



UKRAINIAN MEDIA LANDSCAPE – 2012

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Konrad
Adenauer
Stiftung

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Ukrainian Media Landscape 2012 includes a review of media industries and markets, media legislation framework, education for journalists and media NGOs' activities in Ukraine. The analytical report does not claim to provide a comprehensive coverage of all events and phenomena; its objective is to record and articulate key trends of the year. The English version of the Media Landscape is an extract of the full Ukrainian edition.

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The authors shall be responsible for the information provided in the respective chapters.

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LEGAL FRAMEWORK FOR MEDIA

Tetyana Kotyuzhynska

Parliament elections have become the most significant public and political event in 2012. The number of claims filed to courts soars in the course of the pre-election campaign and right after elections: the courts considered around 100 administrative law-related claims filed by election contestants against mass media. They were mostly related to a demand to impose a binding requirement upon mass media to sign an agreement on publishing promo materials. These claims were related to the denials of the municipal mass media to publish promo materials of opposition political activists due to the pressure of the government authorities. Politicians also practiced filing claims on banning some media publications on the grounds of tentative infringement of the election law. Some of these claims were satisfied by courts.

Criminal and Procedure Code novelties

The new Criminal and Procedure Code came into force on November 20, 2012. It includes six novelties, which are of importance for journalists.

First, in compliance with Article 171 of the New Code it is the police that shall undertake a responsibility to conduct a pre-trial investigation of the cases when premeditated interference with legitimate activities of journalists is suspected. Earlier it was the Prosecutor's Office's role.

Secondly, investigation of these cases shall be started not later than in 24 hours after the information on a tentative offence is provided to the police.

Thirdly, an investigator shall not be compelled to wait until a pre-investigation check is conducted to launch a case; earlier this preliminary check was supposed to cover up to 10 days.

Fourthly, a statement on an offence may be filed both by victims and witnesses of the event.

The New CPC provides journalists with a privileged right to be present in the court's room at the equal terms with relatives and family members of a defendant and a victim (CPC, Article 328).

At last, journalists shall not be interrogated as witnesses to obtain the testimony that includes confidential professional information a journalist was provided with on the terms of non-disclosure of an author or a source of information (CPC Article 65).

There is also a novelty on protection of sources of information journalists use – the access to the objects and documents provided for journalists on the terms of non-disclosure of an author or a source of information is limited (CPC Article 162).

In early 2013 Ukraine is obliged to adopt three mandatory laws to meet the requirements of EU Ukraine Association Agreement: "On Television and Radio Broadcasting" fundamental law; the law on public broadcasting and the law on privatization of press. Ukraine is also obliged to undertake measures to guarantee safety for journalists and provide opportunities for self-regulation.

ACCESS TO PUBLIC INFORMATION

Ihor Rozkladay

"On Access to Public Information" Law of Ukraine and "On Information" Law of Ukraine (amended) were adopted on January 13, 2011 and came into force on May 9, 2011. Pursuant to the reports by two recognized international non-government organizations - Access Info Europe (Spain) and Centre for Law and Democracy (Canada), the Ukrainian law on access to public information was ranked 8th in the international rating among 115 studied bills.

Novelties in information laws

Short timeframes for consideration of requests and the broad list of government agencies and institutions bound by a commitment to provide responses constitute key positive strengths of the law on access to public information for the public and journalists. **The principle of requesting information and not a document is one more strong asset of the law.** Hence, if a document comprises information with restricted access, it must be removed, and all open information shall be provided. However, the experience of the law's implementation shows that the removal of the part of the information is not practiced; an applicant is just denied in access to the whole document.

Freezing factors

In the course of implementation the information laws come across a set of barriers. The types of restricted (internal) information and the personal data protection sphere present most of the problems. In 2010 Ukraine ratified the Convention for the Protection of Individuals with regard to Automatic Processing of Personal Data and adopted the Law of Ukraine "On Protection of Personal Data". The Convention and the Law came into force on January 1, 2011, i.e. 5 months prior to the information laws did.

The right to privacy, comprising personal data protection and access to information are equipotent rights, and the national corpus of laws is supposed to ensure this balance. However, the biggest problem with this law since it was adopted lies in its total incompliance with the information laws.

