JX FUND

REBUILDING RUSSIAN MEDIA IN EXILE:
SUCCESSES, CHALLENGES AND THE ROAD AHEAD

Purpose and approach of this research

Following the start of the war independent Russian media have all but ceased to be able to continue their work within Russia. Many have closed and already relocated abroad, others are considering the move. They are facing numerous legal, operational and organizational challenges to relaunch.

Despite this, there have been notable successes and bright points, showcasing the sector's resiliency. This research aims to help donors, policy-makers and the media community understand the current situation, needs and best ways to support the independent Russian media ecosystem.

The study considers the breadth and diversity of this ecosystem, assessing the situation of not just large media and media managers but also start-ups, niche publications, individual journalists, freelancers and other media related professionals (note: however, we do restrict our focus to quality, values-driven "independent media", not covering state and propaganda outlets as well as low-value aggregators or tabloids)

Due to the extreme security concerns, all information provided by Russian media outlets has been anonymized and is reported here with great care to avoid indicators that can be used to tie back and attribute quotes or data points. While conscious of the potential loss in research value, we have decided to err on the side of media safety. Nonetheless, in cases where media managers or journalists explicitly authorized us to do so, we refer to the situations of specific media outlets.

This report was prepared and run by a coalition including the JX Fund in Berlin, the Media Center of the Stockholm School of Economics in Riga and The Fix Media in London.

Disclaimer

This study does not purport to be an academic research based on comprehensive, large N or multi-year analysis of media hubs*. Rather it aims at gathering actionable insights based on analysis carried out by a range of in-market stakeholders and a combination of explorative, qualitative comparisons and conceptual analysis of data.

Such an approach aims to extract valuable insights within a complex and fast-evolving environment but may require additional research and verification prior to making financial or operational decisions.

Moreover, standard due diligence practices should be conducted before providing funding to any of the organizations listed in the report, or other organizations of a similar nature or fulfilling a similar role.

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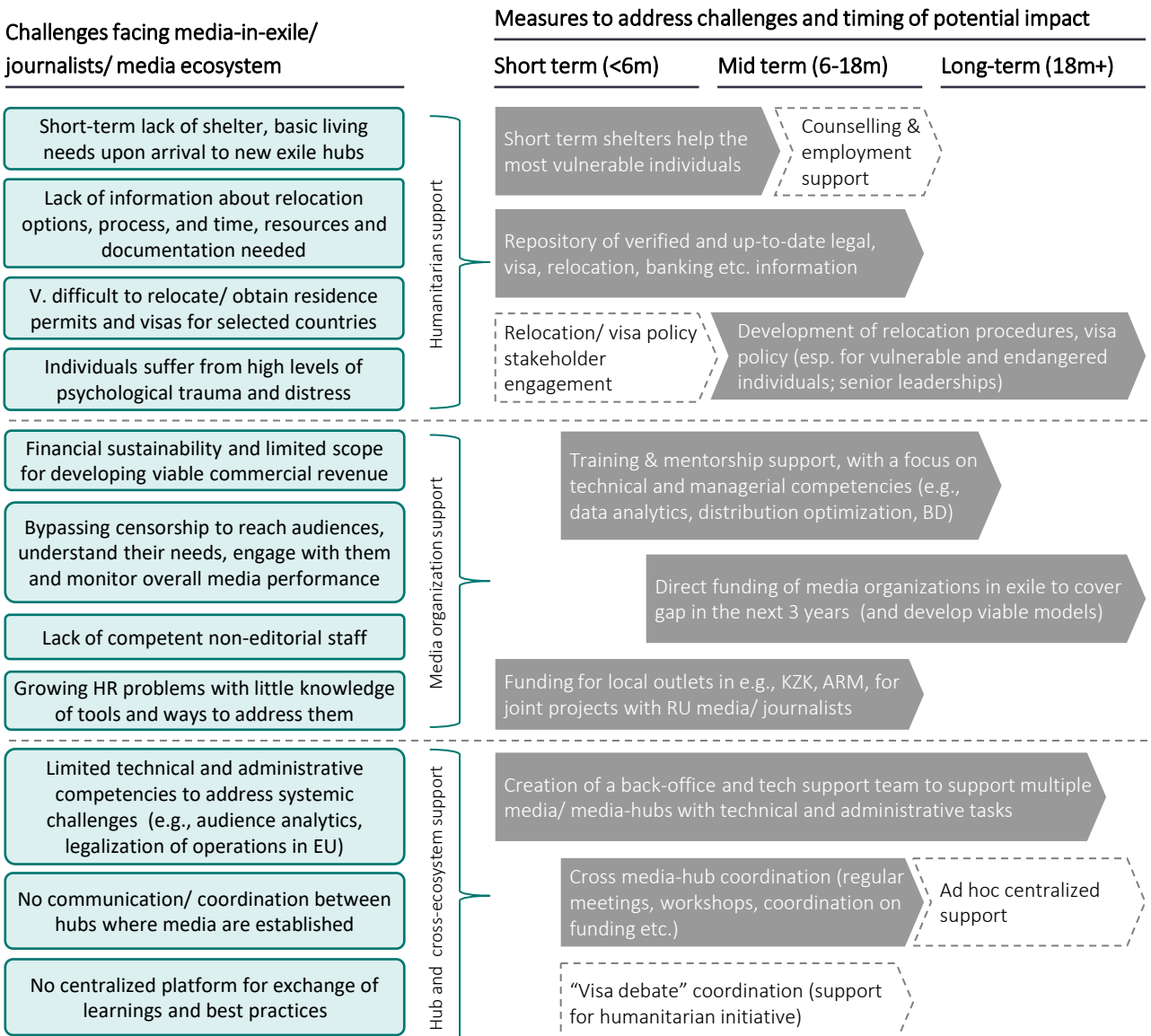|	
Despite constant oppression, Russia has an independent media ecosystem worth saving	• Despite a persistent lack of press freedom, Russia has developed a relatively vibrant independent media ecosystem, with strong investigative reporting, both large and niche media outlets, notable and competent independent regional press and a substantial body of journalists with high professional standards • Built over three decades, this industry is at risk of extinction due to the war against Ukraine and subsequent crackdown on the remnants of free press in the country • This would not only lead to a massive loss of journalistic know-how but also reduce access to reliable information for millions of Russians, both inside the country and abroad
Media in exile are stymied by a lack of technical and managerial competencies, lack of strategic vision	• Virtually all independent media have had to relocate at least a portion of their operations and staff outside of the country – a painful, logistically difficult and expensive task • Media legal setup and team location is not stable. There is a constant fear of visa bans, bank accounts being closed… Many are setting up back-up offices, distributing teams across countries and legal entities – media lack capacity and know-how to manage this process • The war has driven up interest in news. Some media (esp. larger ones) have seen increased reach, audience engagement and even monetization opportunities (esp. crowdfunding) • There have been notable innovations and successes despite all the difficulties (e.g., an inhouse VPN solution, new local editions), demonstrating great resilience and creativity • Censorship has damaged reach for many media. Hence, they need to use unconventional models of distribution (e.g., based on Google AMP, mirror sites). The specific challenges vary significantly based on censorship, creating an ongoing need for tech/ digital support
The space for Russian journalists in exile continues to shrink – putting huge pressure on individuals	• The post-invasion and mobilization waves of emigration from Russia were of historic scale in such a short time span. This has included hundreds of journalists and media workers • Most are concentrated on the few places that accept Russian citizens. But there is political pressure to restrict access for Russians – something that is likely to increase with time. The result is that Russians are confined to an increasingly narrow set of possible destinations • Further migrations may be expected, both from Russia and between émigré hubs. Many of these countries are CSTO members and/or politically close to Russia. There is a high risk of being targeted by security services and men who fled mobilization are at risk of deportation • The psychological welfare of those abroad is deteriorating. Moreover, many have been living on savings that are running out. They are at risk of homelessness and poverty • It is worth noting that in none of the locations has there been notably collaboration of joint projects with local media, further compounding the feeling of ostracism
The Russian media in exile space will require high-touch, centralized and substantial support	• Most journalists and media organizations have concentrated in a few hubs (often teams are split across 2-3 key locations). This allows them to create complementary teams amid severe restrictions on Russians opening accounts, managing legal entities… • At present there are major flows of people moving between exile countries – for work purposes, family reunification or to avoid visa bans, deportation etc. This is especially true for activists and high-profile journalists facing security risks (but without EU visa) • To date coordination and cooperation between central entities at various hubs has been limited (teams in most locations needed to prioritize standing up an entity and providing urgent support), which means that joint solution development has been put on hold

① Executive summary: Recommendations

This study is based on the premise that a substantial degradation of the independent Russian media ecosystem would constitute a major loss for journalism – and hence impede the future establishment of free and independent press in a highly authoritarian part of the world. Moreover, it would have negative knock-on effects, both on the quality of journalism across the region and could escalate integration challenges with Russian communities in exile.

