX (2021) Kosovo: Vibrant Barometer Information, p. 5.

²² Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 8.

²³ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 8.

Zeri.info and cable TV channel Zëri TV. Lazim Destani and Remzi Ejupi own Zëri Publishing Enterprise and have investments in other businesses as well. Destani is a Macedonian national who owns Kosovatex Company in Kosovo and various businesses throughout the world. Ejupi owns the Eurokoha travel agency, the soccer team FC Prishtina, and several businesses in Germany. Here, we find another example of a paper advocating for the business interests of its owner. Zëri extensively covered the Pristina Airport's privatization while Eurokoha was actively submitting bids made available by this privatization; the paper criticized the Privatisation Agency of Kosovo and other companies submitting rival bids.²⁴

The next two papers are well circulated but do not have the backing of larger business firms, placing them in danger of being unable to sustain their operations, in the eyes of some observers.²⁵ The fourth most circulated paper is Bota Sot. The paper is owned by Media Print, which is solely owned by Xhevdet Mazrekaj. Though not tied to any large corporations, media watchdog groups reported a pro-Democratic League of Kosovo (LDK) party bias in Bota Sot's coverage in the 2000s when the LDK controlled the Kosovar legislative assembly.²⁶ It is unclear whether this historical bias continues to be present in Bota Sot's reporting, as we did not find more recent sources to confirm a current political bias. Finally, the fifth most circulated newspaper is Epoka e Re, founded by long-time journalist and activist Muhamet Mavraj, who led the 1997 Kosovo student protests against the Yugoslav government. Mavraj has no overt political or foreign ties.

Overall, the analysis reveals reasons to be both optimistic and pessimistic about resilience to malign foreign influence in the Kosovar print sector. Like the television sphere, we find the top print outlets all possess different owners. This diversity strengthens defense against widespread influence of the most consumed print content, including from malign foreign actors. On the other hand, as in the Kosovar television space, we find a majority of single-owner outlets and ties to political parties, increasing vulnerability to influence. Given the uncertainty the Covid-19 pandemic has placed on

²⁴ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 9.

²⁵ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 8.

²⁶ Committee to Protect Journalists profile of murdered Bota Sot journalist Bardhyl Ajet. URL: <https://cpj.org/data/people/bardhyl-ajeti/>, accessed February 28, 2022. Freedom House (2004) Nations in Transit 2004: Kosovo. URL: <https://www.ecoi.net/en/document/1240497.html>, accessed February 28, 2022.

funding for print media, it is unclear whether this industry will dissolve and become fully digital or return to circulating physical papers once again.

Radio

Radio attracts the third largest audience behind television and internet in Kosovo.²⁷ Ownership in this medium is generally transparent, and three of the top five outlets are state-owned. The most listened to station is the Dukagjini Group's Radio Dukagjini, owned entirely by oligarch Ekrem Lluka. The Dukagjini Group also owns TV Dukagjini, Publishing House Dukagjini, and Dukagjini Telecommunications, as well as a number of businesses in non-communications sectors like construction, hotels, insurance, investment, and tobacco. Analysts suggest Lluka uses his media to promote his business interests.²⁸ Recently, leaders of the Democratic Party of Kosovo have cut off communication with all Dukagjini-owned media because of their accused blatant bias in favor of the Vetëvendosje political party.²⁹

The second, third, and fourth most-listened to stations are state-owned Radio Kosova 1, Radio Kosova 2, and Radio Blue Sky. Radio Kosova 1 is primarily a music and entertainment station but also broadcasts the only daily, English-language news program on Kosovar radio. Radio Kosova 2 focuses more on news and information, broadcasting in Albanian, Serbian, Turkish, Bosnian and Roma. Radio Blue Sky was founded in 1999 by the United Nations Peacekeeping Operation in Kosovo and began broadcasted youth-centric content in Albanian, Serbian, and Turkish a few months after the Kosovo War.³⁰ It was managed by the UN and the Fondation Hironnelle before being turned over to the RTK in 2000. The fifth most-listened to station is Radio 21, owned by the aforementioned Saraçini-Kelmendi family and Xheraldina Vula through Company 21.

Kosovar radio contains the most ownership concentration of all the mediums we have covered so far. A single owner, the government, controls three of the top five radio

²⁷ Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, pg. 8.

²⁸ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 20.

²⁹ Kosova Sot Online. "PDK: Kemi shkëputur çdo komunikimi me Dukagjinin dhe platformat tjera në pronësi të oligarkut Ekrem Lluka." A.P. January 21, 2021. URL: <https://www.kosova-sot.info/lajme/520500/pdk-kemi-shkeputur-çdo-komunikimi-me-dukagjinin-dhe-platformat-tjera-ne-pronesi-te-oligarkut-ekrem-lluka/>. Accessed February 28, 2022.

³⁰ Fondation Hironnelle. Radio Blue Sky - Kosovo. URL: <https://www.hironnelle.org/en/kosovo-en>. Accessed February 28, 2022.

channels in the country. This does not bode well for resilience against outside influence in this medium. If the government in power is compromised by a malign foreign power, this undue leverage can impose substantial effects on the narratives Kosovars consume through radio.

Online

Ninety percent of Kosovars have access to the Internet,³¹ with online outlets attracting an audience second in reach only to television.³² Though no law requires websites to publish ownership information, we found ownership of these top news portals fairly transparent. The most visited news portal is Gazetaexpress.com. Berat Buzhala owns Gazetaexpress.com through the firm MediaWorks, which also owns the television channel T7 discussed above. Gazetaexpress.com began as a print daily until it moved online in 2013 due to struggling sales and financial instability.³³ Despite its challenges as a physical newspaper, it has become the top web portal in Kosovo, as well as gaining popularity in Albania, North Macedonia, and Serbia as well.

The second most visited news portal is Telegrafi.com, which is owned solely by Gentian Lluka through the company Telegrafi. Gentian Lluka is also Telegrafi's CEO and son of Kosovar oligarch and Radio Dukagjini owner Elkem Lluka. Gentian Lluka remains involved in other telecom businesses, including Top Reklama (an outdoor advertisements company) and Smard (an e-commerce company). The news portal is also well-read in Albania.³⁴

The third most trafficked website is Koha.net. Owned by Flaka Surroi, this is the third outlet the Surroi family owns among the top outlets in Kosovo. Unlike the other two outlets owned by the Surroi family, USAID provides funding to Koha.net.³⁵ The fourth most visited website is Kosovapress.com. The web portal is directly owned by A.L. Kosova Press SH.PK, which is then owned by Skënder Krasniqi. Krasniqi is an

³¹ World Bank (2021) Development Indicators. URL: <https://data.worldbank.org/indicator/IT.NET.USER.ZS?locations=XK>. Accessed February 28, 2022.

³² Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, pg. 8.

³³ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pp. 10-11.

³⁴ Berisha, Isuf (2015) "Media Ownership and Finances in Kosovo: Legal Vacuum and Lack of Transparency." Peace Institute, pg. 11.

³⁵ Petković et al. (2020) National Data Overview: Kosovo; Sustainability of Professional Journalism in the Media Business Environment of the Western Balkans. European Union, pg. 8.

outspoken businessman and current chairman of the Kosovo Chamber of Commerce.³⁶ He does not seem to have overt ties to foreign actors or domestic political parties.

Finally, Insajderi.com is owned by Insider LLC, which is owned by Vehbi Kajtazi (50%) and Parim Olluri (50%).³⁷ The owners have no overt political or foreign ties, though Olluri was the target of physical attacks in 2017 for what appears to be his reporting.³⁸

Much like television and print, online media ownership is diverse in Kosovo. Ownership information is also transparent and relatively easy to find. However, four of the five outlets have single owners, which raises concerns and presents a potential channel for influence. Given the reach of the Internet and the growing trust Kosovars have in digital content,³⁹ online outlets will undoubtedly be an important space for malign foreign actors looking to influence narratives, as well as Kosovars looking to maintain an independent voice. Finally, given uncertainty around funding losses in the print sector, Gazetaexpress.com provides a successful model for print dailies to switch to a digital format and remain relevant in the country's media landscape.

Conclusion

In this brief we have identified several avenues by which foreign actors, including but not limited to the Kremlin, might influence the media landscape in Kosovo. The most direct path to influence is via Kremlin-owned media outlets operating in Kosovo

³⁶ Named as chairman in Kosovar media as of 2022. "Energy crisis, request to the Government to draft a plan for the protection of businesses." RTV 21. Published 2022. URL: <https://en.rtv21.tv/energy-crisis-requires-government-to-draft-business-protection-plan/>. Accessed February 28, 2022.

³⁷ We note a curious episode regarding ownership at insajderi.com. In 2020, Kajtazi and Olluri accused Florim and Ardian Alaj of hacking Insajderi and blocking their access to the domain. Florim and Ardian Alaj claimed they owned the outlet. A court indicted Florim and Ardian Alaj in mid-2020, and many sources back up the claim that they wrongfully hacked Insajderi. We were unable to find any updates on this case. However, the Kosovo National Business Registry does list Kajtazi and Olluri as the legal owners. A statement from the Association of Journalists of Kosovo condemns Forum and Ardian Alaj (as well as provides the basic facts of the events) here: <http://agk-ks.org/en/news/ajk-welcomes-the-indictment-for-the-attack-on-gazeta-online-insajderi/>, accessed February 28, 2022.

³⁸ Prishtina Insight. "Kosovo journalist Parim Olluri attacked in Prishtina" Published August 17, 2017. URL: <https://prishtinainsight.com/kosovo-journalist-parim-olluri-attacked-prishtina/>. Accessed February 28, 2022.

³⁹ IREX (2021) Kosovo: Vibrant Barometer Information, pg. 6.

through the two television channels operating there, Channel One and RT. Though official Russian state-owned media presence is relatively limited in-country, we find other foreign ties to domestic Kosovar ownership, including Albania and North Macedonia (via the Kosovar-Albanian diaspora) and the United States. However, three indirect paths emerge in our analysis that may contribute to the vulnerability of Kosovar media to foreign influence, including: (i) the concentration of ownership by families across mediums; (ii) business interests; and (iii) ties to political parties.

The first indirect path for potential foreign influence is through the concentration of media ownership. Our research indicates a handful of families own much of the top media in Kosovo. This includes the Surroi, Lluka, and Saraçini-Kelmendi families that own top media outlets in more than one medium. The Surroi family in particular owns outlets in television (Kohavision TV), print (Koha Ditore), and online media (Koha.net). Berat Buzhala also owns a top outlet in more than one medium. This concentration of ownership across mediums increases the amount of content vulnerable should a malign foreign influence co-opt the outlet's editorial position. A fully compromised Koha Group, for example, could have huge implications for the narratives and stories in multiple mediums that Kosovars consume. Additionally, the state owns four of the top media outlets—more than any single private owner. Given that these outlets operate on funding nearly wholly provided by the government, foreign influence in the government of Kosovo has the potential to significantly impact the media narratives that Kosovars consume.

Second, we find that the business interests of an owner can influence their outlet's content if they view it as a platform to advocate for and advance lucrative deals. Zëri and Radio Dukagjini are blatant examples in the print and radio sectors. This overt misuse of media likely contributes to the declining public trust in Kosovar media.⁴⁰ These outlets are vulnerable to malign influence if foreign actors compromise their owners and begin to advocate for the interest of the foreign actor, especially if the foreign interests align with an owner's business interests.

⁴⁰ National Democracy Institute. Kosovo Public Opinion Survey. Published March 2019. URL: <https://www.ndi.org/sites/default/files/NDI%20Kosovo%20Public%20Opinion%20Poll%202019.pdf>. Accessed February 28, 2022. More recent polls from 2020 and 2021 confirm the low trust in radio but do not ask about newspapers.

The final avenue for influence is ties to political parties. Many outlets seem to have adopted stances in favor of one political party in Kosovo. One glaring example is the accusation that the Dukagjini Group, which owns media in radio and television, are so pro-Vetëvendosje that the Democratic Party of Kosovo refuses to communicate with them. Malign foreign actors may take advantage of these cozy relations to influence media narratives by co-opting or making deals with political parties.

Even with transparency laws and self-regulating standards set by the media sector, the identities of the individuals and companies who truly control many Kosovar outlets may be obscured. Such is the case with the potential control of Klan Kosova by the Devolli Group. However, we were able to find names of owners tied to media outlets using official, government sources. This is an important step to shore up transparency in Kosovo's media sector.



Kazakhstan: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData's team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Kazakh media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Kazakhstan's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Media ownership in Kazakhstan is highly centralized around a few politically connected media owners tied to the family of former President Nursultan Nazarbayev.¹ Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Kazakhstan.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Kazakhstan, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ "Journalism Funding in Kazakhstan: A Government Affair." CEU Democracy Institute: Center for Media, Data and Society. Published June 17, 2019. <https://cmds.ceu.edu/article/2019-06-17/journalism-funding-kazakhstan-government-affair>.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Zenith, Alexa³), as well as public opinion survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Kazakhstan as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Kazakhstan’s media landscape is via Russian state-owned media (see Table 1). Eight of the eleven Russian state-owned media outlets we tracked have a physical presence in Kazakhstan, which provides the Kremlin with a strong channel to directly communicate with, and ultimately influence, Kazakh citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Kazakhstan, but does not speak to how well-consumed each outlet is by Kazakh citizens.

Table 1: Russian state-owned media in Kazakhstan, 2021

Television		Print		Radio		News Agency	
Russia I	✗	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✓						

³ Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData staff used Alexa’s API to gauge website traffic. <https://www.alexa.com/siteinfo>.

TV Centre	✓			
Channel One	✓			
RT	✗			

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Kazakhstan by medium (e.g., television, print, radio, online) based on cross-sectional indicators such as viewership share and circulation. Television and online outlets are the top consumed mediums for information in Kazakhstan and are therefore likely more influential, while radio and print media are less consumed.⁴ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Only one Russian state-owned media outlet, Channel One Eurasia, a partial subsidiary of Channel One, is among the top outlets of Kazakhstan.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Kazakhstan. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a reasonable picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵

⁴ "2019 Media Consumption and Media and Information Literacy Survey in the Countries of Central Asia (Kazakhstan, Tajikistan, Uzbekistan)." The Research Institute of Public Opinion. Published 2019. https://pdf.usaid.gov/pdf_docs/PA00Z2HT.pdf.

⁵ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts

Table 2: Top Kazakhstan media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Channel One Eurasia	Karavan	Autoradio	Nur.kz
2	KTK	Egemen Kazakhstan	Russkoye Radio Asia	Zakon.kz
3	NTK	Kazakhstanskaya Pravda	Radio Dacha	Tengrinews.kz
4	Channel 31	Ekspress-K	Kazakh Radio	Inform.kz
5	Qazaqstan	Vremya	Radio NS	Informburo.kz

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Kazakh outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the print outlet Forbes Kazakhstan; the radio stations Europa Plus, Tengri FM, and Radio Azattyk; and internet outlet Kaztag.kg.

Media Ownership

The absence of legislation mandating transparency, coupled with insufficient institutional protections, contributes to a status quo of opaque media ownership in Kazakhstan.⁶ As a result, AidData used unofficial, secondary sources to identify the

conducted in summer 2021. Additional survey data came from: Kantar’s People-Based Television Ratings (2021), IREX’s Media Sustainability Index (2018), media reports on official broadcast ratings from Liter.kz (2020) and KazInform (2019), CMDS’ “Media Influence Matrix: Kazakhstan” (2019), and USAID, Internews, and Research Institute of Public Opinion’s “Media Consumption and Media and Information Literacy Survey” (2019).

Online: Alexa (April 2021) and Zero.kz (2021).

⁶ “Kazakhstan 2018: Media Sustainability Index.” International Research and Exchanges Board. Published 2018.

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2018-kazakhstan.pdf>.

owner names and shares of privately-owned media. Further examples of ownership ties and relationships are discussed in the results section.

Table 3 lists the ownership information of top Kazakh media outlets by medium (e.g., television, newspaper, radio, and online). The seven Kazakh state-owned media outlets are color-coded blue. AidData staff categorized the remaining privately held media outlets based upon the level of Russian ownership that might increase their susceptibility to Kremlin influence. These categories are denoted by an increasing saturation of red—no known Russian ties (no color), suspected Russian ties, known Russian ties, and direct Russian ownership. In Kazakhstan, four owners had suspected or known ties to the Russian government, and one top outlet had direct Russian ownership.

Table 3: Ownership of top Kazakh media outlets by share

No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)	
Television	1	Channel One Eurasia	Channel One JSC	Government of Kazakhstan		80
				Government of Russia		6.84
				VTB Bank		6.58
				National Media Group		3.9
				Sogaz		2.68
	2	КТК	Commercial Television Channel JSC	Dariga Nazarbayeva	100	
	3	NTK	Commercial Television Channel JSC	Dariga Nazarbayeva	100	
	4	Channel 31	CTC Media Inc	Verny Capital JSC	Bulat Utemuratov	80
				Ivan Tavrin		15
Bank Rossiya					5	
5	Qazaqstan TV	Government of Kazakhstan		100		
Print	1	Karavan	Kazakhstan Today Agency LLP	Dariga Nazarbayeva	100	
	2	Egemen Kazakhstan	Government of Kazakhstan		100	
	3	Kazakhstanskaya Pravda	Government of Kazakhstan		100	

	4	Ekspress-K	Eurasian Insurance Company JSC	<i>Unknown</i>	<i>Unknown</i>
	5	Vremya	Vremya Publishing House LLP	Igor Mazhinov	58.2
				Nurzhan Subkhanberdin	41.8
	1	Autoradio	Autoradio Kazakhstan LLP	Askar Kantarbayev	100
	2	Russkoye Radio Asia	Russian Telegraph	<i>Unknown</i>	<i>Unknown</i>
			DLS Group Holding Company LLP	<i>Unknown</i>	<i>Unknown</i>
Radio	3	Radio Dacha	Krutoy Media Holding	Mikhail Gutseriev	75
				Igor Krutoy	25
	4	Kazakh Radio	Government of Kazakhstan		100
	5	Radio NS	Government of Kazakhstan		51
			Nur Otan Political Party		49
	1	Nur.kz	Internet Portal Nur LLP	Kuat Bakhridinov	100
	2	Zakon.kz	Yurinfo Company LLP	Anna Kiselev	<i>Unknown</i>
				Sergei Kiselev	<i>Unknown</i>
Online	3	Tengrinews.kz	Alash Media Group	Batyr Kazybayev	<i>Unknown</i>
				Dinara Temirova	<i>Unknown</i>
	4	Inform.kz	Government of Kazakhstan		100
	5	Informburo.kz	Verny Capital JSC	Bulat Utemuratov	100

Results

Television

Television is the most consumed source of information in Kazakhstan, with 59.5% of Kazakh citizens relying on television for news.⁷ Owners with ties to the Kazakh and/or Russian governments dominate the television sector in Kazakhstan. The fifth most-consumed television channel, Qazaqstan TV, is fully owned by the government of Kazakhstan.

The most-consumed television channel, Channel One Eurasia, is 80% owned by the government of Kazakhstan and 20% by the Russian government through a number of state-owned agencies and companies. Channel One Eurasia rebroadcasts some

⁷ "2019 Media Consumption and Media and Information Literacy Survey in the Countries of Central Asia (Kazakhstan, Tajikistan, Uzbekistan)." The Research Institute of Public Opinion. Published 2019.

content from Russia's Channel One. Notably, the former President of Kazakhstan Nursultan Nazarbayev's daughter, Dariga Nazarbayeva, may be the true beneficiary of Channel One Eurasia. A powerful force in Kazakhstan, Nazarbayeva was formerly the Chair of the Senate and is currently a member of the Mazhilis. She is also a major player in the media space, owning the second and third most-consumed television outlets, KTK and NTK, respectively. Nazarbayeva also founded state-owned television outlet Khabar TV, and reportedly owns Karavan, the most-consumed print outlet in Kazakhstan, as well.

Nazarbayeva is often not the official owner of the outlets that she owns and controls. However, her former husband Rakhat Aliyev admitted that she held stake in Karavan, NTK, and KTK before his arrest in 2014.⁸ Additionally, multiple articles about Nazarbayeva's control over Channel One Eurasia, NTK, and KTK assert that she is the sole owner of the majority of the top outlets in Kazakhstan.⁹ This ownership puts the Nazarbayev family in direct control of the majority of Kazakhstan television outlets.

The only top television outlet that the Kazakh government or the Nazarbayev family does not directly own is Channel 31. Kazakh billionaire Bulat Utemuratov owns a controlling stake in the outlet, as well as in the fifth most-consumed online outlet, Informburo.kz. Notably, Utemuratov is in the Nazarbayev family's inner circle, giving the former president's family influence in every top television outlet.¹⁰ The founder of Channel 31, Armanzhan Baitasov, sold the remaining 20% of shares to Russian media company CTC Media Inc. Russian oligarch Alisher Usmanov formerly owned a 75% stake in CTC Media before selling his shares to his long-time business partner Ivan Tavrín.¹¹ Bank Rossiya, a Russian publicly traded bank, owns the remaining 25% of

⁸ Mamashuly, Asylkhan. "Направление «Каравана» менялось каждый раз со сменой владельца." Radio Azattyk. Published July 27, 2011.

https://rus.azattyq.org/a/karawan_newspaper_/24277868.html.

⁹ "Kazakhstan: Well-Connected Tycoon Snaps Up TV Station." Eurasianet. Published December 10, 2015. <https://eurasianet.org/kazakhstan-well-connected-tycoon-snaps-up-tv-station>; Nussipov, Adil. "Media Influence Matrix: Kazakhstan." CEU Democracy Institute: Center for Media, Data and Society. Published June 2019.

<https://cmds.ceu.edu/sites/cmcs.ceu.hu/files/attachment/basicpage/1602/mimkazakhstanfunding.pdf>.

¹⁰ "Bulat Utemuratov." Organized Crime and Corruption Reporting Project (OCCRP). Published October 6, 2021. <https://kiar.center/bulat-utemuratov/>.

¹¹ Smirnov, Sergei. "Алишер Усманов продаст телевизионный бизнес." Vedemosti. Published December 13, 2017.

<https://www.vedomosti.ru/technology/articles/2017/12/13/745133-usmanov-telebiznesa>.

shares in CTC Media through Telcrest Investments. Shareholders of Bank Rossiya include Yury Kovalchuk and Gennady Timchenko, Russian oligarchs and friends of President Vladimir Putin.¹² In sum, Kazakh oligarch Bulat Utemuratov owns the majority of Channel 31, while Russian political and business elites own a minority stake in the Kazakh channel.

Top television outlets in Kazakhstan are highly vulnerable to Russian influence. The Russian government and Russian elites own significant minority shares in Channel One Eurasia and Channel 31, allowing them direct access to the Kazakh population. Additionally, the concentration of outlets in the hands of Kazakhstan's political elite, namely Dariga Nazarbayeva and Bulat Utemuratov, creates further vulnerabilities for the Kremlin to exploit.

Print

Like television, top print media outlets in Kazakhstan are controlled by the Kazakh government and connected political elites. Both the second and third most-consumed print outlets, Egemen Kazakhstan and Kazakhstanskaya Pravda, respectively, are state-owned. Additionally, Dariga Nazarbayeva owns Karavan, the most-consumed newspaper.

Ekspress-K, the fourth most-consumed print outlet,¹³ has opaque ownership. According to public documents on the Kazakhstan Stock Exchange (KASE), Eurasian Insurance Company, one of the country's largest insurance agencies, is the sole owner of Ekspress-K.¹⁴ This is further evidenced by the fact that Express-K advertises job vacancies for other Eurasian Resource Group subsidiaries on their website. However, there is disagreement regarding the ownership of Eurasian Insurance Company. Led by

¹² Bazenkova, Anastasia. "CTC Media Sells Russian Television Stations to Billionaire Usmanov." The Moscow Times. Published September 25, 2015. <https://www.themoscowtimes.com/2015/09/25/ctc-media-sells-russian-television-stations-to-billionaire-usmanov-a49836>.

¹³ In June 2021, Ekspress-K published their final print issue and fully moved to an online version of the site, called Exk.kz. Nurullin, Eldar. "Вышел в свет последний номер газеты «Экспресс К.»" Express-K. Published June 25, 2021. <https://exk.kz/news/98868/vyshiel-v-sviet-poslednij-nomier-ghaziety-ekspriess-k>.

¹⁴ "Листинговой комиссии по простым акциям АО "Страховая компания 'Евразия.'" Kazakhstan Stock Exchange. Published November 28, 2005. https://kase.kz/files/emitters/SKEA/skea_list.pdf

CEO Boris Umanov,¹⁵ the Eurasian Insurance Company is owned by Eurasian Resource Group (ERG), one of the largest mining and metallurgy companies operating in Kazakhstan.¹⁶ The ownership structure of ERG is complex and opaque, with some foreign ownership and ownership by Kazakh elites.

The fifth most-consumed print outlet in Kazakhstan is Vremya. Igor Mazhinov, the Chairman of Bank RBK, founded the newspaper and continues to own a controlling stake in Vremya through Shanyrak Trade LLC. Mazhinov is among the most influential businessmen in Kazakhstan and is the son-in-law of Vladimir Kim, a highly connected Kazakh billionaire.¹⁷ Another Kazakh billionaire, Nurzhan Subkhanberdin, owns the remaining 41.8% of shares in Vremya.¹⁸

Like television, print ownership in Kazakhstan is dominated by the government and political elites. Nazarbayeva and the government of Kazakhstan own the top three print outlets, whereas one of the largest mining companies owns Ekspress-K and two Kazakh oligarchs control Vremya. As noted, this highly concentrated ownership system provides significant vulnerabilities to Russian influence in the print sector.

Radio

Radio is the least-consumed medium for news, with only 5.6% of Kazakh citizens using radio as a source of information.¹⁹ While radio is less consumed in Kazakhstan than other mediums, the ownership structure of radio outlets follows the same pattern as print and television of centralization around political elites and the Kazakh government. The government of Kazakhstan wholly owns Kazakh Radio, the fourth most-consumed radio station, and partially owns, along with Nursultan Nazarbayev's ruling Nur Otan Party, Radio NS, the fifth most-consumed radio station.

¹⁵ "Management." Eurasian Insurance Company JSC.

<https://theeurasia.kz/en/about/company-management/>

¹⁶ "Our Business." Eurasian Resource Group. <https://www.erg.kz/en/content/o-kompanii>.

¹⁷ "Igor Mazhinov." Forbes Kazakhstan. Published 2015. <https://forbes.kz/ranking/object/814>.

¹⁸ "Nurzhan Subkhanberdin's estate - on the Cote d'Azur and the size of the Vatican." Organized Crime and Corruption Reporting Project (OCCRP). Published April 15, 2021.

<https://kiar.center/nurzhan-subkhanberdins-estate-on-the-cote-dazur-and-the-size-of-the-vatican/>.

¹⁹ "2019 Media Consumption and Media and Information Literacy Survey in the Countries of Central Asia (Kazakhstan, Tajikistan, Uzbekistan)." The Research Institute of Public Opinion. Published 2019.

Askar Kantarbayev owns the most-consumed radio station, Autoradio, along with Dala FM, another radio station in Kazakhstan.²⁰ Although he owns multiple radio stations, Kantarbayev has considerably fewer connections to the Kazakhstan ruling elite than many of the other media owners in this report.

