JX FUND

Innovation as the Driving Survival Force

The State of the Russian Independent Media in Exile

Research Report |
Berlin, November 2025

Purpose and Approach of This Research

The past year once again shook the Russian independent media sector in exile. The Russian authorities tightened censorship, expanded surveillance, and criminalized the consumption of independent media content.

Independent exiled outlets held their ground despite the hostile environment and sector-wide financial crisis. The USAID support cut that triggered widespread jobs losses in the media development sector hurt but did not break Russian exiled media, which demonstrated an impressive capacity to withstand shocks. A sample of mid-sized and large media saw budget declines of 6% on average, having adapted better than anticipated (though the full brunt of the crisis may not come till 2026). Their continued operation reflects both the professionalism of the sector and the strong, enduring demand for independent reporting among Russian audiences at home and abroad. Against this backdrop, the Russian state continues to invest into the propaganda machine with over 7% increase in the budget over the last year.

The media landscape in exile remains diverse and highly innovative. Outlets cover a wide range of issues, experiment with new, creative formats, and tailor their content for audiences fatigued by war coverage and fearful of surveillance. Despite the hostile environment, over the last year, the Russian media in exile increased the outreach on Instagram (+108%), TikTok (+90%) and YouTube (+11%). In many ways, exiled media are forced into constant innovation. Rather than simply responding to each new restriction or state measure, they become innovation drivers that anticipate the next wave of measures, develop protective tools, and diversify their distribution strategies in advance.

Exiled Russian media offer essential reporting, contributing to audience engagement in Russia and informational security in the host countries. For people inside Russia, these outlets are often the last reliable way to access independent news that reach about 9% of adult population. Some of their correspondents still work in the country and reveal the information that the Kremlin seeks to conceal. For Russian speakers living abroad, and for European audiences, exiled media remain essential sources of reliable information about developments inside Russia. Their work helps EU institutions to assess the impact of sanctions, understand security risks and emerging threats posed by Russian state actors in Europe.

This report builds on JX Fund's previous studies on the Russian independent media in exile. In particular, the 2022 and 2023 reports, which traced the relocation and adaptation of the Russian independent media into exile, and the 2024 report, which addresses the shrinking legal and technical support. This year's study covers how Russian independent media in exile are navigating an ever-hardening information landscape: surviving funding cuts, resisting an expanding censorship regime, and continuing to deliver high-impact journalism that serves audiences in Russia, informs international policy, and contributes to European security. It also signals the urgency of broadened support, without which this vital ecosystem risks being overwhelmed at a moment when its role is more critical than ever.

Maral Jekta, Managing Director, JX Fund

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1 Executive Summary

Exiled Russian media persist as resilient voices for truth despite repression and funding cuts.

Over the past year, the exiled media sector has faced several new restrictions in form of legal pressure on media teams, their audiences and advertisers. As YouTube traffic dropped significantly with about 60%, following the last year's slowdowns, the Russian authorities put pressure on other platforms, for example, WhatsApp, requiring them to share users' data with FSB. Introduction of the state messenger MAX marked another step towards an attempt to reroute the consumers towards state-allowed content only. Despite unprecedented repression, financial hardship, and isolation, the Russian independent media in exile have demonstrated remarkable resilience, continuing to expose state abuses, inform audiences inside Russia, and strengthen democratic discourse abroad. Sustained international support and recognition of their role as part of Europe's broader security and information ecosystem are now essential to ensure their survival and impact.

The abrupt withdrawal of U.S. funding in 2025 has severely undermined the stability of Russian independent media in exile.

With the abrupt cuts in major U.S. funding sources, exiled Russian outlets have lost on average 6% of the funding as compared to the last year (when an average annual budget for a medium to large media was €902,778). This is a significant drop. However, comparing to the consequences faced by other countries, it is a smaller funding cut than expected. The media sector faces stronger competition as the media development intermediaries are themselves under the shutdown. Many media have been forced to downsize, cut projects, and rely on unstable ad-hoc grants, revealing both their extraordinary resilience and the fragility of their dependence on external support.

The Kremlin's toolbox expands with growing investment into propaganda, censorship automation and sanctions against information consumers.

As the Kremlin censorship has expanded to target content consumers, independent outlets lost about 22% of readership on their webpages. Additionally, the censors continued to introduce new legal restrictions for the advertisers collaborating with independent media, as well as to recognize the independent media as "foreign agents", "undesirable organizations" and even "terrorists." Meanwhile, the Kremlin increased its investments into propaganda machine with 7%, including the additional $65 million to Russia Today that targets foreign audiences; as well as innovated automated means of identify and flag an undesired content. Against this backdrop, supporting secure access to information and amplifying independent media must remain central to countering authoritarian disinformation and defending the right to alternative independent information.

Independent media innovate to maintain trust and engage audiences.

Amid censorship, audience fatigue, and shrinking online space, the 63 Russian independent media in exile continue to reach millions by diversifying platforms, introducing more personalized content, and rebuilding trust through human-centered personalized journalism. Over the last year, the media have compensated the loss of audiences on their webpages via Instagram (+108%), TikTok (90%) and YouTube (+11%).

AI empowers exiled newsrooms while exposing new ethical and security challenges.