As such, this study recommends support for the Russian media-in-exile ecosystem, to ensure the survival of a diverse, competent and ethical set of media organizations that can preserve journalistic know-how, serve audiences both in Russia and abroad (counteracting the formation of news deserts) and provide a foundation upon which to rebuild a Russian press in the case of a liberalization of press controls within the country.

An overview of the challenges facing the media ecosystem shows that these can be grouped on three levels – on that of individual journalists, of media organizations, as well as the support and coordination bodies. However, recommendations for each should also consider timing, both in terms of need and potential impact.

Exhibit 1

Core challenges for the Russian media-in-exile ecosystem and potential remediation

Challenges facing media-in-exile/ journalists/ media ecosystem

Measures to address challenges and timing of potential impact

| Short term (<6m) | Mid term (6-18m) | Long-term (18m+) |

Humanitarian support

- Short-term lack of shelter, basic living needs upon arrival to new exile hubs
- Lack of information about relocation options, process, and time, resources and documentation needed
- V. difficult to relocate/ obtain residence permits and visas for selected countries
- Individuals suffer from high levels of psychological trauma and distress

Short term shelters help the most vulnerable individuals

Counselling & employment support

Repository of verified and up-to-date legal, visa, relocation, banking etc. information

Relocation/ visa policy stakeholder engagement

Development of relocation procedures, visa policy (esp. for vulnerable and endangered individuals; senior leaderships)

Media organization support

- Financial sustainability and limited scope for developing viable commercial revenue
- Bypassing censorship to reach audiences, understand their needs, engage with them and monitor overall media performance
- Lack of competent non-editorial staff
- Growing HR problems with little knowledge of tools and ways to address them

Training & mentorship support, with a focus on technical and managerial competencies (e.g., data analytics, distribution optimization, BD)

Direct funding of media organizations in exile to cover gap in the next 3 years (and develop viable models)

Funding for local outlets in e.g., KZK, ARM, for joint projects with RU media/ journalists

Hub and cross-ecosystem support

- Limited technical and administrative competencies to address systemic challenges (e.g., audience analytics, legalization of operations in EU)
- No communication/ coordination between hubs where media are established
- No centralized platform for exchange of learnings and best practices

Creation of a back-office and tech support team to support multiple media/ media-hubs with technical and administrative tasks

Cross media-hub coordination (regular meetings, workshops, coordination on funding etc.)

Ad hoc centralized support

"Visa debate" coordination (support for humanitarian initiative)

① Executive summary: Recommendations

The advised course of action is to act on three levels: providing support to individual journalists (including a substantial number of freelancers), direct and indirect support for media organizations, and assistance for the network of media hubs and centralized support functions (e.g., back office, tech and distribution).

Recommended support for Russian media in exile ecosystem

←Worse   Better→

Areas for action	Recommendations	Importance/ potential impact	Complexity/ resource needs
Humanitarian support	1. Continued support for key repository of up to date legal, visa, relocation, banking etc. information	Average impact	Low complexity
	2. Financial aid for shelters in key exile hubs – providing emergency lodging and job-finding opportunities for journalists and activists	V. impactful for limited group	Some funds needed, but not complex
	3. Development of relocation procedures, easing visa policy (esp. for vulnerable and endangered individuals; senior leaderships)	V. impactful for limited group	High political complexity
Support for media outlets	4. Direct funding of media organizations in exile to cover gap in the next 3 years (est. $35-40M total), partially covering development of viable models	V. impactful for media ecosystem	V. large fund needs, also complex
	5. Training and mentorship support, with a focus on technical and managerial competencies (e.g., team crisis management, business development)	Impactful for media eco-system	Some funds needed, but not complex
	6. Funding for local outlets in e.g., Kazakhstan, Armenia to run joint projects with Russian media/ journalists	Relatively low impact	Relatively complex
Cross-hub / centralized support	7. Creation of a back-office and tech support team to support multiple media/ media-hubs with technical tasks (i.e., legal setup, bypassing censorship)	V. impactful for media ecosystem	Some funds needed, rel. complex
	8. Cross media-hub coordination (regular meetings, workshops, coordination on funding)	Impactful for media syst.	Relatively complex

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Reflections on measures to support the Russian media-in-exile ecosystem

- Potential measures above include a group of quick wins (initiatives 1, 2 & 5) , which should be implemented promptly, as well as high impact but more complex initiatives (initiatives 4, 7 & 8) which can deliver a step-change, especially over the mid-to-long term

- This is a unique case of donor support of media, as underscored by learnings from emergency support carried out to date (which has helped hundreds of media workers to relocate and dozens of outlets to open abroad)

  - Firstly, funding needs to be flexible given the highly volatile environment. The external circumstances may require rapid shift in activities and the funds allocated to the sector should reflect this

  - There is real value in constant monitoring and data gathering. Reliable and recent information is required to provide adequate support and target both the right types of activities and recipients

2 Approach and methodology

Approach and methodology

The current report is based on a mixed-methods research approach, combining insights from different sources and frameworks to provide a holistic picture of the current status of Russian media in exile. This approach has been selected for two principle reasons. Firstly, there is a severe lack of data on this subject, a phenomenon that is compounded by a strong need for confidentiality. Thus, mixed methods are needed to a relatively complete picture of the situation. Secondly, the fast-developing situation requires a similarly rapid research approach – to ensure a broad range of data points are captured in a short period of time, you need parallel workstreams gathering insights.

There are four primary research workstreams, each of which combines data from open-sources and direct research by the team compiling the report: an overview of general trends and facts impacting the Russian media landscape, a detailed analysis of hubs (i.e., key cities) in which media workers in exile are based, an analysis of the experience and situation of media organizations and an analysis of the situation of individual journalists and media workers. A more detailed description of the workstreams is presented below.

Exhibit 3

Key research workstreams and data-gathering approach

|	Surveys and deep-dive interviews	Open sources
1 General trends impact Russian media since Feb-22	• Deep dive interviews and surveys of individual journalists (incl. freelancers), media managers and related professions (lawyers, accountants, media development staff, activists)	• Media monitoring to observe evolution of content and situation of Russian media • Desk research and review of reports on the matter
2 Analysis of key hubs for Russian media workers in exile	• Interviews with a dozen leaders of various hubs based in the EU, Caucasus, Central Asia, Balkans and Middle East	• Desk research and review of reports, articles covering the exodus of Russian media and consolidation in specific hubs
3 Experience and situation of media organizations	• Deep dive questionnaires and analysis of how 20 Russian media have been impacted (general situation, legal status, marketing/ audience reach, finances, people and leadership etc.)	• Desk research on articles covering the situation of media in Russia, the nature of the crackdown and exodus • Social media monitoring of posts by media managers/ company accounts
4 Experience and situation of individual journalists	• Deep dive interview of 12 journalists (both freelancers and employed) • Group discussion with ~20 Russian media professionals in various stages of relocation/ exile etc.)	• Social media monitoring to follow the stories of individual media professionals publicly covering the situation of Russian journalists abroad

③ A systematic campaign to dismantle Russian free press

The destruction of Russia's independent media sector has been a long time coming. While the country never had a "free" media sector, the 1990s to mid-2010s saw noteworthy initiatives, like the launches of outlets like Vedomosti by an international consortium[1] or Lentu.ru and Dozhd by local media managers. Nonetheless, during this time journalism was a dangerous profession – the founding chief editor of Forbes Russia (launched by Axel Springer Russia), Paul Khelbnikov, was assassinated[2] just 4 issues into his tenure.