The law's presumption stating that all personal data represent the information with restricted access constitutes a key barrier. The law does not differentiate between personal data per se (name/surname/parental name, position, occupation) and especially sensitive personal data (education, race, religious beliefs). This provision provided the government authorities with an opportunity to deny in access to information, e.g. about allocation of land plots or housing facilities for members of the Parliament. The recent amendments to the law on personal data protection that came into force on December 20, 2012 entail removal of the provision allowing disclosure of personal data of certain categories of population in compliance with the law. Thus, the balance of the right to privacy and the right access to information was disrupted. Since July 1, 2012 sanctions were introduced to punish for the breach of the procedure personal data processing, and, what is of primary importance, criminal liability for interference with privacy was strengthened. These changes may have a deteriorating effect upon the implementation of the Law on Access to Public Information.

Implementation of the Law

In 2011 after 6 months of the law being in force the Media Law Institute and Center for Political Studies and Analysis conducted a monitoring survey of 16 web sites of the Ministries and 728 web sites of local government bodies and state administrations. The information on availability of mandatory information and convenience of using the information were within the scope of assessment. The Ministry of Emergencies of Ukraine was the only to be graded 4.9 of 5 among all the Ministries. As for local level, the situation was much worse: only half of the web sites included the information on e-mail one can use to send a request. Only 15% of the web sites mentioned the person in charge for ensuring access.

In 2012 Regional Press Development Institute conducted a monitoring survey targeting the national government agencies. The findings showed that the biggest problem is the availability of information on use of the public funds allocated in the budgets; ownership, use or disposal of state or municipal property. Thus, the State Agency on Management of State Corporate Rights was the lowest in the ranking; its transparency index was 27%.

Mass media activists argue that there is a “wall of glass” the journalists are not able to “penetrate”. The answers are behind this wall: the answers to the questions on the details of frauds and schemes with public funds, land and property the highest government servants are involved in, e. g. Mezhyhirya, the former state-owned residence.

Since the law came into force in May 2011, the registry of courts’ judgments includes more than 2,000 court’s rulings and orders on bringing to administrative liability for breach of the right to information.

TV

Kostyantyn Romashko

TV, as it has always been, is still the most popular media in Ukraine.

In 2010-2012 TV industry in Ukraine was developing according to the following trends:

- channels of special interest (so-called niche channels) appeared; in particular, channels for children emerged;
- social constituent of TV content was strengthened (especially due to the big number of new socially oriented channels);
- the biggest media groups intended to unite their efforts (de facto, Ukrainian TV market is divided between influential business groups affiliated with politicians and competing with each other).

TV segment of media market is one of the most attractive for advertisers, and the share belonging to TV advertising is still the most significant one in a general structure of media sales market.

According to the data provided by Ukrainian coalition of advertisers, in 2012 TV market of advertising reached 3,867,000 UAH.

Ukrainian journalism facing new challenges

At the same time, economic situation in the country within two previous years was not the only factor influencing the advertising market and general media development. New challenges for TV and freedom of the press appeared when Victor Yanukovich won the elections and became the president in 2010.

In particular, TV channel "TVi" was deprived of its frequencies (while according to the research held in June, 2012 by the Academy of Ukrainian Press, this very channel broadcasted the biggest number of news stories with several points of view). Thus, political pressure and self-censored Ukrainian cable TV providers gradually removed "TVi" from the cable networks.

How they transmit TV signal in Ukraine

Three major platforms in Ukraine take part in transmitting TV signal to the audience. They are over-the-air signal, cable and satellite. In the first half of 2012 there were 16,585,000 households in Ukraine. Among them, 8 million used over-the-air broadcasting, 5 million used cable and 3,5 million - satellite signal.

Ukrainian channels with highest positions in the ratings

In the end of December, 2012 the State Register of TV and Radio Organizations of Ukraine accumulated data about 1,622 TV and radio organizations. In terms of ownership status they could be divided as follows: 352 organizations were municipal, 37 – state-owned, 1,233 were of other ownership modes.

The list of the six most popular private TV channels has been more or less stable during the last decade. The leader of the market is still "Inter" TV channel, which went on air in 1996. "1+1" TV channel was the second most popular one during the last decade. However, in early 2011 it was outdistanced by more dynamic competitors such as "TV and Radio Company Ukraine" and "STB".

Three channels owned by the son-in-law of the ex-president Leonid Kuchma and Ukrainian businessman Victor Pinchuk ("New channel", "STB", "ICTV"), preserve their positions in Top-6 and go right after the leaders, sometimes switching their own places.

