

JX FUND

LOCKING DOWN THE WINDOWS



A NEW PHASE IN THE FIGHT FOR PRESS FREEDOM IN RUSSIA

Research Report | Berlin, September 2024

Purpose and approach of this research

Over the past year, Russia has done more than simply refine its already deeply repressive system – it is currently in the middle of building a new model of digital censorship, spending hundreds of millions of dollars on top of its already bloated propaganda budgets to ensure its people are fully isolated from independent and objective voices. One of the Kremlin's most important targets: Russian independent media in exile.

For Russian civil society as well as for Western reporting independent exiled media are playing a central role: These media are a unique and precious voice that can still make its way to Russian audiences.

They are also the foundation of Western reporting on Russia – without them, many international media would struggle to keep up with what is happening in the secretive state. Indeed, recognizing this, they are eager to partner with Russian colleagues on especially high-impact stories: intelligence or disinformation operations in the West, for example.

While Russian authorities are building a toolbox for censorship – not just for themselves, but for despotic regimes across the world – Russian exiled media are investing in anti-censorship technologies to fight it. Despite their comparatively small resources and size, they have developed a wide range of innovative digital solutions – from blocking resilient magic links to browser extensions that counter YouTube slowdowns.

Even more impressively, they have done so largely without the support of Big Tech firms. In fact, many of the social media platforms have done more harm than good: indiscriminately creating hurdles for Russian content creators or worse, being manipulated by censors to take down independent or opposition content.

With just a fraction of the budget being spent to silence them, Russia's exiled independent media have shown that they can not just withstand the new censorship regime, but also to create tools and blueprints that can serve their colleagues in other parts of the world. But they remain vulnerable, and deserve both more stable support and support from a wider range of stakeholders – including Big Tech companies.

This report presents the state of the Russian media market as it enters a new, even darker phase, as well as an overview of the media that are fighting back. Hopefully, it can serve to re-energize support, rather than simply serving as a warning of potentially far more serious – and costly – challenges to come if the issues are not addressed now.

Penelope Winterhager, Managing Director, JX Fund

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1 Executive Summary

Russian state toolbox of information control is expanding

- Over the last year the Russian state has increased pressure on independent media sector by introducing number of new laws and continuing misapplication of existing media laws and charging the independent Russian journalists.
- Censorship is reaching an unprecedented level as the Kremlin orders YouTube slowdown, blocks VPN services and Signal, tests blocking of Telegram, and continues to manipulate online spaces and seed propaganda narratives in Russia and abroad.
- The Russian state uses policies to harass foreign tech companies and tries to manipulate Big Tech in their battle against freedom of speech.

Big Tech turns into crucial actor in the digital battle for freedom of speech

- Google, Apple, Meta, Byte Dance (TikTok) continue to comply with the Russian state policies, deemed by experts as problematic and violating human rights. Tech giants prioritize revenue over freedom of speech, thus becoming allies of the Russian state rather than of independent media.
- Along with securing access to independent content for their audiences, the independent Russian media in exile have to protect their services and products from being sanctioned by tech giants. Constantly battling platform moderators saps the time and resources of independent media, distracting them from working on high-quality independent journalism.
- Advocacy on protecting the content and services of independent media in exile remains problematic, despite active assistance of international media organizations. Reaching to tech giants, independent media need support from political institutions and leaders.

Audiences are growing despite censorship

- Media need to leverage as broad a combination of channels and platforms to reach their audiences and evade censors. They are broadly successful, with both subscriptions and traffic continuing to grow, especially via YouTube and Telegram.
- Although tech solutions have reduced the impact of YouTube slowdowns (importantly, multiple innovative anti-censorship solutions were developed by media themselves) and other forms of censorship, these are taking their toll and leaving audiences with a gap in content. This creates a space for propaganda to grow in.

Despite the pressure, the media remain impactful in Russia and abroad

- Russian media in exile continue extensive independent reporting for the Russian audiences by introducing exemplary tech and product innovation that allows to overcome censorship, protect content consumers and address the news fatigue.
- Russian media in exile proved themselves as valuable investigators in Russia and abroad. Materials of the independent journalists assist multiple stakeholders in tracing the international crime, unmasking national and foreign disinformation campaigns of the Kremlin, revealing security threats from the Russian state in Europe.

Donor dependency grows, but some media buck the trend

- Media budgets increased in 2023, with further growth expected in 2024, although the pace is slowing.
- Donor dependence is increasing on average, but some (mainly large and mid-sized) media have successfully decreased reliance on grants in favor of commercial revenues, including reader support.
- Spending on journalists and editors is rising. This produces more content but may make reaching commercial and organizational goals harder.

2 Overview of 2024: Moving to Full Digital Control

Over the past year, Russia tightened the screws on its censorship regime and expanded its toolbox for restricting media freedom. New legal restrictions were passed, both journalists and media organizations faced more far-reaching administrative and security threats, and there is an ongoing effort to further limit ordinary Russians' access to independent media content.

But this is not just a case of expanding or refining an existing system – Russia is currently on the cusp of implementing a new level of control over its digital landscape with blockages of YouTube², Telegram, Signal³, and other services⁴. This new model is currently being tested.

KEY FACTS AND FIGURES

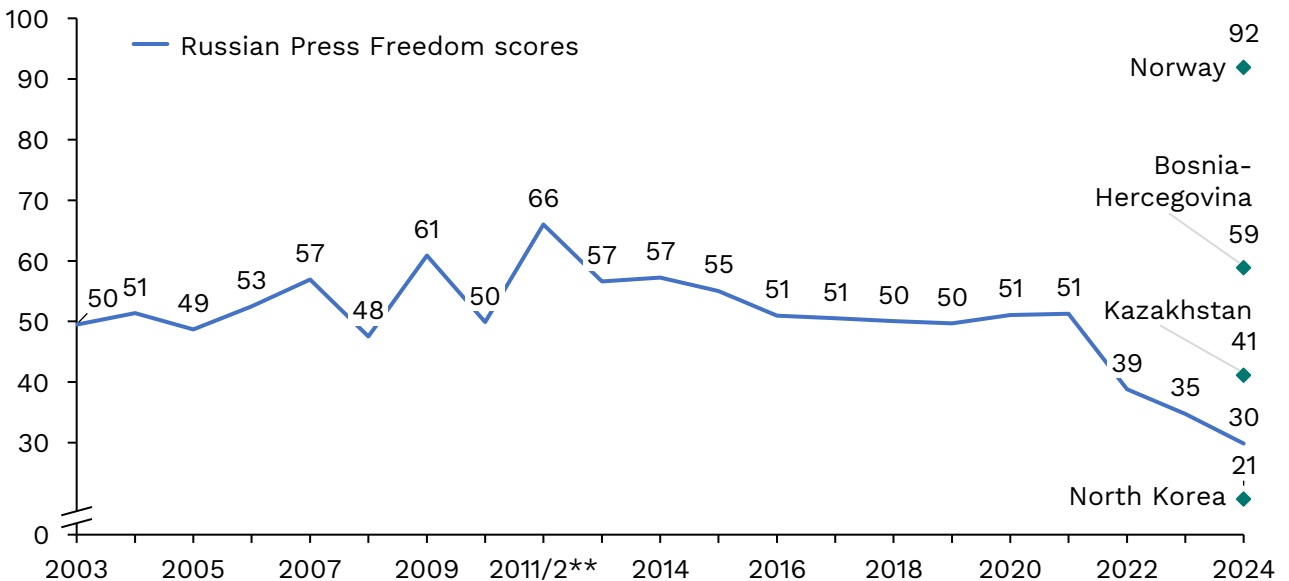
- At least 66 independent news media operating abroad¹.
- 31.77 million total website visits in July 2024.
- 6.15 million cumulative Telegram subscribers.
- 3.25 billion cumulative YouTube views across all channels between August 2024 and August 2023.
- 1.87 million cumulative TikTok subscribers.

Source: JX Fund Dashboard; data as of August 2024 unless otherwise indicated.

Exhibit 1

Press Freedom in Russia

Reporters Without Borders Press Freedom Index for Russia* from 2003-2023; 0-No Press Freedom, 100-Perfect Press Freedom.



*Additional countries included as benchmarks; **Joint rating for two years (note: due to changes in methodology, the 2011/12 result is incongruous with the general trend – it has a value of 74 – and hence disregarded).

Source: Reporters Without Borders Press Freedom Index

1 The number of media surveyed has been reduced compared to earlier reports. This is primarily due to a more precise definition of what constitutes independent news media in exile. However, several YouTube-focused outlets centred around individual creators have also been added. See Appendix I for a detailed definition.

2 The Times (July 15, 2024), www.thetimes.com/world/russia-ukraine-war/article/russia-planning-block-youtube-ukraine-putin-q8s2hzm96.

3 Moscow Times. (August 9, 2024), www.moscowtimes.ru/2024/08/09/vrossii-nachali-blokirovat-messendzher-signal-a139106.

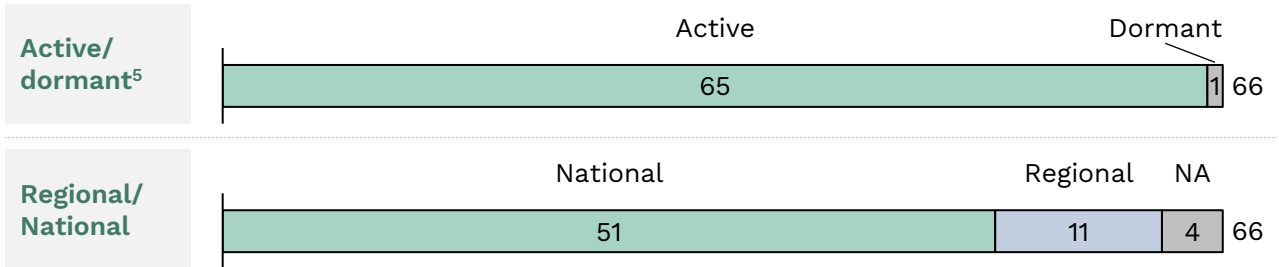
4 Meduza. (August 21, 2024), www.meduza.io/en/feature/2024/08/22/why-russia-s-state-censor-is-full-of-baloney-when-it-blames-ddos-attacks-for-widespread-disruptions-to-social-network-access.

If fully implemented, it would turn Russia into one of the world’s most restrictive digital ecosystems – potentially having a crippling effect on the accessibility of information and serving as a blueprint for other authoritarian regimes. As a result, Russia has fallen even further in press freedom rankings.

Exhibit 2

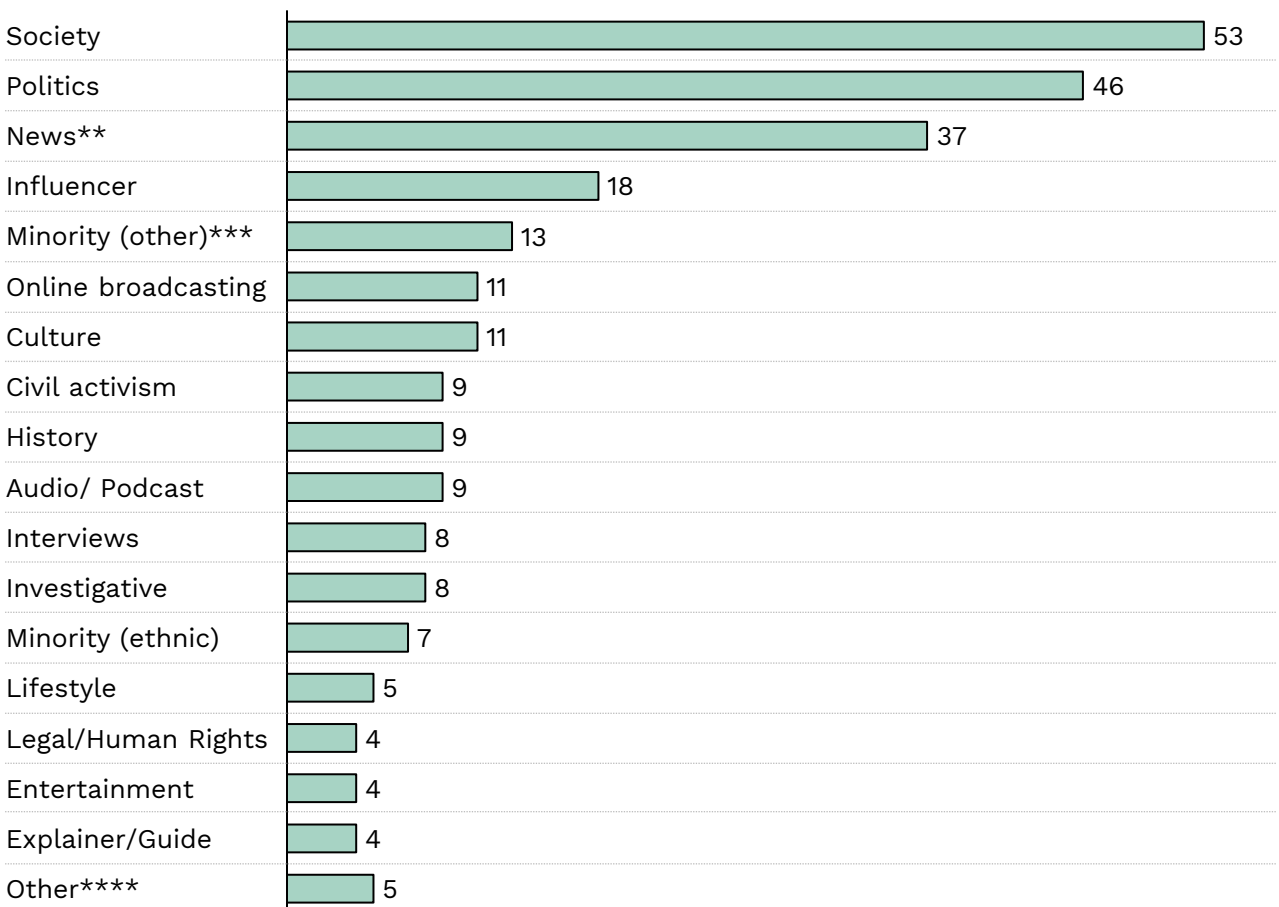
Russian Independent Media Retain Diversity in Exile

Selected descriptive statistics of Russian independent media in exile (N=66).