Since the mid-2000s, however, both the violence against journalists and more general censorship has increasingly been consolidated by the state. In 2006 the murder of Anna Politkovskaya sent shock waves across the world – killed on Vladimir Putin's birthday, she had been investigating the president's rule.

Exhibit 4

Press freedom changes in Russia, 2002 to 2022 (additional countries as benchmarks)
(Reporters Without Borders Press Freedom Index; 0-no press freedom, 100-perfect press freedom)
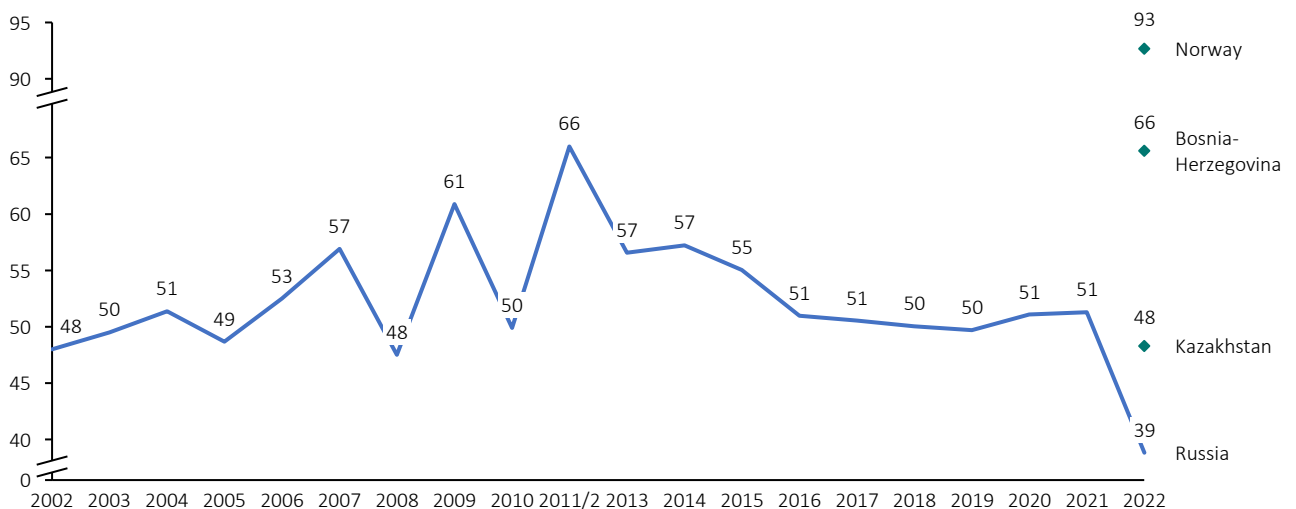
The launch of internet and media regulator Roskomnadzor in 2008 was a major step forward for wider government control (it now runs a list of 1.2 million blocked URLs[3]). The agency has a broad range of tools at its disposal, from granting TV and radio licenses to enforcing data protection rules.

Even against this backdrop, the level of censorship over the past two years has been extraordinary. The expanded "foreign agent laws", which since 2019 can also include natural persons, have been applied to dozens of media and journalists.

This has only worsened since the start of the war. Roskomnadzor has issued censorship orders to numerous foreign tech companies[4]; Meta was designated as an "extremist organization" in March, leading to Facebook and Instagram bans. Further, the already draconian use of the judicial system against journalists has been cranked up. The shocking sentencing in September of Ivan Safronov to 22 years, based on secret evidence[5], had a clear message – there is no room for journalism in today's Russia.

1 https://www.themoscowtimes.com/2015/11/20/pearson-and-dow-jones-sell-russias-vedomosti-newspaper-a50868
2 https://www.economist.com/obituary/2004/07/15/paul-klebnikov
3 https://www.nytimes.com/interactive/2022/09/22/technology/russia-putin-surveillance-spying.html
4 https://rkn.gov.ru/news/rsoc/news74196.htm
5 https://www.theguardian.com/world/2022/sep/05/russian-journalist-ivan-safronov-sentenced-to-22-years-in-prison

4 A record wave of emigration from Russia

This year's emigration from Russia will likely beat the previous record set in 1991 with almost 700,000 people leaving the country. The latest estimates[6] suggest that at least 700,000 have left the country for the "long term", with Georgia, Armenia, Kazakhstan, Kyrgyzstan and Uzbekistan as the main destinations (see exhibit 2, below). Additional notable destinations include the EU, as well as Israel and Turkey.

There is a noteworthy discrepancy between the numbers leaving and long-term residents. For example, Armenian authorities recorded 786 thousand Russian citizens entering the country between January and end-October 2022, but of these only 42 thousand set up residence. Overall, Georgia, Kyrgyzstan, Kazakhstan and Armenia were the key exit corridors for Russians – but only an estimated 7% took up long-term residence. A total 4.1 million Russians entered the four countries, but only 274 thousand stayed.

Fluid distinctions between some journalists and activists, an unclear classification of freelancers and general employment volatility make it difficult to precisely estimate the media staff that has left – both overall and to specific destinations. However, based on interviews with local coordinators and leaders, we can estimate that key hubs Tbilisi, Berlin and Riga have "hundreds of journalists and media workers" (note: this refers to people associated with independent media, not state/ propaganda outlets or tabloids/ aggregators). Turkey (country-wide) is likely to currently house a similar number of media workers, with Kazakhstan, Armenia, Kyrgyzstan and Armenia also accounting for notable populations.

Exhibit 5

Estimated long-term migration of Russians abroad in 2022 (selected countries)
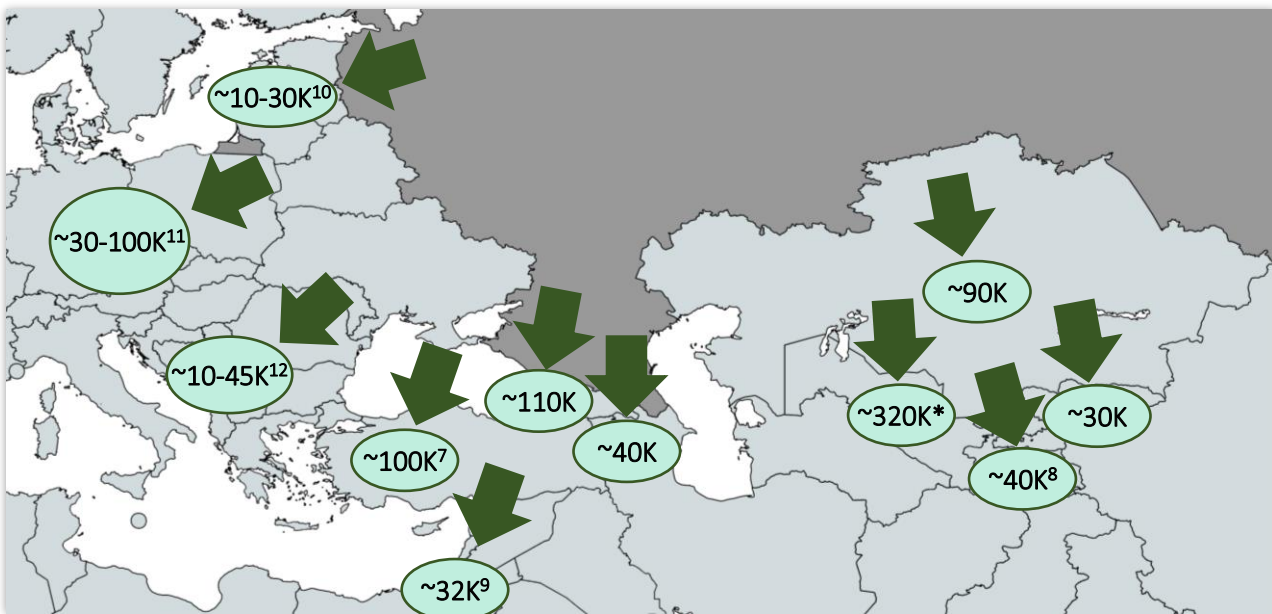
* Residents for at least 15 days. Actual number likely to now be significantly smaller – 70 thousand have opened accounts

Source: Frontex, FSB, National Statistical Offices, Media (see specific footnotes)

6 https://paperpaper.ru/za-2022-j-minimum-700-tysyach-rossiyan-nadolgo-u/
7 https://www.indyturk.com/node/564611/t%C3%BCrki%CC%87yeden-sesler/y%C3%BCzen-rusya-ve-i%CC%87stanbul-k%C3%BClt%C3%BCrel-d%C3%B6n%C3%BCm-noktas%C4%B1nda-rus-muhalif
8 https://www.sibreal.org/a/chislo-uehavshih-iz-strany/31830593.html
9 https://www.jpost.com/aliyah/article-722535
10 Baltic countries, especially Latvia, had large Russian populations prior to the war, but limit new visas (some family reunification ongoing)
11 According to Frontex, 1.3 million Russians have entered the EU since Feb. 24. However, new, long-term migration is orders smaller
12 https://balkaninsight.com/2022/09/23/russian-mobilization-prompts-exodus-to-serbia-turkey/

4   A record wave of emigration from Russia

It should be noted that the current population of Russian emigres is highly mobile, concerned about their precarious situation in countries in Europe and former-Soviet Union, where anti-Russian sentiment can quickly translate to restrictions on residence.