In recent years "TV and Radio Company Ukraine" owned by Rinat Akhmetov's corporation "SCM" has been the most dynamic channel. It challenged the leaders of Ukrainian TV market entering the Top-5 list of channels as for the audience share.

Apart from that, since 2011 TV channels of special interest or niche channels have been developing rapidly (in 2011 there were more than 30 niche channels). It occurs primarily because niche channels "overtake" the audience which used to be loyal to the channels of general interest.

Major trends of Ukrainian TV broadcasting

TV content monitoring results show that recent years have been characteristic by political influence over the most popular national TV channels. First of all, it is visible in their news programs. Top-6 channels belong to businessmen who are either affiliated to current government or try to establish partnership with the authorities. They are Rinat Akhmetov ("TV and Radio Company Ukraine"), Valerii Horoshkovskii (till the end of 2012) and Dmytro Firtash with Serhii Lyovochkin ("Inter"), Ihor Kolomoyskii ("1+1"), Victor Pinchuk ("STB", "ICTV" and "New Channel"). Newscasts on these channels often have evidence of partiality and imbalance, which find expression mostly in insufficient coverage and lack of on-air presence of opposition politicians (according to the monitoring held by the Academy of Ukrainian Press, during post-elections time the attention paid by TV channels to officials in power was by 2.4 times more than to the representatives of the opposition).

How Ukrainian channels make profit

Advertising is the main source of revenue for Ukrainian TV channels.

However, in recent years Ukrainian TV channels have started to diversify their income sources. One of the new sources is sponsorship. Usually, well-known brand leaders of a certain market segment become sponsors at the Ukrainian TV.

Another way of making profit at the Ukrainian TV is product placement. It is a method of a half-hidden advertising of a certain brand.

Recently, self-made TV production has also become popular; it happens due to establishment of so-called in-house production. One of the methods of making profit out of self-made production is selling the rights for broadcasting a company's own product to other channels or even abroad.

Another kind of profit for TV channels is the use of cross-platform opportunities.

Besides, TV channels are active in developing accessibility to their own product (in particular, to the news) from mobile phones, smartphones and tablets. For example, among niche channels the above said can be applied to "News TV Channel 24"; from the Top-6, besides other channels, such opportunity for watching "Facts" newscast is provided by "ICTV" channel.

INTRODUCING DIGITAL BROADCASTING

Olha Bolshakova

TV industry of Ukraine started to switch to digital standards in 2006. But in 2010 all new members of the National Council of Ukraine on Television and Radio Broadcasting were appointed. They cancelled the decisions taken by their predecessors and adopted new ones:

1) they changed the digital broadcasting format from DVB-T to a newer one (DVB-T2), leaving the procedure and the implementation timeframe intact;

2) they dropped the strategy of developing synchronous digital zones (their key strength is an efficient use of radio frequencies; the key weakness is high cost of infrastructure) in favor of building less expensive and less efficient multi-frequency zones;

3) they provided *Zeonbud* LLC, the telecommunications operator, with licenses to develop four out of eight digital multiplexes; the company also provided program services in these networks, thus monopolizing these markets. However, the Antimonopoly Committee of Ukraine did not recognize *Zeonbud* LLC to be a monopolist and did not design any specific procedures to regulate its activities. This step resulted in a critical overpricing of *Zeonbud* LLC telecommunication services: according to some experts' estimates, the prices exceed the cost price by 4-5 times.

4) they conducted a tender on broadcasting by four *Zeonbud* LLC multiplexes: 28 lots were offered for national TV companies (20 – in standard quality, 8 – in HD) and 4 lots for regional and local TV companies in 167 cities and villages. According to the tender's results, 60 regional and local television companies were not provided with a channel to broadcast, whereas 8 national TV companies (including the newly-created "Bank TV" state-owned channel) got the license to broadcast in HD, i. e. using doubled frequencies' resources. However, as of the end of 2012, none of these companies has made use of this license and continued to broadcast in standard quality.

5) the Council recommended to introduce the systems of conditional access to digital TV channels. Thus system raised the cost of digital tuners for the customers, because they had to install extra licensed devices to decode TV channels. It limited the access to market providing it only for those suppliers who obtained the licenses to install the system of conditional access to their tuners from a license owner (*Irdeto B. V.* company) and introduced pre-requisites for paid television.