Source: JX Fund Dashboard Research

Frequency of topics and format labels* (N=66)



* Labels are applied based on an expert review of the content published by a given media and the formats used. Media typically have at least 3 to 4 labels, reflecting the most prominent topics they cover and how.

** News accounts for both a format (e.g., a newsfeed) and a topic (e.g., breaking news).

*** Coverage focused on, for example, sexual minorities.

**** Business, diaspora/ émigré, newsletter.

Source: JX Fund Dashboard Research

The Russian government continues to misuse legislation against extremism and terrorism to exert pressure on independent media. As of September 2024, 40 journalists are detained and two are missing⁶. This year the persecution on independent media crossed state borders: journalists Mikhail Zygar and Dmitry Kolezev were sentenced to prison terms in absentia; at least 12 reporters were detained in Ukraine’s occupied territories by the Russian government⁷.

Meanwhile, Russian media staff have continued to face challenges abroad. These include personal legal and administrative restrictions, e.g., obtaining visas and residence permits, opening bank accounts. There are also hurdles on an organizational level, notably relating to maintaining accounts on international platforms or payments services that are linked to Russian passports.

Against this background, exiled media continue to advocate for equal rights of dissemination of their content on digital platforms (see more in chapter 3). One expert interviewed for this survey noted the “journalists find themselves stuck in between state repression and Western companies that provide communication services and tools. They have to fight on every possible front.”

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Test-running Total Digital Censorship

The current priority of Russian state is to establish control of the country’s digital space. Reportedly, in 2024, some \$660 million over 5 years⁸ has been allocated to this purpose. Activities include blocking further websites, shutting down social media platforms that continue to provide access to ordinary Russians, and tackling anti-censorship solutions.

In November 2023, a leaked document revealed plans of Roskomnadzor (the Federal Service for Supervision of Communications, Information Technology and Mass Media) to block at least 49 Virtual Private Networks (VPN) service providers. By the end of 2023, over 170 VPN services in Russia were blocked⁹. Additionally, Roskomnadzor announced that from March 2024 App Stores will be obliged to block VPN services that provide access to prohibited resources.

Restrictions increased in August 2024, when the Russian state started actively blocking VPN services and protocols by means of TSPU technology (Technical Measures to Combat Threats). TSPU is a “homegrown Deep Packet Inspection technology” directly managed by Roskomnadzor¹⁰. In practice, it empowers the Russian state to route internet traffic and per one expert “limit all requests coming from Russian users to Russian territory; they can slow down or turn off traffic of a specific channel.” This marks away from earlier, crude measures like simply blocking IP addresses or labeling independent media as “foreign agents”.

6 Reporters Without Borders. (2024), <https://rsf.org/en/country/russia>.

7 Reporters Without Borders. (February 12, 2024), <https://rsf.org/en/more-100-journalists-victims-russian-crimes-during-two-years-covering-war-Ukraine>.

8 Reuters. (September 10, 2024), www.reuters.com/world/europe/russia-spend-over-half-billion-dollars-bolster-internet-censorship-system-2024-09-10/.

9 For reference the global VPN market has several hundred providers, although the top 10 account for the bulk of users.

10 Xue, Diwen; Mixon-Baca, Benjamin; Ablove, Anna; Kujath, Beau; Crandall, Jedidiah R.; Ensafi, Roya. (November 2, 2022), <https://censoredplanet.org/tspu>.

Despite growing restrictions on their use, VPNs remain the most popular tool to counter Russian censors. VPNs saw an exponential rise in popularity since 2020, particularly after widespread restrictions were imposed in the wake of the 2022 full-scale invasion of Ukraine. This made Russia the leading country globally by VPN-use. In August 2024 YouTube became temporarily inaccessible in Russia without a VPN connection.

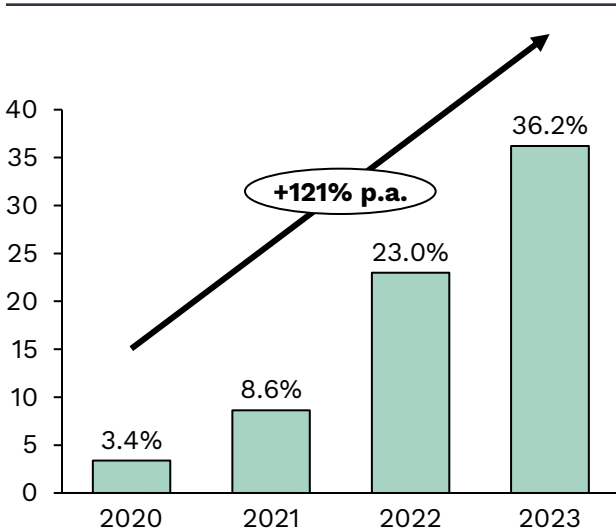
Since the second half of 2023, the authorities placed a bet on developing a clear infrastructure of internet control, censorship through legal measures, and an extension of Roskomnadzor mandate. This infrastructure created new products and technical challenges for independent media.

Exhibit 3

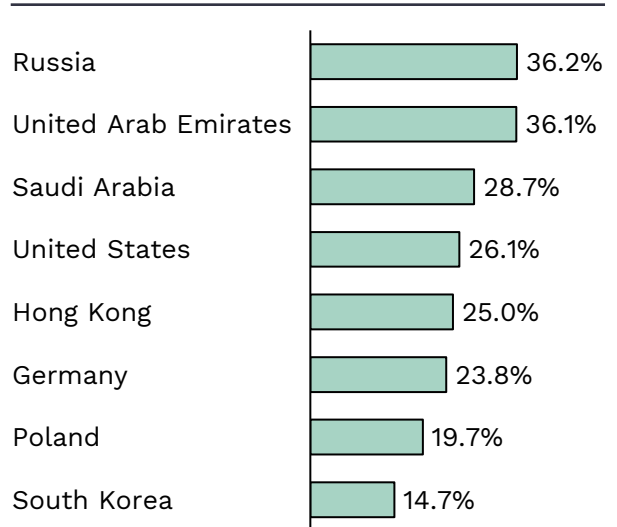
Russia’s Rising Virtual Private Network Usage

Share of people in Russia who used Virtual Private Networks (VPNs) for at least a portion of their online activities over time and compared to other countries.

Share of population* using VPNs in Russia (%)



VPN use by country (% , as of Q4 2023)



*2020-2022 figures are calculated by dividing the number of VPN downloads by the Russian population. 2023 data is based on a survey of 16-64-year-olds who reported using VPNs for at least a portion of their online activities.

Source: GWI; DataReportal; Meltwater; We Are Social

Starting December 1, 2023, a new law forced hosting providers to cooperate with the state on “preventing DDoS attacks and ensuring resilience and sustainability of the Russian internet segment”¹¹. Refusing Roskomnadzor’s pressure to “settle down” in Russia, one of the largest hosting providers, GoDaddy, announced its withdrawal from the Russian market¹².

In January 2024, Leningrad, Novgorod, and Pskov oblast were deprived of 4G connections on orders of the Ministry of Digital Media “for the needs of law enforcement agencies”¹³, allegedly to reinstall counter-drone systems. Experts interviewed for this study argue the targeted internet shutdowns represent a form of censorship that allows to control of information in specific regions, where citizens organize local protests, calling it an “anti-messenger regime”, similar to a policy of containing unrest used by Indian authorities.

11 Habr. (December 13, 2023), <https://habr.com/ru/news/780428/>.

12 Forbes. (December 12, 2023), <https://www.forbes.ru/tekhnologii/502306-hosting-provaidler-godaddy-perestanut-obsluzhivat-klientov-s-rossijskimi-adresami>.

13 Kommersant. (January 29, 2024), <https://www.kommersant.ru/doc/6478262>.

On January 30, 2024, experts reported a massive failure of the .ru domain, presumably related to the transfer of Russian users to the national DNS¹⁴. This affected services of Sber and Yandex, social networks like VKontakte, and trading sites Wildberries, Avito and Ozon. In February 2024, the Public Chamber of the Russian Federation announced the creation of a blacklist of bloggers operating on foreign-owned platforms. Since April 22, Russian users were prohibited from one-click authorization through Google and Apple ID¹⁵. In May, the Ministry of Information announced plans to introduce mandatory reporting of a user's network ports along with IP addresses.

Since the end of July, YouTube in Russia has significantly slowed down. This has impacted the country's economy, as YouTube represents a third of the total Russian traffic – Netblocks estimates the cost at \$23.7 million a day¹⁶. Allegedly, the “slowing down” – a definition absent from the Russian legislation – occurs in stages to gradually limit the platform's viability. Given that most of YouTube content consumed in Russia is entertainment, the impact is felt beyond independent media and opposition content producers. Furthermore, this may affect internet operators for whom access to YouTube is a major part of their offering.

Netblocks estimate the current cost of YouTube shutdown in Russia at \$23.7 million a day

Expanding Autocratic Legal Toolbox

In parallel to testing solutions to block technical access to platforms and sites seen as “undesirable”, Russian authorities have continued to stigmatize independent media as “undesirable organizations” or “foreign agents”. Media restrictions have been carried out via series of administrative and legal measures, targeting both Russian and foreign independent news media.

In November 2023, the Supreme Court supported Roskomnadzor's stance on restricting any foreign ownership of Russian media, although the 2017 Russian media law restricts foreign media ownership to only over 20%¹⁷.

By mid-2024 media restrictions applied to at least 81 foreign media, including Der Spiegel, El Mundo, El Pais, La Stampa, La Repubblica, Helsingin Sanomat, Le Monde, Liberation, Agence France-Presse, Delfi, Politico, and Euobserver.

Later, in March 2024, Vladimir Putin signed a law that prohibits advertising on the websites of media recognized as “foreign agents” and bans “foreign agents” from purchasing advertisement in Russia¹⁸. Additionally, from the beginning of spring, sites and individual articles reporting on the ways to overcome shutdowns have been blocked across Russia. On the eve of the presidential election in March 2024, internet interruptions were registered at least three times across the country. Later, Roskomnadzor announced its intentions to apply AI to register “forbidden content”.

14 Net Freedoms Project. (January 30, 2024), <https://t.me/NetFreedomsProject/975>.

15 Safe Shell VPN. (April 21, 2024), <https://www.safeshellvpn.com/blog/russia-ban-google-apple-login.html>.

16 NetBlocks. (2024), <https://netblocks.org/cost/>.

17 RBC News. (November 20, 2023), <https://www.rbc.ru/rbcfreeneews/655b342c9a79472406964060>.

18 Moscow Times. (March 11, 2024), <https://www.themoscowtimes.com/2024/03/11/putin-signs-ban-on-advertising-for-foreign-agents-a84411>.

In July, Russia introduced another wave of tightening the law on “undesirable organizations”, by extending the scope on any foreign state participation in such organizations and criminalizing any relations with such entities¹⁹. In August, Putin signed another law that requires deanonymization of owners of Telegram, TikTok and YouTube channels with over 10,000 subscribers, to become included into a registry administered by Roskomnadzor²⁰. In practice, this allows Roskomnadzor to request content removal and to further censor bloggers and independent media. Also, the bill prohibits all users of social media to share the materials of channels that ignore this requirement.

Since the second half of July, Russian users experienced slower playback speed of YouTube, while experts speculated about the upcoming restriction for the platform in the country. On 25th July, the head of the State Duma Committee on Communications and IT, Alexander Khinshtein, confirmed that the speed of YouTube downloads on desktop computers by the end of the week may drop to 40%, and by the end of the next week - to 70%.

“

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”

Since 24th July, monetization of the Telegram channels is shut down by the platform, complementing the already existing challenge of monetization for the content producers recognized as “foreign agents” or “undesirable organizations”. On 17th August, Telegram blocking was allegedly tested across the country¹⁸ and on 21st August the platform was inaccessible without VPN, along with WhatsApp and some of streaming platforms¹⁹. Experts foresee that Telegram is the first candidate in line for a shut down by the Russian authorities. In the lieu of the recent accusations against the owner of Telegram, potential loss of access to Telegram for EU-based exiled media, will result in another major challenge for the media in reaching out to the Russian audiences. Media experts, though, believe that “this is not a fatal blow to the media in exile, as many of them have very loyal readership.

Continuing experiments with manual management and control over the informational space, in July–August, the Russian authorities restricted access to Signal, slowed down YouTube playback speed, and tested blocking of Telegram²¹. Despite the rapid decrease in audiences of YouTube (-35% since the initiation of slowing down)²², recent studies show that at least half of Russians continue to use the platform²³.

In parallel, the presence of the Russian state narratives on YouTube and social networking platforms, such as Instagram, Facebook, TikTok, and Telegram, is increasing. As one of the interviewed experts notes, this has effect not only on Russian territory but also in the occupied territories of Ukraine since these have been integrated into Russia’s propaganda infrastructure.

19 Deutsche Welle. (July 27, 2024), <https://www.dw.com/en/russia-tightens-undesirable-organizations-law/a-69780289>.

20 BBC Russian Service. (July 30, 2024), <https://www.bbc.com/russian/articles/c4ngk5x1yy5o>.

21 Meduza. (August 19, 2024), <https://meduza.io/news/2024/08/19/polzovatelyi-v-rossii-stolknulis-so-sboyami-v-rabote-telegram-predpolagaetsya-chto-vlasti-gotovyat-blokirovku-messendzhera>.

22 TV Rain (Dozhd). (August 22, 2024), <https://t.me/tvrain/81073>.

23 FOM. (August 29, 2024). Media and internet report, <https://fom.ru/SMI-i-internet/15064/>.

The EU's lead spokesperson for external affairs, Peter Stano, notes that the EU is working on promoting complete censorship of Russian propaganda channels on EU territory via Google, which should increase the visibility of independent media²⁴. At the same time, Russia has been successfully overcoming the Western sanctions in access to foreign technology and instead intensified its cooperation with other autocracies, such as Iran, Belarus, Egypt, and Cuba²⁵.