> *"We are constantly on the move. Whenever you travel, you never know if you will come back"*
>
> *- Freelance journalist in Georgia*

As a result, a growing number is looking for more stable settlement further abroad, especially in developing countries with relatively liberal digital nomad visa schemes and highly quality of life. Top destinations include Thailand[13], Indonesia and Argentina.

The nature of the migration itself is also a noteworthy consideration – firstly in terms of the type of people who have left. Many of the migrants are young, with a large share of highly trained professionals – 1/3 were IT workers according to a study conducted during the first wave of emigration[14].

> *1/3 of initial migrants are IT workers, 57% earn money from Russia*

In addition to being relatively highly educated, emigrants are also young (57% are below 35 years old) – posing a demographic problem for Russia.

A second factor to consider is the continued dependence on and ties to Russia. Three-fifths of migrants continue to earn funds from Russia – an even larger share has just three months of savings.

From a media perspective, this represents at least two types of opportunities. Firstly, this is an unusual migrant audience, one that continues to have active ties to the home country and is interested in developments there – suggesting that the usually problematic nature of diaspora publications (which tend to become disconnected from the "home country", while their audiences gradually fade away, integrating into local life) will not be as prominent.

Furthermore, the broad ties between the diaspora and people continuing to reside in Russia present operational opportunities – they can help transfer funds, relay information or documents. Nonetheless, this is also a risk, as Russian security services have been taking an interest in migrants (several journalists in exile reported being approached by suspicious characters asking lots of questions).

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13 https://www.breakingtravelnews.com/news/article/thailand-has-opportunity-to-become-major-destination-for-russian-travelers/
14 https://research1.okrussians.org/

5   Comparison of key hubs of Russian media abroad

Comparing hubs across multiple dimensions is complex (i.e., how to compare costs of living to the number and complexity of steps to secure a work permit). To do so, we identified 34 metrics across 8 dimensions (see exhibit 6 below). Each metrics is ranked and normalized to produce a score out of 100 (e.g., if the most arduous process to obtain a visa requires 7 steps, this metric receives a 0, while the best – 1 step – receives a 100; scores are allocated based on standard deviation from the mean).

Exhibit 6

Criteria used to assess key émigré hubs*

Logistics and accessibility	**Cost of living**
The ability to reach team members spread around the globe, attend industry events, or connect with family (incl. in Russia) matters for hub selection. This indicator is based on local airport scale and connections to international hubs, as well as ease of overland access to Russia itself.	Both individuals and companies in exile face significant financial difficulties, making cost of living an important factor. This indicator is based on general living costs, rent, municipal transport and education (both primary and tertiary)
Civic freedom	**Individual relocation**
Operating a media in an autocratic regime is very challenging, hence civic freedoms should impact the selection of a hub for operations. This indicator takes into dimensions such as democracy ranking, crime rate, economic freedom, press freedom and level of homophobia.	The ability to relocate staff plays a critical role – especially as operating as remote teams weighs on organizational effectiveness. This indicator looks at complexity (time needed, number of procedures/ documents needed) for an individual to relocate to a given location.
Banking	**Local talent**
Both for individuals and entities, banking is a core part of their regular operational activity. This indicator looks at the availability of international banks and neo banks (which tend to be easier for running international payments) and ability to make transfers to Russia	Once established in a hub, you may require some local expertise. Thus, requiring to hire local specialists such as accountants and lawyers. This segment shows the value of local salaries and the availability of specialists.
Business operations	**Local environment**
You may need to get established locally by registering your business. Or perhaps you may want to open a new business from scratch. This indicator looks at the complexity (days, number of procedures) of setting up a new legal entity (both non-profit and commercial entities).	Attitudes towards Russians have sharply degraded since the start of the full-blown invasion. Conversely a local Russian diaspora creates both a new potential audience and hiring pool . This indicator considers both attitudes towards Russians and size of local diaspora.

* Reminder: Throughout this report the word "hub" is used to refer to a city or geographical location in which a large number of journalists/ freelancers and/ or media organizations are concentrated (i.e., not a co-working space)

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## 5 Comparison of key hubs of Russian media abroad

A combination of quality of life, civic environment and ease of opening and running businesses favours North European hubs (see exhibit 7 below). But planned visa bans for Russian citizens (for which exemptions have not yet been clarified) make individual relocation challenging. Moreover, a high local cost of living will present financial challenges for struggling media.

The alternative hubs for Russian media (Balkans, Caucasus, Middle East, Central Asia), all have problems with security and the civic environment, in addition to having problems of their own. Tel Aviv, for instance, can be difficult to assimilate in, especially for gentiles. Meanwhile, Dubai is a very high cost autocracy.

The Caucasus, the closest region, offers a decent alternative to European hubs. Tbilisi, with its large Russian speaking diaspora and relatively efficient business environment[15], is the main hub. But local attitudes towards Russians are increasingly hostile. Meanwhile Baku and Yerevan both present safety issues[16].

Exhibit 7

Overview of main hubs for Russian media organizations abroad
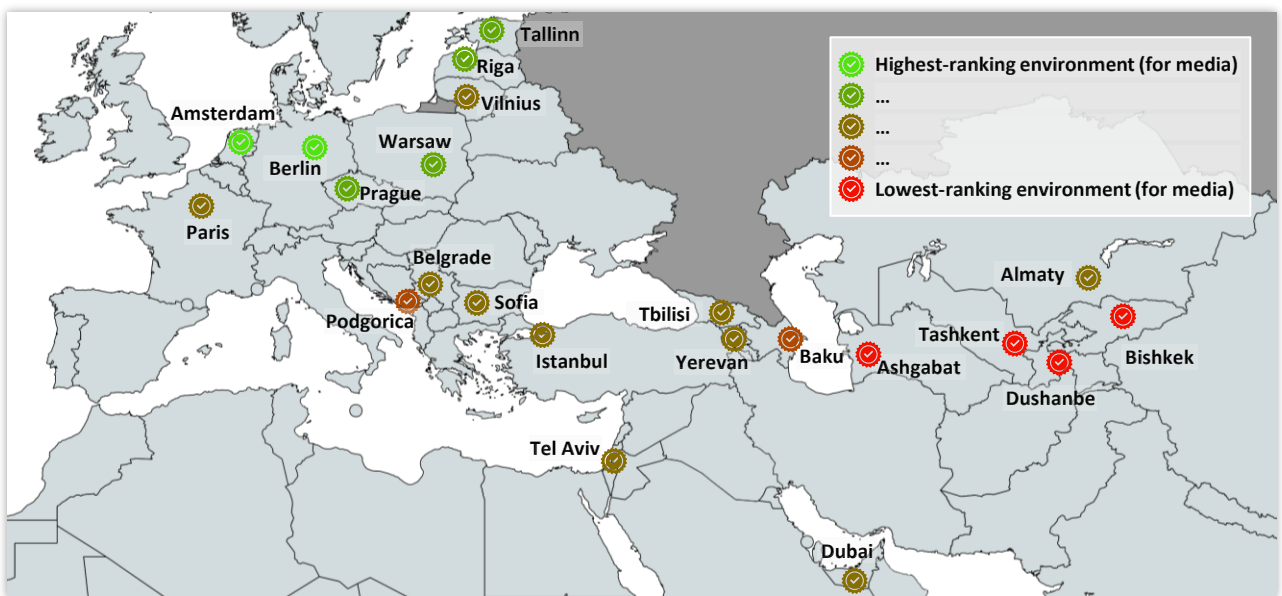
The Balkans also offer a decent alternative, particularly since they are non-EU and hence will likely remain relatively accessible (except Sofia). Belgrade is the top contender, with superior transport links and local banking infrastructure. Nearby Istanbul, a global hub, is interesting for similar reasons.