As Russian independent media in exile navigate scarce resources and digital insecurity, artificial intelligence emerges as both a lifeline and a liability. AI currently empowers most of the media teams in exile, and assists in transcription, content creation, data collection for investigative reporting, data analysis, and audience engagement. Yet, AI also exposes the media to new challenges, such as security & privacy, verification & accuracy. Building collective AI literacy, shared standards, and secure innovation support would allow strengthening media resilience.

2 Mapping the Exodus: Russian Independent Media and Press Freedom in Exile

The Russian independent media sector continues to survive and develop despite harsh censorship inside the country, expanding restrictions and sanctions against their audiences, financial turbulence caused by the USAID funding cuts, and harshening visa restrictions for exiled media workers in some of the host countries, for example, in Germany.

Over the past year, Russian government policies have further worsened conditions for content production, distribution, and consumption. These trends keep Russia in low positions in the ratings of media freedoms, with press, internet freedoms, and journalists' rights deteriorating. The growing pressure on journalists inside the country resulted in the imprisonment of at least 30 and relocation of hundreds of media professionals. Russia currently ranks 5th in the world for imprisonments of journalists[1] and occupies 9th ranking from the bottom in the World Press Freedom Index.[2]

KEY FACTS AND FIGURES

- At least 63 independent news media operating abroad*.
- 10.2 million cumulative Instagram subscribers (≈108% increase from 2024)
- 3.6 million cumulative TikTok subscribers (≈90% increase from 2024)
- 38 million cumulative YouTube subscribers (≈11% increase from 2024)

**Source: JX Fund Dashboard; data as of September 2025.*

Exhibit 1

Russia in Freedom Indices in 2024-2025

Index	2025	2024
Global Freedom Score (Freedom House)	*12/100* ⇩	*13/100*
Internet Freedom Score (Freedom House)	*20/100* ⇩	*21/100*
Nations in Transit (Freedom House)	*1/100* ⇩	*2/100*
Government Social Media Shut Down in Practice (V-Dem)	*0.6/5* ⇩	*0.8/5*
World Press Freedom Index (RSF)	*171/180* ⇩	*162/180*
Physical Attacks and Threats to Life, Liberty, and Health (Risk Map, JFJ Fund)	*9* ⇩	*11*
Journalists Imprisoned (CPJ)	*30* ⇩	*24*
Democracy Index (The Economist)	*150/167* ⇩	*144/167*
VIBE (IREX)	*10/40* ⇩	*12/40*

Sources: Freedom House, Russia, 2024, 2025. V-Dem, Russia, variable "Governmental social media shut down in practice". Risk Map, JFJ Fund, 2025. CPJ, 2025. Democracy Index, 2025. VIBE by IRES, 2025.

1 Deutsche Welle Akademie (April 4, 2025) https://akademie.dw.com/en/space-for-freedom-exiled-journalists-need-assessment/a-72065841
2 Reporters Without Borders, Russia (2025) https://rsf.org/en/index?year

Key Events of the Year that Impacted the Independent Russian Media in Exile

Between September 2024 and October 2025, the Russian independent media sector in exile experienced one of its most turbulent periods since the invasion of Ukraine. The year was characterized by intensified state control over digital communication and the gradual isolation of exiled journalists and media outlets from international support networks.

Since the release of our last report in September 2024, several key events have occurred within the sector. In September 2024, Pavel Durov, the founder of Telegram, was accused of enabling criminal activity on the platform. Though he avoided imprisonment after posting a €5 million bail, this has worried many in the media sector over a potential loss of an important platform for delivering independent content to their audiences.[3] By the end of 2024, the authorities started blocking additional communication platforms, such as Discord[4] and Viber.[5] Around the same time, the government introduced a rule requiring Telegram and YouTube channel owners with over 10,000 subscribers to disclose their personal data, including names, phone numbers, and emails, through the state service Gosuslugi.[6] This effectively undermined the anonymity of independent media creators.

As 2024 drew to a close, Russia expanded its surveillance apparatus. WhatsApp and 11 other messaging services were added to the Register of Information Dissemination Operators (RID, Russian: ORI), requiring them to collect and store user data for the FSB (Federal Security Service).[7] By mid-2025, a new law established the creation of a national messenger MAX, marking another step toward a tightly controlled "sovereign" internet.[8] At the same time, almost half of Russians inside the country expressed their unwillingness to download and use this state-controlled messenger.[9] Some of the experts interviewed for this study argue that even for those who support the current authorities, installation of MAX is seen as a "violation of private life.[10]"

In parallel, the authorities began to slowdown and selectively block multiple platforms and services. As a result, YouTube traffic dropped by 60% after repeated throttling,[11] and Cloudflare reported deliberate interference with its services by the Russian authorities.[12] Further, Amazon Services and Fastly were also disrupted in Russia.[13] By July 2025, internet outages had reached a record of 2,099 incidents.[14]