A legal framework developed by the Russian state over the last years is now an advanced machine of repression that legitimizes censorship of national media, regulates work of foreign companies, restricts and obliges internet providers to collaborate with the state. The laws "On information, information technologies and information protection", in particular, its article 10.6., sovereign internet law, and so-called anti-fakes law legalize the Russian internet control that experts interviewed for this study assess as unprecedented:

“ They are prepared technically, they are prepared legally, too. In their hands are all the possible tools of influence on telecom companies, legal regulation, technical influence. This all has a drastic impact on independent journalism and the Russian citizens in general. ”

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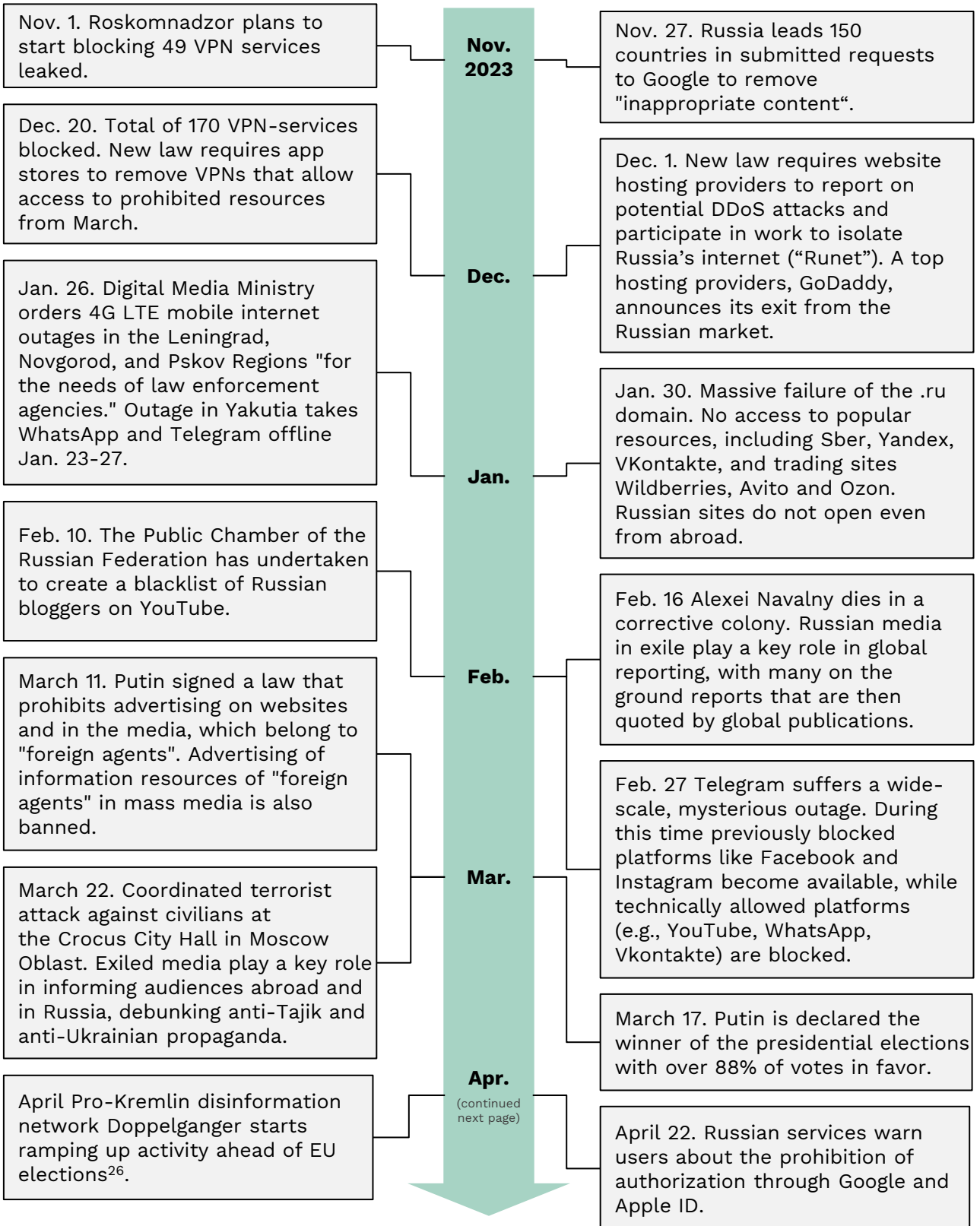
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24 Euroradio. (August 21, 2024), <https://euroradio.fm/eurasayuz-dabivaecca-vydalennya-rasiyskay-prapagandy-z-pashukavikou>.

25 Zentrum für Osteuropa- und internationale Studien (ZOIS). (September 18, 2024), <https://www.zois-berlin.de/en/publications/zois-spotlight/how-russia-is-trying-to-take-the-sting-out-of-western-technological-sanctions>.

Timeline of Key Events Over the Past Year (1/2)

Selected events and milestones during the period of study.

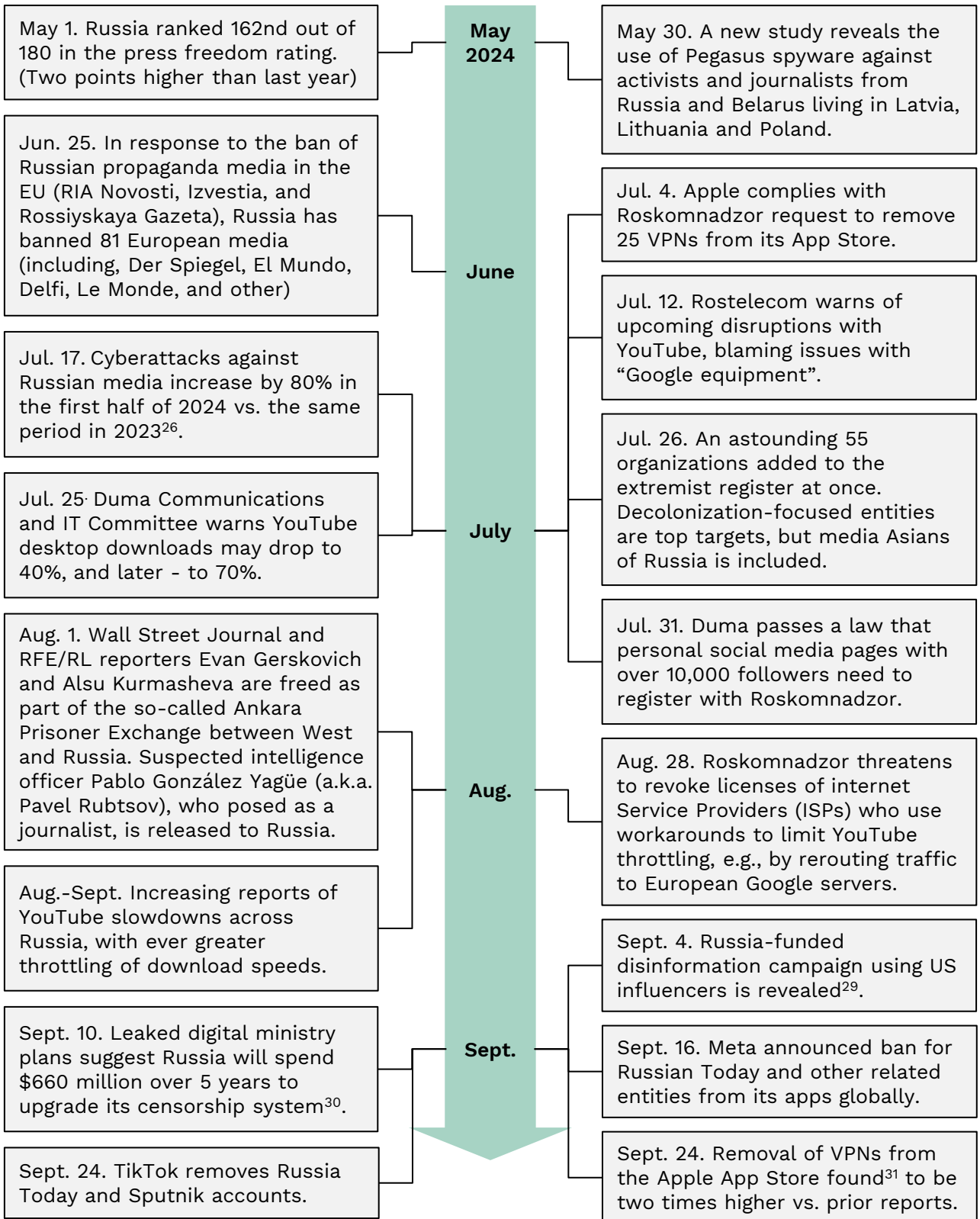


²⁶ Politico. (April 17, 2024), <https://www.politico.eu/article/russia-influence-hackers-social-media-facebok-operation-thriving/>.

Exhibit 4 (continued)

Timeline of Key Events Over the Past Year (2/2)

Selected events and milestones during the period of study.



27 Access Now. (May 30, 2024), <https://www.accessnow.org/publication/civil-society-in-exile-pegasus/>.

28 SecurityLab. (September 5, 2024), <https://www.securitylab.ru/news/551770.php>.

29 Voice of America (VOA). (September 4, 2024), <https://www.voanews.com/a/us-accuses-russia-of-using-state-media-to-spread-disinformation-ahead-of-november-election/7771404.html>.

30 Reuters. (September 10, 2024), www.reuters.com/world/europe/russia-spend-over-half-billion-dollars-bolster-internet-censorship-system-2024-09-10/.

31 Techradar. (September 24, 2024), <https://www.techradar.com/pro/vpn/apple-keeps-removing-vpn-apps-in-russia-and-the-toll-is-worse-than-we-thought>

3 Negotiating Digital Justice: a Battle for Big Tech Support

Russian state plans to control and censor the information space go beyond the independent media sector. Tech platforms, which both exiled media and others use to distribute content, have become another target for Russian censors. This pressure has created a set of new product and tech challenges for independent media, negatively impacting reach.

But tech firms, who own social media platforms, messengers, video hosting services and search engines (further referred to as Big Tech), continue to comply with the legal framework of the Russian state, prioritizing revenue over human rights. This results in Russian citizens struggling to access information.

While faced with a growing threat of regulation in the EU, Google, Apple, Meta and Byte Dance have become more compliant with the Russian legal framework. Instead, the goal of securing a “safe and accountable online environment” should be applied to the Russian market. As one media expert pointed out: “We need to call on the EU countries and the US to demand some accountability from Big Tech. You can't abandon so many people to the mercy of propaganda. It's a crime.”

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Many current challenges linked to Big Tech tie back their modus operandi of prioritizing legally based content moderation appeals. While this may work in the US or other rule-of-law countries, “Big Tech became a new cross-border jurisdiction. For example, the company is registered in the USA but works for the whole world – and this is a completely new information pressure.”

Since February 2022, Big Tech has had to deal with sanctions against Russia and increased EU regulation. A deeper reflection on matters of content moderation and ‘moral values’ was needed following pressure from many stakeholders, including Russian media in exile. As a response, Facebook launched “oversight boards” and TikTok opened a position of government relations representative. Meta also banned RT channels on its platforms after RT in launched a major disinformation campaign targeting US voters³².

At the same time, Big Tech has not gone far in adapting to the new context. One of the reasons is unwillingness to communicate with media representatives and CSOs, directly engaged in advocacy on the matter. The lack of transparency of tech giant's algorithmic policies, absence of effective communication channels with Big Tech's representatives and limited resources for advocacy are among the major challenges for the Russian media in exile³³

32 The Washington Post. (September 17, 2024), <https://www.washingtonpost.com/technology/2024/09/17/meta-ban-rt-russia-state-media/>.

33 International Republican Institute (IRI). (January 17, 2024), https://www.iri.org/wp-content/uploads/2024/01/Can-Big-Tech-Contribute-to-Breaking-Putins-Censorship_1.17.24.pdf.

Compliance with the Russian state vs Freedom of Speech

Most tech giants continue to comply with Russian laws: paying fines following Russian court orders and removing ‘undesirable’ content from their platforms.

This is problematic from several perspectives, comment two experts, who closely work with Big Tech-media relations. Firstly, after March 2022, when the so-called anti-fake law was enacted “Big Tech leaders were very quick to shut down their services without making a distinction on whether you support the war or not.” Secondly, “the court decision of the European Court of Human Rights finds that the Russian laws are vague and incompatible with the EU convention on human rights. They simply should not be treated as neutral.” Thirdly, compliance with Russia’s laws leads to Big Tech becoming a tool in the Russian state’s hands in their long-term strategy of censorship and control.

In 2024, Russia led the world by content removal requests to Google³⁴ and was in the top ten by the number of requests to TikTok³⁵. Most were justified by national security concerns.

In 2024, the platforms have, for the first time, received Roskomnadzor’s requests to block entire channels. In particular, YouTube threatened to block the entire channel of the human rights media project ‘OVD-Info’, but thanks to public pressure this did not happen. In May, YouTube blocked videos on opposition channels, such as those dedicated to evading military service, shortly before the service was slowed down by Russian authorities. Earlier, YouTube blocked The Insider Live channel, as its content allegedly violated the video hosting’s policy on spam, scam and fraud³⁶.

After numerous appeals, the channel was reinstated. So far, many cases of content removal have been resolved following the long process of communication and complaints to the platforms, however, as interviewed experts note: “it takes a lot of time and resources. And sometimes people give up, and it is not effective.”

In these circumstances, VPNs remain the most sought-after means of circumventing censorship, which is why Roskomnadzor demanded that Google and Opera restrict access to VPN plugins in their browsers³⁷. Opera blocked the extensions almost immediately. For the same reasons, in July, applications of VPN services Proton, Hidemy.name, PIA, Nord, Red Shield, Le VPN, and others disappeared from the Russian AppStore after a complaint from Roskomnadzor.

For some experts, Apple’s stance was not surprising: “Apple was the first company that opened a local office in Russia on the government’s demand. What kind of responsibility can we expect from them?” For others, it was another trigger to initiative a dialogue. Thus, in September 2024, Russian activists, media in exile, international organizations have signed an open appeal to Apple, demanding to stop removal of VPNs from the Store³⁸.