While Central Asia is fairly easy to access, it's limited international connections, low local talent base and authoritarian regimes make it a poor location to base media operations – with the potential exception of Kazakhstan, which both has decent infrastructure and a relatively efficient, business friendly environment.

Recommendation: Cross-hub coordination, facilitation of travel (visa facilitation)
- Coordination and specialization among key hubs can help increase the effectiveness of support programs
- Hub-policy-makers cooperation to ease travel for vulnerable individuals, leaders & investigative journalists

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15 https://www.worldbank.org/en/news/press-release/2019/10/24/georgia-ranks-7th-in-the-world-for-ease-of-doing-business-says-latest-world-bank-study
16 https://www.intelligenceonline.com/government-intelligence/2022/05/13/russia-s-fsb-tightens-its-grip-in-armenia,109784440-art

6 Challenges of Russian media organizations

A. Fire-fighting on multiple fronts

Running a Russian media organization was never an easy task. Nonetheless the scope of challenges faced by news outlets has seen an unprecedented expansion since the beginning of the full-scale invasion.
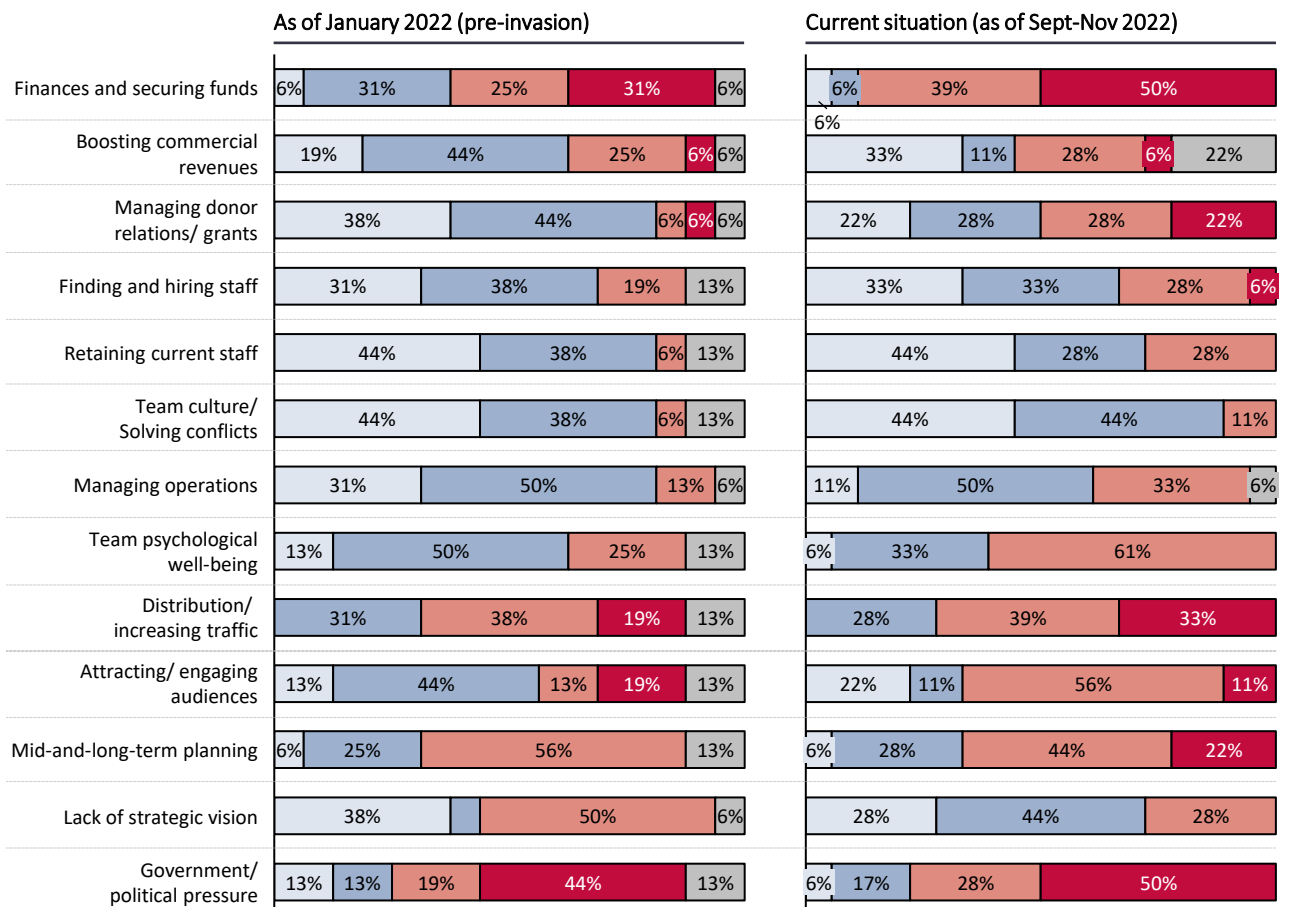
The problems which previously created the biggest headaches for media managers – government pressure, securing stable funding and distribution/ audience engagement – have ballooned (see further details on distribution issues in section 8 of this report; sector financing is discussed in section 9). The share of outlets that see funding stability as a critical or major problem has increased from 56% to 89%. Meanwhile, the share of media struggling to attract audiences (despite heavy censorship), doubled from 32% to 67%.

Daily tasks are also a challenge – while just 13% saw managing operations as a problem at the start of the year, 33% do so now. Managing grants – a very time-consuming task – is an issue for 50%, up from just 12%. Over 60% are struggling with team psychological well-being, up from a quarter previously. Worryingly, lack of strategic vision continues to become an ever-growing challenge – the path forward is unclear.

Exhibit 8

Key challenges of media surveyed (n=18)

Legend: Not a problem · Minor problem · Major problem · Critical problem · NA

As of January 2022 (pre-invasion)

Challenge	Not a problem	Minor problem	Major problem	Critical problem	NA
Finances and securing funds	6%	31%	25%	31%	6%
Boosting commercial revenues	19%	44%	25%	6%	6%
Managing donor relations/ grants	38%	44%	6%	6%	6%
Finding and hiring staff	31%	38%	19%		13%
Retaining current staff	44%	38%	6%		13%
Team culture/ Solving conflicts	44%	38%	6%		13%
Managing operations	31%	50%	13%		6%
Team psychological well-being	13%	50%	25%		13%
Distribution/ increasing traffic	31%	38%	19%		13%
Attracting/ engaging audiences	13%	44%	13%	19%	13%
Mid-and-long-term planning	6%	25%	56%		13%
Lack of strategic vision	38%		50%		6%
Government/ political pressure	13%	13%	19%	44%	13%

Current situation (as of Sept-Nov 2022)

Challenge	Not a problem	Minor problem	Major problem	Critical problem	NA
Finances and securing funds		6%	39%	50%	6%
Boosting commercial revenues	33%	11%	28%	6%	22%
Managing donor relations/ grants	22%	28%	28%	22%	
Finding and hiring staff	33%	33%	28%	6%	
Retaining current staff	44%	28%	28%		
Team culture/ Solving conflicts	44%	44%			11%
Managing operations	11%	50%	33%		6%
Team psychological well-being	6%	33%	61%		
Distribution/ increasing traffic	28%	39%	33%		
Attracting/ engaging audiences	22%	11%	56%	11%	
Mid-and-long-term planning	6%	28%	44%	22%	
Lack of strategic vision	28%	44%	28%		
Government/ political pressure	6%	17%	28%	50%	

6 Challenges of Russian media organizations

B. Securing financial and legal stability

Securing a new legal and financial status is a major challenge for exiled media. This is not just due to restrictions that many countries have placed on Russian citizens – often the sheer numbers of new arrivals simply overloaded the system, results in weeks of queues to get basic administrative processes started or open bank accounts (note: Kazakhstan's efficient Individual Identification Number system bucked this trend, with the registration of 70,000 individuals in just over a week[17] following the Sept. 21 mobilization).