3 The Guardian (September 6, 2024), https://www.theguardian.com/technology/article/2024/sep/06/pavel-durov-telegram-founder-post-comments-arrest-france
4 Reuters (October 8, 2024), https://www.reuters.com/technology/russia-blocks-instant-messaging-platform-discord-tass-reports-2024-10-08/
5 RBC (December 13,2024), https://www.rbc.ru/technology_and_media/13/12/2024/675c690f9a79472300a900a9
6 Meduza (November 2, 2024), https://meduza.io/news/2024/11/02/na-gosuslugah-nachalas-registratsiya-blogerov-akkaunty-v-instagrame-feysbuke-i-sotsseti-x-ne-prinimayutsya
7 Roskomsvoboda (December 20, 2024), https://roskomsvoboda.org/ru/post/surveillance-registry-adds-whatsapp-skype-wire/
8 Interfax (June 10, 2025), https://www.interfax.ru/russia/1030583
9 Current time TV (September 8, 2025), https://www.currenttime.tv/a/extreme-scan-maks-ustanovka-opros/33524594.html
10 Expert interview 6
11 Novaya Gazeta (December 19, 2024), https://novayagazeta.eu/articles/2024/12/19/rossiiskie-polzovateli-stali-aktivnee-zhalovatsia-na-zamedlenie-youtube-rkn-zaiavil-chto-vidit-osnovaniia-dlia-priniatiia-mer-v-otnoshenii-videokhostinga-news
12 The Cloudflare Blog (June 26, 2025), https://blog.cloudflare.com/russian-internet-users-are-unable-to-access-the-open-internet/
13 Human Right Watch (July 30, 2025), https://www.hrw.org/report/2025/07/30/disrupted-throttled-and-blocked/state-censorship-control-and-increasing-isolation
14 Meduza (August 1, 2025), https://hxhrkwtayhhvzavy.30dvtsgew7hf.xyz/news/2025/08/01/na-svyazi-v-iyule-v-rossii-bolee-dvuh-tysyach-raz-otklyuchali-mobilnyy-internet-eto-rekord?utm_source=tg_live&utm_medium=post_ru

The repression extended beyond technology into law and finance. At the end of 2024, a bill was adopted that forced "foreign agents" to use special bank accounts, from which they could access funds only after their status was revoked.[15] In March 2025, the State Duma banned advertisements on the websites of "undesirable" organizations, further depriving independent outlets of revenue.[16] A few months later, the crowdfunding platform Boosty blocked accounts belonging to Russian "foreign agents.[17]"

Meanwhile, courts intensified their punitive actions: journalists Antonina Favorskaya, Artem Kriger, Konstantin Gabov, and Sergey Karelin were sentenced to five and a half years in prison for alleged connections to Navalny's Anti-Corruption Foundation.[18] New laws allowed trials in absentia and criminalized not only the creation and distribution of so-called "fakes" but even their consumption.[19] Legal media experts problematize this as "*the criminalization of searching for extremist content, which may soon spill over beyond the register of extremist materials*.[20]"

The expanding definition of "extremism" and "terrorism" blurred the line between journalism and criminality even further. In January 2025, Russian authorities labelled Free Nations of Postrussia Forum (FNPF) as terrorist, including 172 organizations as a part of FNPF's "structural division". For the first time, a media, minority-focused outlet Komi Daily, was among those designated as terrorist organizations.[21] As one of the interviewed experts clarifies, this is a new practice that sees any minority-focused organization or media as a threat.

> ***"Over 80 different small organizations operating in ethnic niches, supporting various peoples, including small indigenous peoples, ethnic minorities, and ethnic groups, were added to the register of extremist organizations. It doesn't matter whether they were talking about culture and national traditions or whether they were talking about separating Tatarstan from Russia. The Russian authorities immediately labelled them all as extremist organizations.[22]"***

This escalation coincided with the first prosecutions for interviews given to "undesirable" media[23] and a case against a citizen for comments about earlier conflicts, such as the 2008 war in Georgia.[24]

15 Mass Media Defence Centre (January 22, 2025), https://mmdc.ru/blog/2025/01/22/svoboda-slova-2024/#1
16 Meduza Live (March 25, 2025), https://t.me/meduzalive/123756
17 Mass Media Defence Centre (April 9, 2025), https://mmdc.ru/blog/2025/04/09/servis-boosty-zablokiroval-akkaunty-inoagentov-iz-za-zakona-o-speczschetah/
18 International Press Institute (April 16, 2025), https://ipi.media/russia-ipi-condemns-journalists-convictions-for-links-to-broughtnavalny/
19 Meduza Live (April 8, 2025), https://t.me/meduzalive/124483
20 Expert interview 5
21 OVD Info (November 22, 2024), https://ovd.info/express-news/2024/11/22/172-organizacii-priznali-terroristicheskimi-vmeste-s-forumom-svobodnykh
22 Expert interview 5
23 Mediazona (January 25, 2024), https://zona.media/article/2024/01/25/donotwant
24 OVD Info (February 14, 2025), https://ovd.info/express-news/2025/02/14/na-rossiyskuyu-zhurnalistku-zaveli-delo-o-feykakh-iz-za-posta-o-rossiysko

By mid-2025, consuming independent news had itself become a potentially criminal act, while promoting VPNs was punishable by fines.[25]

Additional complications were brought by the financial crisis within the media sector. In January 2025, USAID announced cuts to its media assistance programs.[26] While such media as Radio Free Europe/Radio Liberty have received compensating support from the EU,[27] the turn in the American aid policies left many exiled media workers stranded and vulnerable. Some have managed to sustain, while the real effect of the funding cuts will become apparent only in the long term. Even Meduza, long considered a flagship of Russian independent journalism in exile, issued an urgent appeal for help in September 2025, warning that it might have to close due to financial exhaustion.[28]

The past year was also peculiar in terms of growing challenges for media employees regarding their legalization abroad. As such, the German government froze its visa program for Russian journalists, many of whom have strongly relied on vital legalization support from the German humanitarian visa program.[29] The program was terminated completely in October:[30] "*On paper, they say that this humanitarian program is still ongoing, but in reality, it no longer exists*.[31]" This signals a continuation of the trend of coupling the legal decisions with the matters of national security, observed during the post-2022 years in such countries as Lithuania and Latvia.[32]

The closure of Roskomsvoboda in October 2025, once a key digital rights initiative, symbolized the worrying trend with such institutional defenders of online freedom shutting down.[33] The stigmatization of Reporters Without Borders as an "undesirable" organization[34] that same summer, followed by the same designation of JX Fund, demonstrated the Kremlin's willingness to further expand its blacklist beyond domestic borders, targeting global media advocates.