2012 was the final year for the digital broadcasting in Ukraine to build its infrastructure and to launch a campaign on ensuring access to TV programs for the public.

The Cabinet of Ministers of Ukraine identified the group of population authorized to receive digital TV tuners free of charge.

The National Council introduced changes into the National TV and Radio Information Space Plan. According to these changes, the deadline for switching off the analogue TV was postponed: from 2012 to 2013-2014.

The delay in developing local multiplexes up to 2015 means that 150 regional and local TV companies that did not manage to get licenses to broadcast at MX-5 multiplex will have to suspend their operations in summer 2015 for an undefined term. Within this undefined term coordination of frequencies, licensing and networks development will be in progress. According to the most optimistic forecasts, the interval in broadcasting will take more than 6 months. This will inevitably result in bankruptcy of all broadcasters.

In 2012 the National Council announced a new call for applications and conducted the second tender to disburse 169 vacant broadcasting lots for regional and local companies at MX-5 digital multiplex. 25 TV and radio companies got the licenses, including some strong regional broadcasters. However, the strategic licenses for broadcasting at all four regional centers (Kyiv, Kharkiv, Lviv and Odesa) were granted for the companies with no record of broadcasting, although their competitors were the current licensees with multi-year experience. However, they were not granted with licenses.

PRINT PRESS

Oleh Khomenok

According to the data by the State Registry Agency, as of January 1, 2013, the State Registry of print mass media comprised 34,002 entries on registered outlets, including 19,575 outlets with national, regional and abroad distribution, 14,427 outlets with local distribution. Also the State Registry includes 304 entries on registered information agencies. Out of the total number of registered publications only slightly more than 4,000 ones are regularly published. The share of newspapers is 60%, the remaining 40% are magazines. According to *Presa* state enterprise, the subscription catalogue of Ukraine for 2012 included 2489 Ukrainian publications, the share of newspapers is 35.4%, magazines – 61.3%.

Within the previous years the statistic data regarding the printed media have remained almost the same. Local (oblast, regional, city and district) newspapers constitute the majority (more than 1,800 titles). Around 700 newspapers registered with national coverage are published. Magazines dominate among the national registration publications: out of 1700 ones, 1600 are registered as national outlets.

Daily newspapers are on decline, because they are not able to attend the growing demands of their readers. The number of their copies reduces; those who need information fast migrate to Internet. The share of daily newspapers is around 1% of all publications; 85% of all newspapers are weeklies.

In 2011-2012 several national and regional outlets focused on business issues and general and political affairs terminated their publishing in hard copy.

According to the report by the Association of the Independent Regional Press Publishers, there is a trend at the regional press market: on survival of 2-3 more or less strong publishing projects for one region. The consolidation and closure of unprofitable print projects also contributes to the concentration of advertising market.

There is one more trend – active development of on-line portals of print media, especially at the regional level and the fast growth of on-line readership. In many cases, the readership of successful outlets exceeds the number of copies and the readership of one issue of a publication.

Number of copies

The non-transparent data on numbers of copies and the missing system to certify the number of copies remains the problem for the press market development. Therefore, the readership survey findings and the data on subscription are used to assess the real numbers of copies. The overall trends include decline of number of copies in both retail and subscription modes. Thus, according to *Soyuzdruk* agency, in 2012 the decline of retail sales of the print press ranged from 15% to 30 %, depending on the type and the frequency an outlet is published.

According to surveys, currently the readership's attention is the highest to information and entertainment outlets, TV guides and magazines for women. The general interests' periodicals demonstrate the growth of interest of the audience, whereas TV guides and publications for women decline. As for subscription, subsidized publications with potentially forced subscription and publications for the elderly populations groups take the lead.

According to TNS study, in the last three months of 2011 and in the first three months of 2012 the general interest periodicals' share was 31.2% (27% in 2010), TV guides and outlets on celebrities – 22.25% (25.5% in 2010), outlets for women – 18.6% (22.7% in 2010). "Argumenty i fakty", "Telenedelya" magazine and "Liza" magazine became leaders in these print media segments, respectively.

The average number of subscribed periodical per person in Ukraine was 0.38 copy (in 2011 – 0.42) and per family – 1.15 copy (in 2011 – 1.25).