Companies, as a rule, are more difficult and time-consuming to register than individuals in all countries surveyed (see exhibit 9, below). Non-profits are more challenging still, often requiring a host of administrative criteria (e.g., local address, several-month verification process)

Costs of launching new legal entities (including finding and hiring local lawyers, accountants, as well as various administrative fees) need to be added to the substantial costs of relocating staff. In the case of one large media, expected additional expenses in 2022 would be equivalent to a third of their annual budget.

Moreover, recent months have seen a trend whereby media have spread out across multiple locations and legal entity – primarily to spread out risks of financial restrictions on Russian-founded entities (or outright closures), or forced relocation of staff.

Half of media have 30% or less of their teams in their main hub. On average, 44% of exiled media teams were based in one place (survey results, n=17)

Exhibit 9

Overview of effort and time needed to different relocation steps (survey, n=17)

Legend:
- Relatively easy
- Easy but expensive
- Quite difficult
- Difficult and long
- Difficult and expensive
- Extremely difficult
- Wouldn't/ Couldn't say

	Share (%) of media who said each issue was…	Process done in less than a week*	Took up to a month to finish*	Over a month/ still not finished*
Determine the legal form needed	47% · 6% · 12% · 6% · 29%	30%	40%	30%
Find relevant consultants in English/ Russian	47% · 18% · 12% · 24%	50%	10%	40%
Register a new legal entity	12% · 29% · 18% · 41%	0%	11%	89%
Open a bank account	24% · 24% · 24% · 24%	8%	8%	83%
Rent a workspace	18% · 12% · 6% · 59%	33%	17%	50%
Find local specialists	29% · 6% · 12% · 6% · 35%	30%	20%	50%
Organize relocation for 1 person	18% · 18% · 18% · 18% · 29%	20%	20%	60%
Find housing for 1 person	12% · 18% · 24% · 18% · 12% · 18%	25%	0%	75%

* Share of media among those who provided responses. Totals may not sum to 100% due to rounding

17 https://kapital.kz/gosudarstvo/109351/poryadka-70-tysyach-rossiyan-poluchili-v-kazakhstane-iin.html

6 Challenges of Russian media organizations

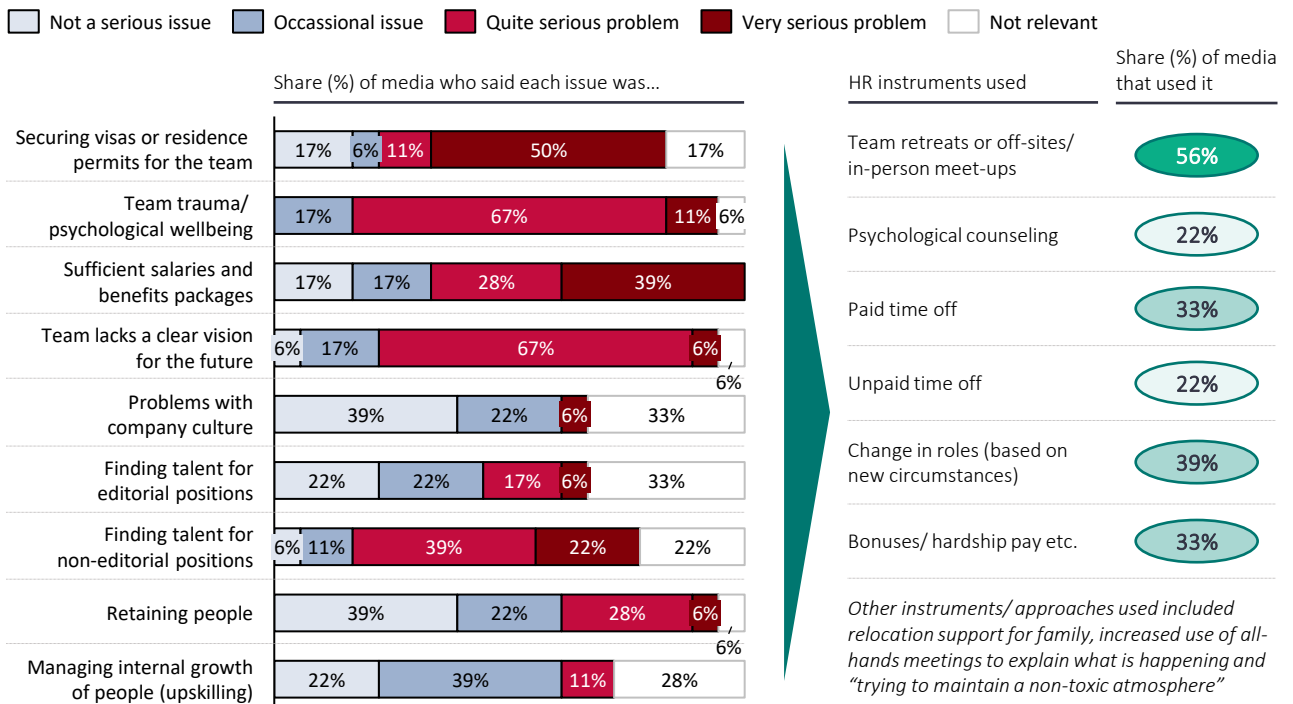### C. Crisis management: teams and organizations under duress

It should be no surprise that HR and personnel management issues are among the main challenges for Russian media-in-exile. Many staff members have experienced difficult journeys to flee Russia; moreover, the presence of family members in Russia adds to constant concerns about their safety and possible reprisals by state authorities. All this results in a very challenging team environment.

A concerning 78% of media surveyed mentioned team trauma or psychological well-being as a very or quite serious issue. This prolonged stress is further accentuated by a lack of vision on how to move forward, relatively low salaries and benefits and challenges with visas. This stressful atmosphere will no doubt lead to further HR difficulties (e.g., conflicts among staff) and degrade media capabilities further. Worryingly, media lack the tools and capabilities to address these problems as they arise.

The challenge of filling non-editorial positions – a major problem for 61% of media surveyed, merits additional consideration. Lack of accountants, project managers, legal and tech staff means weigh down on and stymie the efforts carried by editorial staff. This, too, will likely be an increasingly pressing problem.

Exhibit 9

HR and personnel problems of Russian media in exile (survey, n=18)

Legend: Not a serious issue | Occasional issue | Quite serious problem | Very serious problem | Not relevant

Share (%) of media who said each issue was…

Issue	Not a serious issue	Occasional issue	Quite serious problem	Very serious problem	Not relevant
Securing visas or residence permits for the team	17%	6%	11%	50%	17%
Team trauma/ psychological wellbeing	17%		67%	11%	6%
Sufficient salaries and benefits packages	17%	17%	28%	39%	
Team lacks a clear vision for the future	6%	17%	67%	6%	6%
Problems with company culture	39%	22%	6%		33%
Finding talent for editorial positions	22%	22%	17%	6%	33%
Finding talent for non-editorial positions	6%	11%	39%	22%	22%
Retaining people	39%	22%	28%	6%	6%
Managing internal growth of people (upskilling)	22%	39%	11%		28%

HR instruments used	Share (%) of media that used it
Team retreats or off-sites/ in-person meet-ups	56%
Psychological counseling	22%
Paid time off	33%
Unpaid time off	22%
Change in roles (based on new circumstances)	39%
Bonuses/ hardship pay etc.	33%

Other instruments/ approaches used included relocation support for family, increased use of all-hands meetings to explain what is happening and "trying to maintain a non-toxic atmosphere"

Recommendation: HR management training and back-to-mid office support

- Media tend to be especially weak in HR and personnel management skills – in-depth training programs and ongoing mentorship support in this direction can have an outsized impact on keep media-in-exile functioning
- Back and mid office support for media can significantly alleviate the challenges in finding skilled staff

6 Challenges of Russian media organizations

D. Innovation and persistence despite all odds

Despite the seemingly overwhelming challenges, Russian media in exile have continued to develop, grow and innovate. Some outlets have launched new social media accounts (e.g., MediaZona has launched a successful TikTok[18]), others have developed tech solutions for their audiences to continue to receive access to quality content (e.g., the Samizdat app, launched by Proekt, IStories, The Insider, Bellingcat, and Alexey Navalny's team[19], helping access investigations without requiring a VPN).