By the autumn of 2025, Russian state has further expanded a multilayered system of repression that fused technological, legal, and economic mechanisms. The authorities controlled communication channels, prosecuted dissenters, and dismantled the infrastructure of support for independent voices.

25 Deutsche Welle (July 31, 2025), https://www.dw.com/ru/putin-vvel-strafy-za-poisk-ekstremistskih-materialov/a-73489565
26 Politico (January 24, 2025), https://www.politico.com/news/2025/01/24/state-department-foreign-aid-pause-00200510
27 Deutsche Welle (May 21, 2025), https://www.dw.com/en/eu-releases-funding-to-keep-radio-free-europe-afloat/a-72617621
28 Novaya Gazeta (September 3, 2025), https://novayagazeta.eu/articles/2025/09/03/my-ischerpali-vse-rezervy
29 Deutsche Welle (July 23, 2025), https://shorturl.at/I8ZHF
30 Meduza (October 3, 2025), https://meduza.io/feature/2025/10/03/germaniya-pytaetsya-ogranichit-migratsiyu-odno-iz-resheniy-zakryt-programmu-gumanitarnyh-viz-dlya-rossiyan
31 Expert interview 3
32 Thomson Reuters Foundation, The Fix (November 28, 2024), https://www.trust.org/wp-content/uploads/2024/11/Sustaining-Independent-Journalism-Civil-Society-Organisations-support-for-BY-and-RU-exiled-media-V2-with-legal-disclaimer.pdf
33 Novaya Gazeta (October 9, 2025), https://novayagazeta.eu/articles/2025/10/09/artem-kozliuk-zaiavil-chto-pokidaet-post-rukovoditelia-roskomsvobody-sam-proekt-ne-rabotaet-s-sentiabria-news
34 Meduza (August 14, 2025), https://meduza.io/en/news/2025/08/14/russia-bans-reporters-without-borders-as-undesirable-organization

Exhibit 2

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

Selected events and milestones during the period of study.