Printing and distribution system

On the one hand, "Ukrposhta" monopoly on the market restrains its development (a media outlet or an agency is often unable to accumulate the sufficient number of subscribers to make the project self-sustained), but on the other hand, this situation pushes them to develop their own system of on-line subscription. However, even having on-line subscription system in place, the physical delivery of a publication to a subscriber's address is often carried out with the mediation of "Ukrposhta".

Advertising market

The print media advertising market, similarly to the situation in all media, remain non-transparent and affected by corruption. Both the press and ranking and marketing surveys are used for manipulations, resulting in discrepancies and unfair competition. During the pre-election campaign 2012 the practice of hidden advertising ("dzhynsa") in the press considerably grew, in some cases its share in the advertising profits of publications reached 40%.

One should note that the aggregated data on advertising market includes (for the first time) the figures on hidden advertising or "dzhynsa". According to some estimates its share in 2012 comprised up to 25% of whole advertising market in print media. The significant growth of classifieds may be explained by more thorough and detailed assessments conducted by experts while analyzing the advertising market. In earlier assessment studies these sources of these data had not been used.

RADIO

Oles' Hoyan

The characteristic features of radio broadcasting – its ability to be a background, immediate and easy-to-access source of information – stipulates its quite firm position on the advertising market. With advent of on-line radio it has become very close to a customer and still enjoys quite a considerable audience, mostly active, energetic and influential. There have been efforts undertaken, on the one hand, to digitalize radio as soon as possible, on the other hand, to identify commercially lucrative formats so that to make the radio media business able to yield profits. Around 65% of Ukrainians listen to the radio on the air every day, 24% do it online; every year these shares grow by 10%. This situation on the market promotes technology advancement of radio and re-distribution of its resources; however, the contents of radio programs and the positioning of the radio in public opinion are mostly made pursuant to political groups-related rankings “upon request” and not pursuant to business interests.

At present radio may be listened by air, by cable, by satellite and on-line. Each of these routes of the information delivery is self-sustained, but focused on different segments of the audience. Therefore, the radio stations in their efforts to cover as many listeners as possible try to include all possible options for the signal delivery. The balance of the audience preferences gradually shifts to listening on-line radio broadcasting. This trend is confirmed by active web presentations of both private and state-owned radio companies. It is indicative that Ukrainian offices of the international radio companies, including BBC, Deutsche Welle and Radio Freedom Russian Service, which had been searching for FM-stations partners for years and signing agreements with state-owned and private broadcasters, currently focus on on-line broadcasting.

Out of three key functions of radio broadcasting – to inform, to educate and to entertain – it is the entertainment function that prevails in Ukraine.

The most popular formats at Ukrainian market include Contemporary Hit Radio чи Top-40 (Hit-FM, the rankings leader), National Adult Contemporary (Russian Radio Ukraine) and CHR/Dance (Kiss-FM). These formats constitute 60% of all the formats used by Ukrainian radio stations. 13% of the market belongs to the unique (for the international classification) *Chanson* format – an alloy of bard songs, city romance, and prison lyrics. Furthermore, there is 10% share of international standard Oldies and Retro formats for those listeners who prefer the good old songs. All news and Talk radio formats' development is also in progress, but there are quite few of them, which is quite natural bearing in mind the national advertising market.

In 2012 the advertising market for radio has grown by 20% compared to the previous year. These figures are quite expected, remembering the record's growth of the weekly coverage of radio audience (89%) catching up TV audience (96%). The rankings of the stations advertising budgets are fully compatible with the rankings of the formats successfully operating at the market. E.g. according to the data by “Communication Alliance” (November/December 2012), CHR format (Hit FM) yielded 60.73 million UAH, AC format (Autoradio) – 48.41 million UAH, National AC (Russian Radio Ukraine) – 38.87 million UAH.

Currently radio holdings' share is more than 60% of the market. They are mostly linked to interest of specific political groups and focus on the maximum possible coverage of the audience. They include: UMH Group (Ukrainian Media Holding), comprising 4 network radio stations (Autoradio, Retro FM, Nashe radio, Europa Plus) and 2 local ones – Jam FM and Holos Stolytsi; TAVR, comprising such networks as Russian Radio Ukraine, Hit FM, Kiss FM, Radio ROKS, Radio Melodiya and Radio Relax; BRG (Business Radio Group) with the networks: Radio Chanson, Radio Sharmanka and three local radio stations – Business Radio, Renaissance and DJ-FM. These media holdings divided the national radio advertising market among themselves. The leader is TAVR with more than 20% share followed by Ukrainian Media Holding and Business Radio Group. This re-distribution resulted from “the war of the contents” that is still in progress, because radio develops, using multimedia and offers advertisers multi-platform sales of air and web space.