The second most-consumed station is Russkoye Radio Asia, a Kazakh branch of Russian “Russkoye Radio.” While the individual ownership of Russkoye Radio Asia is opaque, AidData staff found that the outlet is partially owned by Russian Telegraph LLC, a Russian media company, and partially owned by DLS Group, a Kazakh company.²¹ Russian billionaire Mikhail Gutseriev has a majority stake in the third most-consumed radio outlet, Radio Dacha. Gutseriev is politically connected and sanctioned for his ties to Belarusian President Alexander Lukashenko.²² Igor Krutoy, the founder of Krutoy Media Holding and famed Russian musician, sold Gutseriev a 75% stake in Krutoy Media Holding, the parent company of Radio Dacha in 2013.²³

Russian influence is apparent in top radio stations, as both Russkoye Radio Asia and Radio Dacha have Russian owners. Additionally, centralized government ownership can create further vulnerabilities to Russian influence in Kazakhstan.

Online

While the government of Kazakhstan maintains a large presence in top online outlets, there is more diversity in owners among online outlets. However, most top online outlets still promote pro-government views. The fourth most-consumed online outlet, Inform.kz, is state-owned.

²⁰ Nussipov, Adil. “Media Influence Matrix: Kazakhstan.” CEU Democracy Institute: Center for Media, Data and Society. Published June 2019.

²¹ Nussipov, Adil. “Media Influence Matrix: Kazakhstan.” CEU Democracy Institute: Center for Media, Data and Society. Published June 2019.

²² Tognini, Giacomo. “Tracker: In-Depth Look At 20 Russian Billionaires Hit By Sanctions.” Forbes. Published March 1, 2022.

<https://www.forbes.com/sites/giacomotognini/2022/03/01/tracker-in-depth-look-at-20-russian-billionaires-hit-by-sanctions/?sh=541a8ac3ce7a>.

²³ “Krutoy Media radio stations acquired by Mikhail Gutseriev structures.” Krutoy Media Holding. Published January 29, 2013. <http://www.krutoymedia.ru/eng/news/244.htm>.

Kuat Bakhridinov owns and operates the most-consumed online outlet—pro-government Nur.kz. Bakhridinov does not appear to have ties to the government despite his pro-government views.²⁴

Sergei Kiselev and his wife Anna founded and own the second most-consumed online outlet, Zakon.kz, also known for its pro-government views. Until February 2022, Kiselev worked as the CEO of Channel One Eurasia, the top television channel in the country, purportedly owned by Dariga Nazarbayeva.²⁵ Similarly, Tengrinews.kz, the third most-consumed online outlet, also holds pro-government views.²⁶ Through Alash Media Group, Batyr Kazybayev and Dinara Temirova own and control Tengrinews.kz, as well as radio stations Tengri FM and Zhuldyz FM.

Lastly, the fifth most-consumed online outlet is Informburo.kz, owned by its founder, Bulat Utemuratov. The Kazakh billionaire is also the majority owner of the fourth most-consumed television outlet, Channel 31. Utemuratov holds close ties to the Nazarbayev family and promotes pro-government content in his outlets as well.²⁷

In sum, while the ownership is slightly more diverse among top online outlets, the narratives promoted by these outlets are pro-government. However, the diversity of owners, coupled with the fact that all top online owners are domestic citizens, does slightly diminish the potential for Russian influence through ownership in top online media outlets in Kazakhstan.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of Kazakhstan. The collected data highlight two trends in Kazakh media

²⁴ Nussipov, Adil. "Media Influence Matrix: Kazakhstan." CEU Democracy Institute: Center for Media, Data and Society. Published June 2019.

²⁵ "Sergey Kiselev confirmed KazTAG's information about his departure from the Eurasia TV channel." KazTAG. Published February 22, 2022.

<https://kaztag.kz/ru/news/sergey-kiselev-podtverdil-informatsiyu-kaztag-o-svoem-ukhode-s-telekanala-ev-raziya>.

²⁶ Nussipov, Adil. "Media Influence Matrix: Kazakhstan." CEU Democracy Institute: Center for Media, Data and Society. Published June 2019.

²⁷ "Bulat Utemuratov." Organized Crime and Corruption Reporting Project (OCCRP). Published October 6, 2021.

ownership. First, most top outlets are either directly or indirectly connected to the Kazakh ruling elite. Second, Kazakh media outlets are highly vulnerable to Russian influence.

Top Kazakh media outlets center around the Nazarbayev family and the Kazakh government. Of the twenty measured top outlets across mediums, seven are owned by the government, three are owned by Dariga Nazarbayeva, and three more are owned by individuals in Nazarbayev's inner circle, namely Bulat Utemuratov and Sergei Kiselev. Of the remaining seven outlets that do not have a direct connection to the Nazarbayev family, Nur.kz and Tengrinews.kz promote pro-government views and Vremya is owned by the son-in-law of Vladimir Kim, who is a member of Nazarbayev's inner circle as well.²⁸ Ultimately, the only top outlets that are not actively tied to the government or members of the ruling party are controlled by foreign owners.

This highly centralized media system creates significant vulnerabilities to Russian influence. The Russian government has the ability to influence a significant portion of the Kazakh population through just influencing the Nazarbayev family. Additionally, the Russian government directly owns one top outlet, Channel One Eurasia, and has a significant presence through state-owned media outlets in Kazakhstan. Additionally, Russian oligarchs with ties to the Kremlin own shares in top Kazakhstan outlets, including Channel 31, Radio Dacha, and Russkoye Radio Asia.

In sum, the Kazakhstan media space has many channels for Russian influence, including both potential and actual vulnerabilities. Russian direct ownership and a highly centralized media market create numerous opportunities for the Russian government to influence narratives consumed by Kazakh citizens.

²⁸ Patrucic, Miranda, Ilya Lozovsky, and OCCRP Kazakhstan. "Secretive Offshore Maneuvers Enriched Unofficial Third Wife of Kazakhstani Leader Nursultan Nazarbayev." Organized Crime and Corruption Reporting Project (OCCRP). Published October 3, 2021. <https://www.occrp.org/en/the-pandora-papers/secretive-offshore-maneuvers-enriched-unofficial-third-wife-of-kazakhstani-leader-nursultan-nazarbayev>.

Kyrgyzstan: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	6
Television.....	6
Print.....	8
Radio.....	10
Online.....	11
Conclusion.....	13

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Kyrgyz media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding the Kyrgyz Republic's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

The Kyrgyz Republic appears to have the most diverse set of media owners among Central Asian countries. However, the popularity of Kyrgyz and Russian state-owned outlets create many potential channels for Russian influence to directly or indirectly shape narratives consumed by Kyrgyz citizens. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in the Kyrgyz Republic.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.¹ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in the Kyrgyz Republic, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when available (e.g., Alexa²), as well as business registry data from the Kyrgyz Ministry

¹ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

² Alexa is an online analysis tool. AidData staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

of Justice, public opinion survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in the Kyrgyz Republic as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in the Kyrgyz Republic's media landscape is via Russian state-owned media (see Table 1). All of the eleven Russian state-owned media outlets we tracked have a physical presence in the Kyrgyz Republic, which provides the Kremlin with a strong channel to directly communicate with, and ultimately influence, Kyrgyz citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in the Kyrgyz Republic, but does not speak to how well-consumed each outlet is by Kyrgyz citizens.

Table 1: Russian state-owned media in the Kyrgyz Republic, 2021

Television		Print		Radio		News Agency	
Russia I	✓	Rossiyskaya Gazeta	✓	Sputnik	✓	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✓						
TV Centre	✓						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in the Kyrgyz Republic by medium (e.g., television, print, radio, online) based on cross-sectional indicators such as viewership share and circulation. Television is the most consumed medium and is therefore likely more influential than other information sources.³ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Russian state-owned media outlets are popular in the Kyrgyz Republic,⁴ and Russian state-owned Channel One is the most consumed television channel.

³ "Kyrgyzstan profile - Media." British Broadcasting Company. Published June 25, 2019. <https://www.bbc.com/news/world-asia-16187183>.

⁴ "Kyrgyzstan profile - Media." British Broadcasting Company. Published June 25, 2019.

AidData used a weighted average of media consumption survey rankings from 2017 to present to determine the top media outlets in the Kyrgyz Republic. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a reasonable picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵ Additionally, this means that some outlets that recently have stopped circulation, such as Delo No, are included in our rankings.

Table 2: Top Kyrgyz media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Russian Channel One	Super-info	Kyrgyzstan Obondoru	Akipress.org
2	OTRK	Vecherniy Bishkek	Europa Plus	Azattyk.kg
3	KTRK Music	Avtogid	Dream FM	24.kg
4	NTS	Delo No	Tumar FM	Kaktus.media
5	TV EITR	Slovo Kyrgyzstana	Sanjyra Radio	Turmush.kg

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Kyrgyz outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the television channel April TV; the radio stations Hit FM Kyrgyzstan and Jash FM; and online outlets Sputnik.kg and Kloop.kg.

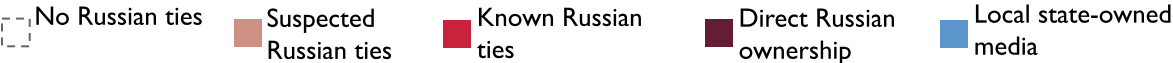
⁵ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: IREX's Media Sustainability Index (2018), M-Vector's "Media Research (8th Wave)" Report (2017), and CMDS' "Media Influence Matrix: Kyrgyzstan" (2019). For online outlets, Alexa (April 2021) was used in addition to the aforementioned surveys.

Media Ownership

Media ownership in the Kyrgyz Republic is fairly transparent due to the public business registry of the Ministry of Justice, though proxy owners sometimes conceal the true beneficiaries of media outlets. Further examples of ownership ties and relationships are discussed in the following section.

Table 3 lists the ownership information of top Kyrgyz media outlets by medium (e.g., television, newspaper, radio, online). The five Kyrgyz state-owned media outlets are color-coded blue. AidData staff categorized the remaining privately held media outlets based upon the level of Russian ownership that might increase their susceptibility to Kremlin influence. These categories are denoted with increasing saturation of red—no known Russian ties (no color), suspected Russian ties, known Russian ties, and direct Russian ownership. In the Kyrgyz Republic, three owners had suspected or known ties to the Russian government, and one outlet had direct Russian ownership.

Table 3: Ownership of top Kyrgyz media outlets by share



Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Russian Channel One	Russian Government		100
	2	OTRK (ОТРК)	Government of the Kyrgyz Republic		100
	3	KTRK Music	Government of the Kyrgyz Republic		100
	4	NTS (НТС)	NTS TRK LLC	Omurbek Babanov	100
	5	TV EITR (ЭлТР)	Government of the Kyrgyz Republic		100
Print	1	Super-info	Super Media LLC	Ikramiddin Islamidinovich Nasirdinov	100
	2	Vecherniy Bishkek (Вечерний Бишкек)	CJSC Vecherniy Bishkek Publishing House	Alexander Kim	100
	3	Avtogid	Editorial office of the newspaper AVTOgid LLC	Vitaly Yen	100
	4	Delo No (Дело)	Social-legal Newspaper Delo No	Svetlana Krasilnikova Viktor Zapolsky	<i>Unknown</i> <i>Unknown</i>

	5 Slovo Kyrgyzstana (Слово Кыргызстана)	Government of the Kyrgyz Republic		100
Radio	1 Kyrgyzstan Obondoru (Кыргызстан обондору)	Ural Mining and Metallurgical Company (UMMC)	Igor Kudryashkin	60
			Andrey Kozitsyn	30
			Andrey Bokarev	10
	2 Europa Plus (Европа Плюс)	Ural Mining and Metallurgical Company (UMMC)	Igor Kudryashkin	60
			Andrey Kozitsyn	30
			Andrey Bokarev	10
	3 Dream FM (Мин Кьял)	Government of the Kyrgyz Republic		100
	4 Tumar FM (Тумар FM)	Tumar Media Group LLC	Alexey Valerievich Sidorov	100
	5 Sanjyra Radio (Санжыра радиосу)	NTS TRK LLC	Omurbek Babanov	100
	Online	1 Akipress.org	AKI Press Ltd	Marat Tazabekov
2 Azattyk.kg		United States Agency for Global Media		100
3 24.kg		Information Agency 24.kg LLC	Asel Ernestovna Otorbaeva	100
4 Kaktus.media		ProMedia Public Foundation	Dina Maslova	<i>Unknown</i>
			Narynbek Idinov	<i>Unknown</i>
5 Turmush.kg	AKI Press Ltd	Marat Tazabekov	100	

Results

Television

Television is the most consumed medium in the Kyrgyz Republic⁶ and has the least diverse ownership, with the government controlling three of the top five channels. The Kyrgyz government owns the second, third, and fifth most-consumed television outlets, OTRK, KTRK Music, and TV EITR, respectively. According to a 2020 Public Association of Journalists survey, OTRK in particular has recently assumed a prominent role as an

⁶ "Kyrgyzstan profile - Media." British Broadcasting Company. Published June 25, 2019.

outlet for state propaganda.⁷ The most-consumed television outlet in the Kyrgyz Republic is Russian Channel One, a Russian state-owned channel.⁸

The only privately owned top channel is NTS, the fourth most-consumed television outlet. While its ownership is highly opaque, most media report that NTS is owned by Omurbek Babanov, former Prime Minister of the Kyrgyz Republic and a current opposition politician.⁹ In October 2017, Babanov ran as an independent presidential candidate, losing to President Sooronbay Jeenbekov, who promised to arrest Babanov on corruption charges.¹⁰ Babanov fled to Russia and in December 2017, under the new Jeenbekov administration, a lawsuit was filed against NTS, resulting in a raid and seizure of NTS offices.¹¹ Some articles were published stating that Babanov was no longer the owner of NTS in 2017,¹² but later articles stated that Babanov still controlled the outlet in 2019.¹³ In June 2021, following his return to the Kyrgyz Republic, Babanov was arrested on corruption charges under the current Sadyr Japarov administration.¹⁴ NTS has historically broadcast pro-opposition content, and Babanov has remained an opposition leader, likely leading to his arrest. The ownership of NTS is opaque and unclear following Babanov's recent arrest, though it is likely he still has control over the outlet.

⁷ Ashiraliev, E. "КЫРГЫЗ ЖУРНАЛИСТИКАСЫНЫН АЗЫРКЫ АБАЛЫ КАНДАЙ?" Public Association of Journalists. Published 2020.

<https://soros.kg/wp-content/uploads/2020/11/Kyrgyz-zhurnalistikasynyn-abaly.pdf>.

⁸ Notably, Russian Channel One, a Russian state-owned channel, is the most-consumed outlet, not Public Channel One, a popular Kyrgyz state-owned television channel.

⁹ "Mirzhan Balybaev has been appointed as the Director General of the NTS TV channel." Azattyk. Published March 18, 2019. <https://rus.azattyk.org/a/29827945.html>.

¹⁰ "Kyrgyz Prosecutors Open Criminal Case Against Presidential Runner-Up." Radio Free Europe/Radio Liberty. Published November 4, 2017.

<https://www.rferl.org/a/kyrgyz-prosecutors-open-criminal-case-against-babanov/28835060.html>.

¹¹ "Kyrgyz Officials Impound TV Station Property Owned By Opposition Politician Babanov." Azattyk. Published December 19, 2017.

<https://www.rferl.org/a/kyrgyzstan-nts-tv-opposition-babnov-officials-impound-property/28927074.html>.

¹² "NTS no longer belongs to Omurbek Babanov." 24.kg News Agency. Published December 22, 2017.

https://24.kg/english/71836_NTS_no_longer_belongs_to_Omurbek_Babanov/

¹³ "Babanov's return. Security officers check fact of raider seizure of NTS." 24.kg News Agency. Published April 12, 2019.

https://24.kg/english/114732_Babanovs_return_Security_officers_check_fact_of_raider_seizure_of_NTS/

¹⁴ "Kyrgyz Ex-PM Babanov Released From Custody For Medical Treatment Abroad." Radio Free Europe/Radio Liberty. Published July 27, 2021.

<https://www.rferl.org/a/kyrgyzstan-babanov-released-treatment/31379820.html>.

In sum, the television industry has a number of vulnerabilities to Kremlin influence. The Russian government controls the most-watched television channel in the Kyrgyz Republic. Three outlets are controlled by the Kyrgyz government, with OTRK in particular recently broadcasting messages with pro-Japarov propaganda. In the case of the privately owned NTS, the Kyrgyz government has employed significant restrictive practices to limit the channel's independence. With heavy state control and influence in the television sector, as well as the popularity of Russian state-owned television, the Kremlin has a number of channels to influence Kyrgyz citizens.

Print

Ownership of print outlets in the Kyrgyz Republic is more diverse than that of television, but even in this medium, the influence of the government and political elites is still evident. Along these lines, the fifth most-consumed print outlet is Slovo Kyrgyzstana, a Kyrgyz state-owned, Russian-language newspaper. The remaining top print outlets are privately owned, though the print sector in the Kyrgyz Republic is struggling to stay afloat with the rise of online outlets.¹⁵

Super-info is the most-consumed print outlet. Until May 2019, Super-info was owned by the family of Kilychbek Sultan, the former Kyrgyz Ambassador to South Korea and founder of Super-info. The previous Jeenbekov administration filed a number of lawsuits against Sultan and Super-info in 2018, similar to its treatment of NTS. Following state pressure, Sultan sold Super-info in May 2019. Although Sultan publicly stated the sale was to a family member,¹⁶ Ikramiddin Islamidinovich Nasirdinov, the new owner according to the public Ministry of Justice business registry, was in fact unrelated.¹⁷ Following the sale, some sources suggested that Raimbek Matraimov, a Kyrgyz oligarch and former Deputy Chief of the Customs Service, purchased Super-info

¹⁵ Turdubaeva, Elina. "Media landscape in Kyrgyzstan: Caught between elite capture and control of political and business interests." The Foreign Policy Centre. Published March 1, 2021. <https://fpc.org.uk/media-landscape-in-kyrgyzstan-caught-between-elite-capture-and-control-of-political-and-business-interests/>.

¹⁶ "Popular Kyrgyz-language Super Info media outlet has new owner." 24.kg News Agency. Published May 24, 2019. https://24.kg/english/118585_Popular_Kyrgyz-language_Super_Info_media_outlet_has_new_owner/.

¹⁷ "Who are the New Owners of Super Info?" Factcheck.kg. Published May 24, 2019. <https://factcheck.kg/kto-oni-novye-vladelczy-super-info/>.

from Sultan and controls the popular outlet through Nasirdinov.¹⁸ However, in October 2020, incumbent President Sadyr Japarov placed Raimbek Matraimov under house arrest for corruption.¹⁹ While Matraimov was released in April 2021,²⁰ his arrest made the ownership of Super-info opaque, as it was unclear who controlled the outlet during his sentence. Nasirdinov is the legal stated owner; however, the true beneficiary is unclear, as a Sultan family member, Raimbek Matraimov, or an unknown third party may control the popular outlet.

The second most-consumed print outlet is Vecherniy Bishkek, a Russian-language daily newspaper. Founded and currently owned by Alexander Kim, Vecherniy Bishkek went through a tumultuous ownership period, as former co-owner Alexander Ryabushkin used his state influence to stage a raid of the outlet's offices in 2015.²¹ Ryabushkin was the sole owner of Vecherniy Bishkek until 2019, when a court ruled in favor of returning the newspaper back to Alexander Kim's control.²² These shifts in media ownership correspond with political turnover at the time, as former President Atambayev forced Kim to cede ownership to Ryabushkin, until President Jeenbekov took power and undid the work of his predecessor.²³

The third most-consumed print outlet is Avtogid, a newspaper for selling or buying cars. Businessman and lawyer Vitaly Yen is the owner of Avtogid. Yen has been involved

¹⁸ "Popular Kyrgyz-language Super Info media outlet has new owner." 24.kg News Agency. Published May 24, 2019.

¹⁹ "House Arrest Ordered For Kyrgyzstan's Powerful Oligarch Raimbek Matraimov." Radio Free Europe/Radio Liberty. Published October 20, 2020. <https://www.rferl.org/a/kyrgyzstan-detains-former-customs-chief-matraimov-on-corruption-charges/30902497.html>.

²⁰ RFE/RL's Kyrgyzstan Service, OCCRP, Kloop, and Bellingcat. "The 'Beautiful' Life Of A Kyrgyz Customs Official." Radio Free Europe/Radio Liberty. Published December 14, 2020. <https://www.rferl.org/a/matraimov-dubai-kyrgyzstan-corruption-luxury-lifestyle/30996456.html>; "Kyrgyz Powerbroker Matraimov Released From Custody, Case Closed." Radio Free Europe/Radio Liberty. Published April 15, 2021. <https://www.rferl.org/a/kyrgyzstan-matraimov-released-probe-closed/31204913.html>.

²¹ "Kyrgyzstan: As political winds change, iconic newspaper again tussled over." Eurasianet. Published October 31, 2018. <https://eurasianet.org/kyrgyzstan-as-political-winds-change-iconic-newspaper-again-tussled-over>.

²² "All Vecherniy Bishkek's assets returned to Alexander Kim." 24.kg News Agency. Published August 1, 2019. https://24.kg/english/125022_All_Vecherniy_Bishkeks_assets_returned_to_Alexander_Kim/.

²³ "Kyrgyzstan: As political winds change, iconic newspaper again tussled over." Eurasianet. Published October 31, 2018.

in international franchise and foreign direct investment work in the Kyrgyz Republic and has spoken at business events run by the United States Embassy in Bishkek.²⁴

The fourth most-consumed print outlet was Delo No, until the outlet shut down its printing operations on May 26, 2021. The owners and founders of Delo No prior to the shutdown were Svetlana Krasilnikova and Viktor Zapolsky.²⁵ AidData notes that the inclusion of closed outlets in our rankings highlights trends of influential outlets, as owners of many closed outlets across the Europe and Eurasia region often continue to exert influence even after the outlet has closed. Additionally, all measured rankings of top print outlets in the Kyrgyz Republic included Delo No among the most-read outlets.

In sum, while top print outlets have more diverse ownership than top television channels, the Kyrgyz government still exerts considerable influence over the print sector. Not only does the government directly own one of the top print outlets, but it has imposed ownership changes on other top outlets such as Super-info and Vecherniy Bishkek, likely to elevate voices more sympathetic to the incumbent regime. This creates major potential vulnerabilities to Russian influence, as the government has the power and willingness to remove owners and influence privately owned newspapers based on the best interests of the incumbent administration.

Radio

Radio consumption is declining in the Kyrgyz Republic, due to the rise of internet outlets and popularity of television channels.²⁶ Like print and television, most top radio stations are controlled by the Kyrgyz government or Kyrgyz or Russian political elites. The Kyrgyz government directly owns the third most-consumed radio station, Dream FM.

²⁴ "International Franchise and Trade Expo Turns the Spotlight on Bishkek for U.S. and International Investors." U.S. Embassy in the Kyrgyz Republic. Published October 11, 2019. <https://kg.usembassy.gov/international-franchise-and-trade-expo-turns-the-spotlight-on-bishkek-for-u-s-and-international-investors/>.

²⁵ "'Delo No. ...' newspaper announces its closure." 24.kg News Agency. Published May 26, 2021. https://24.kg/english/195195_Delo_No_newspaper_announces_its_closure/.

²⁶ Toralieva, Gulnura. "Media Influence Matrix: Kyrgyzstan." CEU Center for Media, Data and Society (CMDS). Published July 2019.

Both top radio stations—Kyrgyzstan Obondoru and Europa Plus, respectively—are owned by the Ural Mining and Metallurgical Company (UMMC) through Europe Media Group. UMMC is majority owned by Russian oligarch Igor Kudryashkin, with minority shares owned by Chief Executive Officer of UMMC Andrey Kozitsyn and Russian oligarch Andrey Bokarev.

Tumar FM, the fourth most-consumed radio station, is owned by Alexey Sidorov, its founder. A young Russian national, Sidorov purchased the frequency for Tumar FM from Pyramid Media Group immediately prior to the Kyrgyz government seizure of Pyramid in 2010.²⁷ Tumar FM has gained in popularity as a hit music station.

The fifth most-consumed radio station is Sanjyra Radio, owned by NTS TRK. Sanjyra, like NTS, is owned by former Prime Minister and opposition candidate Omurbek Babanov. In Fall 2017, the Kyrgyz government revoked Sanjyra's license as a result of repercussions against Babanov. However, Sanjyra purchased a new frequency in March 2018, leading to its rebroadcast.²⁸

Top radio outlets are vulnerable to Kremlin influence as well. The top two stations are controlled by Russian oligarchs with connections to the Russian government. The Kyrgyz government directly controls Dream FM and has exerted significant influence over Pyramid and Sanjyra. The fact that the Kyrgyz government is willing to curb independent media in favor of political interests creates an opportunity for the Kremlin to exert influence via these channels.

Online

Online media outlets are relatively independent from Kyrgyz government interference in their operations and enjoy the most diverse ownership as compared to other mediums in the country. No top online outlets are owned by the Kyrgyz government;

²⁷ "Alexei Sidorov, Director of Radio 'Tumar': 'My First Radio Broadcasted when I was a Child.'" Super-info. Published February 10, 2011.

<https://www.super.kg/article/?article=6047>.

²⁸ "Radio Sanjyra has bought a frequency and is preparing to re-broadcast." 24.kg News Agency. Published March 23, 2018.

https://24.kg/kyrgyzcha/79270_sanjyra_radiosu_jyishtyik_satyip_alyp_kayra_efirge_chyiguuga_dayardan_uuda/.

however, the United States government owns the second most-consumed online outlet, Azattyk.kg, the Kyrgyz branch of Radio Free Europe/Radio Liberty.

Marat Tazabekov is the Chief Executive Officer, founder, and owner of AKI Press Ltd, the parent company of both the first and fifth most-consumed online outlets, Akipress.org and Turmush.kg, respectively. According to IREX's Media Sustainability Index report, AKI Press is loyal to the authorities and receives news and press releases earlier than other media outlets.²⁹ As a result, while AKI Press is privately owned, Tazabekov is loyal to the Kyrgyz government and uses AKI Press as a reporting platform, rather than for investigative journalism.

The third most-consumed online outlet is 24.kg. Officially owned by Director-General Asel Ortobaeva, some articles assert that Dzhanybek Bakchiev owns or influences 24.kg. Bakchiev, a former Member of Parliament for the Bir Bol Party, denies these claims, as does Ortobaeva.³⁰ The outlet appears to be entirely funded by advertising revenues and maintains a stable financial position, unlike most news outlets in the Kyrgyz Republic.³¹ As a result, while Bakchiev may potentially influence the content of 24.kg, the news outlet is largely financially independent of the incumbent Japarov government, which may provide greater protection from political interference.

The fourth most-consumed online outlet is Kaktus.media. During the Atambayev administration, a number of state-backed lawsuits ordered Zanoza.kg, an independent investigative online outlet, to cease operation for libel.³² Dina Maslova and Narynbek Idinov, the founders of Zanoza, created Kaktus.media, another investigative outlet, which quickly gained popularity.³³

²⁹ "Kyrgyzstan 2018: Media Sustainability Index." International Research and Exchanges Board. Published 2018.

³⁰ Dzumakadyrov, Sadat. "Has the government taken over the 24.kg news agency?" Azattyk.org. Published September 21, 2015.

<https://rus.azattyk.org/a/27259613.html>

³¹ Toralieva, Gulnura. "Media Influence Matrix: Kyrgyzstan." CEU Center for Media, Data and Society (CMDS). Published July 2019.