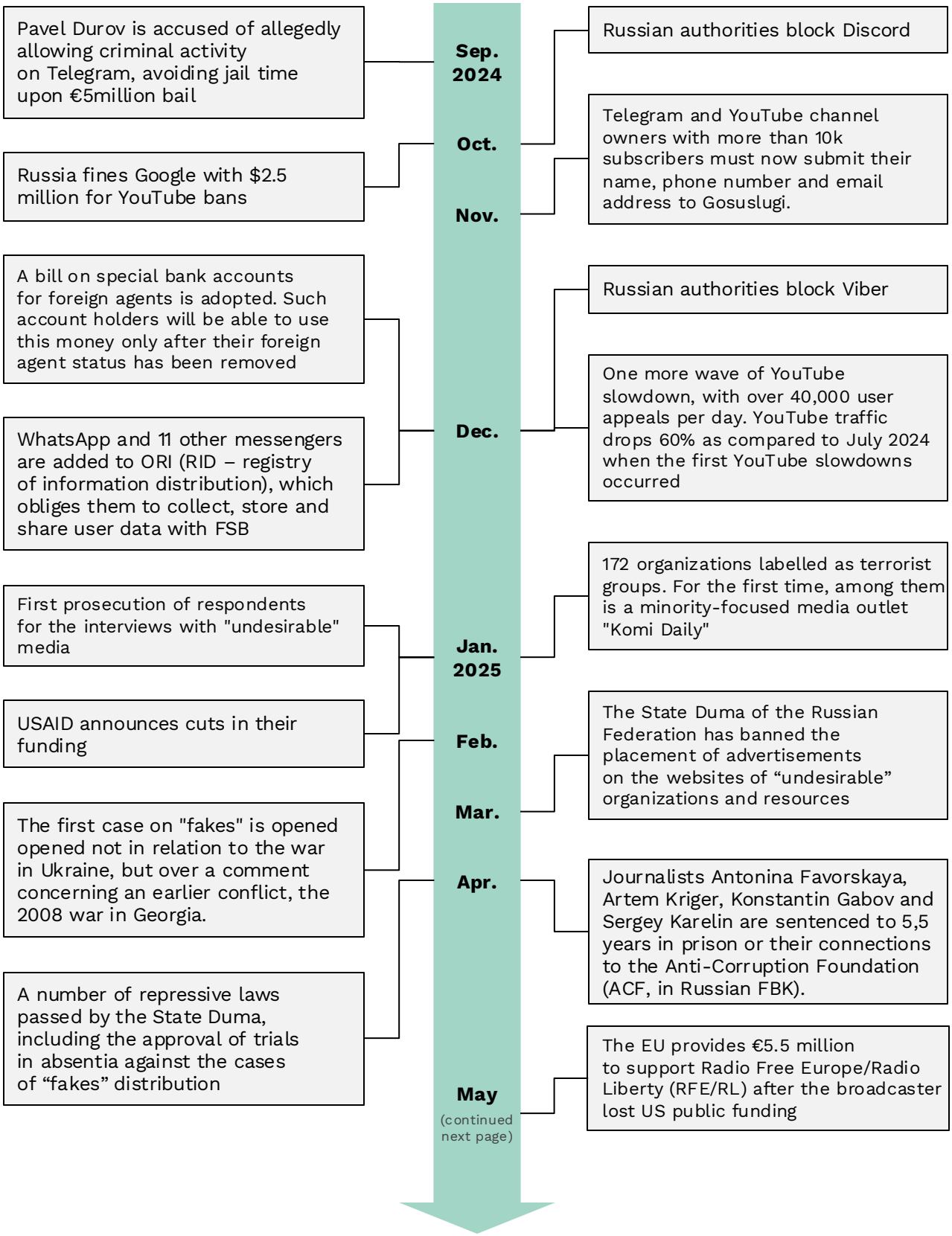
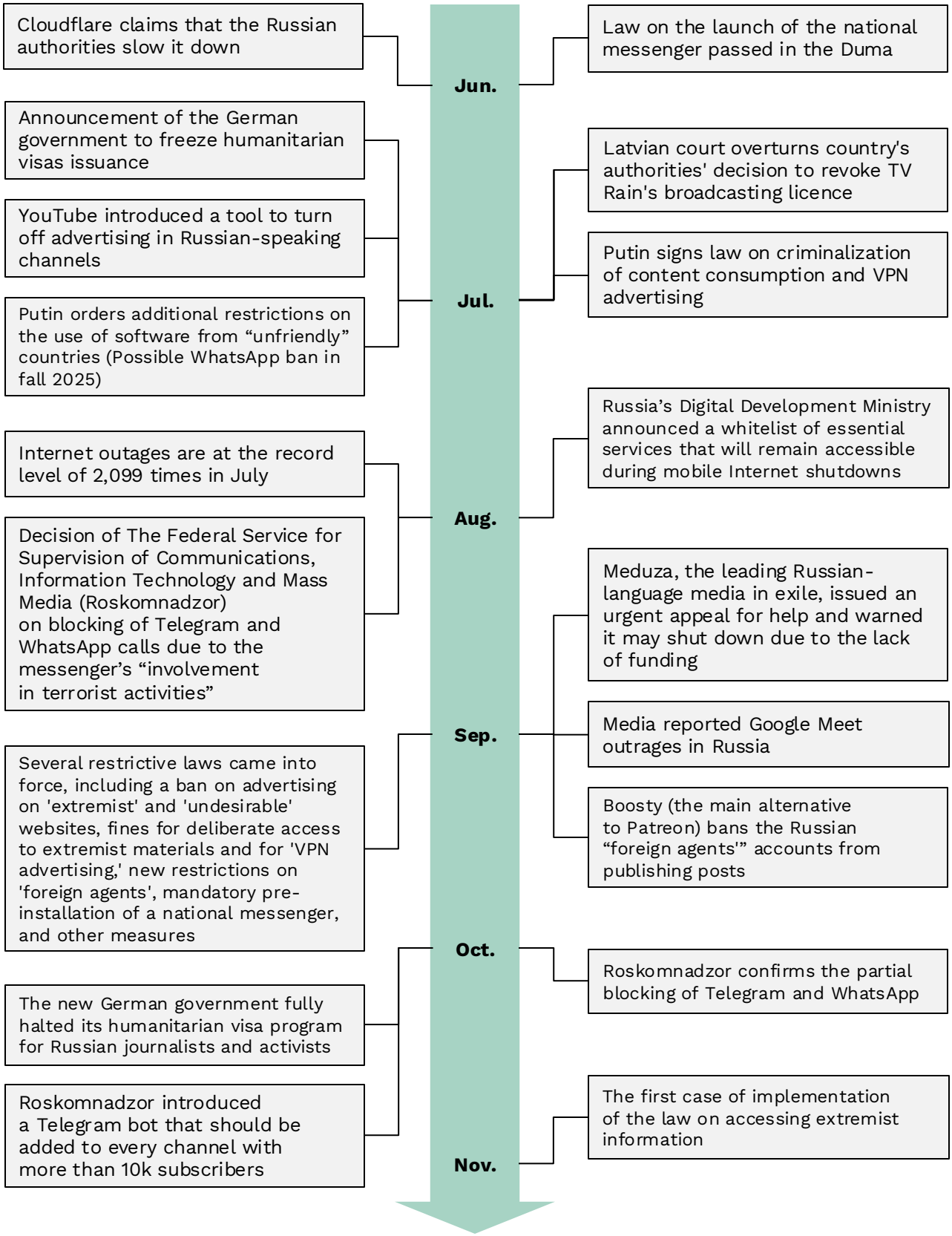


Exhibit 2

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

Selected events and milestones during the period of study.