There are also more operational forms of innovation, as with the use of Artificial Intelligence-based imagery (see exhibit 10, below). By leveraging advanced, free to use software like Stable Diffusion or MidJourney, AI not only allows to produce compelling visuals from places that would not be accessible to exiled media but does so at a fraction of the cost of stock services or freelance photographers[20].

"We started using AI imagery in August 2022, and we believe that it is a great addition to the traditional illustrations, such as author's photos and stock images," Taisia Bekbulatova, Editor in Chief of Russian media in exile *Holod*. "AI imagery allows publishers to save both time and financial resources, which is especially important for small and medium-sized newsrooms."

Exhibit 10

Artificial Intelligence as an alternative source of affordable, quality visuals (example)

Source: Holod Media (https://holod.media/2022/09/26/etkind-putin-prichuda/); Generated by MidJourney

> **Recommendation: Media funding and mentorship support**
> - Media in exile will need sustained funding over the coming years to adapt their models, address a multitude of internal pain points and develop innovative solutions – allowing them to thrive and serve audiences effectively

18 https://www.tiktok.com/@mediazona
19 https://novayagazeta.eu/articles/2022/11/11/proekt-istories-the-insider-bellingcat-navalnys-team-launch-samizdat-app-allowing-to-view-investigations-without-vpn-en-news
20 https://thefix.media/2022/10/20/what-ai-image-generators-can-do-for-newsrooms

7 Challenges of individual journalists

A. "Musical chairs": the psychological pressures of life in exile

The exodus of Russians this year was an unplanned and chaotic process. Many packed their bags and left by and available means of transport (in some cases leaving in the middle of the night, crossing the border on foot[21]). Many had just a few months of savings and/ or found themselves unable to access funds in Russia.

On the ground, they often faced difficulties in getting medical help, finding schools for children, accessing banking services and many other issues. Relations with citizens of host countries are often difficult – many have suffered from Russian oppression and were unhappy with the price rises and strain on local infrastructure that followed tens of thousands of new arrivals.

Arguably the biggest enduring challenge is the precarious nature of life abroad. In many countries local politicians call to restrict or reduce the presence of Russians, often seen as a security threat. In countries that are members of the CSTO (i.a., Armenia, Kazakhstan, Kyrgyzstan, Tajikistan and Belarus), there are concerns that those who escaped mobilization will be sent back.

The result is like the game of musical chairs – every round the list of countries willing to accept Russians shortens, savings and ability to travel erode and the walls slowly close in. This can lead to various psychological conditions, including debilitating anxiety – a major underlying threat to both individual journalists and media organizations operating in exile.

Exhibit 11

Challenges of individual journalists, freelancers and media workers in exile

Accommodation	Visa/ Residence	Mental Health	Financial Security	Banking services
Expensive & often low-quality, crowded – constant travels & stress	Legalization of stays is often difficult and temporary. Securing humanitarian visas can be long/ arduous	Feeling mentally drained, homesick and constantly alert with no vision of the future	High and rising cost of living is eating away at meager savings – meanwhile job options are rare	In some hubs it can take weeks or months to open an account; borrowing money to survive
Medical Insurance	**Discrimination & Safety**	**Managing Legal Cases Remotely**	**Local Legal Consultancy**	**Isolation/ Loneliness**
Needed for both care and applications/ stay legalization. Private insurance is available but costly	Landlords often ask higher rents; some service provision is limited.	Managing assets at home to prevent confiscation/ secure transfer to family	Consultation on legality of stay/visas and next steps. Services are expensive	Isolation with friends and family far away/ in danger contributes to mental burden

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21 https://twitter.com/alexey__kovalev/status/1499964900231233538

7 Challenges of individual journalists

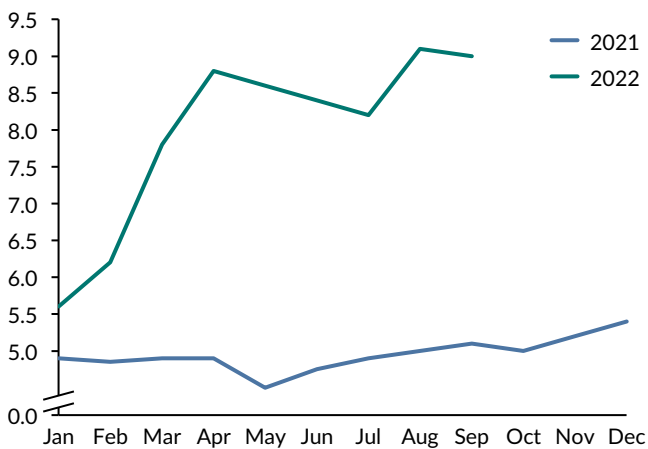## B. Growing financial pressure and risks of homelessness

General stress levels are compounded by an uncertain financial situation for many media workers in exile. Often, they had to leave at short notice, transferring, when possible, their assets to family members or third persons (to avoid confiscation). Their travel abroad has been long and complex (see sidebar). Moreover, rising costs of living, especially in main hubs, have drained those savings that they had.

Nearly all the persons interviewed saw cost of living as a major factor for their choice of residence. In many cases, journalists who had initially moved to capital or major cities in the countries of emigration (e.g., Almaty or Tbilisi), but after take a look at their budgets decided to look for lodging deep in the countryside.

A similar phenomenon was observed on an organizational level – some small teams moved offices or meetings to rural locations to bring down overall operational costs.

Circuitous and expensive travels

For many media workers the trip from Russia to their home in exile was not a direct one. Several journalists recounted journeys that started via Central Asia (the land border was relatively open, for a time), then came trips to Tbilisi, Istanbul or Belgrade, and only then came final destinations (the EU was usually an aspirational target).

In some cases, they would stay in e.g., Serbia, leaving and re-entering the country every 30 days, while they sought to obtain visas/ other documents.

All this has been very expensive, with costs far exceeding any potential revenues from employment opportunities along the way.

Exhibit 12

Average asking rent price per SQM in Tbilisi (USD)

The role of shelters in this ecosystem is quite noteworthy. Tbilisi is in many ways a central point for different émigré communities (Central Asians fleeing persecution, Ukrainian and Belarusian war and revolution refugees). It has seen a rapid rise in rental prices this year (see exhibit 12, opposite) – with prices quoted for Russians often being higher still than the market average.

The city counts at least 6 different shelters for different communities. By providing a place to sleep and come into contact with one's émigré community, they play a major role in prevent homelessness and marginalization.

Recommendation: Shelter and short-term support to precent homelessness, securing basic needs

- Shelters, or common houses run by local media and/ or activists play a vital role in securing the basic needs of individuals living in exile. Usually these are large apartments or standalone houses that are run by activists or local media community members. They offer cheap or free lodging for recent arrivals or vulnerable individuals

8 Reaching audiences and content distribution

A. Crackdown on traditional distribution channels, rise of alternatives

Internet censor Roskomnadzor launched a crackdown on social media platforms in the wake of the February 2022 invasion. After Meta (parent company of Instagram and Facebook) announced it would temporarily allow posts wishing violence to Russian servicemen attacking Ukraine, as well as the Belarusian and Russian presidents[22], the US company was labelled an extremist organization and banned.

But this hasn't been the only measure to control communications. From blocked websites, fines and bank account seizures against Google and YouTube, to increased control of domestic social media (i.a., Vkontakte and OdnoKlassniki – see exhibit 14 below), Russian authorities have done their utmost to limit the circulation of information.

Media have had to adapted – launching new channels of distribution (a quarter launched TikTok accounts, a fifth opened accounts on Twitter and/ or email newsletters). So have their audiences – half of media surveyed saw substantial growth on YouTube and Instagram; two-thirds saw a jump in their Telegram stats.