³² Imanaliyeva, Ayzirek. "New Kyrgyzstan leader vilifying free press." Eurasianet. Published November 10, 2020.

<https://eurasianet.org/new-kyrgyzstan-leader-vilifying-free-press>

³³ "Zanoza.kg turns into Kaktus." 24.kg News Agency. Published August 1, 2017.

https://24.kg/english/58978_Zanozakg_turns_into_Kaktus/

Online outlets have significantly less Kyrgyz government influence in their ownership structures than other mediums. Azattyk.kg, 24.kg, and Kaktus.media all have revealed government corruption and acted as independent free media. However, the shutdown of Zanoza.kg does show that the government can use libel lawsuits to influence popular media outlets in the Kyrgyz Republic.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of the Kyrgyz Republic. The collected data highlight two trends in Kyrgyz media ownership. First, despite more diverse ownership than the other Central Asian countries, the Kyrgyz government exerts considerable influence in the country's media space. Second, Kyrgyz media outlets are highly vulnerable to Russian influence.

The Kyrgyz government directly owns five of the country's top media outlets, and privately held outlets loyal to the government, such as Turmush.kg and AKI Press, are also present amongst top media. Additionally, the Kyrgyz government and political elites across multiple administrations have consistently used libel laws and lawsuits to curtail the operations and content of independent media. The shutdown of Zadoza, restrictions imposed on Super-info and Vecherniy Bishkek, and arrests of political elites like Omurbek Babanov and Raimbek Matraimov illustrate that the Kyrgyz government is both willing and able to exert influence over privately held media outlets.

These dynamics create an opening for external actors such as the Kremlin to co-opt and exert influence over Kyrgyz news outlets via cultivating closer ties with the government. In addition, the Kremlin can more directly influence the country's media space via its Russian state-owned media and ownership stakes in Kyrgyz media outlets. All eleven measured Russian state-owned media outlets are present in the Kyrgyz Republic, and Channel One is the most-consumed television channel. Russian oligarchs own both Kyrgyzstan Obondoru and Europa Plus, the top radio stations.

In sum, the Russian government has a number of potential channels to directly communicate with the Kyrgyz public via its own state-owned media, as well as

indirectly influence citizens via ownership stakes in privately held media outlets and efforts to co-opt Kyrgyz state-owned outlets.

Moldova: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	9
Radio.....	10
Online.....	11
Conclusion.....	12

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia

Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner,
Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Moldovan media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Moldova's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Despite laws that require transparency, there are both foreign and domestic media outlets operating in Moldova with opaque ownership information. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Moldova.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.¹ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Moldova, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather ownership data. We used cross-country sources when available (e.g., Zenith, Alexa²), Molodvan business registries and government databases (e.g.,

¹ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

² Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

IDNO.md, Audiovisual Council Moldova), survey data, media watchdog sources, and other open source data. This profile includes data for Moldova proper and does not separate out any information that may differ in breakaway regions such as Transnistria.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Moldova as of 2021. This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Moldova's media landscape is via Russian state-owned media (see Table 1). Four of the eleven Russian state-owned media outlets we tracked have a physical presence in Moldova, which provides the Kremlin with a limited channel to directly communicate with, and ultimately influence, Moldovan citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Moldova, but does not speak to how well-consumed each outlet is by Moldovan citizens.

Table 1: Russian state-owned media in Moldova, 2021

Television		Print		Radio		News Agency	
Russia 1	✗	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✓
Russia 24	✗					Sputnik	✓
Russia K	✗						
RTR-Planeta	✗						
TV Centre	✗						
Channel One	✓						
RT	✗						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Moldova by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. Television is the most consumed medium in Moldova.³ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. While none of the state-owned outlets in Table 1 above appear here, partner publications and other Russian media outlets such as RTR Moldova,

³ Internews in Moldova, "Perceptions of the Population of the Republic of Moldova on Mass Media," November 2018, https://internews.org/wp-content/uploads/legacy/2019-02/03_INTERNEWS_Final%20report_25.10.18_EN-web.pdf.

Komsomolskaya Pravda v Moldova, and Argumenti i Fakty are among the top outlets in Moldova.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Moldova. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁴

Table 2: Top Moldovan media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Prime	Komsomolskaya Pravda v Moldove	Radio Moldova	Jurnal.md
2	Moldova 1	Makler	Radio Noroc	Protv.md
3	Jurnal TV	Jurnal de Chisinau	Radio Plai	Stiri.md
4	RTR Moldova	Argumenti i Fakty	Hit FM	Point.md
5	NTV Moldova	Ziarul de Garda	Jurnal FM	Publika.md

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Moldovan outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include television stations Channel One and TV8, print sources Sputnik Moldova and Timpul, the radio stations Kiss FM and Radio Chisinau, and online outlets Zdg.md, Unimedia.info, and Diez.md.

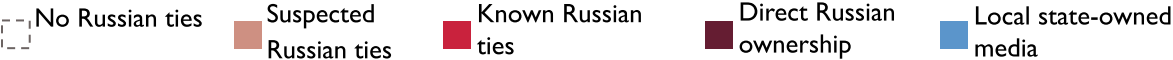
⁴ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Magenta Consulting’s “National Media Audience Survey” (2018 and 2021), International Republican Institute’s “Public Opinion Survey: Residents of Moldova” (2019), IREX’s Media Sustainability Index (2019), Internews’ “Perceptions of the Population of the Republic of Moldova on Mass Media” (2018), and Zenith (2018).
Online: Alexa, April 2021

Media Ownership

Table 3 lists the ownership information of top Moldovan media outlets by medium (television, newspaper, radio, and online). In 2015, Moldova mandated that television and radio company ownership become transparent. As a result, the owners of these television and radio outlets are listed in a register released by the Audiovisual Council of the Republic of Moldova. Nonetheless, even with this transparency law, several outlets have owners with either foreign ties to Russia or murky ties to Moldova’s own political elite that create opportunities for hidden influence. This dynamic could be further exacerbated by the number of media outlets that have a single controlling owner, thus concentrating decision-making authority regarding content curation. This could conceivably make it easier for malign influencers to co-opt these outlets. Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Moldovan state-owned media is color-coded blue. In Moldova, twenty owners had suspected or known ties to the Russian government, and one outlet had direct Russian ownership. As such, this profile has twenty red color-codes and two designations of state-owned media.

Table 3: Ownership of top Moldovan media outlets by share



Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Prime	General Media Group Corp LLC	Vladimir Plahotniuc	100
	2	Moldova 1	Teleradio-Moldova Company		100
	3	Jurnal TV	Reforma Art LLC	Victor Topa	100
	4	RTR Moldova	Rosmediakom	Sberbank	Unknown

			Vneshekonombank	Unknown
			VGTRK	Unknown
		Valentina Stetco	Valentina Stetco	25
		SB Grup Media S.R.L.	Galina Sirbu	20
			Oxana Borsevici	5
	5 NTV Moldova	Exclusiv Media	Corneliu Furculita	100
	1 Komsomolskaya Pravda v Moldove	Exclusiv Media	Corneliu Furculita	100
	2 Makler	Makler LLC	Olga Sviridova	50
			Valeriu Zelinski	50
Newspaper	3 Jurnal de Chisinau	Reforma Art LLC	Victor Topa	100
	4 Arugmenti i Fakty	Exclusiv Media	Corneliu Furculita	100
	5 Ziarul de Garda	Publicatia Periodica Ziaruli de Garda SRL	Aneta Grosu	50
			Alina Radu	50
	1 Radio Moldova	Teleradio-Moldova Company		100
Radio	2 Radio Noroc	Noroc Media SRL	Doinita Topala	100
	3 Radio Plai	Radio Plai SRL	Maria Covalenco	100
	4 Hit FM	Radio Hit SRL	Jana Lozovan	75
			Pavel Lozovan	25
	5 Jurnal FM	Reforma Art LLC	Victor Topa	100
Online	1 Jurnal.md	Reforma Art LLC	Victor Topa	100
	2 Protv.md	PPF Group	Petr Kellner Family	98.93
			Ladislav Bartonicek	0.535
			Jean-Pascal Duvieusart	0.535
	3 Stiri.md	Simpals LLC	Dmitri Volosin	90
			Roman Stirbu	10
4 Point.md	Simpals LLC	Dmitri Volosin	90	

		Roman Stirbu	10
5 Publika.md	General Media Group Corp LLC	Vladimir Plahotniuc	100

Results

Television

Moldova's top television outlets are heavily influenced by actors with ties to the Kremlin and the Moldovan political elite. This was true during our study period, despite a controversial 2018 anti-propaganda broadcasting law that prohibited broadcasting of Russian television channels in Moldova.⁵ This law, however, has failed to stop Russian influence and rebroadcasting of news on other channels.

The most consumed television outlet, Prime, is owned by General Media Group, whose sole owner is Vladimir Plahotniuc. Plahotniuc is an oligarch and the former leader of the Democratic Party of Moldova who was accused of siphoning over a billion dollars from Moldovan banks. After a criminal investigation in 2019, Plahotniuc fled Moldova and Prime was seized.⁶ Prime frequently re-publishes Russian content, and there are frequent allegations of Plahotniuc's business deals with Russia.⁷ Despite this, Plahotniuc has been known to also profess pro-Western viewpoints.⁸

⁵ Megan Reiss, "Moldova Bans Russian News Broadcasts," *Lawfare*, 14 February 2018, <https://www.lawfareblog.com/moldova-bans-russian-news-broadcasts>.

⁶ Radio Free Europe / Radio Free Liberty's Moldovan Service, "Moldova Charges Plahotniuc in \$1 Billion Fraud, Will Seek U.S. Extradition," 19 May 2020, <https://www.rferl.org/a/moldova-charges-plahotniuc-in-1-billion-fraud-will-seek-us-extradition/30621161.html>.

⁷ Robert Schwartz, "Opinion: Moldovan crisis a test case for Russia-US cooperation," *Deutsche Welle*, 12 June 2019, <https://www.dw.com/en/opinion-moldovan-crisis-a-test-case-for-russia-us-cooperation/a-49166310>.

⁸ Robert Schwartz, "Opinion: Moldovan crisis a test case for Russia-US cooperation," *Deutsche Welle*, 12 June 2019, <https://www.dw.com/en/opinion-moldovan-crisis-a-test-case-for-russia-us-cooperation/a-49166310>.

The second most popular television outlet is Moldova 1, which is run by the government of Moldova through Teleradio Moldova (TRM). TRM also operates the country's most popular radio station, Moldova 1.

The third most consumed television channel in Moldova is Jurnal TV, which is owned by Moldovan businessman Victor Topa.⁹ Topa fled to Germany about a decade ago, after he was convicted of blackmail in Moldova, in a case he claims was staged by Prime owner and former politician Plahotniuc. Consequently, Jurnal TV is known for being a critic of the Democratic Party of Moldova.¹⁰ The Jurnal franchise is quite popular across the various mediums, and a Jurnal outlet appears among each of the top outlets in the remaining mediums below.

The fourth most popular outlet is RTR Moldova, a news and entertainment channel owned by TV-Comunicații Grup. Ownership is then split between Valentina Stetco (25%), SB Grup Media (25%), and Rosmediakom (50%). Rosmediakom is owned by Sberbank, Vneshekonombank, and VGTRK; all three of these are Russian state-run companies, with the first two being Russian state banks and the last a Russian state media company. Sberbank's shareholders include the Russian Ministry of Finance, and Vneshekonombank is owned by the Russian Federation. RTR Moldova is ultimately an offshoot channel of RTR Rossiya, and mainly republishes pro-Kremlin content.¹¹ RTR Moldova's broadcasting license in Moldova was obtained by registering ownership to the Moldovan SB Grup and Valentina Stetco. Not much is known about these owners, although Stetco's sister is allegedly close with Russian President Vladimir Putin.¹²

NTV is owned by Corneliu Furculita through his Exclusiv Media Company. A member of the Socialist Party in Parliament, Furculita is known to maintain close ties to the family of former President Igor Dodon. The Dodon family are viewed as the real owners of

⁹ Jurnal TV, "Statement of Ownership," Audiovisual Council of Moldova, <https://www.rise.md/wp-content/uploads/2016/10/JURNAL-TV-Declaratie-la-CCA.pdf>.

¹⁰ NATO Strategic Communications Centre of Excellence, "The Moldovan Information Environment, Hostile Narratives, and their Ramifications," July 2017, https://stratcomcoe.org/cuploads/pfiles/moldova_report_public_2nd_edition_17-07.pdf

¹¹ NATO Strategic Communications Centre of Excellence, "The Moldovan Information Environment."

¹² Hendrik Sittig and Darija Pabijanac, "Russian Dominance on Moldovan Media Market Prevails," *Konrad Adenauer Stiftung*, March 2020, <https://www.kas.de/documents/281902/281951/Russian+Dominance+on+Moldovan+Media+Market+previews.pdf/550e9151-5a3e-25cf-6d49-481c2b549000?version=1.1&t=1584633537034>.

Exclusiv Media and allegedly use the media group as a conduit for money laundering.¹³ NTV is a twin publication of the Russian NTV station run by Gazprom.¹⁴ Furculita also owns the Moldovan versions of Russian newspapers Komsomolskaya Pravda v Moldove and Argumenti i Fakty.

The top outlets in Moldova are heavy with linkages to Russia, the political elite, and allegations of corruption. Despite the law on transparency in ownership, the true controller of these outlets is in a few cases obscured. Additionally, with the exception of Moldova 1, the controlling owners of most top outlets appear to be outside of Moldova at present.

Print

The most popular print outlet in Moldova, Komsomolskaya Pravda v Moldove (KP in Moldova), is owned by Corneliu Furculita through Exclusiv Media. Furculita also owns the fourth most popular print outlet, Argumenti i Fakty (Arguments and Facts). Both the KP in Moldova outlet and the Moldovan Argumenti i Fakty outlet are twin publications of their Russian counterparts.

The second most popular newspaper outlet in Moldova is Makler, which is controlled by Makler LLC and owned by Olga Sviridova (50%) and Valeriu Zelinski (50%). Little additional information was found about either owner of the outlet. Makler is also a widely used platform for selling items and services.

Jurnal de Chisinau, the third most consumed print outlet, is owned by media mogul Victor Topa. Topa owns one top outlet in each of the mediums we tracked, including Jurnal TV, Jurnal FM, and Jurnal.md.

Rounding out the print sector is Ziarul de Garda. Co-owned by journalists Alina Radu and Aneta Grosu, the outlet focuses their reporting on corruption of public officials and

¹³ "Documents: Galina Dodon and the family business 'Exclusiv Media' SRL: 33 million lei 'washed' through the Bahamas," Timpul.md, 30 April 2020, <https://www.timpul.md/articol/documente---galina-dodon-i-afacerea-familiala-exclusiv-media-srl---33-milioane-de-lei-spalai-prin-bahamas-155863.html>.

¹⁴ RISE Moldova, "Exclusive Media SRL," <https://profiles.rise.md/connection.php?id=190128160902>.

politicians. They also frequently publish information to promote the transparency of their own outlet and encourage other organizations in Moldova to do the same. Ziarul de Garda's online outlet, Zdg.md, is also fairly popular.

Print outlets in Moldova do not have the same transparency laws as television and radio outlets, which means there is no registry to refer to as a starting point for outlet owners. Despite this, we see some newspaper outlets, such as Ziarul de Garda, push for transparency. This conflicts with outlets like Makler about which little is known and owners like Furculita who appear to conceal control of their outlets.

Radio

Two owners of radio outlets have appeared earlier in our analysis. The first is Moldova's state-owned TRM, which runs the most consumed radio channel Radio Moldova. The second is Victor Topa, who owns the fifth most consumed radio station, Jurnal FM.

The second most popular radio station is Radio Noroc. Radio Noroc is controlled by Noroc Media SRL, which was bought in early 2020 by Doinița Topala. Topala is the daughter of the director of Moldova's national railway. Topala is also a part-owner of a skating rink and a transportation company.¹⁵

The third most popular radio station is Radio Plai. Radio Plai is owned by Maria Covalenco.¹⁶ We were unable to find much public information on Covalenco.

Hit FM is the fourth most popular radio station in Moldova. Hit FM claims it is primarily focused on media and entertainment. While the station reports their owners as being Jana and Pavel Lozovan,¹⁷ the station is likely controlled by family member Dan Lozovan. Dan Lozovan previously owned a share of this station but faced criticism for

¹⁵ "Iurie Topala's daughter became the new owner of Noroc TV and Radio Noroc," *Media Azi*, 5 February 2020, <http://media-azi.md/ro/stiri/fiica-lui-iurie-topal%C4%83-devenit-noua-proprietar%C4%83-noroc-tv-%C8%99i-radio-noroc>.

¹⁶ Radio Plai, Audiovisual Council of Moldova, 13 March 2020, http://www.audiovizual.md/files/Radio%20Plai_3.pdf.

¹⁷ Hit FM, "Statement on the editorial policy regarding the coverage of the early parliamentary elections in July 2021," Audiovisual Council of Moldova, 17 May 2021, http://www.audiovizual.md/files/HIT%20FM_6.pdf.

owning multiple television and radio outlets; he may have therefore signed over ownership to remove his name from this outlet. Lozovan had previously been accused of being involved in a monopoly of ownership of Moldovan media when he was a business associate of Vladimir Plahotniuc.¹⁸ Lozovan had also been instrumental in bringing Russian broadcasting agreements into Moldova prior to the 2018 anti-propaganda law.¹⁹ Hit FM shares a name with a Russian radio station.

While owners of radio outlets are easily found due to Moldova's transparency law, control of radio outlets is still obscured, such as the case with Hit FM. Owners Lozovan and Topala have ties to the Moldovan political elite, and the top outlet is controlled by the government. Additionally, each of the top radio outlets is owned by a single owner (if the family of Dan Lozovan is considered a single owner), meaning that decision making around control of content is centralized and could be a potential avenue for bias or malign influence.

Online

The most popular online outlet is Jurnal.md, part of the larger Jurnal franchise owned by Victor Topa through Reforma Art LLC. While a Jurnal outlet appears in the top outlets of each medium, the online version is the only instance where it appears as the top outlet.

Protv.md is the second most popular online outlet. Protv.md is owned by Central European Media Enterprises, which was bought by Czech billionaire Petr Kellner's PPF Group in 2019.²⁰ Kellner died in 2021 during a helicopter accident in Alaska, and

¹⁸ "The monopolists of the press, supported by justice; the Centru court rejected the request of the Competition Council to sue, which protects the businessmen Plahotniuc and Lozovan," *Jurnal.md*, 6 July 2016, <https://www.jurnal.md/ro/justitie/2016/7/6/monopolistii-presei-sustinuti-de-justitie-judecatoria-centru-a-r-espins-cererea-de-chemare-in-instanta-a-consiliului-concurentei-care-ii-protejeaza-pe-afaceristii-plahotniu-c-si-lozovan/>.

¹⁹ "CTC Media Announces Expansion Into Moldova," IPN Press Agency, 4 October 2008, https://www.ipn.md/en/-7967_971890.html.

²⁰ "Central European Media Enterprises to be Acquired by PPF," BusinessWire, 27 October 2019, <https://www.businesswire.com/news/home/20191027005041/en/Central-European-Media-Enterprises-to-Be-Acquired-by-PPF>.

inheritance proceedings are still ongoing among his family.²¹ A television outlet of the same name also broadcasts in Moldova.

The third and fourth most consumed online outlets, Stiri.md and Point.md, are owned by Simpals LLC. Point.md was developed for Russian-speaking Moldovans, and Stiri.md was developed for Romanian speakers in response to the popularity of Point.md to have an outlet that shared the viewpoint of Russian-speakers in Moldova.²² Simpals is a company that specializes in online services and is the largest animation studio in Moldova. Majority owned by Ukrainian immigrant to Moldova Dmitri Volosin and minority owned by Roman Stirbu, Simpals has had well-known business dealings with Russian companies.²³

Last on this list is Publika.md. Publika.md is owned by oligarch Vladimir Plahotniuc who owns a television and radio outlet of the same name, along with the Prime TV channel mentioned above.

The top online outlets are notable for their controllers being located outside of Moldova. Protv.md is owned by a Czech company, and the owners of Jurnal.md and Publika.md have both fled Moldova (to Germany and the US, respectively). Additionally, the focus of Point.md was to appeal to Russian-speakers in Moldova. Given these factors, the top online outlets in Moldova are susceptible to substantial foreign influence.

Conclusion

On the surface, Moldova looks uniquely poised to set itself apart as a country with strong media laws that is resilient to foreign influence. Both its anti-propaganda and ownership transparency laws are abided by on paper. However, informally, the control

²¹ "Shareholders," PPF, accessed 2 March 2022,

<https://www.ppf.eu/en/about-the-ppf-group/people-and-statutory-bodies/shareholders>.

²² Igor Fomin, "Moldnet and the 2019 Parliamentary Elections: Navigating Moldova's Russian-Language Digital Media Landscape," Media Forward, February 2019, https://freedomhouse.org/sites/default/files/2020-02/9-Moldnet-2019-Parliamentary-Elections_ENGLISH.pdf.

²³ "First Moldovan 3D cartoon will be ready in 2014," IPN Press Agency, 9 September 2016, <https://www.ipn.md/en/societate/33348>.

and ties of these outlets can be opaque and the law disregarded. We outline here four issues that raise particular concern with regard to the Moldovan media market.

The first is the continuing significant presence of Russian influence in the Moldovan media. Several outlets have found workarounds to the anti-propaganda law to allow for Russian news to be broadcast in Moldova. RTR Moldova split its ownership to be partially among Moldovan citizens, even though it is owned by the Russian government. Several outlets, such as NTV, KP in Moldova, Argumenti i Fakty, and Hit FM, are the twin publications of or are affiliated with the Russian outlets of the same name. Lastly, other outlets such as Prime TV and Point.md share Russian viewpoints with their audiences. All of these factors lead to direct influence by Russia on the Moldovan media audience.

In many instances, overlapping with these Russian ties are the ties to the Moldovan political elite. To the extent that the Kremlin can strengthen ties with Moldova's political elites, Moscow can exert indirect influence via the media outlets in which these leaders have a controlling stake. Two outlets—Moldova 1 and Radio Moldova—are owned by the state, but several others are owned by current and former politicians or their family members.

The third concerning issue regarding Moldovan media ownership is the lack of transparency about who controls the media. Even with transparency laws, the identities of the individuals and companies who truly control many Moldovan outlets still remain obscured. While at first glance the Moldovan domestic media environment appears to have many diverse owners, what relationships we have been able to uncover show a small group of elites controlling substantial portions of the country's media environment.

This leads us to the final issue, which is concentration of media ownership. Many of the same outlets and owners appear across the mediums, notably Topa who owns a top television, print, radio, and online outlet, along with Furculita and Plahotniuc, who also own outlets in multiple mediums. This concentration limits the diversity of narratives and means that consumers are likely receiving the same information, regardless of which medium they consume. Especially for those companies controlled by a single

owner, there are opportunities for leverage by malign actors to shape the country's media narratives.

Ownership laws to encourage media diversity in Moldova are not always enforced and in some cases have led to murkier information but no real change in narrative control. Although Moldova restricts rebroadcasting in an attempt to emphasize its own media, it appears that this has led to greater domestic ownership and consequently bias by the Moldovan political elite. Restrictions on Russian broadcasting have also failed to impact the Kremlin's control of narratives in the Moldovan media space.

North Macedonia: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	9
Radio.....	10
Online.....	10
Conclusion.....	11

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia

Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Macedonian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding North Macedonia's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

North Macedonia remains one of the more transparent countries in the Europe and Eurasia region.¹ In 2013, North Macedonia implemented the Law on Media, which required the ownership of broadcast and print media to be made public. However, online media ownership is relatively opaque, as outlets remain exempt from reporting on their ownership structure. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in North Macedonia.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in North Macedonia, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources

¹ The Vibrant Information Barometer, "2021 North Macedonia Report," <https://www.irex.org/sites/default/files/pdf/vibe-north-macedonia-2021.pdf>.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

when available (e.g., Zenith, Alexa³), as well as the Central Registry of North Macedonia, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in North Macedonia as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in North Macedonia's media landscape is via Russian state-owned media (see Table 1). Five of the eleven Russian state-owned media outlets we tracked have a physical presence in North Macedonia, which provides the Kremlin with a few channels to directly communicate with, and ultimately influence, Macedonian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in North Macedonia, but does not speak to how well-consumed each outlet is by Macedonian citizens.

³ Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData staff used Alexa's API to gauge website traffic. <https://www.alexacom/siteinfo>.

Table 1: Russian state-owned media in North Macedonia, 2021

Television		Print		Radio		News Agency	
Russia 1	✗	Rossiyskaya Gazeta	✗	Sputnik	✗	TASS	✗
Russia 24	✓					Sputnik	✓
Russia K	✗						
RTR-Planeta	✓						
TV Centre	✗						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in North Macedonia by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. According to a 2021 International Republican Institute poll, television and online outlets are the top consumed mediums for information in North Macedonia and are therefore likely more influential, while radio and print media are less consumed.⁴ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of some Russian

⁴ "Macedonia National Public Opinion Poll." International Republican Institute. Published June 16, 2021. https://www.iri.org/wp-content/uploads/legacy/iri.org/wysiwyg/iri_n_macedonia_march-april_2021_poll_june_2021.pdf

state-owned media outlets in North Macedonia, no Russian media appears in the top five outlets for any medium.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in North Macedonia. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of the most-consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵

Table 2: Top Macedonian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	TV Sitel	Sloboden pečat	Antena 5	Time.mk
2	Kanal 5	Večer	Channel 77 (Kanal 77)	Sitel.com.mk
3	TV Telma	Nezavisen vesnik	Radio Metropolis	kajgana.com
4	TV Alsat-M	Nova Makedonija	Macedonian Radio I	centar.mk
5	TV Alfa	Koha	Radio Bubamara	tv21.tv

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Macedonian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the state-run television channel Macedonian Radio Television (MRT), radio station City FM 97.9, and online outlets Kurir.mk, Fokus.mk, and Sakam de Kazam (sdk.mk).

⁵ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: IREX's Media Sustainability Index (2019), Agency for Audio and Audio-visual Media Services of the Republic of Macedonia's Market Report (2020), Agency for Audio and Audio-visual Media Services of the Republic of Macedonia's Public Opinion Research (2017 and 2021), National Democratic Institute's Public Opinion Survey (2021), and International Republican Institute's Public Opinion Survey (2021).
Online: Alexa, April 2021

Media Ownership

Table 3 lists the ownership information of top Macedonian media outlets by medium (television, newspaper, radio, and online). Media ownership transparency in North Macedonia is regulated through the 2005 Law on Broadcasting Activity, the 2013 Law on Media, and the 2013 Law on Audiovisual Media Services. For radio and television outlets, the 2005 Law on Broadcasting Activity prevents political elites and their families from owning radio or television media. This restriction is expanded to the print media sector in the 2013 Law on Media and Law on Audiovisual Media Services. These laws are extensive and should theoretically create a highly transparent and public media space; however, these laws are often poorly implemented in practice. As stated in IREX’s Vibrant Information Barometer, “there are excellent freedom of information (FOI) legislation and strong regulations against media concentration. The problem, rather, is in the implementation of these laws and regulations.”⁶ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Macedonian state-owned media is color-coded blue. In North Macedonia, no owners had suspected or known ties to the Russian government, and no top outlets had direct Russian ownership. As such, this profile has no red color-coding and only one designation of state-owned media.