34 Surfshark. (November 20, 2023), <https://surfshark.com/research/study/governments-google-removal-requests>.

35 TikTok. (June 6, 2024), <https://www.tiktok.com/transparency/en/government-removal-requests-2023-2/>.

36 The Insider. (August 9, 2024), <https://theins.ru/obshestvo/273729>.

37 RBC News. (June 25, 2024), <https://www.rbc.ru/rbcfreeneews/667ad4149a79471be913bb9f>.

38 Human Rights Watch. (September 2, 2024), <https://www.hrw.org/news/2024/09/02/joint-open-letter-apple-stop-censoring-runet>.

Another challenge for independent media in exile, and hence their audiences in Russia, is the disconnection from monetization services of social platforms. Any ties to Russia, for example, an account at a Russian bank, can automatically deprive exiled media from monetization options. In August, Google sent out³⁹ information to Russian users about the disabling of Google AdSense accounts. With the help of this service, owners of YouTube sites and channels received a part of Google's advertising profits from contextual advertising. For YouTubers from Russia, starting in 2022, this was the last remaining way to monetize content. That is when fundraising platforms Patreon⁴⁰, GlobalGiving, and Benevity banned Russians from receiving money through them.

Tech platforms continue to ignore the problem that algorithms favor state propaganda over independent media content. Most smartphones on the Russian market use the Android operating system developed by Google and have the Google Chrome browser installed by default. When entering this browser, the user sees Google's recommendations for news, texts, images and videos under the search bar. Increasingly, the Google Discover recommendation service directs to propaganda resources and non-political content. Technically there is a possibility to tailor algorithms, and this is something that interviewed media experts expect from the tech giants in the future.

To overcome censorship, blocking and restrictions directly or indirectly enforced by the Russian state, independent media, international human rights organizations have joined efforts to advocate on the matter.

Advocacy in Defense of Freedom of Speech

Several Russian civic projects, NGOs, media, and human rights organizations wrote an open letter to YouTube and its owner, Google. They called on the video hosting platform not to comply with Russian authorities and not to block channels and individual videos at the request of Roskomnadzor. Among the signatories were Access Now, Roskomsvoboda, Hothouse of Social Technologies, OVD-Info media, and Reporters Without Borders⁴¹. In parallel, meetings were held with representatives of tech companies to explain the importance of civil society. Earlier, the European Commission asked Google and other Big Tech firms to start active promotion of opposition media in Belarus⁴².

Back in 2021, human rights organizations sent requests to X, Meta and Google in connection with the Russian authorities' demands to block⁴³ OVD-Info's resources. Twitter and Meta responded that they follow not only local laws but also their own moderation policies. At the same time, the number of 'extremist' and 'terrorist' justifications for suppressing freedom of speech is growing year by year - in 2024 alone, 60 extremist organizations appeared in the register of the Russian Federation's Ministry of Justice.

39 Google AdSense Support. (2024), <https://support.google.com/adsense/answer/13402307?hl=ru>.

40 Patreon News. (August 10, 2022), <https://news.patreon.com/articles/patreon-is-restricted-in-Russia>.

41 Roskomsvoboda. (May 28, 2024), <https://roskomsvoboda.org/ru/analysis/open-letter-to-google-about-russian-authorities/>.

42 Financial Times. (January 7, 2024), <https://www.ft.com/content/0b33b19f-6ded-4458-be0b-b335cdf31f17>.

43 Amnesty International. (December 25, 2021), <https://eurasia.amnesty.org/2021/12/25/blokirovka-rossijskogo-informacionnogo-i-pravozashhitnogo-proekta-ovd-info-akt-neprikrytoj-cenzury-amnesty-international/>.

International organizations that promote a more responsible and accountable ecosystem for the independent media, commented for this report that “*advocacy with Big Tech is a tedious process. Google seems to be more open for dialogue than Meta or X.*” One of the problems that international organizations highlight is an absence of first-touch support that is mostly effective as it impacts the “*less clumsy content moderation system*”. Overall, international organizations advocate for increased regulation of tech platforms and a greater involvement into promotion of freedom of speech:

“ We would like to see Big Tech use resources to challenge these [Russian] laws in court, which they rarely do; to fully align with human rights, adopt measures to overcome censorship, and increase the number of encrypted and secure services developed by these platforms. ”

While the exiled media community and international organizations have tested multiple mechanisms of influence and encouragement to dialogue, little has been achieved “since there is no state pressure from the EU and they don’t react on media or human rights defenders”. An expert, interviewed for this study, explains, such corporations are very closed businesses and sometimes “it is easier for them to remove one app than lose money”.

A comprehensive model of Russia’s informational control is one of the harshest in the world. Since February 2022, it stretched from the national regulation to pressure on international tech giants. Russian state instrumentalizes Big Tech platforms for increasing pressure on independent media, and for deprivation of Russian citizens from access to independent channels of information. For the Russian media in exile, this is a significant challenge in terms of survival and audience outreach: “the Russian media, which already observed a decrease in audience outreach, will have to develop new methods of content dissemination, increase the informational advocacy on how to use VPN, and overcome shutdowns”.

Moreover, Russia’s pressure on major tech companies’, and compliance with Russian state regulation, sets a worrying precedent for other autocracies across the world. Many of them increase digital literacy and co-opt technology for preserving their status-quo by attacking freedom of speech. Experts interviewed for this study express the concern that “it has not only repercussions inside the country but for the whole international community”. In the current context, it is critical that tech giants consider human rights as a guiding value in their policies. Otherwise, they risk being turned in tools for autocrats to implement their repressive vision for the world.

4 Audience Growth Despite the Odds

A defining feature of the Russian independent media in exile is the continuous effort put into content distribution, that is necessary to stay ahead of the Russian government censors and to maintain and expand audience outreach. To do so, the independent media in exile invest into a broad range of social media accounts, so that media can pivot from one to another depending on changes in consumer habits and government attempts to shut them down.

Since 2022, this has meant a focus on YouTube and Telegram – two platforms that have seen the most significant growth among audiences of the Russian independent exiled media. These have grown at an average annual rate of 19.2% and 16.6%, respectively (i.e., both from 2022 to 2023, and from 2023 to 2024). This fast growth is likely a major cause for the two platforms becoming priority targets for Roskomnadzor’s censors (as well as the cause for both experiencing outages⁴⁴ or slowdowns⁴⁵ in recent months).

Exhibit 5

Key Statistics of Russian Independent Media in Exile

Descriptive statistics for media surveyed within the context of the JX Fund Exiled Media Dashboard (August 2024, N=66⁴⁶).

# of media using the following platforms		% of all media surveyed	Total cum. # of followers*
# of media surveyed	66	100%	na
Have a website	49	74%	8.4M**
Have a YouTube channel	44	67%	34.3M
Have a Telegram channel	59	89%	6.1M
Have a Twitter (X) account	51	77%	6.8M
Have an Instagram account	50***	76%	4.9M
Have a Facebook account	48	73%	3.1M
Have a TikTok account	20	30%	1.9M

* Refers to amount of people following or subscribing to a social media account.

** Total cumulative unique users of all websites surveyed. Data as of July 2024 (last date for which data is available across all sites).

*** Does not include 3 media which have Instagram accounts but no subscribers (i.e., dormant or de facto shut down).

Source: JX Fund Dashboard; data as of August 2024 except where otherwise indicated

44 Novaya Gazeta Europe. (August 21, 2024), www.novayagazeta.eu/articles/2024/08/21/telegram-and-whatsapp-down-in-russia-amid-widespread-outage-en-news.

45 Reuters. (August 8, 2024), www.reuters.com/world/europe/youtube-slowdown-russia-darkens-freedom-speech-outlook-2024-08-08/.

46 The number of media surveyed has been reduced compared to earlier reports. See the previous research: JX Fund. (December 2023), Sustaining Independence: Current State of Russian Media in Exile 2023, <https://jx-fund.org/wp-content/uploads/2023/12/Sustaining-Independence-Current-State-of-Russian-Media-in-Exile-2023.pdf?x92233>.

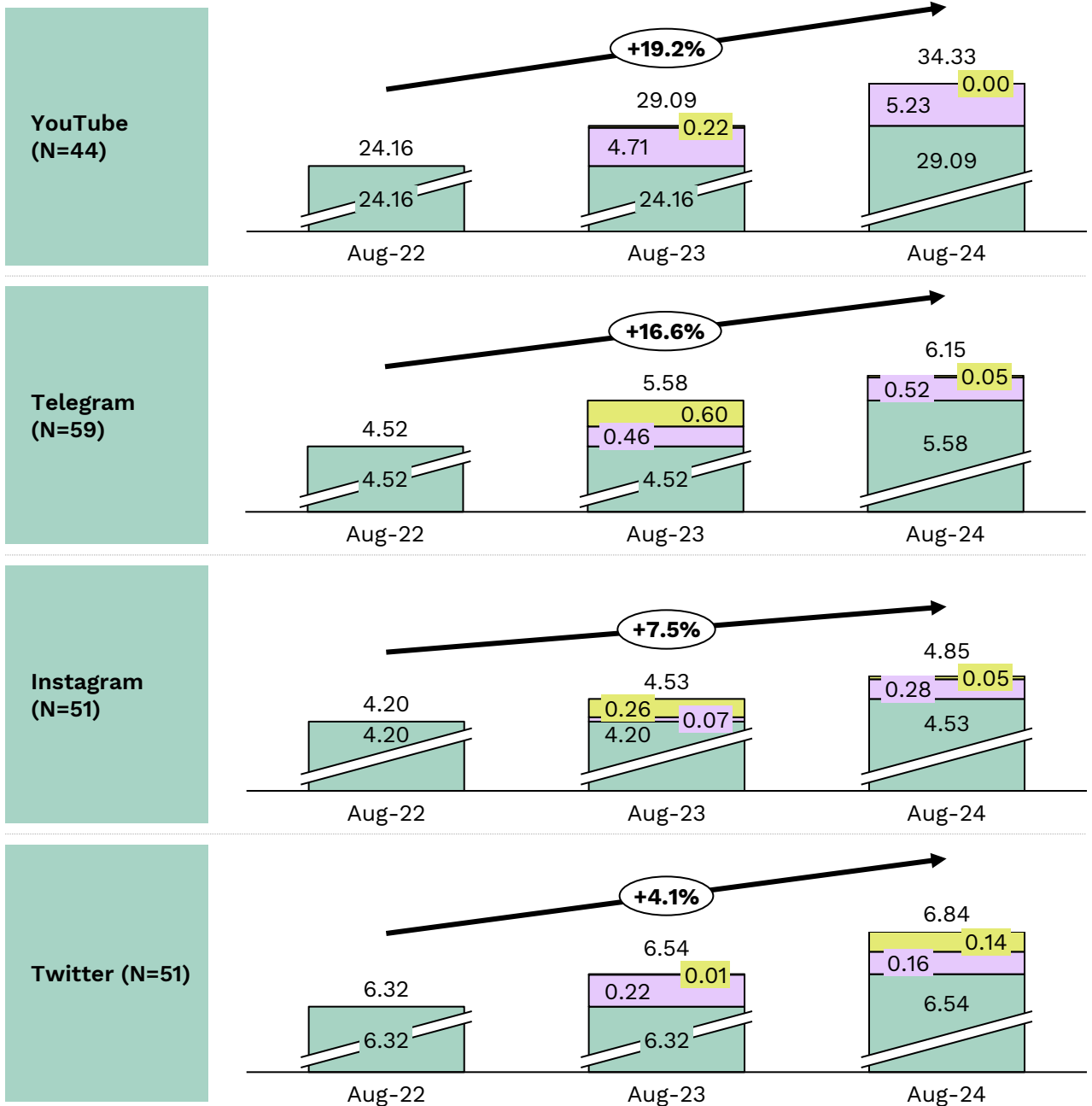
The need for diversified paths to reach audiences has led many media to launch social media accounts they did not use previously – first of all, Telegram, which requires a relatively low effort due to its user-friendly, text-focused interface. However, a number of media have also launched Instagram and YouTube channels – more substantial investments, requiring ample video content (and likely new team members, in the case of YouTube).

Exhibit 6

YouTube, Telegram Lead in Growth among Russian Independent Media in Exile

Follower numbers in August 2024, 2023, and 2022 for selected media (millions).

■ New account(s) launched ■ Growth of existing accounts



Source: JX Fund Dashboard

Among the different social media, YouTube deserves particular attention. First, the recommendation algorithm allows viewers to consume channels' content without subscription (reducing risks for ordinary consumers). Second, many Russian media in exile have channels registered abroad, securing the monetization of views outside Russia.