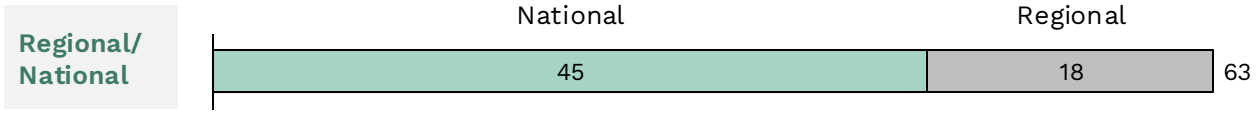
Coverage and Impact of the Russian Media in Exile

Russia is a vast and diverse country, and these exiled media organizations collectively cover a wide range of topics, audiences, and formats. Each outlet occupies its own niche: some provide regional reporting, others specialize in investigative journalism, and many focus on specific themes or communities.

Exhibit 3

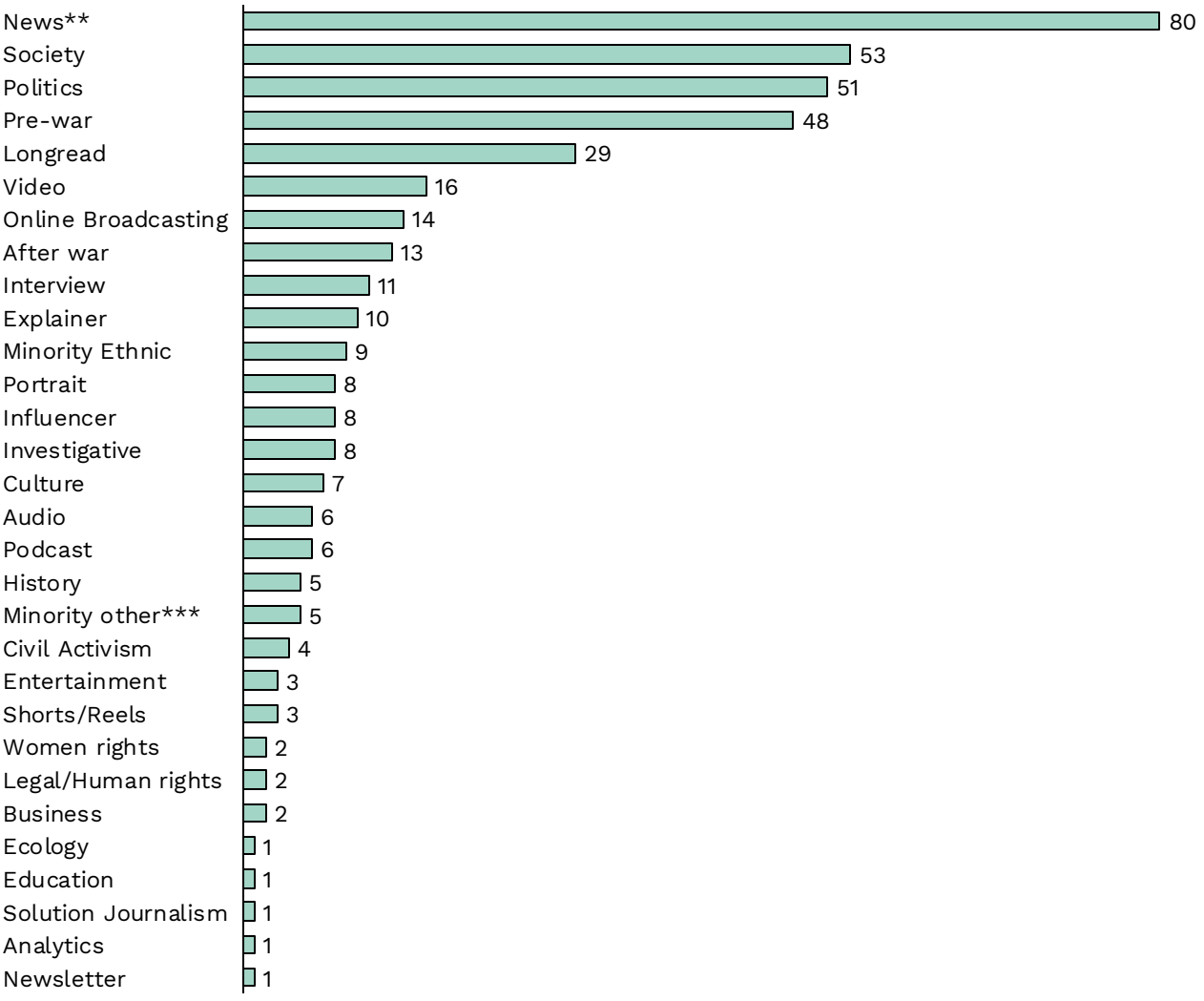
Russian Independent Media Profile

Selected descriptive statistics of Russian independent media in exile (N=63).



Source: JX Fund Dashboard Research

Frequency of Topics and format labels* (N=63)



* 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 (Topics and Format) also count multiple (e.g., a newsfeed) and a topic (e.g., breaking news).