Table 3: Ownership of top Macedonian media outlets by share

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Sitel TV	Monteko LLC	Goran Ivanovski	100
	2	Kanal 5	Kanal 5 SMLLC	Emil Stojmenov	100

⁶ The Vibrant Information Barometer, “2021 North Macedonia Report.”

Print	3 Telma TV ⁷	Makpetrol AD Stock Company	Publicly Traded Stock Andreja Josifovski (through OILKO Skopje)	<i>Unknown</i> 3.43
	4 TV Alfa	CHS Invest Group Ltd	Peter Schatz	51.3
			Goran Balac	5.7
		Makosped JSC	Publicly Traded Stock	14.3
			Tome Kornakov	2.7
		Technometal Vardar Inc	Publicly Traded Stock	12.4
			Dusko Angelov	2.6
	Evropa Inc	Publicly Traded Stock	9	
		Mila Leventic	1	
		Esamedin Hasani	1	
	5 TV Alsat-M	VEVE Group Ltd Skopje	Imihane Velija	88
			Zana Velija	11
		TRD Alsat-M	Ferik Velija	1
	1 Sloboden pečat	Free Press LLC	Vladimir Galjak	50
Miroslav Jovanovic			50	
2 Večer	Vecer Press LTD	Saso Bogdanovski	100	
3 Nezavisen vesnik	Independent Balkan News Agency LLC Skopje	Spiridon Sideris	95	
		Nikolaos Fragopulos	5	
4 Nova Makedonija	Repro One Ltd	Mincho Jordanov	100	
5 Koha	Koha Production LLC	Lirim Dulov	60	
		Arben Ratkocer	40	
Radio	1 Antena 5	Antena 5 Radio Network	Zoran Petrov	33.3
		Marjan Gusev	33.3	
		Kosta Janevski	33.3	
	2 Channel 77 (Kanal 77)	GBC Communications LTD	Viktor Gavrilov	100

⁷ Telma TV is wholly owned by Makpetrol AD, a publicly traded oil company. However, ownership becomes highly circular after this point, making it extremely difficult to pinpoint individual shareholders and their respective shares. As a case in point, OILKO Skopje, another publicly traded company, owns 22.87% of shares in Makpetrol AD (as of April 15, 2019) President of the Makpetrol board Andreja Josifovski owns 14.98% of OILKO Skopje, the largest percentage for an individual in the company, giving him a 3.43% stake in Makpetrol. In turn, Makpetrol AD owns 35% stake in OILKO as well, meaning that both companies are invested in each other. No other company or individual owns more than 5% share in Makpetrol, meaning that their ownership is not published. Ultimately, the share of publicly traded stock is ambiguous, as OILKO and Makpetrol's percentages of private owners to public stockholders is unclear.

	3 Radio Metropolis	Metropolis Radio Network	Darko Gelev	50.04
			Mile Gjosevski	49.96
	4 Macedonian Radio I	Government of North Macedonia		100
	5 Radio Bubamara	Trade Broadcasting Company - Bubamara LLC	Ranko Petrovic	100
Online	1 Time.mk	Tajm-Borg LLC	Igor Trajkovski	100
	2 Sitel.com.mk	Monteko LLC	Goran Ivanovski	100
	3 kajgana.com	Kajgana Media LLC	Darko Lazarevski	<i>Unknown</i>
			Marjan Lazarevski	<i>Unknown</i>
			Dejan Petkovski	<i>Unknown</i>
			Darko Stoilevski	<i>Unknown</i>
	4 centar.mk	Sky Press Ltd	<i>Unknown</i>	<i>Unknown</i>
	5 tv21.tv	Company 21	Aferdita Saraçini Kelmendi	60
			Eugen Saracini	20
			Florin Kelmendi	10
Xheraldina Vula			10	

Results

Television

Television remains the most popular news medium in North Macedonia.⁸ The top most watched television channels consist of only private television channels, many of which are ultimately owned by larger joint stock companies and publicly traded corporations. For example, Telma TV is owned by Makpetrol AD, the largest oil distributor in North Macedonia, which trades on the Macedonian Stock Exchange. Similarly, a number of joint stock companies, including Makosped JSC, Technometal Vardar Inc, and Evropa Inc, own minority shares in TV Alfa. This complex ownership structure appears reminiscent of Western media ownership, with multiple independent minority shareholders and public corporations.

⁸ Macedonia National Public Opinion Poll." International Republican Institute. Published June 16, 2021.

However, despite TV Alfa's outwardly Western ownership structure, foreign owners control the television outlet. Peter Schatz, a Hungarian media executive and the majority shareholder of TV Alfa, is directly connected to Hungarian Prime Minister Viktor Orban's right-wing Fidesz Party. TV Alfa is aligned with the conservative VMRO-DPRO party, and Schatz's acquisition of TV Alfa in 2017 is a potential way for the right-wing Fidesz Party to bolster conservative ideologies in North Macedonia.⁹ Notably, the Government of North Macedonia charged Schatz's CHS Invest Group with tax evasion in 2021, highlighting the role of foreign corruption in the Macedonian media market.¹⁰

For television outlets with individual owners or families of owners, TV Sitel, Kanal 5, and TV Alsat-M round out the top television outlets in North Macedonia. TV Sitel is owned by soft-drink company Monteko LLC, wholly owned by Goran Ivanovski, the son of former Socialist Party of Macedonia leader and Member of Parliament Ljubisav Ivanov-Dzingo. Similarly, Kanal 5 is owned by Emil Stojmanov, the son of Member of Parliament and former leader of VMRO-DPRO Boris Stojmanov.

Notably, the Government of North Macedonia in 2012 instructed these two outlets to comply with the 2005 Law on Broadcasting Activity, which prevents the ownership of media outlets by the families of politicians. For TV Sitel, Ljubisav Ivanov-Dzingo retired from his parliamentary position to avoid prosecution; however, he was able to retain his status as leader of the Socialist Party of Macedonia.¹¹ For Kanal 5, a reportedly undisclosed sale of the television outlet occurred in 2012; however, according to recent Agency for Audio and Audiovisual Media reports, Emil Stojmanov is still the owner of Kanal 5.¹² Finally, TV Alsat-M is owned by the Velija family, divided into portions between the children of Alsat-M founder and Albanian media mogul Vebi Velija following his death in 2009.

⁹ Jovanovska, Maja, Tamas Bodoky, and Aubrey Belford. "Right-Wing Hungarian Media Moves Into the Balkans." OCCRP. Published May 9, 2018. <https://www.occrp.org/en/spooksandspin/right-wing-hungarian-media-moves-into-the-balkans>

¹⁰ "The company-owner of Alfa TV accused of tax evasion." Sloboden Pecat. Published April 1, 2021. <https://www.slobodenpecat.mk/en/firmata-sopstvenik-na-tv-alfa-obvineta-za-danochno-zatajuvane/>

¹¹ Petkovska, Biljana. "Ownership and Financial Models of the Most Influential TV-Channels in Macedonia, Croatia, and Slovenia." Macedonian Institute for Media: Skopje, 2021. https://mim.org.mk/attachments/article/1035/Ownership%20and%20financial_models%20of%20the%20most%20influential%20TV%20channels.pdf

¹² Agency for Audio and Audiovisual Media Services. "Report on Media Ownership." last edited June 2017. <https://avmu.mk/wp-content/uploads/2017/06/REPORT-ON-MEDIA-OWNERSHIP.pdf>

In contrast to the complex and diverse ownership of Telma TV, it is clear that other top television channels are at greater risk of political capture, as the sons of two party leaders own full stakes in top television outlets. In addition, while the laws on media ownership in North Macedonia are largely comprehensive, enforcement of the laws is not, as in the case of Kanal 5. Additionally, foreign influence is present in the Macedonian television sector, such as Hungarian ownership of TV Alfa.

Print

Print media ownership in North Macedonia follows a similar pattern to television, as private and foreign owners dominate the top five outlets. The most-circulated outlet in North Macedonia is Sloboden Pečat, owned by Free Press LLC. Vladimir Galjak, a prominent Serbian lawyer, and Miroslav Jovanovic, a Macedonian businessman, each own equal portions of Free Press LLC. Večer, the next most read outlet, is owned by Saso Bogdanovski, a Macedonian businessman. Little information outside of their ownership history is available for Jovanovic or Bogdanovski. Nezavisen Vesnik is part of the Independent Balkan News Agency network, which operates in many Balkan countries and is owned by two Greek citizens, Spiros Sideris, founder and editor-in-chief of IBNA, and Nikolaos Fragopulos. Koha is an Albanian daily newspaper, owned by two ethnic Albanian journalists in North Macedonia, Arben Ratkoceri and Lirim Dullovi.

The fourth-most read outlet, Nova Makedonija, is wholly owned by Repro One Ltd, a company registered in the British Virgin Islands without a named shareholder. However, in 2021, the British Virgin Islands mandated that all foreign entities registered there must name a final owner. After 22 years of unnamed ownership, former Deputy Prime Minister Mincho Jordanov was revealed to be the owner of Repro One Ltd, which owns companies in construction, real estate, and media.¹³

Like the television sector, foreign private owners play a role in print media, with investors from Greece and Serbia owning shares in top print outlets. Additionally, hidden ownership (similar to that of some top television outlets) can still be found in

¹³ "Минчо се пријави како сопственик на офшор-фирма со огромен имот." Fokus Media. Published May 7, 2021. <https://fokus.mk/mincho-se-prijavi-kako-sopstvenik-na-ofshor-firma-so-ogromen-imot/>

the Macedonian print media space. Hidden and foreign owners create potential vulnerabilities for Russian influence in both Macedonian print media and television.

Radio

Unlike television and print, top Macedonian radio stations are fully owned by domestic actors. Most top radio stations are privately owned, with the exception of state-owned Macedonian Radio 1. The top radio station in North Macedonia is Antena 5, a contemporary hit music station owned by co-founders Zoran “DJ Dynamite” Petrov, Marjan Gusev, and Kosta Janevski. The next top outlet, Kanal 77, is a news station owned and founded by GBC Communications LLC, wholly owned since 2013 by Viktor Gavrilov. Kanal 77 sometimes rebroadcasts Radio Free Europe segments.

The final two outlets are Radio Metropolis, owned by executive director Darko Gelev and Mile Gjosevski, and Radio Bubamara, owned by station director Ranko Petrovic. Both stations mostly broadcast music. AidData researchers found no indications of hidden ownership or foreign influence, with the exception of some rebroadcasts of Radio Free Europe, in Macedonian top radio outlets.

Online

Online outlets are not required to disclose their ownership in North Macedonia, obscuring who controls these channels. For example, the individual owner of Centar.mk is unknown, as are the breakdown of shareholder percentages for the owners of Kajgana.com. Nevertheless, some online outlets are more transparent than others.

The top visited online news outlet in North Macedonia is Time.mk, a news aggregation site owned and founded by Igor Trajkovski. A senior data scientist and researcher, Trajkovski created the site to draw headlines from all over the Internet. The second most-visited outlet is Sitel.com.mk, an online news site for TV Sitel whose ownership is discussed in the television section.

The third most-visited outlet is Kajgana.mk, co-founded and owned by Darko Lazarevski, Marjan Lazarevski, Dejan Petkovski, and Darko Stoilevski. Similar to Time.mk, Kajgana.mk is a web news portal and pulls from Macedonian-language

media. The site includes memes and gaming news in addition to regular news headlines, drawing a diverse audience.

Unlike online television channels or web portals, the fourth most-visited website, the online tabloid Centar.mk, does write and analyze its own reporting. Owned by the opaque Sky Press Ltd, Centar.mk, like many online tabloids, reports mostly on healthcare and pop culture, in addition to some political news.

Finally, RTV 21, an Albanian-language television station broadcasting from Pristina, Kosovo, has one of the top visited news sites in North Macedonia. Widely viewed by the ethnic Albanian population in North Macedonia, TV21.tv was created by Aferdita Saracini Kelmendi, her husband Florin Kelmendi, and her brother Eugen Saracini. Xheraldina Vula also owns a minority share in the company. The only apparent foreign influence in top online outlet ownership comes from ethnic Albanians in Kosovo. As noted before, there is a clear trend of foreign owners in the Macedonian media market, as well as some opaque ownership structures, highlighting potential vulnerabilities to foreign malign influence.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of North Macedonia. The collected data highlight two trends in Macedonian media. First, Macedonian media ownership is generally transparent, though some risk of political capture exists. Second, while no owners have Russian ties, the Macedonian media market has some clear vulnerabilities to Russian influence.

Due to the public business register and reports from the Agency for Audio and Audiovisual Media Services, media ownership in North Macedonia is mostly transparent. Despite this transparency, there are some instances of political capture of the media, such as the children of politicians owning television stations or former Deputy Prime Minister Mincho Jordanov's ownership of media outlets through companies hidden in the British Virgin Islands. Additionally, online outlets do not have to report their ownership to the government, leading to opaqueness and potential vulnerabilities in media ownership online. While media transparency laws in North

Macedonia are largely comprehensive, enforcement of these laws is not, leading to a greater risk of hidden ownership with opportunities for political capture by forces foreign or domestic, particularly in the less transparent online mediums.

None of the top media owners in North Macedonia have clear ties to the Russian government. However, the significant presence of foreign ownership, including from Hungary, Kosovo, Greece, and Serbia, highlights a potential entry point for Russian influence. Openness to foreign ownership, coupled with the aforementioned trend of hidden ownership, provides potential vulnerabilities for Russian ownership in North Macedonia. Additionally, Russian state-owned media have a moderate presence in North Macedonia, with broadcasts of five state-owned television outlets available in the country. While Russia's international broadcasting is not highly viewed, it offers some opportunity to directly influence the Macedonian population. Furthermore, online television and web portals that grab headlines from all over the Internet are widely consumed in North Macedonia and Russian state-owned articles pulled through these outlets could offer a third channel of influence.

In sum, North Macedonia has some openings for Russian influence. While there are five present Russian state-owned outlets in North Macedonia, the potential repurposing of Russian state-owned content by local news aggregators allows Kremlin narratives to directly influence the Macedonian public. In addition, the dominance of foreign ownership and ownership by political elites provides vulnerabilities for potential Russian ownership or influence.

Montenegro: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	9
Radio.....	10
Online.....	12
Conclusion.....	13

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Montenegrin media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Montenegro's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

In August 2020, the Montenegrin government passed the new Media Law which enacted legal requirements for increasing ownership transparency.¹ Prior to that time, data on media ownership was limited, and many hidden owners controlled the media landscape through proxies.² While this new law has not yet been widely enforced and some hidden owners persist, the law is a step in the right direction for increasing transparency.³ Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at media ownership in Montenegro.

¹ Smiljanic, Veljko and Bojan Vuckovic. "Revising the Regulatory Environment for Media in Montenegro." Karanovic and Partners. Published September 16, 2020.

<https://www.lexology.com/library/detail.aspx?g=1af28765-3e3e-4095-bf64-d73ecbf96a54>

² "Montenegro 2019: Media Sustainability Index." International Research and Exchanges Board. Published 2020.

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-montenegro.pdf>

³ Vukovic, Dragoljub and Daniela Brnic. "Monitoring Media Pluralism in the Digital Era: Montenegro." European University Institute. Published July 2021.

https://cadmus.eui.eu/bitstream/handle/1814/71967/montenegro_results_mpm_2021_cmpf.pdf?sequence=1&isAllowed=y

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.⁴ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Montenegro, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We primarily used cross-country sources when available (e.g., Alexa⁵), as well as survey data, media watchdog sources, media articles, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Montenegro as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insight into potential channels for foreign influence of the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Montenegro's media landscape is via Russian state-owned media (see Table 1). Only two of the eleven Russian state-owned media outlets we tracked have a physical presence in Montenegro, which provides the Kremlin with a weak channel to directly communicate with, and ultimately influence, Montenegrin citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a basic footprint of Russian state-owned media presence in Montenegro, but does not speak to how well-consumed each outlet is by Montenegrin citizens.

⁴ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

⁵ Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Montenegro, 2021

Television		Print		Radio		News Agency	
Russia I	✓	Rossiyskaya Gazeta	✗	Sputnik	✗	TASS	✗
Russia 24	✗					Sputnik	✗
Russia K	✗						
RTR-Planeta	✗						
TV Centre	✗						
Channel One	✗						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and the presence of pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Montenegro by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. According to a NATO study, television and online outlets are the top consumed mediums for information in Montenegro and are therefore likely more influential, while radio and print media are less consumed.⁶ While we make no claims about the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of two Russian state-owned media outlets in

⁶ Svetoka, Sandra and Tihomira Doncheva. "Russia's Footprint in the Western Balkan Information Environment: Susceptibility to Russian Influence." NATO Strategic Communications Centre of Excellence. Published October 2021. <https://stratcomcoe.org/publications/russias-footprint-in-the-western-balkan-information-environment-susceptibility-to-russian-influence/216>.

Montenegro, none of the tracked Russian state media appears in the top five outlets for any medium.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Montenegro. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁷

Table 2: Top Montenegrin media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	TV Vijesti	Dan	Radio Crne Gore (RCG) (Radio Montenegro)	vijesti.me
2	TVCG	Vijesti	Radio Antena M	cdm.me
3	Nova (formerly TV Pink)	Pobjeda	Atlas Radio (RTV A1)	portalanalitika.me
4	Pink M	Dnevne Novine	Radio D	rtcg.me
5	Prva TV	Blic Crna Gora (Blic Montenegro)	Radio 98 (R98)	in4s.net

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Montenegrin outlets mirror the results of open-source data collection by AidData researchers. Additional outlets excluded from this top outlet list but ranked highly by local experts include the online outlets Antena M (antenam.net), Montenegrin News Agency (mina.news), and PCNEN (pcnen.com).

⁷ Television, Print and Radio rankings: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: IREX's Media Sustainability Index (2019), NATO Strategic Communications Centre for Excellence Russia's Footprints report (2021), IRI's Public Opinion in Montenegro survey (2017), and Digital Forensic Center's public opinion survey (2021). Online rankings: Alexa, April 2021.

Media Ownership

Table 3 lists the ownership information of top Montenegrin media outlets by medium (television, newspaper, radio, and online). Following the passage of the new Media Law in August 2020, media outlets are required to publicly report all owners with greater than a five percent share in the outlet. The new Media Law requires transparency of online outlets, in addition to traditional print and broadcasting outlets. However, the government has not widely enforced the law as of early 2021, which means that ownership transparency has not yet caught up to the new legal requirements in Montenegro.⁸ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff has devised a four-point scale, color-coded shades of red, to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Montenegro has one outlet with suspected Russian ties, the online news outlet IN4S, which acts as a consistent reposter of Kremlin-owned Sputnik Srbija. No known relationship between IN4S and the Russian government exists, but the continued use of Russian state media articles in Montenegro implies a potential relationship. State-owned media is color-coded blue in the table below; as such, IN4S is highlighted in red to denote “suspected Russian ties” and four state-owned outlets are highlighted in blue below to denote state ownership.

Table 3: Ownership of top Montenegrin media outlets by share

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
				Media Development Investment Fund	30.725
Television	1	TV Vijesti	Daily Press LLC	Filip Ivanovic	22.05
				Katarina Perovic	22.05
				Stefan Mitrovic	18.175

⁸ Vukovic, Dragoljub and Daniela Brnic. “Monitoring Media Pluralism in the Digital Era: Montenegro.”

		Marijana Bojanic	7
2 TVCG	Radio i Televizija Crne Gore		100
		BC Partners	52.3
		Senior management	38.5
3 Nova (TV Pink)	United Group	Kohlberg Kravis Roberts (KKR)	6.8
		EBRD	2.4
4 Pink M	Pink International Company	Zeljko Mitrovic	100
5 Prva TV	Kopernikus Corporation	Srdjan Milovanovic	100
		Mladen Milutinović	50
1 Dan	Jumedia Mont LLC	Slavica Jovanović	25
		Vojin Jovanović	25
		Media Development Investment Fund	30.725
2 Vijesti	Daily Press LLC	Filip Ivanovic	22.05
		Katarina Perovic	22.05
		Stefan Mitrovic	18.175
		Marijana Bojanic	7
3 Pobjeda	Media Nea	Petros Stathis	99.9
		Boris Darmanović	0.01
4 Dnevne Novine	Savana Group	Veselin Mijač	100
		Ringier Family	37.5
	Ringier Group	Marc Walder	
		La Mobilere	12.5
		Kohlberg Kravis Roberts (KKR)	17.8
5 Blic Crna Gora (Blic Montenegro)		Friede Springer	11.3
		Mathias Döpfner	11
	Axel Springer	CPPIB	6.5
		Axel Sven Springer	2.5
		Ariane Melanie Springer	0.5
		Friede Springer Foundation	0.5

Radio	1	Radio Crne Gore (RCG) (Radio Montenegro)	Radio i Televizija Crne Gore	100	
	2	Radio Antena M	Antena M LLC	Darko Sukovic	100
	3	RTV A1	Atlas Group	Dusko Knezevic	100
	4	Radio D	M.D. Company LLC	Ljiljana Martinovic	50
				Dejan Raznatovic	50
	5	Radio 98 (R98)	Radio i Televizija Crne Gore	100	
Online			Media Development Investment Fund	30.725	
	1	vijesti.me	Daily Press LLC	Filip Ivanovic	22.05
				Katarina Perovic	22.05
				Stefan Mitrovic	18.175
				Marijana Bojanic	7
	2	cdm.me	Media Nea	Petros Stathis	99.9
				Boris Darmanović	0.01
	3	portalanalitika.me	Portal Press LLC	Petros Stathis	100
	4	rtcg.me	Radio i Televizija Crne Gore		100
	5	in4s.net	IN4S	Gojko Raičević	100

Results

Television

Television is the most popular news medium in Montenegro, with 67 percent of Montenegrins watching television daily.⁹ While the second most-watched television outlet in Montenegro is the state-owned Television Crne Gore (TVCG), the remaining four most-watched television channels are all privately run and are fully or partially owned by media companies from outside of Montenegro.

⁹ Svetoka, Sandra and Tihomira Doncheva. "Russia's Footprint in the Western Balkan Information Environment: Susceptibility to Russian Influence." NATO Strategic Communications Centre of Excellence. Published October 2021.

The most popular television station in Montenegro is TV Vijesti.¹⁰ In May 2008, with the help of US-based Media Development Investment Fund, Vijesti newspaper launched a nationwide television station in Montenegro. While the owners of Vijesti have changed many times since the newspaper's original launch in 1996, the current Montenegrin owners include journalist Filip Ivanovic, Vijesti co-founder Katarina Perovic, Stefan Mitrovic, and CEO of TV Vijesti, Marijana Bojanic. In addition to these domestic owners, the largest single shareholder of Vijesti is the Media Development Investment Fund, a US-based media investment non-profit with financing from George Soros' Open Society Foundation. Prior to December 2020, TV Vijesti was often critical of the former Djukanovic regime; however, following the 2020 parliamentary elections, Vijesti has been highly supportive of the newly elected opposition government.¹¹

The third most-watched television station is Nova M, formerly known as TV Pink until owner Zeljko Mitrovic sold the outlet to the United Group in 2018. The United Group is owned by a coalition of Western businesses, including British-owned BC Partners, US-owned Kohlberg Kravis Roberts (KKR), and a minority share from the European Bank for Reconstruction and Development (EBRD). Interestingly, Mitrovic, a Serbian businessman, reinstated a new Pink M channel in Montenegro in October 2018, competing against his former company. Currently, the new Pink M is the fourth-most watched television outlet in Montenegro.

Prva TV is the fifth-most watched television station in Montenegro. Srdjan Milovanovic's Kopernikus Corporation owns Prva TV, a popular outlet in Serbia. Milovanovic controls a large share of media outlets in the Western Balkans, including online outlet B92, television channels O2 and Prva TV, and radio station Play Radio (formerly B92 Radio).

Four of the top five television stations in Montenegro are either fully or partially owned by media companies from outside Montenegro. Serbian media moguls Zeljko Mitrovic and Srdjan Milovanovic own Pink M and Prva TV respectively, while Western owners hold considerable shares in Nova M and TV Vijesti. According to a 2021 NATO StratCom Report, Montenegrins perceive Serbia to be the greatest foreign security

¹⁰ "Public Opinion Survey – Media Literacy and the Citizens of Montenegro." Digital Forensics Center.

¹¹ USAID has informally confirmed Vijesti's pro-government bias in consultation with AidData. AidData staff could not externally confirm the validity of this statement.

threat to Montenegro, which may be due in part to significant Serbian ownership of top Montenegrin outlets.¹²

Print

While print media has declining readership in Montenegro, the owners of most top newspapers also own top outlets in other mediums. The owners of most-read print outlet Dan, formerly owned Radio D. The owners of the second most-read outlet, Vijesti, also own Vijesti TV and the Vijesti online news portal. Petros Stathis, the main owner of third most-read outlet Pobjeda, also owns top online outlets Portal Analitika and Cafe del Montenegro (CdM).

Founded by Dusko Jovanovic in 1998, Dan is currently the most-read newspaper in Montenegro. Initially an opposition newspaper closely tied to the Socialist People's Party, Dan was largely critical of the Djukanovic government. In 2004, founder and editor-in-chief Dusko Jovanovic was assassinated.¹³ Half of Jovanovic's shares were split between his wife, Slavica Jovanovic, and his son, Vojin Jovanovic. Mladen Milutinovic, the current editor-in-chief of Dan, received the remaining half of the shares and remains the head of the Dusko Jovanovic Foundation.

Vijesti, the second most-read newspaper, is owned by the same owners as TV Vijesti and, like Dan, is considered critical of the incumbent government. While initially a pro-Djukanovic newspaper, following the 2006 independence referendum from Serbia, Vijesti developed a more critical stance against the long-time leader.

Pobjeda, the third most-read newspaper in Montenegro, is a former state-run newspaper. Purchased by Greek business tycoon Petros Stathis in 2014, the newspaper remained pro-Djukanovic government, and Stathis was considered a "strategic partner" of the Montenegrin regime.¹⁴ In November 2014, as Pobjeda was on the verge of bankruptcy, Stathis purchased the pro-government media conglomerate

¹² Svetoka, Sandra and Tihomira Doncheva. "Russia's Footprint in the Western Balkan Information Environment: Susceptibility to Russian Influence." NATO Strategic Communications Centre of Excellence. Published October 2021.

¹³ "Dusko Jovanovic." Committee to Protect Journalists. Last updated: March 2021. <https://cpj.org/data/people/dusko-jovanovic/>

¹⁴ Freedom House. Nations in Transit 2018 - Montenegro. Published April 11, 2018. <https://www.refworld.org/docid/5b3cc278a.html>.

Media Nea through his investment firm First Financial Holdings. Stathis owns 99.99 percent of Pobjeda through Media Nea, but allowed the CEO and founder of Media Nea, Boris Darmanovic, to own the remaining 0.01 percent of the newspaper.

Stathis and Darmanovic also owned the fourth most-read newspaper in Montenegro, Dnevne Novine, until Veselin Mijac purchased the newspaper in early 2021. A Montenegrin citizen, Mijac has lived in Sweden for decades, eventually establishing the Swedish company Savana Group. Through Savana Group and negotiations with Stathis, Mijac purchased Dnevne Novine.