State radio broadcasting in Ukraine is low in rankings, because it was defeated by commercial broadcasters during the tenders on FM frequencies both at the regional and national levels. The National Radio Broadcasting Company of Ukraine (NRBCU) and oblast radio committees are not provided with resources for development, because they have further less access to

business audience and to so-called election-related audience: housewives and pensioners who listen to radio more actively.

Most people in rural regions listen to the wire radio, but its share incessantly reduces.

Currently there are good prospects in Ukraine for the development of radio as a mass media product delivery channel, because the commercialization level of the radio enables it to fill in the functional niches in the media system. However, this type of commercialization, when the fight for power monopoly supersedes everything, deprives the national radio of its most important public function – to enable the audience have an effect over the development of events.

INTERNET AND SOCIAL MEDIA

Vitaliy Moroz

Ukrainian Internet continues to grow and expand its influence on everyday life of average citizens, especially in urban areas.

19.7 million of Ukrainians out of 45 million population has an access to Internet and the figure grows every year. At “.ua” domain the number of registered sites is 611,387 as of January 1, 2012. It's 14% growth from previous year. For hundred thousands of Ukrainians, Internet became one of the key sources of news, online shopping and entertainment. With the censorship at main TV-channels, Internet is considered by many to be an “island of freedom” of uncensored news.

Likewise other freedoms, Internet freedom was under the pressure by Ukrainian government in 2012. Many scandals involving law enforcement agencies fighting against business took place last year. Ex.ua, the biggest file hosting website was forced to closure by law enforcement agencies. State Tax Administration blocked the work of the biggest online-seller Rozetka.ua with accusation on tax heaven for about \$1 million. Second biggest online-seller Sokol.ua faced raid by State Tax Administration as well.

In early 2012 State Tax Administration created a unit targeting e-payments. In October the President of Ukraine signed a bill that shrinks e-payments in Ukraine. According to the bill, only banks are authorised to establish e-payment mechanism and only in local currency.

On the other hand, the government is slow with legislation, beneficial for customers when needed. In 2012 mobile operators did not get licenses on 3G mobile Internet from state regulation bodies. It is a keystone obstacle for a rapid growth of mobile Internet in Ukraine. Still, mobile Internet even in 2G format continues to gain popularity, especially among young audience.

Internet penetration

Currently the Internet audience constitutes around 50% of population of Ukraine. Among those users, 17.9 million use Internet at least once a week, 13.3 million - daily. %. The gender balance for Internet users in Ukraine is almost equal - men (51%) and female (49%).

The key trends for 2012 - the fastest growing segment of users are rural users. During first 9 months of 2012 their relative number increased by 53%. Internet access in Ukraine continues to be one of the cheapest in the world. The average monthly fee for home Internet is slightly less than \$10.

The context of the Internet development

Top officials of Ukrainian government mention free online media to EU officials as an evidence of freedom of speech in Ukraine.

According to Freedom House report, in Ukraine “there is no practice of institutionalized blocking or filtering, or a regulatory framework for censorship of content online, although indirect attempts at creating legislation which could help censor or limit content are occurring”.

One of the positive signs for Ukrainian Internet in 2012 was passing the law on tax exemptions for IT industry. The law provides IT companies and individuals in the IT industry will be taxed at 5% rate during next 10 years.

Today leading online media in Ukraine can be classified according to two main criteria. The first one is the source of funding. The second is the type of ownership.

According to source of funding the online media can be divided into three main categories:

– commercial media - revenues come from ads and other business tools. Examples: Pravda.com.ua, Korrespondent.net, Forbes.ua;

– patronized media - funds are donated by politicians or economical moguls who are interested to promote their political/business interests through publications. Such media practice low ethical standards and actually erode the principles of journalism. Examples: Bagnet.net.

– media that are partly supported by international funds and programs of international technical assistance like USAID, NED, Soros Institute. Examples: Svidomo.org, Ostro.org, SumyNews.com.

There could also be mixed types of media. Such online media can be commercially successful, but are affiliated with political parties, thus back rather political than public interests. Example: Segodnya.ua

Money in Internet

The revenues of online media can not be estimated directly as owners protects their financial data.