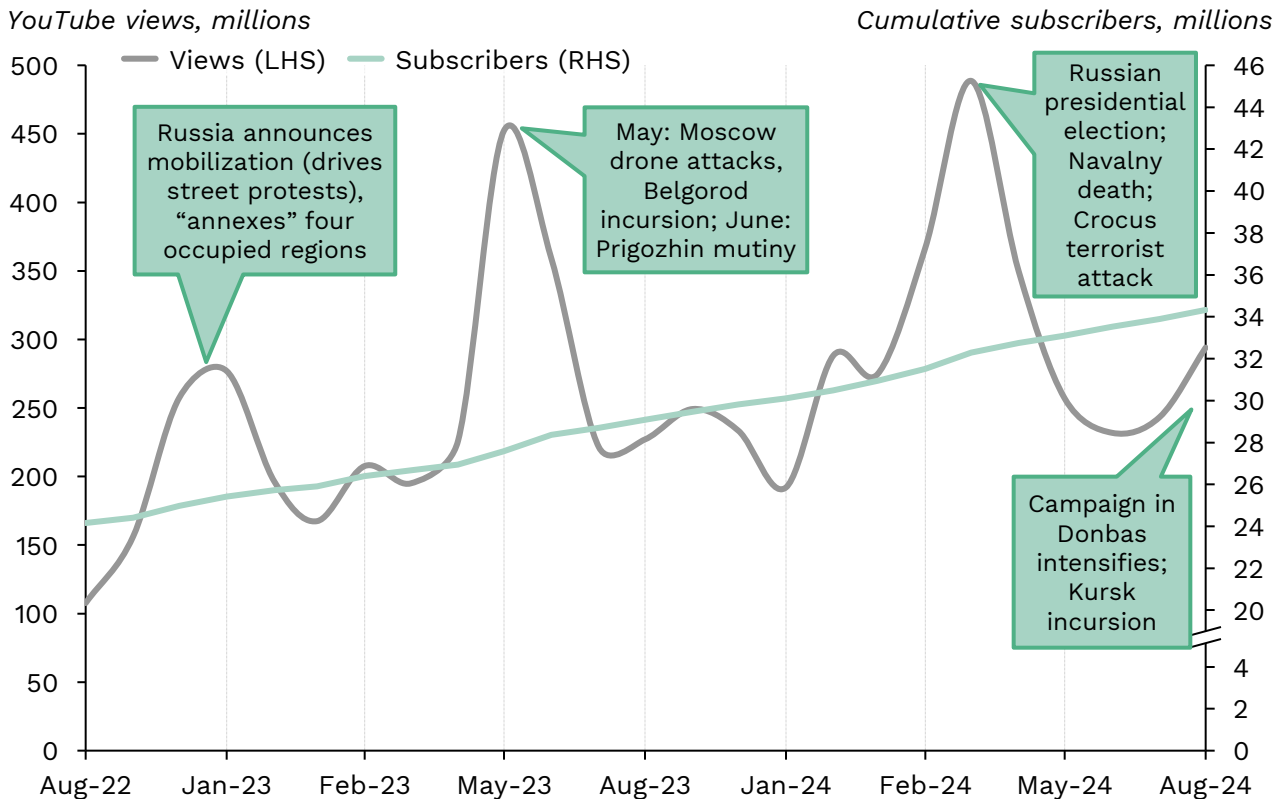
YouTube usage in Russia remains high, with 55.6 million daily⁴⁷ and over 95.4 million monthly⁴⁸ active users. Independent media in exile have seen a strong growth of subscribers, increasing from 24.2 million in August 2022 to 35 million in August 2024. Average monthly viewership has also grown – from almost 108 million to 293 million over the same period (although it should be noted these are volatile, with peaks of almost 0.5 billion followed by sharp declines).

As a result, authorities have promoted YouTube alternatives, like Rutube and VKontakte, both of which are currently among Russia's top 3 most downloaded apps (recently Platforma⁴⁹ joined the list). Despite fast growth they remain far smaller than YouTube. Rutube's daily user base grew from 4 million in July to 9.6 million in August: the VK Video app was downloaded 20 million times⁵⁰.

Exhibit 7

YouTube – a Growing Channel, Especially in Times of Crisis

Monthly YouTube views* and subscriber numbers of Russian independent news media in exile (N=44).



*Note: Negative values (typically the result of videos being removed) not included in the calculation.

Source: SocialBlade

47 Meduza. (September 12, 2024), www.meduza.io/en/feature/2024/09/12/the-russian-authorities-slowed-youtube-speeds-to-near-unusable-levels-so-why-are-kremlin-critics-getting-more-views.

48 Statista. (March 31, 2024), <https://www.statista.com/forecasts/1146977/youtube-users-in-Russia>.

49 Meduza. (September 12, 2024), www.meduza.io/en/feature/2024/09/12/the-russian-authorities-slowed-youtube-speeds-to-near-unusable-levels-so-why-are-kremlin-critics-getting-more-views.

50 idem.

YouTube traffic is driven by news events, especially visually spectacular ones that are seen as affecting viewers' lives (e.g., drone attacks on Moscow-city in May 2023 drove higher traffic for many media than the June mutiny by Wagner's leader Evgeny Prigozhin). Such news events mitigated the impact of YouTube disruptions for independent media in August 2024, with the Kursk incursion and Ankara prisoner swap driving up traffic. By comparison, Russian entertainment channels that did not cover news events saw their traffic drop.

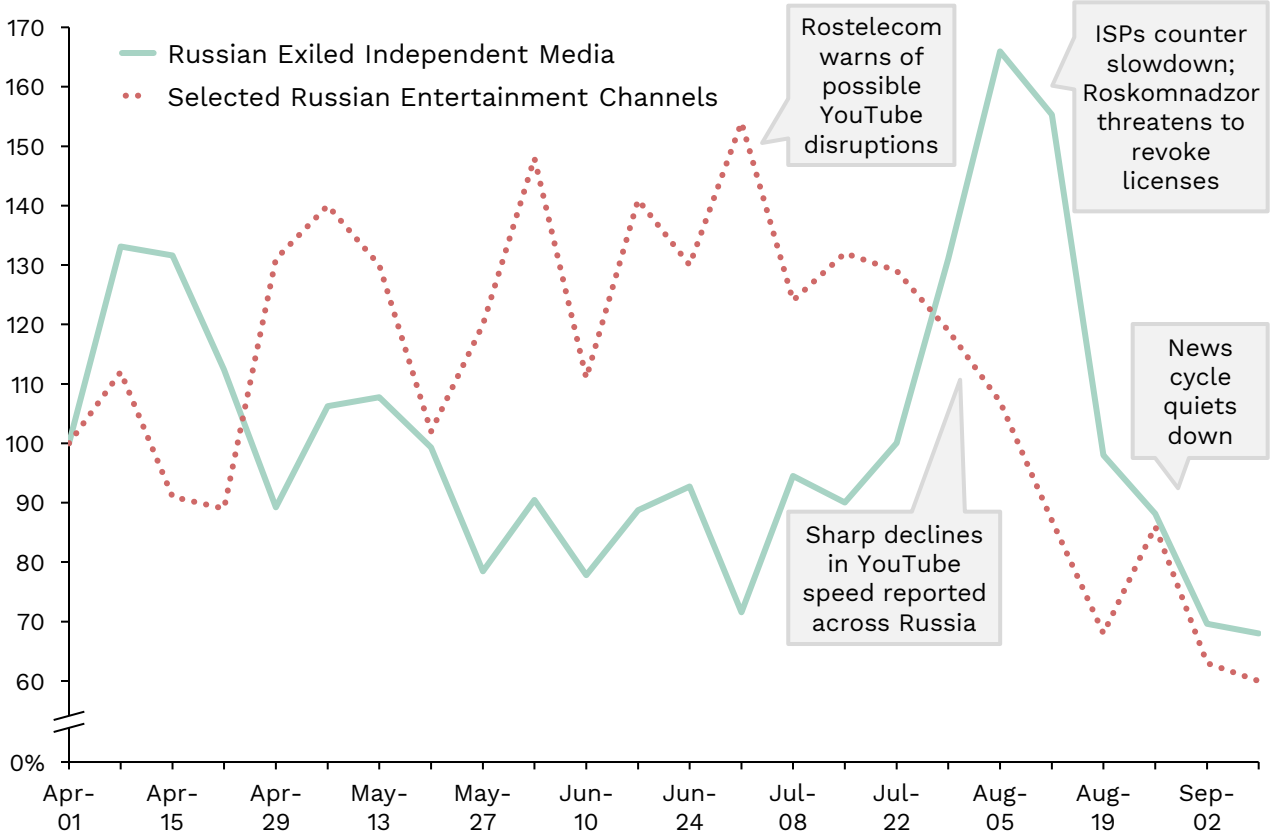
YouTube traffic is quite unique compared to other platforms. The recommendation algorithm can push videos independently of their link to the news cycle and allow some videos to attract steady views for months. Further, the home page makes discovery of new creators or content easier. Hence, it is worth comparing YouTube to other platforms, like media websites. The latter are both more deliberate and direct – users rarely “stumble upon” a news site and the content is more closely linked to events (i.e., viewership grows mainly during news events and not for months after).

Exhibit 8

Weekly YouTube Traffic Analysis Suggests Slowdown, Mitigated by News Cycle

Weekly YouTube views* of Russian independent news media in exile and selected large Ukrainian media on YouTube media.

YouTube views growth (April 1-8 2024=100)



*Note: Negative values (typically the result of videos being removed) not included in the calculation. Due to a high number of such results, the YouTube channel of Varlamov has been removed entirely.

Source: SocialBlade; Russian entertainment channels include Mr Loloshka, Glent, A4 and Kuplinov Play

A comparison of Russian independent media in exile website traffic with figures for Ukrainian media and international English-language publications focused on the war-related content, provides a valuable reference point. While traffic fell from the stratospheric peaks seen in 2022, it is worth noting that Russian independent media consumption continues to rise in times of crisis – during which those outlets are often a primary source of information for international outlets, as in the cases of the Prigozhin mutiny, the death of Navalny or the recent Kursk incursion and Ankara prisoner swap.

Still, digital censorship seems to be taking a toll. The prisoner swap in August 2024 sparked wide social media discussions and boosted international traffic, but independent media saw only modest growth. Further, Russian outlets dropped proportionally lower than Ukrainian peers in July despite the latter dealing with rolling blackouts. This suggests a growing need for anti-censorship solutions: audience demand is present, but content cannot be accessed.

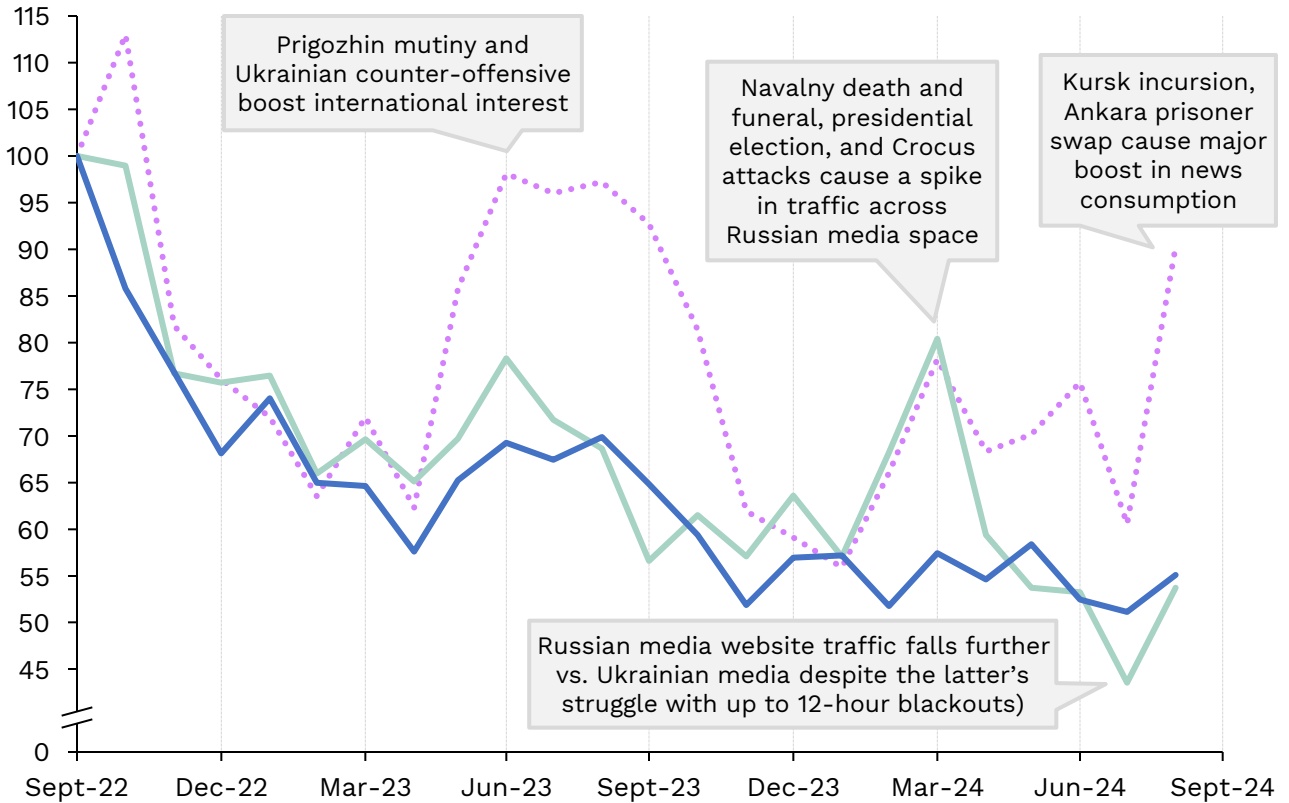
Exhibit 9

Fatigue at Home, More than Abroad

Website traffic dynamics* of selected Russian, Ukrainian and English-language media focused on war coverage (N=32).

- Ukraine-Russia war coverage in English
- Independent Ukrainian media
- Independent Russian media in exile

Normalized website traffic (September 2022=100)



Source: SimilarWeb; Russian media included: Meduza, Holod, Mediazona, Istories, The Bell, Paper, Tx7, Novaya Gazeta Europe, Doxa, The Insider; Ukrainian media included: Ukrayinska Pravda, NV, Censor, Hromadske, Suspilne, Zaborona, Liga, The Village Ukraine, The Ukrainians, Ukrainer, Tvoe Misto, Nakipelo, Most, Babel; English-language media focused on the war include: Kyiv Independent, Kyiv Post, The Moscow Times, Institute for the Study of War, War on the Rocks, Business New Europe, Riddle Russia, Ukraine World





5 Preserving Audience and Tackling Censorship by Innovation

Emigration from Russia, combined with growing pressure from the Russian state, have pushed media teams to develop innovative solutions to reach their audiences despite rising censorship. This process continued throughout 2024, the Russian exiled media stepped forward in launching, testing and expanding various innovative solutions.

Exhibit 10

Engaging in a Wide Range of Innovative Activities

Innovative solutions proposed by the independent Russian media in exile.