Most sources report that Montenegro only has four daily newspapers: Dan, Vijesti, Pobjeda, and Dnevne Novine.¹⁵ However, in the 2021 AidData survey of local experts, Blic Crna Gora, the Montenegrin branch of the Serbian outlet Blic, was ranked the fifth most-read newspaper in Montenegro. Blic is owned by Swiss publishing house, Ringier Axel Springer Media AG, in turn owned by the Ringier and Springer families, as well as the aforementioned US owners of Nova M, Kohlberg Kravis Roberts (KKR). In sum, the declining print media sector in Montenegro has given way to foreign ownership, such as Greek owner Petros Stathis, Western owners in Vijesti and Blic, and Swedish-Montenegrin owner Veselin Mijac.

Radio

Radio stations in Montenegro seem to be more locally owned than other mediums in Montenegro. The government of Montenegro owns two of the top five radio stations: the most-listened radio station, Radio Crne Gore, and the fifth-most listened radio station, Radio 98. The remaining outlets are all private with Montenegrin owners.

The second-most popular radio station is Radio Antena M, owned by Montenegrin journalist Darko Sukovic. Sukovic is CEO, owner, and the editor-in-chief of Radio Antena M and online Portal Antena M. Sukovic has no apparent ties to either the Montenegrin government or foreign governments.

¹⁵ Freedom House. Nations in Transit 2018 - Montenegro. Published April 11, 2018. <https://www.refworld.org/docid/5b3cc278a.html>.

The third-most popular radio station is RTV A1 (formerly Atlas Radio), owned by Montenegrin businessman Dusko Knezevic. Knezevic is the founder and President of Atlas Group Corporation (AGC), a major conglomerate owning financial services, media outlets, and banks in Southeastern Europe, the United Kingdom, and Russia. Knezevic is one of the wealthiest Montenegrins, and holds a pro-Western and pro-NATO stance despite his business dealings in Russia.¹⁶ In January 2019, a video surfaced of Knezevic handing a \$100,000 check to the Mayor of Podgorica, supposedly to support the ruling Democratic Party of Socialists of Montenegro (DPS) re-election bids.¹⁷ As a result of the perceived corruption, mass protests erupted in Montenegro calling on President Milo Djukanovic and other DPS leaders to step down. In response to the protests, Montenegrin authorities filed money laundering charges against Knezevic and the Mayor of Podgorica, though no early elections were called.¹⁸ Knezevic supposedly lives in London now, but remains the sole owner of RTV A1 through Atlas Group.¹⁹

The fourth-most popular radio station is Radio D, co-owned by Ljiljana Martinovic and Dejan Raznatovic. Radio D was formerly owned by the owners of Dan newspaper, Mladen Milutinovic, Slavica Jovanovic, and Voljn Jovanovic. However, the Electronic Media Agency of Montenegro ruled in 2013 that the owners of Dan had to sell their stakes in Radio D to prevent media concentration. This ruling was regarded as potentially politically motivated, as Dan was considered to be an opposition newspaper.²⁰ As a result of this government-forced sale, Martinovic and Raznatovic are the owners of Radio D, while Milutinovic remains the "authorized representative" of the radio station. Radio stations in Montenegro are owned exclusively by local owners and

¹⁶ Freeman, Colin. "Montenegro Tycoon fights to end 29-year reign of 'Milo the Czar' from London exile." Telegraph UK. Published August 29, 2020. <https://www.telegraph.co.uk/news/2020/08/29/montenegro-tycoon-fights-end-29-year-reign-milo-czar-london/>

¹⁷ Tomovic, Dusica. "Montenegro Protesters Demand President's Resignation." Balkan Insight. Published February 23, 2019. <https://balkaninsight.com/2019/02/23/montenegro-protesters-demand-presidents-resignation/>

¹⁸ Kajosevic, Samir. "Montenegro Capital's Ex-Mayor Indicted for Money-Laundering." Balkan Insight. Published September 24, 2021.

<https://balkaninsight.com/2021/09/24/montenegro-capitals-ex-mayor-indicted-for-money-laundering/>

¹⁹ Freeman, Colin. "Montenegro Tycoon fights to end 29-year reign of 'Milo the Czar' from London exile."

²⁰ Cadenovic, Ivan and Mila Radulovic. "Montenegro: double standards in regulating media concentration." Centro per la Cooperazione Internazionale. Published April 27, 2017. <https://www.cci.tn.it/eng/Areas/Montenegro/Montenegro-double-standards-in-regulating-media-concentration-179589>

appear to have fewer potential channels for foreign influence than other traditional mediums.

Online

Many of the same owners of top outlets in Montenegro own the most popular online outlets as well. Petros Stathis, the Greek owner of top newspaper Pobjeda, also owns the second and third most-visited online outlets in Cafe del Montenegro (CdM) and Portal Analitika, respectively. Vijesti is the most popular online outlet through the portal vijesti.me. The owners of Daily Press LLC, the parent company of Vijesti, control the television, the newspaper, and the online outlet. Finally, the government of Montenegro owns rtcg.me, the fourth most-visited online outlet.

Gojko Raicevic, the owner and founder of IN4S news portal, is the only new name in the list of owners of top online outlets in Montenegro. IN4S is the fifth most-visited outlet in Montenegro, and is outwardly pro-Russian. According to analysis conducted by NATO, IN4S is the largest republisher of content from Sputnik Srbija in Montenegro. Sputnik Srbija is the Serbian version of Russian state-owned media Sputnik, and IN4S often exactly duplicates or repurposes content from the Russian state media site.²¹ As a result, IN4S provides an indirect but potent channel for Russian content and narratives to reach the Montenegrin population.

Due to the popularity of online outlets in Montenegro (second in consumption only to television), the content and ownership of online outlets is particularly important.²² The majority of top online outlets in Montenegro are, like television, foreign-owned. In addition, the popularity of IN4S, a clear channel for Russian state media to further narratives in Montenegro, highlights subtle ways that Russia can influence the Montenegrin public.

²¹ Svetoka, Sandra and Tihomira Doncheva. "Russia's Footprint in the Western Balkan Information Environment: Susceptibility to Russian Influence." NATO Strategic Communications Centre of Excellence. Published October 2021.

²² "Public Opinion Survey – Media Literacy and the Citizens of Montenegro." Digital Forensics Center.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of Montenegro. The collected data highlight three trends in Montenegrin media ownership. First, many media outlets in Montenegro are owned by foreign owners. Second, Russian narratives have channels for subtle but potent influence in Montenegro. Third, media transparency and ownership in Montenegro is dynamic and appears transitional.

Montenegrin top media outlets are mostly centered around foreign owners. Of the most-consumed mediums, television and online, eight of the ten measured television and online outlets are foreign-owned and many of these foreign owners own multiple top outlets in Montenegro. For example, Greek businessman Petros Stathis owns two top online outlets and a top newspaper outlet, and Serbian media mogul Srdjan Milovanovic owns a top television station. As such, Montenegrin media is flush with foreign influence coming from Serbia, Russia, Europe, and the United States. This openness to foreign ownership in top media could lead to a potential channel for Russian influence, as there are few norms preventing Russian owners from purchasing outlets in Montenegro.

While there is no direct Russian ownership of top outlets in Montenegro, Russian narratives in Serbian and Montenegrin outlets are present. Montenegrin top online outlet IN4S is a major republisher of Russian state media content, as are some Serbian-owned online and television outlets. These channels provide the Russian government with a potent channel of influence, as Kremlin narratives can be disguised as local insights.

Lastly, with the passage of the new Media Law in 2020, Montenegro is taking steps toward increased media transparency and ownership. However, the Montenegrin government's unequal enforcement of many components of this law, in combination with recent developments in the media landscape, has created a rapidly changing media environment. Many media outlets, such as Nova M and Vijesti, look more Western in nature with a plurality of owners from different backgrounds. Other ownership structures, such as RTV A1 and Prva TV, are still based on older models of

control, with political and economic elites from both Montenegro and abroad controlling the media. If the law becomes applied more evenly, there is potential for Montenegrin media ownership to diversify to combat corruption and foreign influence, though the steps for this have been preliminary at best.

In sum, Montenegro has some channels for Russian influence. While there are only two Russian state-owned outlets present in Montenegro, the repurposing of Russian state-owned content by local outlets allows Kremlin narratives to directly influence the Montenegrin public. In addition, the dominance of foreign ownership and ownership by political elites provides vulnerabilities for potential Russian ownership or influence in Montenegro.



Serbia: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	4
Results.....	6
Television.....	6
Print.....	8
Radio.....	9
Online.....	9
Conclusion.....	10

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Serbian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Serbia's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

On the surface, Serbian media ownership appears transparent and ownership information for top outlets is usually easy to track down. However, much of this ownership information that is available is out of date, incorrect, or deceptive, in that one person may be the legal owner, but the outlet is de facto controlled by someone else. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Serbia.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.¹ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Serbia, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Alexa²), as well as Zenith, Serbian business registries (apr.gov.rs), business profiles, survey data, media watchdog sources (including the Media Ownership Monitor Serbia), and other open source data. This profile includes data for Serbia proper and does not separate out any information that may differ in breakaway regions such as Vojvodina.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Serbia as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Serbia's media landscape is via Russian state-owned media (see Table 1). Seven of the eleven Russian state-owned media outlets we tracked have a physical presence in Serbia, which provides the Kremlin with a relatively strong channel to directly communicate with, and ultimately influence, Serbian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Serbia, but does not speak to how well-consumed each outlet is by Serbian citizens.

² Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Serbia, 2021

Television		Print		Radio		News Agency	
Russia 1	✗	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✓
Russia 24	✓					Sputnik	✓
Russia K	✗						
RTR-Planeta	✓						
TV Centre	✗						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Serbia by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Notably, none of the Russian state-owned outlets (previously identified in Table 1) were among those with the highest market share.

AidData used a weighted average of media consumption survey rankings from 2017 to present to determine the top media outlets in Serbia. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of

most consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.

Table 2: Top Serbian media outlets ranked by overall consumption³

Rank	Television	Print	Radio	Online
1	RTS 1	Blic	Radio S	Blic.rs
2	PINK	Informer	Radio Beograd	Kurir.rs
3	N1 TV	Vecernje novosti	Play Radio	B92.net
4	PRVA	Kurir	Hit FM Radio	Telegraf.rs
5	Happy TV	Alo!	Radio S2	Alo.rs

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Serbian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the print outlet Politika, radio station TDI, and online outlet Informer.rs.

Media Ownership

Table 3 lists the ownership information of top Serbian media outlets by medium (television, newspaper, radio, and online). Serbian media ownership is quite diverse, in that several types of ownership are present in the country. While some outlets are transparent about their ownership, others are not registered and have changed hands without informing the public. Serbia does have a disclosure law requiring ownership to be registered, but it is rarely enforced.⁴ Some top outlets are foreign owned. In one instance we could not find ownership data and have listed this in the table below as

³ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: Zenith (2018), NATO Strategic Communications Centre of Excellence’s “Russia’s Footprint in the Western Balkan Information Environment” reports (2021), IREX Media Sustainability Index (2019), Centar za slobodne izbore i demokratiju’s “Public Perceptions of the International Position of Serbia” report (2021), Gemius (2021), and Media Landscapes (2017).

Online: Alexa (2021)

⁴ IREX (2019) *Media Sustainability Index: Serbia*. pg. 9.

“unknown.” Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Serbian state-owned media and public broadcasters are color-coded blue. In Serbia, no owners had suspected or known ties to the Russian government, and no top outlets had direct Russian ownership. As such, this profile has no red color-coded outlets and two designations of state-owned media.

Table 3: Ownership of top Serbian media outlets by share

 No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)	
Television	1	RTS 1	Radio Television Serbia (RTS)		100	
	2	Pink TV	Pink International	Zeljko Mitrovic	100	
	3	N1 TV	United Group	BC Partners	52.3	
				"Senior management"	38.5	
				Kohlberg Kravis Roberts (KKR)	6.8	
				EBRD	2.4	
	4	PRVA	Kopernikus Corporation	Srdjan Milovanovic	100	
	5	Happy TV	Ideogram	Vladana Cirovic	100	
	Print	1	Blic	Ringier Group	La Mobilere	12.5
					Ringier Family	37.5
Marc Walder						
Kohlberg Kravis Roberts (KKR)					17.8	
Axel Springer ⁵				CPPIB	6.5	
				Friede Springer	11.3	
				Mathias Döpfner	11	
				Axel Sven Springer	2.5	
Ariane Melanie Springer	0.5					

⁵ Shares are rounded to the nearest tenth.

			Friede Springer Foundation	0.5	
	2	Informer	Insajder Tim	Dragan Vucicevic	100
			Media 026	Boban Rajic	98.06
	3	Vecernje novosti	Beodragos	Unknown	1.94
	4	Kurir	Adria Media Group	Igor Zezelj	100
	5	Alo!	Dnevne Novine Alo	Sasa Blagojevic	100
Radio	1	Radio S	S Media Team	Ljubinka Andjelkovicis	100
	2	Radio Beograd 1	Radio Television of Serbia		100
	3	Play Radio	Kopernikus Corporation	Srdjan Milovanovic	Majority
	4	Hit FM Radio	Maxim Media	Milos Krdzic	100
	5	Radio S2	S Media Team	Ljubinka Andjelkovicis	100
Online				La Mobilere	12.5
			Ringier Group	Ringier Family	37.5
				Marc Walder	
				Kohlberg Kravis Roberts (KKR)	17.8
		1	Blic.rs	CPPIB	6.5
				Friede Springer	11.3
			Axel Springer	Mathias Döpfner	11
				Axel Sven Springer	2.5
				Ariane Melanie Springer	0.5
				Friede Springer Foundation	0.5
	2	Kurir.rs	Adria Media Group	Igor Zezelj	100
	3	B92.net	Kopernikus Corporation	Srdjan Milovanovic	100
	4	Telegraf.rs	Internet Group Ltd	Srecko Miodragovic	100
	5	Alo.rs	Dnevne Novine Alo	Sasa Blagojevic	100

Results

Television

Multiple owner types are present in Serbia's top consumed television outlets. Serbia's most-watched television channel is the state-owned RTS 1, which is run through the

public broadcasting service Radio Television Serbia. RTS also operates the second most-consumed radio station, Radio Beograd.

Pink TV, owned by Zeljko Mitrovic, is the second-most popular television channel. Mitrovic is believed to have maintained close ties with the ruling elite, including former President Slobodan Milosevic, in order to obtain a nationwide broadcasting frequency.⁶ Since 2014, Mitrovic's media company has received more than €10 million in loans from the State treasury, leading to allegations that it is being funded by the state.⁷

The third most popular television station in Serbia is N1 TV, owned by the United Group. United Group owns several other outlets in the region, including online outlet Nova.rs. The majority shareholder of this group of primarily foreign investors is British private equity firm BC Partners, while US-based Kohlberg Kravis Roberts (KKR) owns a minority share.

The fourth and fifth most consumed television outlets in Serbia are tied to Srdjan Milovanovic, whose brother, Zvezdan, is a senior official of the Serbian Progressive Party and is believed to be also involved in the business. Srdjan Milovanovic is the sole owner of both PRVA, along with another popular channel, O2.⁸ Milovanovic also loaned television outlet Happy a total of 4.8 million Euros in 2017, with shares in Happy as collateral. If the loan is not repaid on time, Milovanovic could become the owner of this network as well. Happy is currently owned by Vladana Cirovic, although informally controlled by Predrag "Peconi" Rankovic, who is tied to the Surcinski Klan, a Belgrade criminal group.⁹

In sum, Serbia's television sector appears to consist of a diverse mix of ownership types. However, while N1 TV is foreign owned, the rest of the top outlets are owned by the state government or have direct ties to political elites.

⁶ Media Ownership Monitor: Serbia, *Zeljko Mitrovic*.

⁷ "Serbia: Powerful private media company 'Pink' supported by State with more than €10 million," South East European Network for Professional Media, 14 June 2018, <https://seenpm.org/serbia-powerful-private-media-company-pink-supported-state-e10-mil/>.

⁸ Media Ownership Monitor: Serbia, *Srdjan Milovanovic*.

⁹ Media Ownership Monitor: Serbia, *Predrag Rankovic*.

Print

Ownership of top print media in Serbia is more diverse than in television. All of the top outlets have different owners, and the top news outlet is foreign-owned. The top-consumed outlet, and the only foreign-owned newspaper outlet on this list, is Blic, which is owned by Swiss publishing organization Ringier Axel Springer Media AG. Ringier Axel Springer Media owns several outlets in the region, including the Bosnian newspaper Euroblic.

The second most popular print outlet is Informer, which was founded by Dragan Vucicevic and gained popularity as an inexpensive tabloid.¹⁰ Informer's online outlet is also fairly popular in Serbia.

Third is Vecernje novosti, which was a state-owned outlet that was privatized a little over a decade ago. The outlet has changed hands several times over the last decade and is now majority owned by Boban Rajic through his company Media 026. Rajic owns the Coka group, which is a portfolio company that includes everything from trade to cardboard packaging to restaurants.¹¹ The minority stake of Vecernje novosti belongs to Beodragos, a small paper company with no public ownership information.

Kurir, the fourth-most read print outlet, is owned by Igor Zezelj, who acquired Adria Media Group in 2019.¹² Zezelj also is the owner of Mondo, another Serbian media company that was previously owned and operated by the state-run Telekom Srbija. The details of Adria Media Group's sale have not been made public, and it has been reported that Telekom continues to control Kurir even though Zezelj has denied this claim.¹³

¹⁰ Media Ownership Monitor: Serbia, *Dragan Vucicevic*.

¹¹ *Vecernje Novosti*, "Changes in the ownership structure of the Company news: Media 026 majority owner," November 15, 2019.

¹² Media Ownership Monitor: Serbia, *Adria Media Group*.

¹³ "Telekom alleged to control tabloid publisher," N1, 11 February 2020, <https://rs.n1info.com/english/news/a568576-telekom-alleged-to-control-tabloid-publisher/>.

Lastly, Alo! is owned by Sasa Blagojevic, who bought the outlet from Ringier Axel Springer Media in 2017. We were unable to find much information about Blagojevic, besides that he has worked for several years in the Serbian marketing space.¹⁴

While the print sector in Serbia appears to contain relatively diverse ownership types, not much is known about some owners, such as the Beodragos company or Sasa Blagojevic. Other outlets, like Kurir, may be obscuring their true ownership.

Radio

The most-listened to radio outlet in Serbia is Radio S, and its sister outlet Radio S2 is the fifth most-listened to outlet. Radio S is formally owned by Ljubinka Andjelkovicis, though it is commonly believed that her son, Zoran Andjelkovic, is in control of the company. Zoran Andjelkovic was previously the President of the Serbian Railroad and a member of Parliament.¹⁵

The second most consumed radio station is Radio Beograd. This publicly owned channel is operated by Radio Television of Serbia. Other individually owned radio outlets include Play Radio and Hit FM Radio. Play Radio is owned by Srdjan Milovanovic, the media mogul who also owns B92 and television station PRVA. Hit FM is owned by Milos Krdzic, who is believed to be friendly with the political elite.¹⁶ Krdzic also owns TDI Radio.

Online

Four of the five top online outlets are owned by individuals and companies already discussed in the preceding categories. Blic.rs is the online version of the newspaper Blic, owned by foreign media group Ringier Axel Springer Media. Kurir.rs is the online version of Kurir, owned by Igor Zezelj. B92.net is owned by Srdjan Milovanovic and is tied to Radio B92, along with the television outlets O2 and PRVA. Lastly, Alo! is owned by Sasa Blagojevic, who operates a print outlet of the same name.

¹⁴ Media Ownership Monitor: Serbia, *Sasa Blagojevic*.

¹⁵ Media Ownership Monitor: Serbia, *Zoran Andjelkovic*.

¹⁶ Media Ownership Monitor: Serbia, *Milos Krdzic*.

Telegraf.rs rounds out this list and is nominally owned by Srecko Miodragovic through the Internet Group Ltd. However, sources report that the real owner of Telegraf.rs is Serbian businessman Veselin Jevrosimovic, who owns the IT company Comtrade.¹⁷

Conclusion

In this brief, we have presented an overview of the domestic media environment of Serbia. The Kremlin's channels to exert malign influence via Serbian media appear at first to be relatively limited due to lack of Russian ownership. Russian state-owned media is not among the top consumed outlets in Serbia, and the Kremlin does not appear to have an overt ownership stake in the country's top media outlets. However, the re-purposing of Russian state-owned media content may occur frequently, often without direct citation of the source, in both domestic and foreign-owned outlets.¹⁸ However, the absence of a strong regulatory environment to mandate transparent disclosure of ownership of Serbia's media outlets means that we could be undercounting potential Kremlin linkages that are obscured from view.

While the top consumed outlets within each medium have low rates of ownership overlap, the ownership of top media outlets is fairly centralized across mediums to a handful of owners, many with ties to political elites or allegations of receiving explicit state funding. This centralization could mean that Serbia is vulnerable to receiving biased media information and provides an opening for a Russian-sympathetic owner to affect many mediums.

While many media companies in Serbia do share their business registrations or ascribe formal owners, the true control and ownership often belongs to a family member, usually with political ties. This opacity likely increases the vulnerability of Serbian citizens to potential bias in domestic reporting. This risk is acute, as the majority of domestic media outlets are connected to wealthy local business owners or political

¹⁷ Media Ownership Monitor: Serbia, Veselin Jevrosimovic.

¹⁸ "Russia's Footprint in the Western Balkan Information Environment," NATO Strategic Communications Centre of Excellence, October 2021, <https://stratcomcoe.org/pdfjs/?file=/publications/download/Russias-footprint-in-the-Western-Balkan.pdf?zoom=page-fit>.

elite, which tend to orient their reporting to appeal to a specific ethnic group or political party, rather than a broader and more diverse constituency. There are also instances, such as Kurir, where state-backed broadcasters may be controlling the media even when they are not listed as formal owners. Low transparency of both Serbia's media outlet ownership and the potential for repurposed content, creates vulnerability to influence by both the domestic political elites and Russia.

Tajikistan: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	3
Top Media Outlets.....	4
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	8
Radio.....	10
Online.....	11
Conclusion.....	13

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Tajik media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through the republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Tajikistan's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Most of Tajikistan's top media are controlled by the government. Although independent media have emerged at various times during the post-Soviet era, the number of independently owned outlets is dwindling.¹ The Tajik government, which operates in a closed political system,² has worked to shore up control of the entire sector.³ Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In

¹ Media freedom increased and the media opened up moderately just after independence from the Soviet Union, and then again in the years following the Tajik Civil War and post-9/11 era (Adinabay, Esfandiari. 2013. Changing media and politics in Tajikistan, pp. 7-10. Reuters Institute for the Study of Journalism, University of Oxford. URL:

<https://reutersinstitute.politics.ox.ac.uk/our-research/changing-media-and-politics-tajikistan/>.

² Freedom House. 2021. Nations in Transit 2021: Tajikistan. URL:

https://freedomhouse.org/country/tajikistan/nations-transit/2021#footnote14_b7amb8b, accessed March 18, 2022.

³ We highlight two recent developments. First, a government decree in 2019 states it has the right to regulate and control content broadcasted in television and radio no matter the outlet's owners. (US Department of State. 2019. Country Reports on Human Rights Practices: Tajikistan. URL:

<https://www.state.gov/reports/2019-country-reports-on-human-rights-practices/tajikistan/>, accessed March 18, 2022).

Second, a 2021 license rule requires licensed television and radio to work within "the framework of the country's unified policy in the information sphere" in addition to increasing the license fee (Committee to Protect Journalists. "New Tajikistan licensing rules restrict independent reporting, increase state fees." Published May 17, 2021. URL:

<https://cpj.org/2021/05/new-tajikistan-licensing-rules-restrict-independent-reporting-increase-state-fees/>, accessed March 18, 2022).

this profile, we begin to close this gap with an in-depth look at domestic media ownership in Tajikistan.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.⁴ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Tajikistan, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. Given the lack of cross-country sources, we largely relied on a 2021 AidData survey of experts in Tajikistan, as well as media watchdog sources and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Tajikistan as of 2021. This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

⁴ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

Russian Media Footprints

The most direct form of Kremlin influence in Tajikistan’s media landscape is via Russian state-owned media (see Table 1). Four of the eleven Russian state-owned media outlets we tracked have a physical presence in Tajikistan, which provides the Kremlin with a channel to directly communicate with, and ultimately influence, Tajik citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Tajikistan, but does not speak to how well-consumed each outlet is by Tajik citizens.

Table 1: Russian state-owned media in Tajikistan, 2021

Television		Print		Radio		News Agency	
Russia I	✗	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✓
Russia 24	✗					Sputnik	✓
Russia K	✗						
RTR-Planeta	✓						
TV Centre	✗						
Channel One	✗						
RT	✗						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Tajikistan by medium (e.g., television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. Television is the most consumed medium.⁵ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in Tajikistan. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a reasonable picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁶

Table 2: Top Tajik media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	TV Safina	Oila	Sadoi Dushanbe	News.tj
2	Televizioni Tojikiston ⁷	Jumhuriyat	Imruz	Khovar.tj
3	TV Jahonamo	Asia-Plus	Asia-Plus	Avesta.tj
4	TV Bakhoritston (TVB)	Sadoi Mardum	Vatan	Faraj.tj
5	Varzish TV	Minbari Halq	Tajikistan Radio	Pressa.tj

⁵ The Research Institute of Public Opinion/Internews. 2019. Media consumption and media and information literacy survey in the countries of Central Asia (Kazakhstan, Tajikistan, Uzbekistan), p. 20. URL: https://pdf.usaid.gov/pdf_docs/PA00X2HT.pdf, accessed March 18, 2022.

⁶ Television, print, radio, and online rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data and ranking information came from: IREX's Media Sustainability Index report (2019), Narzikulovych (2019), the Research Institute of Public Opinion (Nur-Sultan, Kazakhstan)/Internews (2019), Zerkalo (2018).

⁷ Formerly known as Shabakai Yakum.

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Tajik outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the television channels Russian Public Television (ORT) and the Russian state-owned RTR Planeta; the newspapers Faraj, ImruzNews, and Reklamnaya Gazeta; the US-funded radio station Radio Liberty; and the online outlets Akhbor.com and Jumhuriyat.tj. Several of these outlets named by experts are owned by the same company that owns top outlets that appear in Table 1. The newspapers Faraj and ImruzNews are owned by the same companies that control Faraj.tj (the fourth most-consumed online outlet) and Imruz radio station (the second most-listened to radio station), respectively. Additionally, the website Jumhuriyat.tj is owned by the same company that controls the second most-read newspaper Jumhuriyat.

Media Ownership

No known transparency laws exist that require independent media owners to declare their ownership stakes publicly. Although outlets must register their organization through either the Ministry of Culture (for print media) or the State Committee on Television and Radio (for television, radio, and electronic media), the government does not make a registry of these licensed outlets publicly available. As a result, the ownership of privately owned media is not transparent and names were discovered through unofficial secondary sources. Further examples of ownership ties and relationships are discussed in the following section.

Table 3 lists the ownership information of top Tajik media outlets by medium (e.g., television, newspaper, radio, and online). The eleven Tajik state-owned media outlets are color-coded blue. AidData staff categorized the remaining privately held media outlets based upon the level of Russian ownership that might increase their susceptibility to Kremlin influence. These categories are denoted by an increasing saturation of red—no known Russian ties (no color), suspected Russian ties, known

Russian ties, and direct Russian ownership. In Tajikistan, no independent media owners had suspected or known ties to the Russian government, and none had direct Russian ownership.