According to All Ukrainian Advertising coalition the advertising market for Internet has grown from UAH 590 million in 2011 to UAH 680 million in 2012.

Trends for online media

The market for online media in Ukraine is not full yet. It was proved in September 2012 by the launch of Forbes.ua - an online business resource, which is a part of Ukrainian Media Holding (UMH). During first four months of its operation, Forbes.ua became one of the leading media outlet in Ukraine due to its own content and professional staff.

Also visualization tools become more and more popular among media outlets. One of pioneers - Texty.org.ua has won the award in The Guardian worlds' data visualization contest.

Second trend for online media in Ukraine is the rising level of journalist investigations. NashiGroshi.org became the first professionally led resource to expose corruption on government level based on official data.

EDUCATION IN THE AREA OF MEDIA

Volodymyr Rizun, Valery Ivanov

In Ukraine 39 education institutions award degrees in journalism. Every year around 1,500 journalists graduate from universities (these are experts' estimates; the official data have not been published yet). The situation may be illustrated by comparison with Soviet times: then only three centers were training journalists: Kyiv and Lviv Universities and Lviv Higher Military Political Academy.

Two universities – Kyiv-Mohyla Academy and Ukrainian Catholic University offer only MA courses in journalism.

The key explanation for the fast growth of the number of higher education institutions awarding journalism degrees is based on the popularity of the profession and the development of the media market. After Soviet Union collapsed, a huge number of new newspapers and TV and radio companies were set up. Most Ukrainian media professionals are not educated as journalists. Few of them are highly professional journalists who obtained the skills by self-education, but the average level of media professionalism leaves much to be desired. The demand resulted in the supply growth.

However, there has been a persistent problem that media industry cannot formulate a clear and concise request for education institutions to train future professionals. Some of these requests were formulated, but mostly at the local level. But there is no picture of a media professional agreed by all stakeholders. There are some underlying reasons for that: media community is very diverse (including in terms of professional skills). It hardly conceives the role and significance of journalists' education system. This explains the low professional and corporate culture of mass media. At present the notion of professional standards is non-existent for many journalists who do not have an experience of education as journalists.

On the other hand, there are problems in the journalism education system itself. Most of newly-created institutions are associated with two features: 1) fee-based studies; 2) lack of qualified professors. When universities introduce "journalism" into their curricula, they pursue the sole purpose: to earn some money exploiting the desire of people to become journalists. In other words, some higher education institutions operate in accordance with the principle of "a vacuum-cleaner": by sucking out the money and giving neither knowledge nor skills in exchange.

Hence, the relationships between centers of education for journalists and media industry, the supplier and the customer, remain problematic. These relationships can be hardly called partnership ones. On the one hand, the media industry accuses the universities in poor training of journalists; on the other hand, the education institutions note the corruption and in compliance with standards of journalism in materials produced by most media outlets. Unfortunately, the constructive dialogue has not substituted "cold war" between "the manufacturer" and "the customer" of journalists.

In Ukraine the advancement in the direction of harmonization with Bologna standards is proclaimed. Higher education has been transformed to adopt cycles' system. After four years of study a student is granted with a Bachelor's degree. After that he/she may choose either a one-year course to be awarded with the Specialist's degree or two-year course – Master's degree. The universities use the module and credits-based grading system, enabling them to assess the students' performance more systematically.

In fact, the current system of education for journalists in Ukraine does not completely satisfy the needs of media market. The significant share of journalists who were not provided with proper journalism education is not in the position to be distracted from their jobs for studies for a long term. Therefore, the specialized journalism training programs conducted by various non-government organizations are very popular with journalists. Their common feature is that they are mostly funded by Western donors. The trainers are mostly Western media professionals or those who were trained in Western countries.

MEDIA NGOs AND INTERNATIONAL ORGANIZATIONS' ACTIVITIES IN MEDIA SPHERE

Oksana Voloshenyuk

In 2012 (just like in previous years) media NGOs and professional associations of journalists experienced the key challenges – incessant efforts of government authorities and media owners to influence over mass media's work. These efforts became especially active during the pre-election campaign.

Quality responsible journalism. Media NGOs play a significant role in strengthening mass media and their adaptation to new technologies' advance. In particular, in 2012 various programs were implemented with a focus on development of independent and market-oriented media.