 <p>Safe solutions for content dissemination</p>	<ul style="list-style-type: none"> • PDF clones of web pages (e.g., Meduza, Novaya Gazeta Europa) • WhatsApp groups for new dissemination (e.g., Verstka) • Magic links (e.g., Meduza)
 <p>Anti-censorship software and solution</p>	<ul style="list-style-type: none"> • VPN services to overcome blocking (e.g., Paper) • Google chrome extensions for high-speed YouTube access (e.g. TV Rain) • Generator of lock-free mirror links (Kaleidoscope)
 <p>Creative content formats to overcome news fatigue</p>	<ul style="list-style-type: none"> • Gamification of storytelling via social games (e.g., 7x7 Horizontal Russia, Scafander Games) • Production of graphic content on Pinterest (e.g., Verstka)
 <p>Connecting exiled media with correspondents in Russia</p>	<ul style="list-style-type: none"> • Database for connecting freelance correspondents and exiled media (New Tab, Glush)

Source: Media Surveys

Russian media in exile continue to create safe solutions for disseminating content among their audience, despite the stigmatization of them as “foreign agents” or “undesirable organizations”. Several newsrooms create PDF copies of their web pages, offering a simple and reliable alternative for users who are unaware of how to bypass censorship. Novaya Gazeta Europe highlighted in the comment that the PDF clones of their web pages help “to maintain reader engagement with lengthy content”.

An alternative to this solution with a similar goal of safe delivery of news to Russian readers are Magic Links. Novaya Gazeta Europe and Meduza have extensively relied on this solution during the last year. Magic Links are a solution that composes the alternative link to the media materials through a link shortener and leads a user to the media webpage. This solution also “enhances the readability of extensive content, thereby maintaining reader engagement on the site”, highlighting the media that introduced this solution in 2024. According to Meduza, Magic Links were used by at least 2,000,000 users since October 2023, and PDF versions of content – by at least 500,000 users.

For some of the media (e.g., Verstka), WhatsApp serves as an alternative platform for content dissemination. Verstka asks its subscribers to forward publications from their channel to their families in Russia via private messages and family chats. However, only users outside of Russia can subscribe to the channels directly. The representative of Verstka notes that although “the solution is being tested since the beginning of summer 2024, and it is difficult to assess its efficiency”, “it is important to continue testing new formats of interaction with the audience.” Since recently, Verstka also introduced the content on Pinterest that by far reaches about 2,500–3,000 people a month to disseminate the content in a visual format.

Some media have developed their own innovative solutions to deliver content into Russia by creating the services to bypass site and social media blocking. Paper has developed a secure VPN that for now provides services to over 60,000 users, “the audience is growing at a moderate pace, but growth has resumed due to YouTube slowdown”.

Developers of Paper's VPN do not store data, and this security is “a key selling point, according to the executive”. At the same time, a growing digital competence of the Russian state requires the developers to keep exploring new ways to avoid blocking by the Russian state.

Another solution to overcome blocking is Kaleidoscope which allows to create lock-free links to mirrors and replace the mirror links as soon as they are blocked by the Russian state. Kaleidoscope provides access to the admin, from where one can create links to their blocked materials to post them to social networks and e-mail newsletters: “mirrors are full copies of the original site that work identically to it - that is, they retain all the site's functionality (dynamic elements, buttons, popups, search)”.

Clients do not need their own team of technical specialists, which is usually required to set up mirror systems different from Kaleidoscope — the product already has its own support line. Over 25 organizations (including Memorial, Holod, DOXA, VPN services like Amnezia and vpnpay.io) are currently using this technology with over 80,000 pages viewed via Kaleidoscope each month.

Addressing the slowing down of YouTube, Russian exiled media were quick to propose a solution in form of Google Chrome browser extension. As such, TV Rain developed a service Potok that grants free fast access to YouTube for two hours⁵¹. As the solution was introduced in the end of August 2024, it remains unclear what scaling potential it has. At the same time, it is another illustration of how the exiled media rapidly engage in protection of their audience's rights via innovative solutions.

Gamification of storytelling is another innovation recently introduced in the Russian exiled media space. Journalists collaborate with developers to tell stories and capture attention through interactive visual novels that explore contemporary challenges, “it is not primarily about gamification, but about storytelling and creating a compelling story that is impossible to put down”.

51 Meduza. (August 29, 2024), <https://meduza-io.ceno.life/news/2024/08/29/dozhd-vypustil-uskoritel-dlya-yutyuba-pod-nazvaniem-potok>.

One of such example is Scafander Games. Creators spend at least six months writing the story, which is rewarded with significant user engagement. Scafander Games claims that their “games create motivation to explore the social issues” on which the games are based. Another media that works with gamification, 7x7 Horizontal Russia also includes the links to donations and content on which a game is based and believe that “incorporating games into content can enhance emotional involvement and expand the audience”.

Addressing the problem of obtaining information from Russia, some of the media create solutions that allow connecting Russian correspondents to the exiled media. Project Glush, founded in the summer of 2022, connects freelancers in the regions with media who have left the country via the database. “The database is divided by skill, location, and topic, making it easy to find the match. The project started with an open chat, and later Glush added a bot, developed by OVD-Info to make the process even faster”. Similar solution has been introduced by the New Tab Media. The initiative serves as an intermediary in communication between freelancers and editors and provides “an entry point for those with some experience in storytelling who are interested in working”.

6 Impactful Reporting in Russia and Abroad

Russian independent media in exile play a critical role in the global journalist ecosystem – providing a rare source of information on what is happening in the country and the activities of the Russian state abroad.

Further, Russian media in exile are critical to countering the rising waves of disinformation spread by the Kremlin. These affect not just Western countries but also a host of states from the so-called “Global South”.

Groundwork for International Media Reporting on Russia

International media coverage of Russia would likely be impossible in its current form without independent Russian media. News outlets rarely recognize the work of competitors. However, even these rare citations of Russian outlets are on par with major national media – showcasing the importance of the sector⁵².

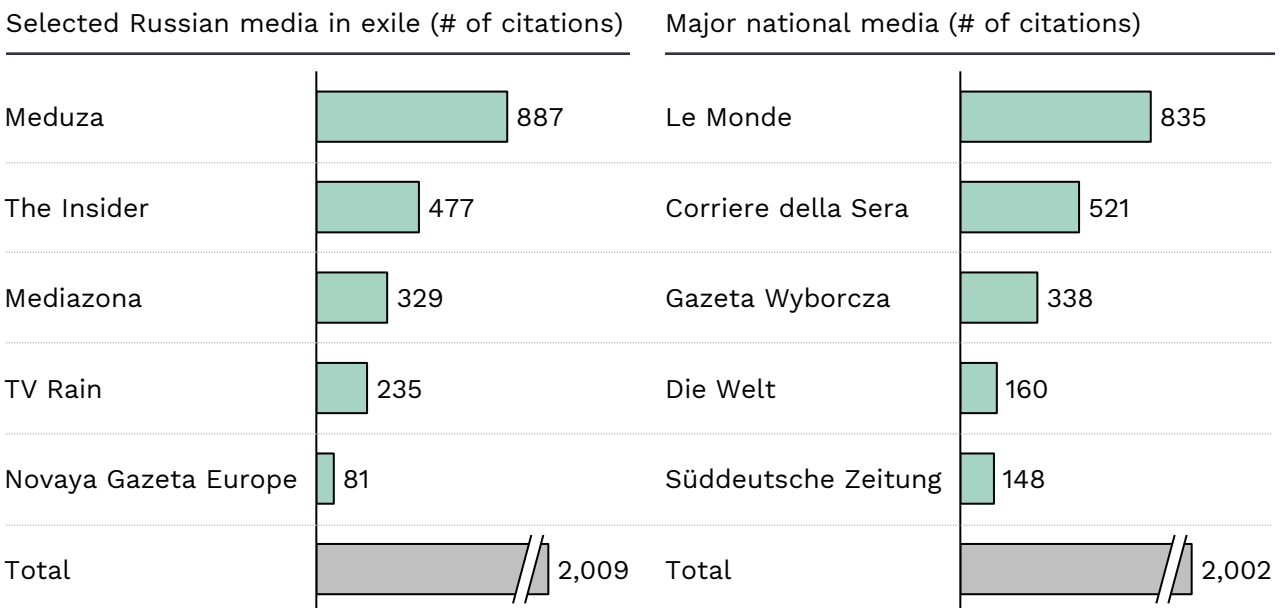
Over the past year, Russian media in exile have, among others, helped calculate the extent of Russian casualties in the war⁵³, exposed Russian intelligence operations⁵⁴ and revealed Russian war crimes in occupied Ukraine⁵⁵.

Arguably the most impactful area of Russian exiled media reporting concerns the exposure of Kremlin influence and intelligence operations. Joint investigations by Russian media in collaboration with foreign journalists have enabled the identification and arrest of Russian agents on EU territory.

Exhibit 11

Global Opinion Shapers and Sources of Information

Number of citations of major national media and selected Russian independent exiled outlets in leading global publications* between February 23, 2022, and July 20, 2024.



*The list comprises the New York Times, the Washington Post, the Wall Street Journal, the Guardian, Der Spiegel and Le Monde (Le Monde quotation in Le Monde are excluded).

Sources: New York Times, Washington Post, Wall Street Journal, Guardian, Der Spiegel, Le Monde.

52 In fact, 7 Russian media in exile are the source and subject of as much news as the top outlets from 5 European countries.

53 Mediazona. (updated on September 13, 2024), <https://zona.media/casualties>.

54 The Insider. (February 1, 2024), <https://theins.ru/en/politics/268805>.

55 Istories. (October 3, 2023), <https://istories.media/en/stories/2023/10/03/melitopol-torture/>.

For example, a story by The Insider, Le Monde and Der Spiegel⁵⁶ uncovered that a Russian cook was recruited to carry out provocations at the Olympics in Paris in July 2024. The information was relayed to French security services, leading to the suspect's arrest and charges of espionage.

In a different high-profile investigation, The Insider and Der Spiegel revealed⁵⁷ covert and influence operations by Russian intelligence to protect high-profile fugitives. Journalists uncovered evidence that Russian secret services are hiding Jan Marsalek, the former operational director of Wirecard, in Russia. Marsalek, involved in a massive fraud scheme, allegedly stole billions of dollars. Insider sources revealed that Marsalek is hiding in Russia, disguised as a priest, with the assistance of secret services.

As EU countries dedicated expertise and financial resources to tracking Russian sanctions compliance, exiled media become an important ally in monitoring circumvention. An investigation by Istories and OCCRP delves into⁵⁸ a money laundering scheme involving investments in a luxury resort in a Cypriot village, orchestrated by two Russian businessmen linked to the Magnitsky case (the imprisonment and death of a lawyer defending US investors in Russia).

This report is significant as it reveals methods used to legalize Russian funds, including those from sanctioned individuals, within Europe.

Media in exile have also worked on unmasking how the Russian state looks to influence Western opinion leaders. Investigators from Paper Trail Media, Der Spiegel, ZDF, and Istories collaborated to expose⁵⁹ how German journalist Hubert Seipel received financial backing from a Russian oligarch to promote a favorable image of Putin in the West. The investigation uncovered that Alexei Mordashov, a Russian oligarch, paid Seipel hundreds of thousands of euros to write books and provide comments praising Putin in international media.

Countering Rising Disinformation Across the Globe

After unmasking the Doppelgänger campaign in 2022⁶⁰, the Russian state continued to invest into disinformation campaigns and manipulation of public opinion in Western countries.

Mediazona and the BBC: Counting Russia's war fatalities

Journalists from BBC Russia and Mediazona used open-source data to challenge the Kremlin's official casualty numbers, uncovering the names of over 69,000 Russian soldiers that have died in Ukraine. Their investigation relies on a range of sources, including obituaries, social media posts, and probate court records. These findings suggest a significantly higher death toll than official figures, underscoring the human cost of the war, initiated by the Russian state.



Source: "Russian losses in the war with Ukraine.", Mediazona, September 13, 2024, https://en.zona.media/article/2022/05/20/casualties_eng.

56 The Insider. (July 25, 2024), <https://theins.ru/politika/273341>.

57 The Insider. (March 1, 2024), <https://theins.ru/politika/269604>.

58 Istories. (December 19, 2023), <https://istories.media/stories/2023/12/19/nalogovie-makhinatori-iz-rossii-vlozhilis-v-pafos/>.

59 Istories. (November 14, 2023), <https://istories.media/stories/2023/11/14/zapadnii-zhurnalists-kotorii-mnogo-let-voskhvalyali-putina-poluchal-za-eto-dengi-ot-putinskogo-oligarkha/>.

60 EU DisinfoLab. (August 13, 2024), <https://www.disinfo.eu/doppelganger-operation/>.

A recent example reveals an intervention into presidential electoral campaign at the upcoming election in the US via RT and an American content production company to increase Trump's support⁶¹.

High reliance on AI allows the pro-Kremlin resources to advance their tactics even further. Against this backdrop, the role of the Russian media in exile in uncovering the disinformation warfare of the Putin's regime remains crucial.

In a context of growing disinformation across the world, the Russian exiled media play an important role in countering propaganda narratives seeded by the Russian state. From covert espionage and information warfare to financial manipulation and media control, the cases of collaboration between the Russian exiled media and international media, raise awareness on the Kremlin's measures on the international arena.

Istories and Tagesspiegel: Revealing War Crimes via Satellite Images

Journalists from Istories and Tagesspiegel, in collaboration with Vertical 52 experts, analyzed the extensive destruction in Ukrainian cities like Mariupol, Severodonetsk, and Bakhmut using satellite imagery. They employ machine learning to compare damage before and after the war. In Mariupol, 50% of structures were destroyed, with 59% in Severodonetsk and 71% in Bakhmut affected. The imagery reveals the devastating impact on residential areas, schools, hospitals, and infrastructure. This methodology offers an experimental but powerful visual representation of the war's destruction.



Source: "Traces of war from space: what we have learned about the scale of destruction of Ukrainian cities from the analysis of satellite images", Istories, February 22, 2024, <https://istories.media/stories/2024/02/22/sledi-voini-iz-kosmosa/>.

As an example, a recent investigation by Meduza, which relies on leaked government documents, shows⁶² that state-owned media have recently increased their efforts to reach liberal audiences.