Table 3: Ownership of top Tajik media outlets by share

No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	TV Safina	Government of Tajikistan		100
	2	Televizioni Tojikiston	Government of Tajikistan		100
	3	TV Jahonamo	Government of Tajikistan		100
	4	TV Bakhoritston (TVB)	Government of Tajikistan		100
	5	Varzish TV	Government of Tajikistan		100
Print	1	Oila	Oila Media Holding	Sharif Hamdampur	100
	2	Jumhuriyat	Government of Tajikistan		100
	3	Asia-Plus	Asia-Plus Media Group	Umed Babakhanov	100
	4	Sadoi Mardum	Government of Tajikistan		100
	5	Minbari Halq	Government of Tajikistan		100
Radio	1	Sadoi Dushanbe	Government of Tajikistan		100
	2	Imruz	Orieno Media LLC	<i>Unknown</i>	<i>Unknown</i>
	3	Asia-Plus	Asia-Plus Media Group	Umed Babakhanov	100
	4	Vatan	Vatan TV and Radio Company (TRK)	<i>Unknown</i>	<i>Unknown</i>
	5	Tajikistan Radio	Government of Tajikistan		100
Online	1	News.tj	Asia-Plus Media Group	Umed Babakhanov	100
	2	Khovar.tj	Government of Tajikistan		100
	3	Avesta.tj	Muhammad-Bilal LLC	Jamshed Ulmasov	100

4 Faraj.tj	NGO Public Association Center for Journalistic Research in Tajikistan	<i>Unknown</i>	<i>Unknown</i>
5 Pressa.tj	Oila Media Holding	Sharif Hamdampur	100

Results

Television

The Government of Tajikistan owns all of the top five television outlets in the country. TV Safina is the most-watched station with general broadcasting and some news in Russian. The second most watched is Televizioni Tojikiston (formerly known as Shabakai Yakum), also featuring general broadcasting and some Russian news. Next, TV Jahonamo is dedicated to domestic and international news and broadcasts in Tajik, Russian, and English. The fourth and fifth most-consumed outlets are largely entertainment: TV Bakhoritston (TVB) is dedicated to children’s broadcasting and Varzish TV is dedicated to sports. Though Russia does not have any state-run outlets in the top five, observers report that Tajik state-run television rebroadcasts Russian television content.⁸

Television is the most trusted medium to get information, though this is less true for younger Tajiks who place more trust in information from the Internet.⁹ However, with a single owner controlling all the top television outlets in Tajikistan, there is a higher risk of vulnerability to co-optation. The concentration in decision-making authority over content could make it easier for a foreign actor to convince a compromised government to promote its preferred narratives without restraint.

⁸ IREX. 2019. Media Sustainability Index: Tajikistan, p. 9. URL: <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-tajikistan.pdf>, accessed March 18, 2022.; Olcott, Martha Brill. 2019. Tajikistan's difficult development path, p. 37. Brookings Institution Press.

⁹ The Research Institute of Public Opinion/Internews. 2019. Media consumption and media and information literacy survey in the countries of Central Asia (Kazakhstan, Tajikistan, Uzbekistan), p. 6.

While independent television outlets do exist in Tajikistan, recent developments undermine editorial control over an outlet's content. In 2021, government officials announced that any broadcast media looking to renew its broadcast license would need to submit editorial content for prior approval by the state's Television and Radio Committee (KTR).¹⁰ The KTR will also require approval to broadcast foreign media content, as well a 1% payment of the outlet's profits. An outlet which refuses to adhere to these requirements risks losing their broadcast license and thus their ability to operate. Though President Rahmon argued the policy protected Tajik media from the "danger posed by foreign media," independent Tajik journalists and media observers condemned the move as further constricting media freedom in the country and increasing government control over media content.¹¹ With this new policy, any resilience the Tajik television sector had seems to have nearly evaporated.

Print

Like television, the government of Tajikistan dominates most of the print medium by owning three of the top five outlets. The government owns Jumhuriyat, the second-most circulated outlet, along with Sadoi Mardum and Minbari Halq, the fourth and fifth most-consumed outlets, respectively. Jumhuriyat is owned specifically by the office of the president, while Sadoi Mardum is owned and published by the parliament. Minbari Halq appears generally state-run, not making public an ownership distinction among government offices.

Two privately owned outlets remain among the top five most circulated outlets in Tajikistan. The most-circulated outlet is Oila, which appears to be owned by Sharif Hamdampur through his firm Oila Media Holding. Hamdampur is a veteran journalist who was formerly editor of Komsomolskaya Pravda Tajikistan before it closed in 2016, following a row when a journalist from the paper's Russian edition published an article perceived as an insult to the Tajik people.¹² IREX reports that almost all independent

¹⁰ Reporters without Borders. "Tajikistan imposes total control over independent broadcast media." Published May 14, 2021. URL: <https://rsf.org/en/news/tajikistan-imposes-total-control-over-independent-broadcast-media>, accessed March 18, 2022.

¹¹ Reporters without Borders. "Tajikistan imposes total control over independent broadcast media." Published May 14, 2021.

¹² Radio Free Europe. "Tajik edition of Russian daily suspended for 'insulting' comment." Published July 21, 2016. URL: <https://www.rferl.org/a/tajik-russia-newspaper-komsomolskaya-pravda-stop-printing/27871465.html>, accessed March 18, 2022.

press in Tajikistan is printed using Oila Media Company's printing machines,¹³ providing a connection between Oila and the remaining independent print outlet Asia-Plus.

The third-most circulated print outlet is Asia-Plus, which is owned by the Asia-Plus Media Group. The organization is one of the largest privately owned media firms in Tajikistan and has several other media holdings. Umed Babakhanov appears to own Asia-Plus Media Group. Babakhanov is a seasoned journalist who worked as a correspondent for both the Tajik edition of the Russian paper Komsomolskaya Pravda and the Associated Press for much of the 1990s. Babakhanov has owned Asia-Plus since its founding in 1995.

Asia-Plus offers alternative perspectives to the content produced by government media. This may account for the many instances of the Tajik government running interference on its operations. In 2020, the government forcibly moved Asia-Plus from the building where it had been working for years and used the space to house Khovar, a government-run media outlet.¹⁴ In 2011, the government sued the paper for libel after it reported on the torture allegations of a Tajik general.¹⁵ Much of the government's recent harassment targets Asia-Plus's online page, which we discuss in more detail in the Online section below.

While the government's presence is strong among top print outlets, some independent outlets make the top-five list. Much like television, close relations with foreign actors can influence narratives in several key print outlets. Although the two independent outlets are owned by different people, they share use of the same printing machines.

¹³ IREX. 2018. Media Sustainability Index: Tajikistan, p. 14. URL: <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2018-tajikistan.pdf>, accessed April 4, 2022.

¹⁴ Freedom House. 2021. Nations in Transit: Tajikistan. URL: <https://freedomhouse.org/country/tajikistan/nations-transit/2021>, accessed March 18, 2022.

¹⁵ Radio Free Europe. "Tajik edition of Russian daily suspended for 'insulting' comment." Published July 21, 2016.

Radio

Radio remains a popular news source in Tajikistan, with nearly half of Tajiks listening to news programs on the radio.¹⁶ The Tajik government has a strong presence among top radio outlets, but less so than television and print. It owns the top and fifth-ranked outlets, which are Sadoi Dushanbe and Tajikistan Radio, respectively. The remaining outlets are independent. The second-most listened to outlet is Imruz. While we can confirm that Orieno Media LLC owns the outlet, we are unable to identify the name of the firm's stakeholder. The government closed Imruz several times in the late 2000s,¹⁷ charging its sister print outlet with libel in 2013 and forcing the outlet to pay a fine.¹⁸ However, it seems to have navigated these attacks and still broadcasts today.

Asia-Plus is the third-most consumed radio station and owned by Umed Babakhanov through his firm Asia-Plus Media Group. The fourth-most consumed radio station is Vatan, which is owned by Vatan TV and Radio Company (TRK). While the station provides this information on their website, we are unable to confidently identify the owner. Two potential candidates include its founders Daler Amonov and Vera Kulakova-Brannerud. Amonov faced a corruption scandal in 2010 where he was investigated for taking 4 million somoni for his Arzon Mobile company, which was the largest provider of cellular phones at the time.¹⁹ We were unable to determine if he was convicted of this charge or if the accusation affected his ability to continue as owner of Vatan. Kulakova-Brannerud is currently the outlet's general director. Beyond this, we are unable to confirm if they remain legal owners of the outlet after founding it, or if other stakeholders have a share in the ownership as well.

¹⁶ However, radio consumption is reported most often outside the house, such as while in vehicles mostly in the background. This suggests Tajiks passively select into listening to radio (The Research Institute of Public Opinion/Internews. 2019. Media consumption and media and information literacy survey in the countries of Central Asia (Kazakhstan, Tajikistan, Uzbekistan), p. 22.).

¹⁷ In 2008: Radio Free Europe. "Tajikistan: Government shuts down independent radio station." Published April 16, 2008. Url: <https://www.rferl.org/a/1109579.html>, accessed March 18, 2022. In 2009: Olcott, Martha Brill. 2019. Tajikistan's difficult development path, p. 37.

¹⁸ Human Rights Watch. 2014. World Report 2014 - Tajikistan. URL: <https://www.ecoi.net/en/document/1238932.html>, accessed March 18, 2022.

¹⁹ Asia-Plus. "Director of Vatan radio station faces fraud charge." Published October 27, 2010. URL: <https://asiaplustj.info/en/news/tajikistan/laworder/20101027/director-vatan-radio-station-faces-fraud-charge>, accessed March 18, 2022.

Though we find more independent outlets with seemingly diverse ownership in this medium compared to television and radio, the government's recent license renewal requirements for broadcast media (that includes government approval of editorial content and payment of a portion of the outlet's profits) also applies to radio. We are therefore hesitant to report greater independence and diversity of ownership in Tajik radio as a sign of elevated resilience in this medium. In addition, we were unable to find ownership information on two of the five outlets. This opacity allows more space for these outlet's owners to operate without accountability and makes it difficult for citizens and observers to evaluate the extent to which an outlet's business, political, or foreign ties could influence their content.

Online

The online sector sees the fewest government-run outlets in its top five, though one does appear. Since only about 23% of the population has access to the Internet,²⁰ the government may be less invested in online content. The increase in competition online may also mean citizens are more likely to consume information from privately held outlets. The most-trafficked website is News.tj, owned by Asia-Plus Media Group. The Tajik government has blocked the Asia-Plus website has several times²¹ and has pursued defamation lawsuits against the online edition as well.²² The Asia-Plus website has also made waves outside of Tajikistan; in 2019, Russian regulators deemed it an extremist website and temporarily blocked it from Russia after accusing the outlet of promoting suicide.²³

The second most trafficked website is Khovar.tj, which the Tajik government owns. Khovar is a state-run news agency established in 1925 that also operates well-consumed radio and print outlets. The third most visited website is the

²⁰ Central Intelligence Agency. 2022. The CIA world factbook: Tajikistan. URL:

<https://www.cia.gov/the-world-factbook/countries/tajikistan/#communications>, accessed March 20, 2022.

²¹ Freedom House. 2021. Nations in Transit: Tajikistan; Organization for Security and Co-operation in Europe (OSCE). 2020. ODIHR Election Assessment Mission Final Report, p. 17. URL: <https://www.osce.org/files/f/documents/9/9/453243.pdf>; IREX. 2019. Media Sustainability Index: Tajikistan, p. 6; Eurasianet. "Tajikistan: Russia hinders independent Tajik news website." Published August 5, 2019. URL: <https://eurasianet.org/tajikistan-russia-hinders-independent-tajik-news-website>, accessed March 20, 2022.

²² Human Rights Watch. "Tajikistan: 'Insult' Ruling Against News Outlet." Published June 2, 2014. URL: <https://www.hrw.org/news/2014/06/02/tajikistan-insult-ruling-against-news-outlet#>; Committee to Protect Journalists. "Tajik judges seek millions from weeklies in civil libel case." Published February 3, 2010. URL: <https://cpj.org/2010/02/tajik-judges-seek-millions-from-weeklies-in-civil/>, accessed March 20, 2022.

²³ Eurasianet. "Tajikistan: Russia hinders independent Tajik news website." Published August 5, 2019.

Russian-language Avesta.tj, which is directly owned by Muhammad-Bilal LLC and subsequently owned by Jamshed Ulmasov. Ulmasov provided comments in the Chinese state-run outlet People's Daily supporting government crackdown on Hong Kong protesters in 2019²⁴ and is a representative of the Turkish Global Journalism Council,²⁵ an international journalist association that focuses on journalists from Turkey, Central Asia, Caucasus, Balkans and the Middle East.

The fourth most viewed outlet is Faraj.tj, owned by the NGO Public Association Center for Journalistic Research in Tajikistan. Although the ownership of this NGO is unknown, we can confidently identify Khurshedjon Niyozov as the key principal and chairman of the organization,²⁶ as well as the chief editor of Faraj.²⁷ AidData staff was unable to find further information about Niyozov's business or political ties. The fifth most viewed outlet is Pressa.tj, owned by Oila Media Holdings, which, in turn, is owned by Sharif Hamdampur.

Online outlets appear to have the most diverse ownership among mediums in Tajikistan. While the government dominates other sectors, the online sector has four independently owned top outlets. However, two of the four independent outlets do not have transparent ownership, which makes it difficult for consumers to evaluate the degree to which an outlet's business, political, or foreign ties could influence their content. Although only about one-fifth of Tajiks have access to the internet, the government seems to see it as a threat. It regularly blocks news sites critical to the government,²⁸ including top web portals Faraj and Asia-Plus in the lead-up to the 2020 presidential election. Asia-Plus, for example, was blocked several times in 2018 for refusing to print content prepared by government officials.²⁹ It is also increasingly blocking social media websites like Facebook, YouTube, Odnoklassniki, and

²⁴ Hanbo, Zhou. "Western interference in China's internal affairs won't work." People's Daily. Published August 31, 2019. URL: <http://en.people.cn/n3/2019/0831/c90000-9611065.html>, accessed March 20, 2022.

²⁵ See Foreign Representatives on Global Journalism Council's webpage. URL: <https://www.gjc.org.tr/foreign-representatives/>, Accessed March 20, 2022.

²⁶ Organization for Security and Co-operation in Europe (OSCE). "OSCE Office in Tajikistan supports World Press Freedom Day conference." Published May 4, 2017. URL: <https://www.osce.org/office-in-tajikistan/315001>, accessed March 20, 2022.

²⁷ IREX. 2019. Media Sustainability Index: Tajikistan, p. 4.

²⁸ Swerdlow, Steve. "Tajikistan: Why authoritarian elections also matter." The Diplomat. Published October 10, 2020. URL: <https://thediplomat.com/2020/10/tajikistan-why-authoritarian-elections-also-matter/>, accessed March 20, 2022.

²⁹ Reporters Without Borders. "Blocking websites benefits no one in Tajikistan." Published April 29, 2019. URL: <https://rsf.org/en/news/blocking-websites-benefits-no-one-tajikistan>, accessed March 20, 2022.

VKontakte.³⁰ Since the government has the least direct control over online content, it seems to be using its ability to pull the cord on websites to exert influence.

Conclusion

In this brief, we have identified several avenues by which foreign actors, including but not limited to the Kremlin, might influence the media landscape in Tajikistan. The most direct path for Russia to influence Tajik media is via Kremlin-owned media outlets operating in Tajikistan, such as television station RTR Planeta and radio station Sputnik. Russian news agencies TASS and Sputnik are present in Tajikistan as well. However, two indirect paths emerge from our analysis that may contribute to the vulnerability of Tajik media to foreign influence, including (i) the concentration of government ownership both within and across mediums and (ii) a small but loosely connected independent media.

The first indirect path for potential foreign influence is the concentration of government ownership of media. This exists both within and across outlets. The government owns top media in all four major mediums. It completely dominates television, as all five top outlets are government owned. It also owns multiple top outlets in print and radio and at least one top internet outlet. In this respect, if a foreign actor was able to politically capture the Tajik government, it could easily influence a substantial share of the content that Tajiks consume everyday and promote its own preferred narratives.

Similarly, there is a high degree of concentration of ownership even among independent media, which may increase vulnerability to malign foreign influence as well. Only larger, more well-established firms have endured since independence, likely due to the hostile environment that the government has created for independent media. In practice, this means that companies such as Asia-Plus Media Group and Oila Media Holdings have outsized influence, as they own media across multiple communication mediums. Although diversification across mediums and cooperation among independent media groups may be an appropriate survival strategy, this concentration of content-producing power in the hands of just a few firms increases their vulnerability to foreign influence. A compromised Asia-Plus Media Group, for

³⁰ IREX. 2019. Media Sustainability Index: Tajikistan, p. 3.

instance, could give a foreign influencer the ability to affect narratives across print, radio, and online content simultaneously. However, given recent moves by the government, threats to independent media appear to be more likely to come from the domestic government itself.

In sum, Tajik media remain highly vulnerable to domestic, political, and foreign influence due the concentration of media in the hands of the government and a few large firms. This vulnerability is compounded by effects from the Covid-19 pandemic that have decreased revenues among independent newspapers and radio, as advertisers move their business to digital platforms and emphasize outdoor advertising like billboards.³¹ Transparency is not a priority for the Tajik government and it has made moves to consolidate its hold on independent media.³²

³¹ Timerkhanov, Timur. "Как из-за пандемии изменился рекламный рынок Таджикистана Подробнее." Asia-Plus. Published August 13, 2020. URL: <https://www.asiaplustj.info/ru/news/tajikistan/society/20200813/kak-iz-za-pandemii-izmenilsya-reklamnii-rinok-tadzhikistana>, accessed March 20, 2022.

³² A Tajik Supreme Court ruling led to the closing of independent news outlet Akhoboar in 2020 (International Partnership for Human Rights. "Tajikistan: Crackdown on independent media outlets, lawyers and political activists continues." Published May 20, 2021. URL: <https://www.iphronline.org/tajikistan-crackdown-on-independent-media-outlets-lawyers-and-political-activists-continues.html>, accessed March 20, 2022.

Turkmenistan: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	6
Television, Print, and Radio.....	6
Online.....	8
Conclusion.....	9

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Turkmen media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including through republishing of foreign content in domestic media outlets, interactions on social media, and journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Turkmenistan's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting.

Turkmenistan has a virtually closed media market, with no independent media operating openly within its borders due to government restrictions.¹ Given this reality, collecting market share or survey data on citizen's media consumption habits proved challenging. The top outlets that do operate openly in Turkmenistan are generally controlled by the government. In this profile, we take an in-depth look at domestic media ownership in Turkmenistan.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Turkmenistan, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We gathered this information using limited

¹ Reporters Without Borders. 2021. Turkmenistan. URL: <https://rsf.org/en/turkmenistan>, accessed April 7, 2022.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

information from IREX's 2019 Media Sustainability Index report as well as a 2021 AidData survey of observers with expertise on Turkmenistan's media.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Turkmenistan as of 2021. This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

Although the most direct form of Kremlin influence is via Russian state-owned media, none of the eleven Russian state-owned media outlets we tracked have a physical presence in Turkmenistan (see Table 1). Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. This is not surprising, given that the Turkmen government does not allow foreign media to invest in Turkmenistan.³ Although some citizens are able to view media using other means like satellite television or streaming online, this is generally limited due to poor telecommunication infrastructure in the country.⁴

Table 1: Russian state-owned media in Turkmenistan, 2021

Television		Print		Radio		News Agency	
Russia I	✗	Rossiyskaya Gazeta	✗	Sputnik	✗	TASS	✗
Russia 24	✗					Sputnik	✗
Russia K	✗						
RTR-Planeta	✗						

³ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 9. URL: <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-turkmenistan.pdf>, accessed April 7, 2022.

⁴ Central Intelligence Agency. 2022. Turkmenistan: Communications. In The world factbook. URL: <https://www.cia.gov/the-world-factbook/countries/turkmenistan/#communications>, accessed April 7, 2022.

TV Centre	X			
Channel One	X			
RT	X			

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData focused on direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the most-consumed media outlets in Turkmenistan by medium (e.g., television, print, radio, online) based on available data. While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens.

AidData used a weighted average of data from our 2021 media survey of country experts and IREX’s 2019 Media Sustainability Index report to determine the top media outlets in Turkmenistan. As such, the top outlets may not exactly reflect the current order of most consumed outlets, but do show a reasonable picture of the media landscape over the past three years.

Table 2: Top Turkmen media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Altyn Asyr	Neutralny Turkmenistan	Çar Tarapdan	Turkmenportal.com
2	Türkmen Owazy	Biznes Reklama	Wattan Radio	Tdh.gov
3	Miras	Turkmenistan	Owaz Radio	Azathabar.com
4	Türkmenistan Sport	Watan	Miras	Turkmenistan.gov.tm

Experts from our 2021 AidData survey reported that ORT—the Russian state-owned Channel One television station—was the top TV outlet; however, AidData staff could not independently verify the physical presence of Channel One in Turkmenistan. Viewership for ORT likely comes from a satellite feed or through a streaming website or app. As a result, the data for physically present outlets in Turkmenistan only included four top television outlets.

In addition, experts offered Hroniki Turkmenistan as a top print outlet, but this paper does not publish openly in the country and operates mainly as a Turkmen-language digital platform outside of Turkmenistan.⁶ We removed it from our list and replaced it with Habarlar, the sixth most-circulated paper according to experts.

The survey results also suggested Türkmen Döwlet Habarlary (TDH) and Azatlyk Radiosy (Radio Liberty) were top radio channels, but we found no evidence that TDH has a radio channel or that Azatlyk Radiosy operated in the country. In fact, Turkmenistan only has four domestic stations, so we removed these two from our top outlets and placed Miras—the remaining radio station not on the list—as the fourth most listened to radio outlet.⁷

Media Ownership

The government of Turkmenistan controls almost all media outlets operating in the country. Television and radio outlets are regulated by the State Committee of

⁵ When less than five outlets were verified as operating in Turkmenistan, N/A connotes that there is no fifth outlet based on the available data.

⁶ Chronicle of Turkmenistan. About Us. URL: <https://www.hronikatm.com/about/>, accessed April 7, 2022.

⁷ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 2.; Central Intelligence Agency. 2022. Turkmenistan: Communications.

Turkmenistan for Television, Radio Broadcasting and Cinematography,⁸ though AidData was unable to find which government entity regulates print and online outlets.

Table 3 lists the ownership information of top Turkmen media outlets by medium (e.g., television, newspaper, radio, online). The sixteen Turkmen state-owned media outlets are color-coded blue. AidData staff categorized the remaining privately held media outlets based upon the level of Russian ownership that might increase their susceptibility to Kremlin influence. These categories are denoted with increasing saturation of red—no known Russian ties (no color), suspected Russian ties, known Russian ties, and direct Russian ownership. In Turkmenistan, one outlet has ownership with known Russian ties.

Table 3: Ownership of top Turkmen media outlets by share

No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Altyn Asyr	Government of Turkmenistan		100
	2	Türkmen Owazy	Government of Turkmenistan		100
	3	Miras	Government of Turkmenistan		100
	4	Türkmenistan Sport	Government of Turkmenistan		100
Print	1	Neutralny Turkmenistan	Government of Turkmenistan		100
	2	Biznes Reklama	Government of Turkmenistan		100
	3	Turkmenistan	Government of Turkmenistan		100
	4	Watan	Government of Turkmenistan		100
	5	Habarlar	Government of Turkmenistan		100
Radio	1	Çar Tarapdan	Government of Turkmenistan		100
	2	Wattan Radio	Government of Turkmenistan		100

⁸ Asia-Pacific Broadcasting Union. Members Profile: State Committee of Turkmenistan for Television, Radio Broadcasting and Cinematography. URL: https://www.abu.org.my/portfolio-item/state-committee-of-turkmenistan-for-television-radio-broadcasting-and-cinematography/?doing_wp_cron=1649264670.1222550868988037109375, accessed April 7, 2022.

	3	Owaz Radio	Government of Turkmenistan	100	
	4	Miras	Government of Turkmenistan	100	
	1	Turkmenportal.com	SNG-Media, LLC	Schetinin Pavel Konstantinovich	100
	2	Tdh.gov	Government of Turkmenistan	100	
Online	3	Azathabar.com	Radio Free Europe/Radio Liberty	U.S. Agency for Global Media	100
	4	Turkmenistan.gov.tm	Government of Turkmenistan	100	
	5	Gundogar-news.com	Government of Turkmenistan	100	

Results

Television, Print, and Radio

The top television, print, and radio outlets in Turkmenistan are entirely owned and controlled by the Turkmen government. The government allows seven television channels to air in Turkmenistan, though experts in our survey only identified four channels. In order of most watched, they are Altyn Asyr, Türkmen Owazy, Miras, and Türkmenistan Sport. Altyn Asyr covers political events, Türkmen Owazy is a music channel, Miras features content on history and culture, and Türkmenistan Sport features coverage of sporting events.⁹ Rounding out the other available channels are the Turkmenistan TV Channel (a news channel that broadcasts in several languages including Russian), Yashlyk (which provides youth content), and Ashgabat TV (with local content related to the capital).¹⁰

More data exists about print than other outlets but it is still generally sparse. As of 2019, print dominated the media landscape in Turkmenistan,¹¹ which is unsurprising given the country's poor telecommunication infrastructure.¹² The top outlets are

⁹ Asia-Pacific Broadcasting Union. Members Profile: State Committee of Turkmenistan for Television, Radio Broadcasting and Cinematography.

¹⁰ Asia-Pacific Broadcasting Union. Members Profile: State Committee of Turkmenistan for Television, Radio Broadcasting and Cinematography.

¹¹ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 8.

¹² Central Intelligence Agency. 2022. Turkmenistan: Communications.

Neutralny Turkmenistan, Biznes Reklama, Turkmenistan, Watan, and Habarlar, respectively. All five are owned by the government. IREX reports that Neutralny Turkmenistan and Turkmenistan are the country's main newspapers that are published daily, while Watan and Habarlar are published thrice weekly. Finally, Biznes Reklama is a business advertising paper published specifically by the Ministry of Trade and Foreign Economic Relations.¹³

There are four Turkmen radio stations that broadcast in-country. The experts rank Çar Tarapdan, Wattan Radio, and Owaz Radio as the top three radio outlets, respectively. Miras is the only remaining outlet that broadcasts in-country, and we list them as the fourth-most consumed radio station. All four outlets are state-owned. Additionally, WorldRadioMap indicates that several foreign radio stations broadcast on Turkmen airwaves from neighboring countries, including stations from Iran, Tajikistan, and Armenia.¹⁴

In sum, we find the Turkmen state completely dominates all top traditional media in-country. This is no surprise given its closed nature and high level of state control. Directors of news outlets that do not follow the government's proscribed narrative are fired, such as the recent case of Miras director Guvanch Bayramdurdyev, who did not cover the country's economy in accordance with government expectations.¹⁵ While the Turkmen government controls all top traditional media in-country, this single ownership structure leaves the Turkmen media highly vulnerable to foreign influence. If the president or his government were compromised by a malign foreign actor, this could greatly affect the narratives that Turkmen citizens consume every day.

Online

Turkmenistan has the lowest level of Internet penetration (21.25%) of any country in the Europe and Eurasia region.¹⁶ While online media ownership generally mirrors

¹³ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 8

¹⁴ World Radio Map. Radio stations in Ashgabat. URL: <https://worldradiomap.com/tm/ashgabat>, accessed April 7, 2022.