Exhibit 13

How different communication channels changed between Jan-22 and now
(% of media that say their traffic/ follower numbers changed in the following ways; n=18)

	Higher traffic/ followers #	No significant change	Lower traffic/ followers #	Blocked/ closed	Launched post-war	Comment
Website	29%	14%	36%	21%	0%	*Some high growth but most drop/ block (n=14)*
Email (newsletter)	44%	22%	0%	11%	22%	*Solid growth – a rel. new trend for RU media (n=9)*
Facebook	33%	40%	20%	0%	7%	*Resilient to govt blocking attempts (n=15)*
VKontakte	7%	14%	14%	64%	0%	*Key channel blocked post-Feb 24 (n=14)*
Odno-klassniki	0%	14%	43%	43%	0%	*2nd most blocked channel post-Feb 24 (n=7)*
Youtube	50%	29%	7%	0%	14%	*Main growth/ new launch channel (n=14)*
Twitter	40%	33%	7%	0%	20%	*Popular growth/ new launch channel (n=15)*
Instagram	50%	21%	14%	7%	7%	*High growth despite govt blocking attempt (n=14)*
TikTok	13%	13%	38%	13%	25%	*Relatively low use and effectiveness (n=8)*
Telegram	65%	12%	6%	6%	18%	*Key growth channel (n=17)*

Note: Additional questions were asked about LinkedIn and Viber, but neither was widely used by surveyed media

22 https://rbc-ru.turbopages.org/rbc.ru/s/technology_and_media/11/03/2022/622a86c29a7947a262f4882a

8   Planning for an even more repressive future

B. Planning for an even more repressive future

"We have always taken a pessimistic view [on the future], it turns out we were always right", is the comment of one Russian media manager. Sadly, the past three decades have proven this approach to be merited. The question now is – what kind of problems should Russian media outlets expect from the months and years ahead.

The current trajectory does not have much to be optimistic about Russia. The government is showing no signs of easing up on the information space – moreover, any moves in this direction would not and should not be perceived as credible.

But as independent media slowly fade away from the information space of ordinary citizens, a vicious cycle appears. Measures used to bypass censorship, e.g. VPNs (virtual private networks) become even less accessible to people as they have less chances to be reminded about them.

On the other hand, sanctions and general ostracism of Russian issues create challenges on the level of global tech infrastructure. Various media solution providers (i.e., MediaTech) are curtailing access to their e.g., software for Russians, while companies like YouTube are limiting monetization options (a particularly painful issue given this is one of the most promising channels to reach audiences).

Automating censorship – Yandex.ru

Tech giant Yandex, Russia's Google, Uber, Amazon rolled into one, has been a major force shaping Russian's online content consumption.

The sale of Yandex.ru, the country's biggest website (over 60% of search traffic), to state-controlled VK, will increase direct government oversight over the main gatekeeper for popular news.

The personalized news platform Yandex.zen (part of the sale; Yandex.ru is expected to redirect to dzen.ru) and content prioritization program Nirvana are powerful tools to depoliticize the news agenda[xx], according to University of Helsinki's Olga Dovbysh.

These changes will further increase government control over Russians' news consumption, allowing for an increasingly personalized stream of vetted information and infotainment.

The upshot, for media, is that the biggest site in Russia will no longer be available for new user acquisition and distribution of content. Finding alternative solutions will be painful and require several solutions rather than a single silver bullet.

However, it is worth the effort – without fresh users coming in, penetration of Russia-based audiences is likely to consistently decline.

Recommendation: Support needed for reliable benchmarking, analytics

- With conventional means of distribution curtailed, the quality of audience analytics is significantly degraded. This means media both lack visibility as to content reach, and audience preferences and engagement
- This also impacts ongoing donor support – without reliable insights it is difficult to assess and benchmark the effectiveness of support (in the medium to long term, resources need to be directed towards projects and media with higher effectiveness of reaching Russian audiences)
- Most media lack technical and marketing specialists – this function can be aggregated across multiple entities, creating an expertise hub that supports the sector overall

9 Forecasting the viability of the Russian media space

A. Prospects on rationalization and ensuring the survival of key outlets

The size of the Russian media market, measured by revenues available to publishers (ads, subscriptions, events…) has collapsed by several orders of magnitude. Direct international payments into Russia are virtually impossible from many countries; within Russia people and firms are simply afraid to work with independent media – even if they are still able to do so (the economy is paying a heavy toll for the war).

Exhibit 14

Estimate size of the Russian independent media market post-rational

	Pre-war # of media*	# media post-rationalization	Est. yearly budget**	Funding gap 2023***	Funding gap 2024***	Funding gap 2025***	Total 3-year needs****
Large national media/ broadcasters	5-7	3	€3 M	40%	35%	30%	€9.5 M
Mid-sized national media	10-15	5	€1.5 M	60%	50%	40%	€11.3 M
Notable regional media	15-20	5	€1 M	60%	50%	40%	€7.5 M
Specialized/ niche media	20-30	8	€0.5 M	50%	40%	30%	€4.8 M
Social media-based/ startups	na	10	€0.2 M	70%	60%	50%	€3.6 M

* Rough estimate based on expert interviews
** Average of several available media budgets, rounded down to reflect emphasis on cost reduction
*** Estimates based on current performance of respective media (i.e., based on 2022 budget performance)
**** Annual budget multiplied by expected cash gap for each of the next three years

Total: ~€37 M

As a result, most media will be unable to sustain their operations without external support. But with limited support available, this means the entire sector will need to go through rationalization. If left unmanaged, the most likely outcome is a loss of diversity. Many outlets have already received "survival grants" covering a few months of operations – going forward however, large outlets will likely be able to consolidate both donor support and crowdfunding revenues.

To avoid stagnation due to lack of diversity and competition, multiple interviewees recommended distributing scarce resources across a wider range of outlets (a sort of Noah's Ark; see exhibit 14). This approach would allow for easier restoration and preserve a wide range of competencies (e.g., investigative report, literary journalism). It should be noted that such a structure would require substantial funds (approx. 35 to 40 million euros over 3 years) and an unprecedented level of donor coordination.

B. Models for media in exile viability

Although limited, there are still monetization models available to Russian media (see exhibit XX). Indeed, there have been very successful cases even during the past year – St. Petersburg based Bumaga launched its own VPN service, Meduza managed to cover two-thirds of costs through crowdfunding.

Exhibit 15

Potential revenue streams for Russian media in exile

←Worse   Better→

Revenue models		Description	Potential scale
Subscriptions (reader revenue)	1a	**Reader revenue (classic)** – paywall or membership to build community regular supporters (focus on outside Russia)	V. high potential, esp. for large media
	1b	**Reader revenue (honorary circle)** – small group of high-value individual contributors (e.g., $1,000+ per year)	High potential, esp. for large media
Community based (events, trainings)	2a	**Events (offline)** – hosting or supporting (mainly marketing services) events in exile hubs (option to focus on diaspora)	Difficult to compete with local players
	2b	**Online events and training** –online courses, events for niche interest groups (e.g., professional skills, job orientation)	Some interesting niche opportunities
Advertising	3a	**Digital ads (programmatic, display)** – both automated (auction) and direct sale of advertising space inventory	High potential in case of traffic spike
	3b	**Native advertising** – creating and featuring branded/ sponsored content on own resources	Negative image of RU limits demand
Production services	4a	**Production services (audio, video)** – in-house creative staff produce commercial materials (e.g., branded podcast)	Potential for strong creative teams
	4b	**Production services (marketing materials)** – providing creative and/ or marketing agency services for brands	Local competition, image issues
Publishing	5a	**Publishing (audio/ e-books)** – offering catalog of audio and e-books (either standalone or complement to subscription)	High potential, esp. for large media
	5b	**Special reports/ research** – preparing tailored research on commission (e.g., market or political analysis)	High value but limited demand

Nonetheless, Russian media-in-exile need to deal with a negative image in most markets and may struggle with local competition. The most promising options are reader donations (mainly from diaspora), automated services (e.g., programmatic ads) and high demand services (e.g., production).

Recommendation: Expert/mentor support and training to transform media business model

- The need for business model transformation requires a high level of capabilities and innovation, for which media outlets will require expert support
- Where possible, it is worth coordinating and building joint solutions (e.g., a joint sales house)

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