To do that, Dialog, an organization established for informational warfare of the Russian state, manipulates content by rephrasing and distorting the initial meaning of famous liberal bloggers, such as Yury Dud, or independent media to establish contact with liberal readership.

Thus, on the eve of Russian presidential election in March 2024, Dialog worked with repurposing content to establish 'relevant' systems for filtering information and disseminating their narratives among liberal audiences. Meduza published series of other articles uncovering Dialog's role in developing a disinformation tool of the Kremlin.

Russian propaganda has long spread anti-Ukrainian fake news. A recent case was the disinformation campaign against the wife of the Ukrainian president. "Olena Zelenskaya purchased a Bugatti" - read the headlines of the article on the recently established French Media Vérité Cachée. The Insider unpacked⁶³ the disinformation campaign and traced it back to Russian propagandists.

61 The Kyiv Independent. (September 7, 2024), <https://kyivindependent.com/reuters-rt-trump-us-viewers/>.

62 Meduza. (June 5, 2024), <https://meduza.io/en/feature/2024/06/05/we-thought-we-d-return-the-favor>.

63 The Insider. (July 2, 2024), <https://theins.ru/antifake/272818>.

Russian exiled media have also been instrumental in uncovering the Kremlin's attempts to manipulate informational space after Alexei Navalny's death. As an example, the Insider revealed⁶⁴ a series of plots regarding Navalny's death in the Russian prison distributed by various pro-state media.

Russian media in exile remain a crucial source of such investigations, as they preserve a wide network of sources inside Russia, including some within the Russian state. Thus, over the last year, Russian media in exile have uncovered multiple disinformation campaigns that targeted both Russian citizens and Western audiences, impacting the broader understanding and deterrence of the Kremlin's propaganda machine.

64 The Insider. (February 21, 2024), <https://theins.ru/en/antifake/269366>.

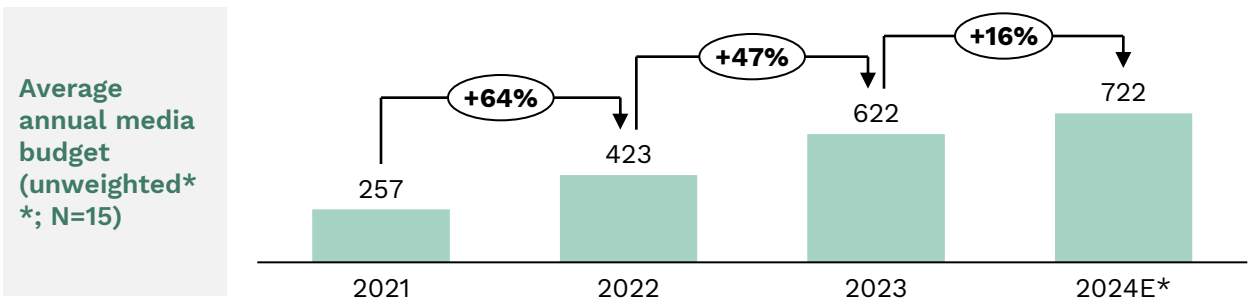
7 Countering Risks of Donor Dependency

The move from working in Russia to operating abroad, often in multiple locations was difficult for independent media both from a personal perspective, but also financially on the level of the overall organization. Media moved from a relatively low-cost and well-known environment to one with new rules and significantly higher costs (especially since most media ended up in the European Union, primarily due to safety and quality of life concerns). This was a major driver of costs in past years, but especially in 2022 (note: by 2023, so-called exiled-related costs fell almost to zero). This is now slowing, although double-digit cost increases are still expected to continue through 2024.

Exhibit 12

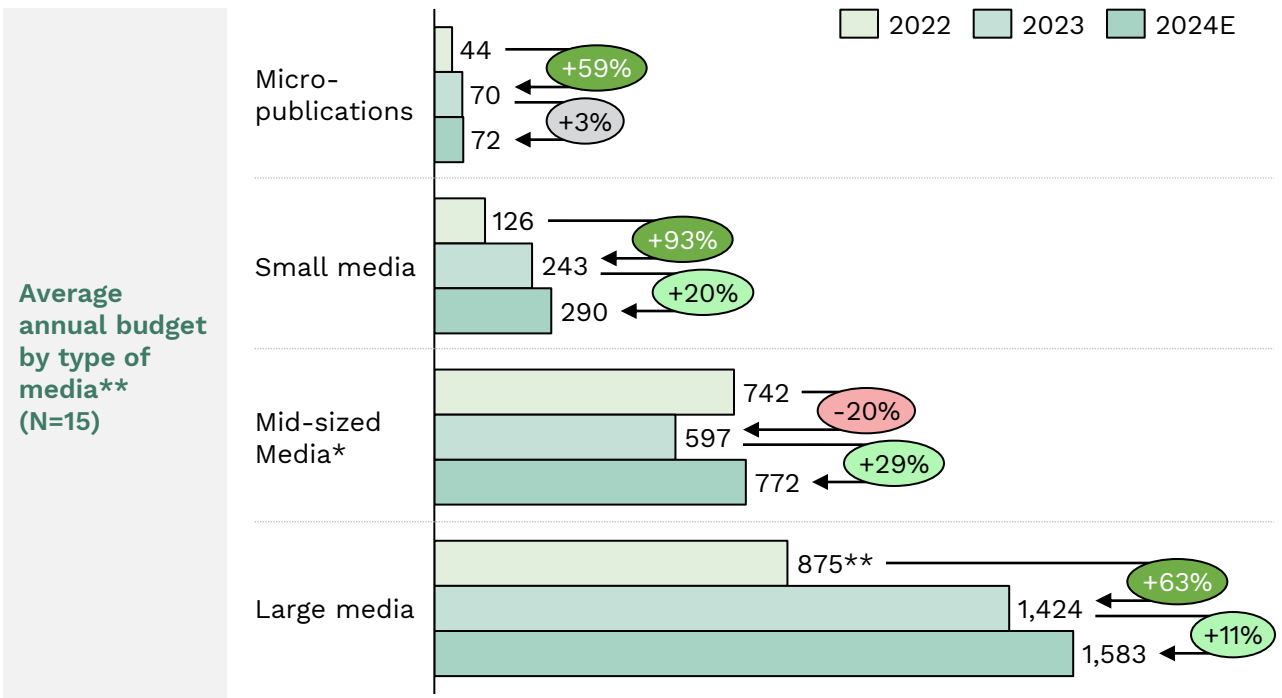
Rising Costs: How Budgets are Evolving

Budget changes during 2021-2024 (Euros ‘000, N=15).



* Estimated value provided by media in August-September for the current calendar year.

** The sample of data obtained has a disproportionate share of large and mid-sized media, with underrepresentation of small/ micro-publications.



*One media transitioned from mid-sized to large between 2022 and 2023, primarily due to audience and editorial growth.

** Defined primarily by size of team and budget, but also considering complexity (e.g., use of multimedia, different channels). Note: the transition to exile for large media in 2022 took the longest, as a result, their numbers for that year do not reflect their full cost load.

Source: Media surveys

This transition was the most difficult for mid-sized media (which typically had budgets of several hundred thousand euros and a few dozen staff). This may be due to a more difficult process of managing the company move (which involves much more complex operations than, say, teams of 10 to 15 people), but lacking some of the infrastructure and specialized staff that help large media operate.

This difficulty can also be seen in budgeting. A majority media met or exceeded their targets for 2023 (set in the second half of that year⁶⁵), while mid-sized media, on average, fell short of goals.

This may be partially caused by donors gradually shifting their priorities. In 2022 a lot of funds were unlocked to support Russian independent media in exile and distributed widely to ensure the survival of the sector (an initiative which has been, by and large, successful).

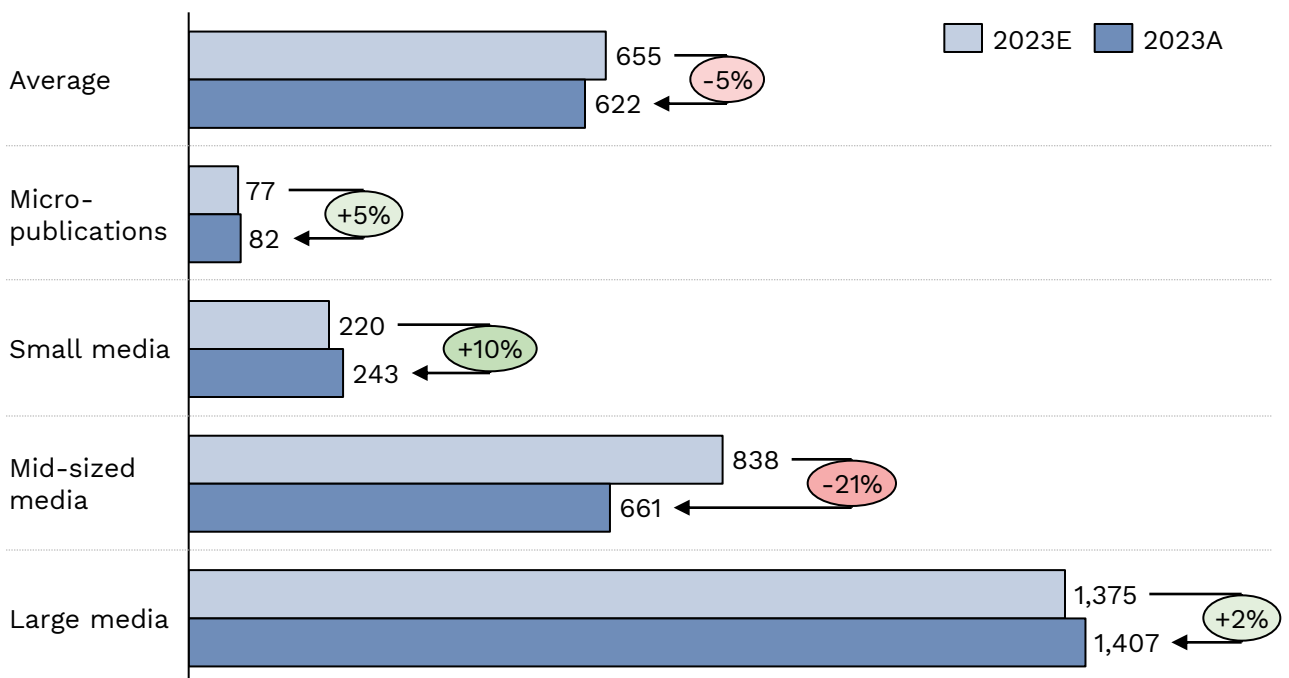
However, in 2023, some donors began to diverge in terms of strategy – with large donor funds supporting some of the biggest publications (whose budgets reach several million euros), while others focused on small media, typically aimed at niche audiences or specific regions.

Given the overwhelming dependence on donor support, this will likely be a growing challenge. As was to be expected, since moving into exile, Russian independent media have seen their business models collapse (most previously focused on advertising and commercial projects in Russia) and have instead relied on donors. Compared to last year, a few major media have made impressive progress in rebuilding commercial activities, while a few did very poorly.

Exhibit 13

Media Mostly Achieved 2023 Plans, But Mid-Sized Media Struggled

Budget changes during 2021-2024 (Euros ‘000, N=15).



Source: Media surveys

65 The number of media surveyed has been reduced compared to earlier reports. See Appendix I for the criteria applied.

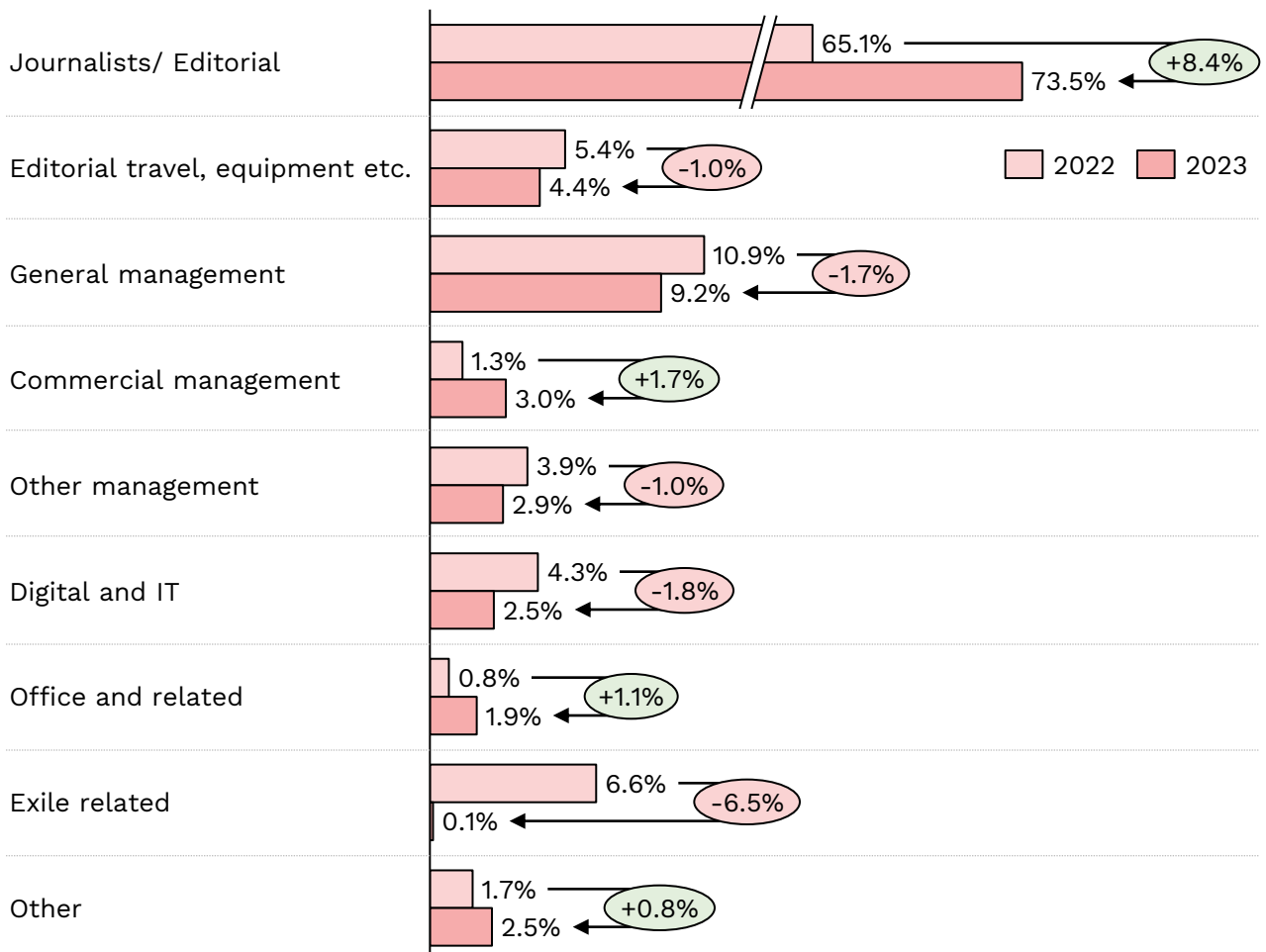
As is often the case with media reliant on donor funding, a growing share of expenses went to funding journalists and editors (this is the core function of a media, one that donors are most likely to fund, as a result of which other areas atrophy). The relatively high 8.4 percentage point increase for this category, on average, came primarily from a reduction in exile-related expenses, but also drops in management, travel and equipment costs, and digital or IT related expenses. Encouragingly, spending on commercial management increased which has produced meaningful results, albeit only for a handful of publications that have seriously invested resources in this direction.