¹⁵ Freedom House. 2021. Nations in Transit: Turkmenistan. URL: <https://freedomhouse.org/country/turkmenistan/nations-transit/2021>, accessed April 7, 2022.

¹⁶ World Bank. 2022. World Governance Indicators: Individuals using the Internet (% of population) - Turkmenistan. URL: <https://data.worldbank.org/indicator/IT.NET.USER.ZS?locations=TM>, accessed April 7, 2022.

traditional media in being completely state dominated, there is some evidence of foreign ownership based on the responses provided by experts. The top online outlet is Turkmenportal.com. While based in Ashgabat, it is registered at the Federal Service for Supervision of Communications, Information Technologies and Mass Communications (Roskomnadzor), a Russian federal agency that monitors and censors Russian media. Roskomnadzor's database lists SNG-Media, LLC as the company that owns Turkmenportal.com. The Russian legal entities database SKRIN points to CIS Media, LLC as owning SNG-Media, with Schetin Pavel Konstantinovich as the ultimate owner.¹⁷ Although foreign-owned, the content of Turkmenportal.com appears to adhere to Turkmen government expectations¹⁸ that published articles "should not mislead readers and contradict the legislation of Turkmenistan."¹⁹

The second-most visited webpage is the government-owned Tdh.gov, which is the main website of the country's flagship news agency. Third is Azathabar.com, the Prague-based and U.S. government-funded Turkmen language Radio Free Europe/Radio Liberty service. Although the government blocks online access to Azathabar.com in the country, some citizens are likely able to access it through circumvention software such as virtual private networks (VPNs).²⁰

The fourth-most consumed online site is the government-owned Turkmenistan.gov.tm, which like Tdh.gov serves as a news outlet and direct channel of information from government to citizens. Finally, experts suggest Gundogar-news.org is the fifth-most trafficked website in Turkmenistan. Gundogar-news.com is a government-run spoof of Gundogar.org,²¹ a pro-democracy website run by Turkmen exiles that is barred in Turkmenistan.²² The government uses this platform to counter the narratives Gundogar.org publishes.²³

¹⁷ SKRIN. Counterparty check: ООО "СНГ-МЕДИА." URL: <https://kontragent.skrin.ru/issuers/1167746868849>, accessed April 7, 2022.

¹⁸ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 8.

¹⁹ Turkmenportal. Cooperation page: Basic terms of publication of articles. URL: <https://turkmenportal.com/en/information/3>, accessed April 7, 2022.

²⁰ Radio Free Europe/Radio Liberty. 2021. RFE/RL's Turkmen Service: Radio Azatlyk. URL: <https://pressroom.rferl.org/rferl-turkmen-service-radio-azatlyk>, accessed April 7, 2022.

²¹ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 8.

²² Gundogar. О «ГУНДОГАРЕ». URL: <http://www.gundogar.org/?0150000000000000011000000>, accessed April 7, 2022.

²³ IREX. 2019. Media Sustainability Index: Turkmenistan, p. 8.

In sum, like traditional media, the Turkmen government dominates the online space. The Turkmen government owns three top outlets directly, exerts influence on a Russian-owned outlet, and severely restricts access to another outlet that publishes content critical of the government. Although it is possible that Azathabar.com is accessed by many in Turkmen citizens using VPNs, this access is in jeopardy. Freedom House reports that the state-owned Turkmentelecom recently installed technology to increase surveillance on Turkmen citizens.²⁴ Azathabar.com itself reported that security officials identified and harrassed several residents using a VPN to view information critical of the government on YouTube in 2020.²⁵

Conclusion

Turkmenistan is one of the most closed countries in the world, and its media ownership reflects this reality. All of its top traditional outlets are dominated by the government. The state also dominates the online space, directly controlling some outlets, while limiting the autonomy of action of others through restricting broadcasts or incentivizing outlets to adhere to the governments' content policies. Given that the vast majority of the media is controlled by a single owner, Turkmenistan is highly vulnerable to narratives from foreign, malign actors should they be able to influence the President. In this respect, Russian narratives could be inserted into stories that Turkmen citizens consume every day, spread by Turkmen state-run media, adding foreign manipulation into an already closed media system.

²⁴ Freedom House. 2021. Nations in Transit: Turkmenistan.

²⁵ Azatlyk Radiosy Türkmenistan. "Туркменистанцев допрашивают за просмотр заблокированных в стране сайтов." Published December 14, 2020. URL: <https://rus.azathabar.com/a/30999952.html>, accessed April 7, 2022.

Ukraine: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

March 2023

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	4
Results.....	8
Television.....	8
Print.....	10
Radio.....	12
Online.....	14
Conclusion.....	15

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Ukrainian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Ukraine's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

Media ownership in Ukraine is highly centralized around a few politically connected media houses and owners.¹ Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Ukraine.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Ukraine, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We

¹ Vitalii Ribak. "Yes, Ukraine's Oligarchs Own the Airwaves, But Their Days are Numbered." Atlantic Council. Published January 29, 2018. <https://www.atlanticcouncil.org/blogs/ukrainealert/yes-ukraine-s-oligarchs-own-the-airwaves-but-here-s-why-their-days-are-numbered/>

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

used cross-country sources when available (e.g., Zenith, Alexa³), as well as Ukrainian business registries, survey data, media watchdog sources, and other open source data. This profile includes data for the entire country of Ukraine and does not separate out any information that may differ in breakaway regions, such as Crimea, Luhansk, or Donetsk.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Ukraine as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Ukraine's media landscape is via Russian state-owned media (see Table 1). Five of the eleven Russian state-owned media outlets we tracked have a physical presence in Ukraine which provides the Kremlin with a few channels to directly communicate with, and ultimately influence, Ukrainian citizens. Notably, the Ukrainian government has consistently sanctioned or banned Russian outlets since the Euromaidan events in 2014, preventing some Russian outlets, including Sputnik and RIA Novosti, from broadcasting in Ukraine.⁴ Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Ukraine, but does not speak to how well-consumed each outlet is by Ukrainian citizens.

³ Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData Staff used Alexa's API to gauge website traffic. <https://www.alexacom/siteinfo>.

⁴ "Ukraine Extends Ban on Russian News Agencies, Journalists." Committee to Protect Journalists. Published May 24, 2018. <https://cpj.org/2018/05/ukraine-extends-ban-on-russian-news-agencies-journ/>

Table 1. Russian state-owned media with a physical presence in Ukraine, 2021

Television		Print		Radio		News Agency	
Russia 1	✗	Rossiyskaya Gazeta	✓	Sputnik	✓	TASS	✓
Russia 24	✗					Sputnik	✗
Russia K	✗						
RTR-Planeta	✗						
TV Centre	✗						
Channel One	✓						
RT	✓						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Ukraine by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of some Russian state-owned media outlets in Ukraine, none of the tracked Russian state media appears in the top five outlets for any medium.

AidData used a weighted average of media consumption survey rankings from 2017 to present to determine the top media outlets in Ukraine. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of the most-consumed outlets, but do show a solid

picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵

Table 2: Top Ukrainian media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	TV Channel Ukraine	Argumenty i Fakty v Ukraine	Hit FM	ukr.net
2	1+1	Vesti	Avtoradio Ukraine	pravda.com.ua
3	ICTV	Bulvar Gordona	Lux FM	obozrevatel.com
4	Inter TV	Segodnya	Radio Pyatnica	korrespondent.net
5	STB (STV)	Fakty i Kommentarii	Radio Shanson	unian.ua

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Ukrainian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include television channel UA: Pershyi TV; print outlets Novoye Vremya and Den; radio stations Ukrainian Radio and Hromadske Radio; and online outlet censor.net.

Media Ownership

Table 3 lists the ownership information of top Ukrainian media outlets by medium (television, newspaper, radio, and online). A series of amendments enacted in October 2015 revamped the legal framework of Ukrainian media ownership, requiring television, radio, and print media to make their ownership

⁵ Television, Print, and Radio Sources: Television, print, and radio rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional data came from: the Television Industry Committee's Television Audience Measurement (2021), IREX's Media Sustainability Index (2019), the USAID-Internews Media Consumption Survey (2021), and the Center for Media, Data, and Society's Media Influence Matrix Ukraine (2021).

Online Sources: AidData predominantly used data from Alexa (collected April 2021); however, additional data came from the AidData expert media survey (2021), the USAID-Internews Media Consumption Survey (2021), and the Center for Media, Data, and Society's Media Influence Matrix Ukraine (2021).

structures and final beneficiaries public.⁶ However, the law does not require transparency of online outlets and is unevenly enforced, as some outlets are still able to hide their ownership structures.⁷ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Ukrainian state-owned media is color-coded blue. In Ukraine, six owners had suspected or known ties to the Russian government, and no outlets had direct Russian ownership. As such, this profile has six red color-coded owners and no designations of state-owned media.

Table 3: Ownership of top Ukrainian media outlets by share

No Russian ties
 Suspected Russian ties
 Known Russian ties
 Direct Russian ownership
 Local state-owned media

Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	TV Channel Ukraine	SCM Holdings Ltd	Rinat Akhmetov	100
	2	1+1	Harley Trading Ltd	Ihor Kolomoisky	67.8
			Bolvik Ventures Ltd	Oksana Marchenko	24.7
			1 + 1 Production	Unknown	7.5
	3	ICTV	StarLight Media Ltd	Viktor and Olena Pinchuk	100
4	Inter TV	PJSC TV channel Inter	Viktor Medvedchuk	80	

⁶ "OSCE Representative welcomes law on transparency of media ownership in Ukraine as it comes into force." Organization for Security and Cooperation in Europe. Published October 1, 2015. <https://www.osce.org/fom/187956>.

⁷ The Vibrant Information Barometer, "2021 Ukraine Report," <https://storage.googleapis.com/vibe.irex.org/Reports/VIBE%20-%20Ukraine%202021.pdf>.

				Serhiy Lyovochkin	20	
	5	STB	StarLight Media Ltd	Viktor and Olena Pinchuk	100	
Print	1	Argumenty i Fakty v Ukraine	UMH Group Ltd	Ihor Kolomoisky	Unknown	
	2	Vesti	Multimedia Invest Group LLC	Yuriy Pishko	100	
	3	Bulvar Gordona	Bulvar Newspaper Editorial Office LLC	Dmitry Gordon	100	
	4	Segodnya	SCM Holdings Ltd	Rinat Akhmetov	100	
	5	Fakty i kommentarii	Fakty i Kommentarii Newspaper Editorial LLC	Oleksandr Shvets	100	
Radio	1	Hit FM	Media Market TV and Radio Company LLC	Nikolay Bagrayev	47.5	
				Viktor and Olena Pinchuk	45.2	
				Yana Kutz	4.8	
				TAVR Media Company	Igor Chernyshov	2.5
	2	Avtoradio	UMH Group Ltd	Ihor Kolomoisky	Unknown	
	3	Lux FM	PJSC TV and Radio Company Lux	Kateryna Kit-Sadova	76.8	
				Roman Andreyko	13.1	
Oksana Andreyko				10.1		
4	Radio Pyatnica	Investment in Development LLC	Denys Kozlitin	100		

	5	Radio Shanson	Top Radio Broadcasting Company, LLC	Anatoly Evtuhov	51
				Larisa Evtuhov	49
Online	1	ukr.net	Ukrnet LLC	Borys Komissaruk	41
				Mikhail Komissaruk	20
				Alexei Komissaruk	20
				Olha Grach	10
				Vitachi Kushnir	9
	2	pravda.com.ua	Dragon Capital Group	Tomas Fiala	Majority
				George Soros	Minority
				Unknown	Minority
	3	obozrevatel.com	Zolota Seredyna LLC	Yuriy Brodsky	55
				Svitlana Brodska	34.9
				Rostyslav Brodsky	10.1
	4	korrespondent.net	UMH Group Ltd	Ihor Kolomoisky	Unknown
	5	unian.ua	1+1 Media Group	Ihor Kolomoisky	98
				Gennadiy Bogolyubov	2

Results

Television

Media ownership in Ukraine is highly concentrated amongst Ukraine's oligarchs and the top television outlets are no exception. Political elites own all five of the top television outlets in Ukraine, and in many cases are involved in more than one outlet. The top television station is TV Channel Ukraine (TRK Ukraine), owned by Rinat Akhmetov, a Ukrainian billionaire and oligarch from Donetsk. Akhmetov, like many Ukrainian oligarchs, had many of his assets seized following the Euromaidan events for his connections to the pro-Russian Yanukovich regime.⁸ However, Akhmetov still remains one of the richest men in Ukraine and the sole owner of SCM Holdings, the parent company of TRK Ukraine. Akhmetov is also the founder of the "Opposition Bloc," a former pro-Russian opposition party in the Verkhovna Rada.

Ihor Kolomoisky, a Ukrainian oligarch and billionaire, owns the controlling stake in 1+1 Media Group, a media conglomerate that owns and operates eight television stations and two major online outlets, UNIAN and TSN.ua. In addition, Kolomoisky reportedly has ties to current Ukrainian President Volodymyr Zelensky and bankrolled his presidential campaign.⁹ Unlike most Ukrainian oligarchs, Kolomoisky is not actively pro-Russian, and financed the "Dnipro Battalion," a local militia defending parts of Eastern Ukraine from Russian aggression and separatism.¹⁰ However, there are corruption concerns, as Kolomoisky was accused of embezzling \$5 billion from PrivatBank, the largest bank in Ukraine, before the Ukrainian government nationalized it.¹¹

⁸ Krasnikov, Denys. "Court Suspends Renationalization of Ukrtelecom, Still in the Hands of Akhmetov." Kyiv Post. Published June 6, 2018. <https://www.kyivpost.com/technology/court-suspends-renationalization-of-ukrtelecom-still-in-hands-of-akhmetov.html>

⁹ Maheshwari, Vijai. "The Comedian and the Oligarch." Politico. Published April 17, 2019. <https://www.politico.eu/article/volodomyr-zelenskiy-ihor-kolomoisky-the-comedian-and-the-oligarch-ukraine-presidential-election/>

¹⁰ Cullison, Alan. "Ukraine's Secret Weapon: Feisty Oligarch Ihor Kolomoisky." Wall Street Journal. Published June 27, 2014. <https://www.wsj.com/articles/ukraines-secret-weapon-feisty-oligarch-ihor-kolomoisky-1403886665>

¹¹ Maheshwari, Vijai. "The Comedian and the Oligarch." April 17, 2019.

However, Kolomoisky does not have sole ownership of 1+1 Media. Ukrainian oligarch Ihor Surkis formerly owned a sizable minority stake in the conglomerate, reportedly selling his stake to Oksana Marchenko, the wife of pro-Russian Ukrainian oligarch Viktor Medvedchuk. This is not Medvedchuk's only television station ownership either, as pro-Russian exiled oligarch Dmytro Firtash offloaded his shares in Inter TV to Medvedchuk prior to his departure from Ukraine and subsequent arrest.¹² Medvedchuk is reportedly tied to Russian President Vladimir Putin, who is the godfather to his daughter.¹³ In May 2021, the Ukrainian government charged Medvedchuk with treason, froze his assets, and placed him under house arrest.¹⁴ While Medvedchuk is technically still the owner of Surkis' stake in 1+1 Media and Firtash's stake in Inter TV, his arrest puts a question mark on who actually controls two of the top television outlets in Ukraine.

Serhiy Lyovochkin, a member of parliament and long-time associate of Firtash and Medvedchuk, also owns a minority stake in Inter TV. Lyovochkin, Firtash, and Medvedchuk were all founding members of the Opposition Platform - For Life, the largest pro-Russian political party in the Verkhovna Rada.

Viktor Pinchuk and his wife Olena own the final top two outlets in Ukrainian television— ICTV and STB. While the official ownership breakdown of media conglomerate StarLight Media Ltd is unknown, Viktor Pinchuk unofficially controls the company as the final Ukrainian oligarch on the list of top television owners. Olena Pinchuk is the daughter of former Ukrainian President Leonid Kuchma, and Viktor Pinchuk has benefited from her connections with the Kuchma regime, earning exclusive business deals during the former president's tenure.¹⁵ However, Pinchuk has remained mostly out of politics recently,

¹² "Medvedchuk reportedly buys 80% of TV Channel Inter from fugitive oligarch Firtash – media." UNIAN. Published June 30, 2019. <https://www.unian.info/politics/amp-10601421-medvedchuk-reportedly-buys-80-of-tv-channel-inter-from-fugitive-oligarch-firtash-media.html>

¹³ Kamenev, Maxim. "Viktor Medvedchuk: Politychna Lehalizatsiia." Published August 7, 2018. <https://hromadske.ua/posts/viktor-medvedchuk-politychna-lehalizatsiia>; "Kyiv Would 'Gladly' Swap Medvedchuk For Ukrainian Prisoners In Russia, Says Top Official." RFE/RL. Published May 15, 2021. <https://www.rferl.org/a/ukraine-medvedchuk-russia-prisoner-swap-treason/31256736.html>

¹⁴ "Суд дав дозвіл на затримання Козака." Ukrainian Pravda. Published May 20, 2021. <https://www.pravda.com.ua/news/2021/05/20/7294233/>

¹⁵ Hess, Maximilian. "Wooing the West: Who is Ukraine's Viktor Pinchuk?" Eurasianet. Published February 26, 2020. <https://eurasianet.org/wooing-the-west-who-is-ukraines-viktor-pinchuk>

avoiding pro-Russian or pro-Ukrainian conflict and focusing on business dealings, rather than political power.

Television ownership in Ukraine is dominated by Ukrainian oligarchs with ties to political regimes, both internal and external. Internally, top television owners have strong ties to former Ukrainian Presidents Leonid Kuchma and Viktor Yanukovich and current Ukrainian President Volodymyr Zelensky. Many owners are themselves politicians in Ukraine as well, operating or founding political parties. Externally, Rinat Akhmetov, Viktor Medvedchuk, and Serhiy Lyovochkin are all pro-Russian oligarchs and have ties in the highest echelons of Russian government. As such, those sympathetic to Russian influence dominate the Ukrainian television industry, which provides many channels for Kremlin involvement. In addition, despite moves from the Ukrainian government to ban Russian TV channels and Ukrainian channels with Russian state content, Russian entertainment still plays a major role in many Ukrainian television channels.¹⁶ In sum, through pro-Russian oligarchs, the Russian government has many channels of influence in Ukrainian television.

Print

Like television, Ukrainian oligarchs dominate print media ownership in Ukraine. Many of the same names appear in print media: Ihor Kolomoisky acquired UMH Group in 2020, which owns *Argumenty i Fakty*, the most-circulated newspaper, and Rinat Akhmetov's SCM Holdings owns *Segodnya*, the fourth most-circulated newspaper in Ukraine.

Kolomoisky's acquisition of UMH Group highlights the relationship between the Ukrainian government and top media owners. UMH Group was formerly owned by pro-Russian Ukrainian oligarch Serhiy Kurchenko. Kurchenko has been a fugitive since 2014; however, the Ukrainian government seized his assets in 2017, including UMH Group. In 2020, Kolomoisky's 1+1 Internet won the bid for

¹⁶ Polman, Mitchell. "Russian-language media: Can Ukraine compete with the Kremlin?" Atlantic Council. Published April 15, 2021.
<https://www.atlanticcouncil.org/blogs/ukrainealert/russian-language-media-can-ukraine-compete-with-the-kremlin/>

ownership over UMH Group and holdings.¹⁷ Due to Kolomoisky's ties with President Zelensky, some oligarchs accused Zelensky of favoring Kolomoisky in this massive acquisition from the government. Now with Argumenti i Fakty in tow, Kolomoisky has an even more dominant position in Ukrainian media than before, and owns a major Russian-language newspaper in addition to the eight television stations mentioned above.

Another oligarch, Alexander Klimenko, owns Vesti, the second most-circulated newspaper in Ukraine. The ownership structure of Vesti is highly opaque, as a number of proxy companies have been established as owners of Vesti. Multimedia Invest Group LLC is the owner of Vesti, which was formerly owned by Ilya Guzhva, former editor-in-chief of Vesti. However, Guzhva left his position in 2017, ultimately revealing that fugitive oligarch-in-exile Alexander Klimenko was the full beneficiary of Vesti. According to the Ukrainian business registry, an unknown individual named Yuri Pishko is the current owner of Multimedia Invest Group LLC;¹⁸ however, this individual acts as a proxy for Alexander Klimenko. Klimenko's wife Olga Semchenko is the head of Vesti's Board of Directors, and the newspaper consistently promotes pro-Klimenko content.¹⁹ Klimenko was the former Minister of Revenue and Duties under President Viktor Yanukovich; following Yanukovich's departure, Klimenko fled to Russia, while the Ukrainian government charged him with corruption and high treason in absentia. In spring 2021, the Ukrainian government dropped the charges against Klimenko and unfroze his assets; however, Klimenko appears to continue to reside in Russia.²⁰

The third most-circulated newspaper in Ukraine, Bulvar Gordona, is owned by Dmitry Gordon, a longtime Ukrainian journalist. The first non-oligarch on this list, Gordon worked as a journalist for top newspapers since 1983, before founding Bulvar Gordona (then just "Bulvar") in 1995. Gordon is also known for holding

¹⁷ "Компанія Коломойського управлятиме УМХ" Detector Media. Published September 11, 2020. <https://detector.media/rinok/article/180529/2020-09-11-kompaniya-kolomoyskogo-upravlyatym-e-umkh/>

¹⁸ "Пішко Юрій Ростиславович." OpenData. Last updated February 11, 2020. <https://opendatabot.ua/p/1DVU907>.

¹⁹ Milakovsky, Brian. "Vesti: Weapon or casualty in the information war?" Open Democracy. Published October 19, 2017.

²⁰ "Помилка' прокурора: як біглий ексміністр доходів Олександр Клименко перестав бути підозрюваним і повернув елітне майно." Bihus.info. Published August 17, 2021. <https://bihus.info/pomylka-prokurora-yak-biglyj-eksministr-dohodiv-oleksandr-klymenko-perestav-but-y-pidozryvanym-i-povernuv-elitne-majno/>.

truth to power through his interview series “Visiting Dmitry Gordon,” where he interviews famous politicians, athletes, and other public figures.²¹ In 2019, Gordon had his first foray into politics, working as the head of the election headquarters for Ihor Smeshko’s Strength and Honor party. However, despite his support for Smeshko, Gordon remains predominantly a journalist.

Like Bulvar Gordona, Fakty i Kommentarii, the fifth most-circulated newspaper in Ukraine, is not owned by an oligarch. Formerly the property of oligarch Viktor Pinchuk, the newspaper was sold to long-time General Director and Editor-in-chief Oleksandr Shvets. Shvets has been a major journalist in Ukraine since 1992 and is known for his independence; however, he also has loyalties to former President Leonid Kuchma.²² Bulvar Gordona and Fakty i Kommentarii mark the only top media outlets in either television or print to have non-oligarchic ownership.

Radio

Ukrainian oligarchs continue to dominate the top radio outlets. The Tavr Media Group, a media conglomerate controlled by the Pinchuk and Bagrayev families, is the parent company of the top radio station Hit FM. Viktor and Olena Pinchuk own a controlling stake in Tavr Media and their other media holdings are discussed in prior sections. The key players in the Bagrayev family are Nikolay Bagrayev, founder of Tavr Media in 2003 and a member of the Verkhovna Rada from 2002-2014, his wife Svitlana, and his son, Ruslan. While Viktor Pinchuk is considered an oligarch, Nikolay Bagrayev is a former politician with media ownership and political connections.

The second and fourth most-listened to radio stations are Radio Pyatnica and Avtoradio, both former holdings of Kurchenko’s UMH Group before the Ukrainian government seized control of the company. Radio Pyatnica was sold off to Investment in Development LLC, formerly owned by lawyer Maxim

²¹ Romanyuk, Roman and Eldar Sarakhman. “‘I told Smeshka: If you don't go, I'll go...’ - Dmitry Gordon.” Ukrayinskaya Pravda. Published June 13, 2019.

<https://www.pravda.com.ua/articles/2019/06/13/7217949/>

²² “АЛЕКСАНДР ШВЕЦ О ЖЕЛТИЗНЕ И РЕСПЕКТАБЕЛЬНОСТИ, СВОЁМ ДВОЙНИКЕ И БЛАГОДАРНОСТИ КУЧМЕ.” Detector Media. Published August 4, 2021.

<https://video.detector.media/special-projects/aleksandr-shvec-o-zheltyzne-y-respektabelnosty-svojom-dvoynike-y-blagodarnosti-kuchme-i76>

Varlamov and now owned by Denys Kozlitin. According to media reports, Investment in Development LLC was implicated in a money-laundering scheme with Alexander Yanukovych, the son of former pro-Russian President Viktor Yanukovych in 2013.²³ However, no clear ties between Yanukovych and Kozlitin currently exist, as the company only reformed in 2018. The Ukrainian government appears to have sold Avtoradio as part of the UMH Group package to Ihor Kolomoisky and not sold separately like Radio Pyatnica.²⁴

Another politician involved in radio, Lviv Mayor Andriy Sadovyi is the co-founder of Lux Radio, the third most-listened outlet in Ukraine. Sadovyi's wife, Kateryna Kit-Sadova, is the majority shareholder of Lux Radio today, splitting ownership with co-founder Roman Andreyko and his wife Oksana. As Mayor of Lviv, Sadovyi became leader of the pro-European Self-Reliance Party, and actively opposed Russian involvement in Ukraine. Co-founder Andreyko is also politically active and a close friend of Sadovyi as a former Lviv city council member.

Finally, the fifth most-listened to radio station is Radio Shanson, a traditional music radio station. Owned by Anatoliy Evtuhov and his wife Larisa, Radio Shanson falls under Business Radio Group's holdings, along with DJ FM, Business FM, and Power FM. Evtuhov founded Business Radio Group and formerly owned Fokus Group as well, before selling it to Alexander Borshchevich.²⁵ He reportedly got his start as a Radio DJ, and has remained an influential media businessman in the radio industry, though he has largely stayed out of the public eye. His son, Evgeny Evtuhov, is also a radio DJ and the head of DJ FM, and reportedly a former candidate for the pro-Russian Shariy Party.²⁶

²³ "Кандидат у мультиплекс Зеленського. Колишній CEO Парковий про купівлю телеканалу у сім'ї засновника АТБ і ТВ-бізнес в Україні — інтерв'ю." NV Business. Published July 28, 2021. <https://biz.nv.ua/ukr/tech/radio-p-yatnicya-era-prodakshn-kanal-centralniy-vintazh-tb-i-plani-na-multipleks-mh-7-interv-yu-50173719.html>

²⁴ The details surrounding UMH Group's bidding process have made ownership somewhat unclear. While AidData Staff have confirmed that Ihor Kolomoisky's 1+1 Internet won the bid for UMH Group, it is unknown exactly what pieces of UMH Group the Ukrainian government left intact. Kozlitin's ownership of Radio Pyatnica is based on official Ukrainian government ownership records updated in 2021; however, it is possible that this is temporary until UMH Group is fully transferred under Kolomoisky's ownership.

²⁵ "СОБСТВЕННИКОМ ООО «ФОКУС МЕДИА» СТАЛ АЛЕКСАНДР БОРЩЕВИЧ, ИЗДАНИЕ ФОКУС ВОЗГЛАВИЛ АЛЕКСЕЙ ГАЗУБЕЙ." ICTV.ua. Published May 2020. <https://ictv.ua/ru/media-news/fokus-otrymav-novoho-vlasnyka/>.