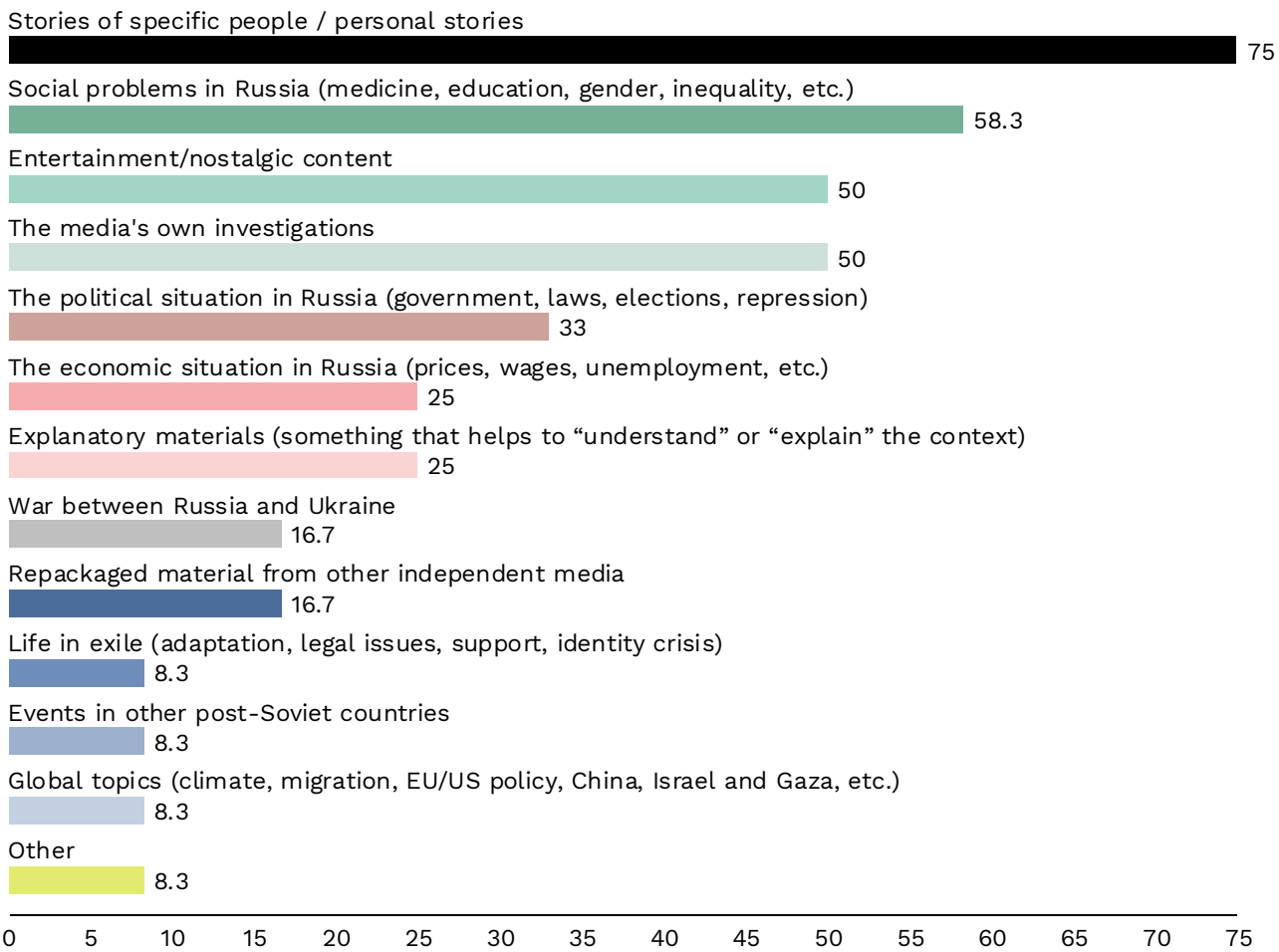
*** Coverage focused on, for example, sexual minorities, races

Source: JX Fund Dashboard Research as of September 2025

The Russian independent media in exile sustain, with at least 63 active media organizations that combine various formats and topics (see the definition and criteria in Annex 7c). This landscape diversity is essential. Interestingly, on closer inspection, general interest media make up a rather small part of the overall landscape. These media ensure a basic supply of independent news and reach large sections of the population. However, in the context of the world's largest country, with 89 federal subjects as diverse as Moscow, Buryatia, and Chechnya, media are needed to provide people with independent information on the local agenda. Doing so from exile is a particular challenge, so it is an outstanding achievement that regional media continue to report. In some cases, a solution journalism approach serves as a trigger for resolving specific problems at the local level, even if the exiled media would never be cited. Special interest media reach particular audience segments such as students or entrepreneurs. Others draw attention to serious problems as political repression, violations of minority rights, or environmental issues. Finally, professional investigative media help to expose and document the omnipotence of elites, arbitrariness, violence, and corruption in the country. They also uncover topics of international importance, such as Kremlin-controlled disinformation campaigns targeting Europe.

Exhibit 4

Most Popular Topics Among the Audience of the Russian Media in Exile (%, Multiple Choice)



Dashboard data and Audience survey results

In their coverage, the Russian media in exile mostly target the audiences in Russia and offer a nuanced and broad reporting, with "repression" as the main topic of coverage of the Russian independent media.[35] At the same time, our survey results indicate that the audience reacts mostly to the content featuring the social problems in Russia.[36] This may signal yet another trait of fatigue from news on repression and war, while a continuous interest in daily matters and problems of the audiences. Despite this, the Russian media in exile, have contributed significantly to uncovering the mechanisms, agents, and narratives sustaining the Kremlin's system of repression and warfare. This reporting remains an important source for the international audiences, including decision makers and politicians.