2012 was marked by the turn to more intense implementation of training programs by on-line tools. Respectively, the training courses' topics feature the tools of promoting media products in social networks, receiving knowledge and skills on producing materials for various media platforms;

- training and resource support for journalist investigations; RPDI is the key NGO in this sphere closely cooperating with international projects on investigative journalism, promotes experience sharing, communication, and thus, supports the network of journalists conducting investigations in Ukraine;

- strengthening professional skills of journalists is also carried out through training programs on standards of journalism. The journalists are trained in skills of presenting information, use of sources, copyright applications (conducted by the Academy of Ukrainian Press and RPDI). In its turn, Telekytyka NGO promotes the quality journalism ideas through its web site. Internews Ukraine also joins the common efforts adding a session on news journalism standards in almost every training program.

One should note that media NGOs focus on priority social problems: disposal of land resources, energy policy reform, environmental issues, public health, corruption, administrative services, women and children's rights.

Self-regulation

There is a self-regulation body in Ukraine called the Committee on ethics of journalism. It operates as a professional civil society institution and considers conflict situations related to ethic and professional issues arising in the media community between journalists and the public. In 2012 the Information Initiative on Freedom of Expression issues has been actively operating; it was established by IAU (Internet Association of Ukraine) and a group of media NGOs (Independent Association of Broadcasters, Ukrainian Association of Press Publishers, Institute of Mass Information, Academy of Ukrainian Press and others) with the purpose to combat the arbitrary attempts to restrict the freedom of expression. The self-regulated site for on-line outlets was created where they may be registered.

Professional associations of journalists. The National Union of Journalists still features the biggest number of members (more than 20,000). It has a quite developed system of branches in the regions inherited from Soviet times. It is this organization that represents Ukraine in many international journalists' associations. In April 2012 the new management was appointed to run the Union (Oleh Nalyvayko, the Head of the Union, Serhiy Tomilenko, the first secretary). They undertake efforts to reform the Union's activities.

Independent Media Trade Union, the national union of media professionals is a comparatively young professional association. IMTU and NUJU are members of International Federation of Journalists. The trade union was established in 2002 by a group of prominent media professionals currently and now it has more than 600 members – journalists from all regions of Ukraine. In 2012 the Trade Union continued to defend professional, social, economic, labor interests of its members in their relationships with employers, government authorities and other organizations.

Media education and media literacy become more and more recognized to be the part of missions of media NGOs and associations of journalists. The associations of media professionals actively promote the system of training individuals in media education skills as a preventive mechanism for the public to protect from manipulative information, which is frequently produced by dishonest and self-censored mass media.

Thus, the Academy of Ukrainian Press maintains active cooperation with high school teachers and university professors. During 2012 the Academy conducted 3 Media Education Schools. As a result, 42 professionals were trained to implement media education courses at high schools and higher education institutions. In 2012 the Academy published *Media education and media literacy* manual, the first of its kind, for pedagogic universities and continuing education institutions (the manual was recommended by the Ministry of Education, Science, Youth and Sport of Ukraine).

Mediasapiens portal launched by Telekrytyka NGO constitutes an important endeavor in the sphere of media literacy. Its key topical areas – media psychology, media ethics, media law and manipulations in media) help the consumers of media products to better understand the essence of media, to get the skills on orientation in media space, to obtain an ability to adopt a critical attitude to media content, to identify quality and truthful information.

Elections. The Parliamentary elections became the key public and political event in 2012. Respectively, monitoring survey projects intensified within this period. The monitoring survey encompassed a wide scope of parameters of media's performance; various methods were applied.

Such monitoring NGOs as AUP, IMI, Telekrytyka noted that audience of mass media, especially TV channels, experienced problems with access to information about opposition parties, especially in the regions: at the local level mass media were loyal to the ruling party.

Journalists' activities during the elections. In the course of elections the practice occurred when outlets issued dozens and even hundreds of mass media cards to individuals who were not related to these outlets whatsoever. These individuals used the media cards to get the authorization to be present at the polling stations and districts and to interfere with the work of elections commissions. National Union of Journalists of Ukraine and Independent Media Trade Union of Ukraine drew the attention to this problem, condemning such practices of mass media outlets.

Movements of journalists. The action held by "Stop Censorship" movement at the World Newspaper Congress was widely covered by mass media. 14 activists of the movement stood up and held up the posters with slogans calling to freedom of expression and against censorship. The slogans included "Eight out of nine TV channels are under government's control".