²⁶ "The CEC registered the son of the owner of "Radio Chanson" Yevtukhov as a candidate for deputy: what is known." 24 Kanal. Published July 2, 2019. https://24tv.ua/ru/cik_zaregistrirovala_syna_vladelca_radio_shanson_evtuhova_kandidatom_v_deputaty_cho_izvestno_n1173910.

Ultimately, Anatoliy Evtuhov is an elusive media owner, and his ties are largely unclear.

Despite the presence of oligarchs Viktor Pinchuk and Ihor Kolomoisky, top Ukrainian radio outlets include some non-oligarchic ownership by politicians, such as former Verkhovna Rada member Nikolay Bagrayev and Lviv Mayor Andriy Sadovyi. In addition, despite the allegations that Kozlitin is tied to the Yanukovich regime, AidData staff uncovered no visible ties between the current owners of Radio Pyatnica and oligarchs.

Online

Top online media outlets in Ukraine have slightly more diverse ownership than traditional media outlets, though many of the same oligarchs are players online as well. Ukr.net, a news aggregation website drawing headlines from across the internet, is the most visited online media website in Ukraine. Borys Komissaruk, Olha Grach, and Vitachi Kushnir founded Ukr.net in 1998, and all three founders are also owners of the website, along with Borys' son Mikhail and Alexei, a relative in Venezuela. In addition to owning one-fifth of Ukr.net's shares, Mikhail Komissaruk is the company's CEO, taking over the position from his father.

While news aggregation sites are among the most popular online media outlets in Ukraine, online media outlets that create their own content round out the top five. In May 2021, long-time owner of Ukrayinska Pravda, Olena Prytula, announced that she had sold 100% of the outlet to Tomas Fiala's Dragon Capital Group. Fiala, who also acquired popular outlet Novoye Vremya, runs one of the largest Ukrainian investment groups. Dragon Capital Group is known for their pro-Western stance, as billionaire George Soros is a current partner, and Goldman Sachs Group formerly owned a minority stake in the investment group.

Obozrevatel.com is the third most-visited news site in Ukraine. Founded by Mykhailo Brodsky, his sons Yuriy and Rotyslav and his wife Svitlana now own the website. Like many Ukrainian media owners, Brodsky is actively involved in politics, serving as a member of the Verkhovna Rada, as well as Chairman of the

State Committee for Regulatory Policy and Entrepreneurship before its liquidation in 2014.²⁷

While online outlets in Ukraine have slightly more diverse ownership than traditional sources in Ukraine, there is a continued oligarchic presence online. Ihor Kolomoisky owns both the fourth and fifth most-visited online outlets, Korrespondent.net and UNIAN.ua. Kolomoisky acquired Korrespondent through his aforementioned controversial acquisition of UMH Group, and previously acquired UNIAN with his long-time business partner Gennadiy Bogolyubov through his 1+1 Media Group. Kolomoisky owns at least one top five outlet in every medium, highlighting the concern regarding media concentration in the hands of Ukraine's oligarchs.

Online outlets in Ukraine follow a regional trend of more open media outlets. Although there is less regulation of online outlets, which provides a potential channel for hidden malign influence, journalists have a space to turn a critical eye on the government without relying on oligarch-owned traditional media. Online outlets also provide a space for new figures to enter the Ukrainian media market, such as Tomas Fiala, preventing oligarchic influence from dominating every medium. But as noted, oligarchs are not absent from the media space, since Ihor Kolomoisky now owns the fourth and fifth most-visited online outlets in Ukraine.

Conclusion

In this brief, we have presented an overview of the domestic media environment of Ukraine. The collected data highlight three major trends in Ukrainian media. First, Ukrainian media is dominated by a centralized political elite. Second, the majority of Ukrainian media owners have ties to the Russian government. Third, the Ukrainian government is attempting to curb media centralization and Russian influence, despite the political power of Ukrainian oligarchs.

To address the first trend, Ukrainian oligarchs Ihor Kolomoisky, Rinat Akhmetov, Viktor Pinchuk, Viktor Medvedchuk, and Alexander Klimenko own shares in 12 of

²⁷ "Brodsky will sit in Kuzhel's chair?" Ukrayinska Pravda. Published March 23, 2010. <https://www.pravda.com.ua/news/2010/03/23/4884480/>

the 20 outlets that AidData staff investigated. Five individuals dominate the media space in Ukraine and their ownership of these media outlets arguably allow them to shape the narrative around corruption ties, the government, and Ukraine's War in Donbass, giving them significant power. In addition, Lviv Mayor Andriy Sadovyi and former-Verkhovna Rada member Mykhailo Brodsky control two of the eight outlets without ties to an oligarch, with only six total outlets owned by individuals that are not former Ukrainian politicians. This centralization of ownership provides a channel for political influence, both overt and hidden.

Second, the deep connections between the Russian government and many of these powerful oligarchs create an accessible indirect channel for Kremlin influence. While the Ukrainian government has blocked or censored many Russian media outlets, the high number of Russian speakers in Ukraine and the ties between Ukrainian media owners and the Russian government prevent Ukraine's leaders from effectively blocking Kremlin influence. Some of these oligarchs actively support Russian influence in Ukraine, as former media owners Serhiy Kurchenko and Dmytro Firtash and current media owners Viktor Medvedchuk, Serhiy Lyovochkin, and Rinat Akhmetov all have been members of pro-Russian political parties in Ukraine. Medvedchuk is known to be particularly close with Russian President Vladimir Putin. These close ties between Russia and Ukrainian media owners provide a space for Russian influence in Ukrainian media.

Third, despite Russia's many channels of influence in Ukraine, Ukrainian officials are making moves to strengthen media vulnerabilities. The arrest and exile of pro-Russian Ukrainian oligarchs Dmytro Firtash, Serhiy Kurchenko, and Viktor Medvedchuk, as well as the government-forced shutdown of pro-Russian channels 112, ZIK, and NewsOne in February 2021 highlight a desire to combat foreign influence in the media space.²⁸ Ukrainian oligarchs continue to dominate the media landscape; however, there are some exceptions. Online outlets have relatively less oligarchic control, meaning that the Kremlin has to find other channels to influence the online media space. Additionally, oligarch Viktor Pinchuk sold Fakty i Kommentarii to Oleksandr Shvets and Serhiy Kurchenko's

²⁸ Dickinson, Peter. "Analysis: Ukraine bans Kremlin-linked TV channels." Atlantic Council. Published February 5, 2021. <https://www.atlanticcouncil.org/blogs/ukrainealert/analysis-ukraine-bans-kremlin-linked-tv-channels/>

UMH Group lost Radio Pyatnica to Denys Kozlitsin, adding new owners to the media market.

In sum, the Russian government has significant channels to influence Ukrainian citizens through the media. With some Russian state-owned media outlets still operating in the country, as well as Russian-affiliated Ukrainian oligarchs dominating the media market, the potential for Kremlin influence is abundant in Ukraine. However, recent steps by the Ukrainian government have moved towards a more diverse media landscape and away from the pro-Russian centralized landscape of the past.

Uzbekistan: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

Introduction.....	1
Russian Media Footprints.....	2
Top Media Outlets.....	3
Media Ownership.....	5
Results.....	7
Television.....	7
Print.....	9
Radio.....	10
Online.....	11
Conclusion.....	12

Acknowledgements

The authors would like to acknowledge Vera Choo, Samantha Custer, and Rodney Knight for their advice and assistance in the research and compilation of this profile. We additionally want to acknowledge AidData’s team of student Research Assistants who collected data for this project, including Diane Frangulea, Maggie Herndon, Daniel Highland, Katherine Hughes, Sonia Kelly, Morgan King, Deb Kornblut, Amelia Larson, Abby Maher, Daniella Marx, Harper Ortlieb, Caroline Prout, Andrew Tanner, Emmeline Walker, Sophia Zaman, and Noa Zielinski.

Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Uzbek media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding Uzbekistan's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

The Uzbek government either directly owns or indirectly influences nearly every top media outlet in Uzbekistan.¹ However, under President Shavkat Mirziyoyev's reforms, some media ownership has become independent of government influence, particularly online outlets.² Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in Uzbekistan.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.³ The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in Uzbekistan, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources when

¹ "Freedom on the Net 2021 - Uzbekistan." Freedom House. Published May 31, 2021.

<https://freedomhouse.org/country/uzbekistan/freedom-net/2021>.

² "Freedom on the Net 2021 - Uzbekistan." Freedom House. Published May 31, 2021.

³ This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

available (e.g., Alexa⁴), as well as public opinion survey data, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in Uzbekistan as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the most consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in Uzbekistan's media landscape is via Russian state-owned media (see Table 1). Six of the eleven Russian state-owned media outlets we tracked have a physical presence in Uzbekistan, which provides the Kremlin with some channels to directly communicate with, and ultimately influence, Uzbek citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in Uzbekistan, but does not speak to how well-consumed each outlet is by Uzbek citizens.

⁴ Alexa is an online analysis tool. AidData staff used Alexa's API to gauge website traffic. <https://www.alexa.com/siteinfo>.

Table 1: Russian state-owned media in Uzbekistan, 2021

Television		Print		Radio		News Agency	
Russia I	✓	Rossiyskaya Gazeta	✗	Sputnik	✓	TASS	✗
Russia 24	✓					Sputnik	✓
Russia K	✓						
RTR-Planeta	✗						
TV Centre	✗						
Channel One	✓						
RT	✗						

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in Uzbekistan by medium (e.g., television, print, radio, online) based on cross-sectional indicators such as viewership share and circulation. Television is the most-consumed medium and is therefore likely more influential than other information sources.⁵ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. While Russian state-owned media outlets are popular in Uzbekistan,⁶ none of the tracked Russian state media appears in the top five outlets for any medium.

⁵ "Uzbekistan profile - Media." BBC News. Published November 20, 2018. <https://www.bbc.com/news/world-asia-16218808>.

⁶ "Uzbekistan profile - Media." BBC News. Published November 20, 2018.

AidData used a weighted average of media consumption survey rankings from 2017 to present to determine the top media outlets in Uzbekistan. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of most-consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁷

Table 2: Top Uzbek media outlets ranked by overall consumption

Rank	Television	Print	Radio	Online
1	Zo'r TV	Narodnoye Slovo	Vodiy Sadosi	Daryo.uz
2	Mening Yurtim (MY5)	Argumenty i Fakty	Yoshlar Ovozi Radio	Gazeta.uz
3	Sevimli	Pravda Vostoka	Radio Grand	Kun.uz
4	Milliy TV	Khalq Sozi	ORIAT FM	Qalampir.uz
5	Yoshlar	Bisnis Vestnik Vostoka	Radio Toshkent	Xabar.uz

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Uzbek outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include television channels Channel One and Uzbekistan 24, and online outlet UZreport.uz.

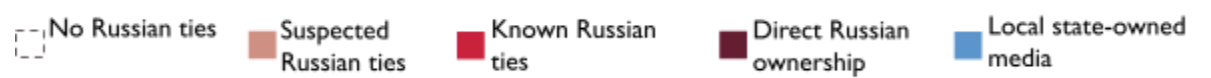
⁷ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: IREX's Media Sustainability Index (2019), "Yuksalish" Nation-wide Movement's national survey (2020), ICT News' online survey (2017), and Internews' "2019 Media Consumption and Media and Information Literacy Survey in the Countries of Central Asia" Report (2019). Online: Alexa (April 2021) and Centralasia.media's analysis of the National Search System of Uzbekistan (2019) were used in conjunction with the aforementioned surveys.

Media Ownership

The Uzbek government prohibits media monopolies through its Law on Mass Media, which requires reporting on media outlet shareholder information. However, this shareholder information is not public, making the law less effective than it could be in combating media monopolies.⁸ As a result, media ownership in Uzbekistan is concentrated in the hands of Uzbek and Russian political elites. Further examples of ownership ties and relationships are discussed in the following section.

Table 3 lists the ownership information of top Uzbek media outlets by medium (e.g., television, newspaper, radio, online). The nine Uzbek state-owned media outlets are color-coded blue. AidData staff categorized the remaining privately held media outlets based upon the level of Russian ownership that might increase their susceptibility to Kremlin influence. These categories are denoted by an increasing saturation of red—no known Russian ties (no color), suspected Russian ties, known Russian ties, and direct Russian ownership. In Uzbekistan, one outlet had direct Russian ownership.

Table 3: Ownership of top Uzbek media outlets by share



Medium	Rank	Outlet	Owner, Company	Owner, Individuals	Owner (%)
Television	1	Zo'r TV	Zo'r Teleradiokompaniya LLC	Shukhrat Akhmetov	50
				Ismail Israilov	50
	2	Mening Yurtim (MY5)	Ozod Yurt Tolqinlari LLC	Government of Uzbekistan	61
				Firdavs Abdukhalikov	39
	3	Sevimli	Master Media Production and Broadcast LLC	Firuza Sharapova	70

⁸ Uzbekistan: Law on Mass Media." Article 19. Published February 2019.

https://www.article19.org/wp-content/uploads/2019/05/A19_Mass-Media-Law-UZ-Analysis-Feb-2019_Eng_Web.pdf

			Amira Rashidova	20	
			Abdullajon Abdukhalikov	10	
	4	Milliy TV	Milliy Telekanali	Komil Allamjonov	100
	5	Yoshlar	Government of Uzbekistan		100
Print	1	Narodnoye Slovo	Government of Uzbekistan		100
	2	Argumenty i Fakty	Argumenty i Fakty Uzbekistana LLC	Government of Moscow	100
	3	Pravda Vostoka	Government of Uzbekistan		100
	4	Khalq Sozi	Government of Uzbekistan		100
	5	Bisnis Vestnik Vostoka	Information-Rating Agency Saipro LLC	Unknown	Unknown
Radio	1	Vodiy sadosi	Vodiy Sadosi Yoshlar TV and Radio Company LLC	Shukhrat Akhmetov	100
	2	Yoshlar Ovozi Radio	Yoshlar Ovozi LLC	Unknown	51
				Government of Uzbekistan	49
	3	Radio Grand	Edel Veys-Ali LLC	Svetlana Khan	74
				Government of Uzbekistan	26
ORLAT	4	ORLAT FM Teleradiokompaniya LLC	Bahtier Usmanov	100	

5	Radio Toshkent	Government of Uzbekistan		100	
1	Daryo.uz	Uztelecom JSC	Government of Uzbekistan	94.09	
			Unknown	5.91	
Online					
	2	Gazeta.uz	Afisha Media Holding	Suren Sapov	100
	3	Kun.uz	Web Expert LLC	Makhsud Askarov	Unknown
				Umid Shermukhammedov	Unknown
Abdugani	4	Qalampir.uz	Qalampir LLC	Qamariddin Shaykhov	100
5	Xabar.uz	Xabar.uz LLC			100

Abdurahmanov

Results

Television

Television is the most-consumed medium in Uzbekistan⁹ and is largely controlled by a few politically connected elites. The Uzbek government fully owns the fifth most-consumed channel, Yoshlar, and partially owns Mening Yurtim (MY5), the second most-consumed channel.

Zo'r TV, the most-consumed channel in Uzbekistan, is jointly owned by Ismail Israilov and Shukhrat Akhmetov. Both men control other media outlets as well, with Israilov owning shares in Pro FM and Akhmetov controlling top radio outlet Vodiy Sadosi and

⁹ "Uzbekistan profile - Media." BBC News. Published November 20, 2018.

the Tasvir publishing house.¹⁰ Notably, both Israilov and Akhmetov are business partners with the influential Mayor of Tashkent, Jahongir Artykhodzhaev, who likely influences the outlet.¹¹

Firdavs Abdukhalikov is the owner of both the second and third most-consumed television channels, MY5 and Sevimli, respectively. Formerly the sole owner of MY5, Abdukhalikov ceded majority ownership to the government of Uzbekistan. However, his role as a media mogul remains intact. The sole owner of Darakchi newspaper, Abdukhalikov also controls Sevimli through the ownership of his family members and he is the chairman of “Uzbekkino” National Agency (now the Cinema Agency of the Republic of Uzbekistan). Abdukhalikov founded and ran the National Association of Electronic Mass Media of

Uzbekistan (NAESMI) for nearly two decades until February 2022.¹² This impressive resume gives Abdukhalikov significant influence over shaping narratives through Sevimli, MY5, and Darakchi, as well as through creating state-funded films through Uzbekkino. Additionally, Abdukhalikov is connected with former President Islam Karimov’s daughter, Gulnara Karimova.¹³

The fourth most-consumed outlet is Milliy TV, founded and owned by Komil Allamjonov, who is connected politically with current President Shavkat Mirziyoyev. Allamjonov served as the Press Secretary to Mirziyoyev¹⁵ and Director of the Agency for Information and Mass Communications.¹⁴ Currently, Allamjonov is Chairman of the

¹⁰ “Kazakhstani media publishes material about Uzbekistan’s media magnates.” Kun.uz. Published September 28, 2021.

<https://kun.uz/en/news/2021/09/28/kazakhstan-publishes-material-about-uzbekistans-media-magnates>.

¹¹ “Tashkent city mayor’s office awards contracts to entity owned by the mayor’s business partners.” The Tashkent Times. Published November, 2020.

<http://tashkenttimes.uz/national/5948-tashkent-city-mayor-s-office-awards-contracts-to-entity-owned-by-the-mayor-s-business-partners>

¹² Zohidov, Abror. “What is NAESMI and why did Firdavs Abdukholiqov leave the 19-year-old organization he founded?” Kun.uz. Published February 2, 2022.

<https://kun.uz/uz/news/2022/02/02/naesmi-oz-i-nima-va-firdavs-abduxoliqov-oz-i-ochgan-19-yillik-tashkilo-tan-nega-ketdi>.

¹³ “«Вести из рая» – 2: Госучреждения и коммерческие банки обязали перечислить миллиарды сумов для пропаганды реформ Мирзиязева.” Radio Ozodlik. Published June 20, 2021.

<https://rus.ozodlik.org/a/31315308.html>.¹⁵ “Uzbek leader establishes Administration of the President of Uzbekistan.” UzDaily.uz. Published August 28, 2018. <https://www.uzdaily.uz/en/post/45466>.

¹⁴ “Komil Allamjonov becomes Acting Director of the Agency for Information and Mass Communications.” UzDaily.uz. Published February 8, 2019. <https://www.uzdaily.uz/en/post/47764>.

Public Fund for Support and Development of National Mass Media, a non-governmental organization.¹⁵

In sum, television ownership in Uzbekistan runs primarily through the government. Firdavs Abdukhalikov and Komil Allamjonov are both connected to the current Mirziyoyev administration and served in senior positions within the government. The Mayor of Tashkent likely controls Zo'r TV, and the government of Uzbekistan itself owns the remaining shares. Every top television channel is directly connected to the incumbent administration and powerful elites within the government.

Print

Like television, the Uzbek government owns the majority of top print outlets, including the first, third, and fourth most-consumed newspapers Narodnoye Slovo, Pravda Vostoka, and Khalq Sozi, respectively.

The second most-consumed print outlet is Argumenty i Fakty, a Russian outlet owned by the Government of Moscow. Russian-owned media outlets are popular in Uzbekistan,¹⁸ giving the Russian government some channels to directly influence Uzbek citizens.

The ownership of Bisnis Vestik Vostoka, the fifth most-consumed print outlet, is opaque. The outlet is owned by SAIPRO Information-Rating Agency, which also owns UzReport.uz, an influential online outlet. However, since the ownership structure of SAIPRO is unknown, this in turn conceals the ultimate beneficial owners of Bisnis Vestik Vostoka.

In sum, the Uzbek government dominates top print media ownership. Of the top print outlets, only two newspapers are not owned by the government: Argumenty i Fakty, owned by the Moscow government, and Bisnis Vestik Vostoka, which has unknown ownership. Media centralization, particularly around the state, creates significant

¹⁵ "Kazakhstani media publishes material about Uzbekistan's media magnates." Kun.uz. Published September 28, 2021. ¹⁸ Davletova, Nozima. "Perspectives | Uzbekistan: For Russia, soft power is just business." Eurasianet. Published June 19, 2019. <https://eurasianet.org/perspectives-uzbekistan-for-russia-soft-power-is-just-business>.

vulnerabilities to foreign malign influence, as a lack of diverse narratives amongst top media outlets can be easily subjected to foreign manipulation.

Radio

Government influence and media centralization continue in top radio stations in Uzbekistan. The government of Uzbekistan fully owns the fifth most-consumed radio station, Radio Toshkent.

Additionally, due to a seizure of Radio Grand and an acquisition of 49% of shares in Yoshlar Ovozi Radio, the government owns shares in two other top radio outlets as well.

The most-consumed radio station in Uzbekistan is Vodiy Sadosi, owned by the aforementioned co-owner of Zo’r TV, Shukhrat Akhmetov. As noted previously, Akhmetov is a business partner of the Mayor of Tashkent, highlighting more ties between the current government and the top radio stations.

Yoshlar Ovozi Radio is the second most-consumed radio station in Uzbekistan. In September 2020, the government of Uzbekistan created the “Youth Media Holding” under the Agency for Youth Affairs. This media holding now controls the state-owned Yoshlar TV channel and Yoshlar Publishing House, and acquired 61% of MY5 from Firdavs Abdukhalikov and 49% of Yoshlar Ovozi Radio from Yoshlar Ovozi LLC.¹⁶ The original owners of Yoshlar Ovozi LLC are unknown, as the ownership structure is opaque. Currently, the Uzbek government holds a minority share in Yoshlar Ovozi Radio through the Youth Media Holding.

The Uzbek government has employed various means to take effective control of Radio Grand, the third most-consumed radio station. In 2015, an Uzbek court order stated that Radio Grand was an asset of Rustam Madumarov, the imprisoned ex-husband of

¹⁶ “Yoshlar ishlari agentligiga ayrim OAVning ulushlari beriladi, «Yoshlar media xoldingi» tashkil etiladi.” Kun.uz. Published September 16, 2020. <https://m.kun.uz/uz/news/2020/09/16/yoshlar-ishlari-agentligiga-ayrim-oavning-ulushlari-beriladi-yoshlar-media-xoldingi-tashkil-etiladi>.

Gulnara Karimova, and his assets were forfeited to the state, including Radio Grand.¹⁷ However, Svetlana Khan, the owner of Radio Grand, was the sole owner of the outlet and had no clear ties to Madumarov when the outlet was seized.¹⁸ In May 2019, Radio Grand reportedly went up for auction, as the Uzbek government dropped the price of Radio Grand dramatically to sell off the outlet. However, the case gained national attention, and the Uzbek government eventually returned 74% of Svetlana Khan's assets, keeping 26% of Radio Grand.¹⁹

Oriat FM, the fourth most-consumed radio station, is owned by Director-General Bahtier Usmanov, who keeps a lower public profile than most other media owners of top Uzbek outlets. AidData staff were unable to find any connections between Usmanov and Russian actors or the Uzbek government.

Like the television and print sectors, the Uzbek government has a strong presence among the top radio outlets in Uzbekistan. The government acquired shares in Radio Grand and Yoshlar Ovozi Radio and wholly owns Radio Tashkent. Additionally, Shukhrat Akhmetov, owner of the top radio station Vodiy

Sadosi, has ties to the government as well, further highlighting media concentration around the state.

Online

Online outlets have more diverse ownership than traditional media outlets in Uzbekistan. The Uzbek government only controls the most-consumed online outlet, Daryo.uz, through Uztelecom JSC, the largest telecommunications provider in the country. The remaining top online outlets are privately owned.

Gazeta.uz, the second most-consumed online outlet, is owned by Suren Sapov, the son-in-law of Sodiq

¹⁷ "«Grand» radiosi Rustam Madumarov bilan aloqalarni rad etdi." Kun.uz. Published May 3, 2019. <https://m.kun.uz/uz/news/2019/05/03/grand-radiosi-rustam-madumarov-bilan-alloqalarni-rad-etdi>.

¹⁸ "The founder of Radio Grand denied that its owner was Gulnara Karimova's ex-husband." Ozodlik Radiosy. Published May 3, 2019. <https://www.ozodlik.org/a/29919340.html>.

¹⁹ "How the trial ended in relation to the raider seizure of the radio station "Grand" by Gulnara Karimova - all the details." Podrobno.uz. Published September 16, 2019. <https://podrobno.uz/cat/obchestvo/chem-zakonchilsya-sud-v-otnoshenii-reyderskogo/>.

Safoyev, the first deputy chairman of the Senate of Uzbekistan's Parliament.²⁰ Sapov founded Afisha Media Holding, the parent company of Gazeta.uz, though his father-in-law likely holds influence over the content of the outlet.

All remaining top online outlets are owned by journalists that founded their respective outlets. Makhsud Askarov and Umid Shermukhammedov are both journalists who founded Kun.uz, the third most-consumed online outlet. Journalist Qamariddin Shaykhov founded and owns Qalampir.uz, and journalist Abdugani Abdurahmanov founded and owns Xabar.uz. All three outlets are fairly independent of state influence, though government harassment and censorship of these outlets does occur.²¹

In sum, despite some government ownership of top online outlets, independent journalism and media outlets are present online in Uzbekistan. Kun.uz, Qalampir.uz, and Xabar.uz all report on government corruption and add critical voices to the Uzbek media space that were not present during the Karimov administration.²² However, state harassment and censorship of these outlets highlight that the Uzbek government is still willing to exert control over online media.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of Uzbekistan. The collected data highlight two trends in Uzbek media ownership. First, the Uzbek government fully controls the top traditional media outlets, though independent media exists online.

Second, Uzbek media outlets are vulnerable to direct and indirect channels of Russian influence.

²⁰ "Kazakhstani media publishes material about Uzbekistan's media magnates." Kun.uz. Published September 28, 2021.

²¹ "Uzbek Journalists Push Back Against Media Regulator." Voice of America. Published December 2, 2020.

https://www.voanews.com/a/press-freedom_uzbek-journalists-push-back-against-media-regulator/6199088.html.

²² "Uzbekistan 2019: Media Sustainability Index." International Research and Exchanges Board. Published 2019.

<https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2019-uzbekistan.pdf>.

The Uzbek government directly owns nine of the country's top media outlets, and most privately held outlets are owned by political elites with connections to the government. Media moguls such as Shukhrat Akhmetov, Firdavs Abdukhalikov, and Komil Allamjonov all have ties to the incumbent administration, furthering centralized media control by the government. Additionally, the Uzbek government appears willing to take control of private outlets, such as Yoshlar Ovozi Radio and Radio Grand, through seizures or legislation. The only outlets independent of direct government ownership or indirect control were online outlets, highlighting the importance of online media in promoting diverse narratives in Uzbekistan.

The dynamics of heavy state control over traditional media create an opening for external actors such as the Kremlin to co-opt and exert influence over Uzbek news outlets by cultivating closer ties with the government. In addition, the Kremlin can more directly influence the country's media space via its Russian state-owned media. Six of the eleven tracked Russian state-owned media outlets are present in Uzbekistan, and Moscow government-owned Argumenty i Fakty is the second most-consumed print outlet in the country.

In sum, the Russian government has a number of potential channels to directly communicate with the Uzbek public via its own state-owned media, as well as indirectly influence citizens via efforts to co-opt Uzbek state-owned outlets or privately owned outlets controlled by political elites.