The current level of spending on journalism and editorial, proportionally to the overall budget, is higher than what many European publishers would consider healthy (publishers often have a rule of thumb of 60-40, with 60% of the budget going to journalists and editorial⁶⁶). While producing content is the core activity of media, sacrificing spending on such issues as distribution, product or monetization typically creates problems down the line.

Exhibit 15

Gradual Reallocation of Funds to Core Editorial Activities

Expense structure of Russian independent media in exile, 2022 vs. 2023 (% of total, N=14).



Source: Media Surveys

Looking at the challenges facing Russian independent media in exile – particularly of circumventing censors and maintaining ties with their audiences at home – the question of allocating more funds to such innovation arises. But this is not just about the share of the budget, but also the amounts in absolute terms.

It is worth remembering the budgets deployed against press freedom in Russia dwarf the combined budgets of the independent exiled media sector. Although it likely undercounts significant elements of spending, a conservative estimate is that Russia spends over 2 billion euros on propaganda and censorship – most of it at home, directly targeting the audiences of independent media. Addressing this imbalance is a key challenge for both Russian exiled media and their supporters.

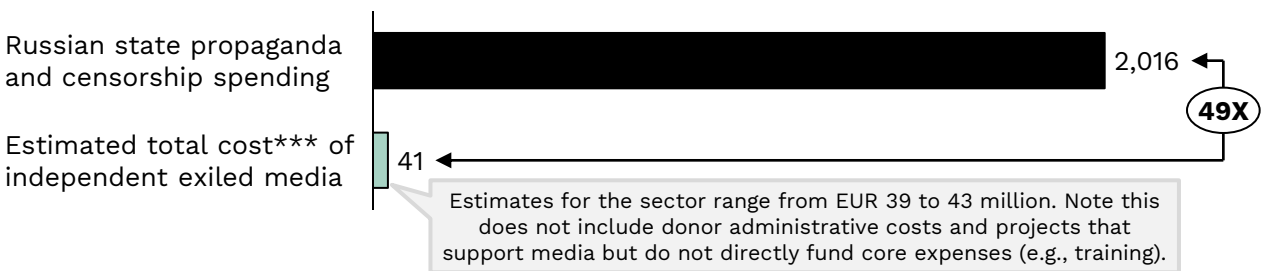
Exhibit 16

Propaganda and Censorship Expenses Draft Independent Media Funding

Breakdown of spending on propaganda and censorship by the Russian state compared to the estimated overall value of independent exiled media budgets.

Type of spending	Breakdown and examples of expenses	Estimated 2024F cost
Official propaganda	<ul style="list-style-type: none"> In 2023 \$1.6 billion was allocated to state and sponsored mass media (just over half went to VGTRK, Russia Today and Rossiya Segodnya)⁶⁷. 	1.43 billion euros (conservative estimate that 2024 spending at same level at 2023)
Unofficial propaganda	<ul style="list-style-type: none"> Russia spent \$182 million between 2016 and 2021 on lobbying, foreign influence in the US⁶⁸. Regular campaigns uncovered in Europe (Voice of Europe⁶⁹, Doppelgänger⁷⁰, Portal Kombat⁷¹...) 	100 million euros (assumes half of propaganda schemes are not uncovered*)
Censorship	<ul style="list-style-type: none"> Roskomnadzor 2023 budget of \$354 million⁷². Spending on innovation (including development of new TSPU traffic management tools, estimated at \$660 million for 5 years⁷³). 	486 million euros (includes annualized value of new package)

Comparing 2024F** expected annual total spending, EUR millions



* Likely a significant underestimate, given that a lot of spending is carefully disguised. Does not include intelligence operations.
 ** Forecast full-year spending in 2024. Russian propaganda and censorship spending includes estimated annual spending on innovation.
 *** Increases compared to the estimate in the previous report are driven by increased average spending across all media as well as the inclusion of previously excluded YouTube-focused projects, which tend to have a high cost to operate.
 Source: JX Fund Research

67 Debunk. (May 4, 2023), <https://www.debunk.org/kremlin-spent-1-9-billion-usd-on-propaganda-last-year-the-budget-exceeded-by-a-quarter>.
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 73 idem.

8a Appendix I: Approach and Methodology

The current report employs a mixed-method approach to grasp the state of operation, challenges, and opportunities for the Russian media in exile in 2024. The primary data sources used were open-source historical data (with ongoing updates) on such topics as overall audience reach performance (including the dynamics of views and audience engagement across social media, website analytics, and messaging platforms), data provided by the media themselves (interviews; staffing and budgetary data), and working with researchers on data generation (e.g., labeling media activity).

Exhibit 17

Approach to Data Gathering

Open-source gathering

- Open-source data gathering was a primary input for the dashboard, covering a broad range of topics: media distribution, description, status vis-à-vis legal designation, and various operational metrics;
- Sources include media websites, social media channels, SimilarWeb, SocialBlade, TGStat as well as industry research and publications.

Media data integration

- Selected media (the same sample as in previous reports) provided budget and staff structure data and agreed to interviews to develop a more detailed picture of the sector. Different types of media were selected to improve representativeness;
- Media selection aims to be as comprehensive as possible – including all potential independent media. However, it is worth noting that already dormant media are difficult to identify retroactively, creating survivorship bias in the sample.

Data generation

- Researchers assessed individual media and added labels (e.g., politics, newsletter) based on their main thematic areas of coverage and formats used. There was a limit of three primary labels (used for comparison of media) to ensure the most relevant features of an outlet were assessed.

Composite metrics

- The totality of available data within the dashboard was used to develop composite indices and benchmarks that can be used to compare media performance, help define trends as well as look for outliers that could be the result of data issues and submit them for verification and validation by researchers.

Media and expert interviews

- Researchers interviewed nine representatives of the independent Russian media in exile, whose cases of innovation were highlighted in the Chapter 6. Additionally, six experts in media legislation, internet rights protection and advocacy of independent media interests contributed to the present report.

8b Appendix II: Defining Exiled Independent Media

The definition of exiled independent media is a subject of discussion. This is a relatively recent phenomenon – historically, it was difficult to find technical solutions that would allow non-state groups to broadcast into a territory that was not accessible to them and thus reach audiences in the country of origin (unlike, say, journalists who served fellow emigres in “diaspora” publications).

The concept of media itself is shifting, notably due to the rise of content creators or, for example, satirical shows that deliver news-related content in a way that counteracts growing news fatigue. Furthermore, exiled media can remain unregistered or have a fluid concept for years after relocation. Some media can also go dormant, defined as not engaging in public activities for a period of 3 months or more.

In the current research we have changed the approach to defining Exiled Independent Media (EXIM). The developed list includes both “hard” and “soft” criteria. While “hard” criteria are required for the media to be considered EXIM, “soft” ones are desirable but not mandatory. This change of the approach led to a decrease in the number of media covered by the research, from 93 in last year’s report to 66 in the current one, as some of them did not meet the necessary criteria. To avoid excessive expansion of the report, we have included only the “hard criteria” (see exhibit 18).

Overall, the new approach allows us to focus on the projects that produce exclusive (or at least significantly reworked) and relevant content periodically and deliver it to specific audiences inside the country of origin through effective communication channels. At the same time, the medium must exercise its work from outside due to the risk of legal prosecution for its work. Lastly, it has to be independent (editorially and financially) from any state, political party, oligarch, politically exposed persons, or other form of undesirable influence.

Defining Exiled Independent Media

Logical structure and criteria used to define exiled independent media.

Media	Self-identification	The organization identifies as a media outlet It produces its own content or transforms existing content.
	Content	Published content is not just informational or non-journalistic (e.g., event platform). New content is published regularly (min. once a month). The audience exceeds at least 10,000 on one platforms.
	Journalistic approach	Published content does not justify violence, extremism, or terrorism (according to common standards).
	Relevance	Published content covers current affairs. Published content has significant social relevance.
	Publisher	The outlet is not a media arm of a non-media organization.
Exiled	Self-identification	The subject country is seen as the media's place of origin. It does not identify as primarily focused on the diaspora.
	Risk in the homeland	Conditions in the country of origin make it impossible to work there. Staff in country of origin are/ would be exposed to threats of administrative measures, prison, or physical violence. The bulk of the media's audience is in the country of origin.
	Audience	The media is able to reach audiences in the country of origin. Content is published in a native language of the country of origin. Published content is tied to current affairs in the country of origin.
	Operations	A meaningful part of the editorial team/ management comes from the country of origin but operates outside it.
Independent	Connections	The media is or was not seen as having a primary affiliation to a state actor, politically exposed person or political party. The media was not launched and is not run by a political party or non-media corporation. The media has not been accused of spreading propaganda.
	Finances	The media is financially independent of political parties, politically exposed persons, and state funds (over longer periods).

The presented list includes only "hard" that the JX Fund uses to determine if the media can be considered an exiled independent media. Additional criteria may be included for more precise classification of media outlets.

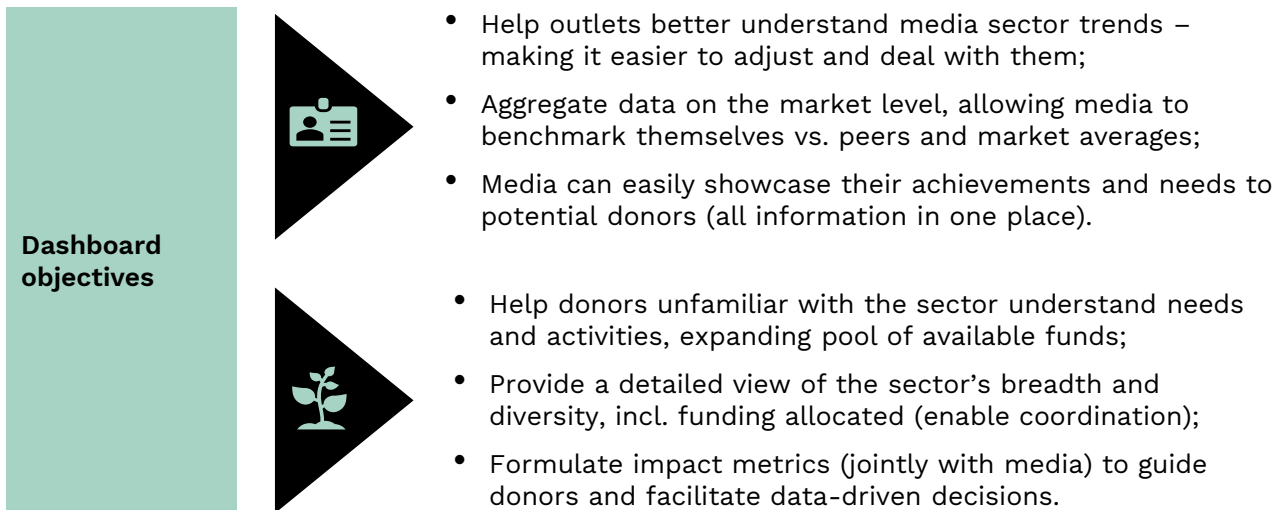
8c Appendix III: Exiled Media Dashboard – Concept Overview

Media in exile play a key role in informing the world about what is happening in some of the world’s most oppressive regimes. They counter propaganda and disinformation and sustain a sense of community those who continue to live under authoritarian regimes and those that have left to be free.

To support their continued existence and operations, JX Fund together with The Fix Research & Advisory created a database of information that is needed to understand the situation and needs of exiled media. The dashboard is targeted to verified media professionals, donors and policy-makers.

Exhibit 19

Exiled Media Dashboard: Key Objectives and Features



8d Appendix IV: Interview Respondents

Qualitative data for this report was collected via interviews with media managers and editors, legal experts, media advocacy activists and representatives of international organizations. For reasons of interviewee safety, all quotes in this report are anonymous.

Media interviewed for this study include Novaya Gazeta Europe, 7x7 Horizontal Russia, To Be Continued, New Tab, Paper, DOXA, Vertska, and Meduza.

Various experts have also provided their input to this report, including Alexander Amzin (media analytics consultant), Galina Arapova (media lawyer), Sarkis Darbynian (Roskomsvoboda), Helene Hahn (Reporters Without Borders), and Mikhail Klimarev (internet protection society).

Additionally, interviews were carried out with representatives of Glush and Scafander Games.

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The JX Fund helps media workers quickly and flexibly to continue their work after they have fled war and crisis zones. It aims to strengthen independent media in exile beyond a current phase of high attention and to support the building of sustainable media outlets accessible for their home countries. The continued work of journalism in exile will have to provide the independent sources of information that will make future democratic developments in their home countries possible. Without them, censorship wins out. To learn more, reach out to info@jx-fund.org or visit www.jx-fund.org

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