> ***"Some progress is possible when European politicians and national politicians—I mean European governments—begin to understand that the existence of these independent Russian media is part of the European security system. Ultimately, this is necessary for protecting Europe and European interests from external aggression, from aggression from Russia."***[37]

To highlight some of the media's contributions, in July 2025, The Insider published a major investigation revealing how hundreds of thousands of Russian schoolchildren were being mobilized in state-run programs to construct drones later deployed against Ukraine.[38] The report detailed a state-orchestrated campaign to militarize education under the guise of "patriotic training," showing how children were taught to assemble combat drones as part of extracurricular activities funded by the government and private defense enterprises. In June 2025, IStories published an investigation that cast doubt on Telegram's long-claimed independence.[39] The piece traced potential channels of cooperation between the messenger's administrators and Russian security agencies, including evidence of selective data access and the tolerance of pro-Kremlin channels.

It raised questions about the platform's dual role—as both a haven for opposition voices and a tool potentially infiltrated by the state—making it one of the year's most discussed reports in Russian exiled media circles.

Meanwhile, Mediazona in collaboration with BBC, continued its long-term project *Russia 200*, chronicling the stories of soldiers and civilians killed in the war against Ukraine.[40] By collecting testimonies, photographs, and data from open sources and families, Mediazona humanized the conflict's toll and countered official narratives that glorify the military campaign.

These contributions, along with high-quality coverage of the affairs in Russia, keep the Russian media in the loop of the large media editions across the world with citations of the independent Russian media in exile comparable to the

35 Center for Data and Research on Russia (March, 2025), https://cedarus.io/research/what-do-russians-read
36 Audience survey, Question 'Which topics caused the highest interest of audience in the last year'?
37 Expert interview 1
38 The Insider (July 22, 2025), https://theins.ru/en/inv/283351
39 IStories (June 10, 2025), https://istories.media/en/stories/2025/06/10/telegram-fsb/
40 Mediazona, Russia 200, https://en.zona.media/article/2025/11/07/casualties_eng-trl

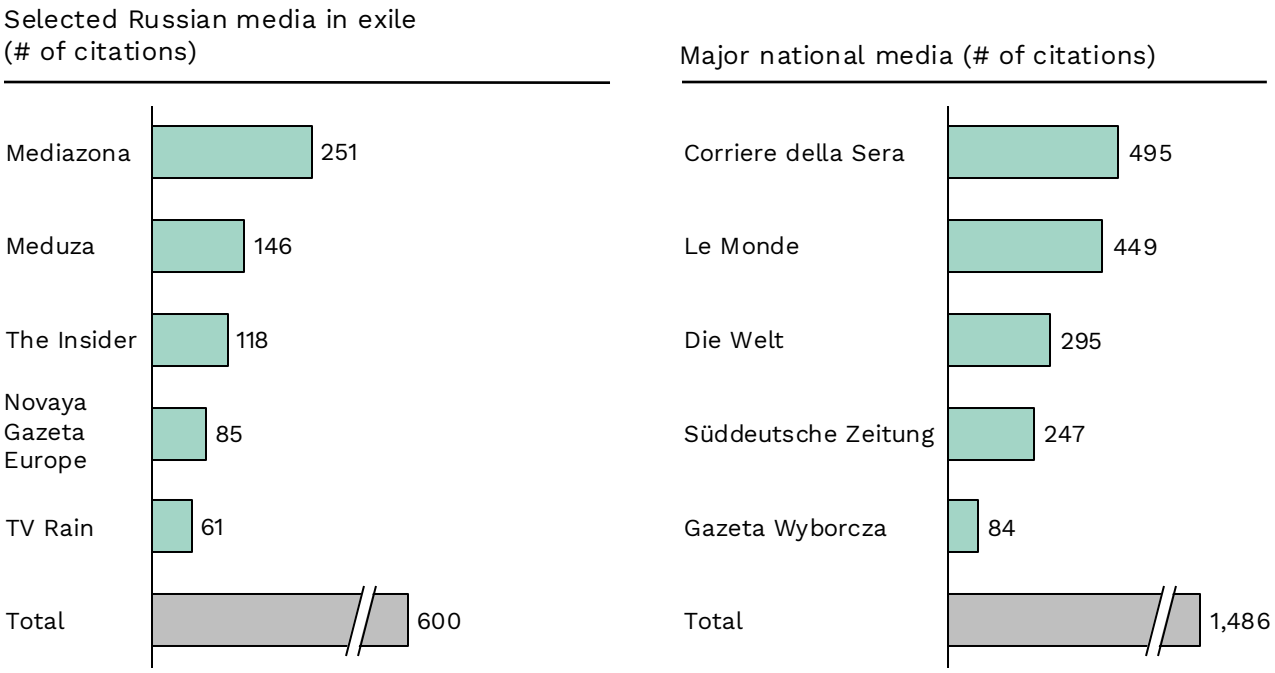
largest national media with much higher funding. Sustaining their outreach and focus on the audiences inside the country, most of the Russian media in exile continue to face a number of challenges abroad. From legal challenges complicated by national security framing in some countries to the challenges of employment and mental pressure on the media workers.[41]

Against the backdrop of growing financial burden, related to the U.S. funding cuts, growing costs for sustaining the media organizations related to the operation from more expensive jurisdictions and some other factors, some of the largest Russian media in exile this year turned to their audiences for financial support. Considering the criminalization of interaction with the Russian media in exile designated as "undesirable" by the Russian state, audience co-funding remains a rather small contribution to the capital of the outlets.

Exhibit 5

Russian Independent Media in Exile (EXIM) as Sources for Global Media

Number of citations of major national media and selected Russian independent exiled outlets in leading global publications* between September 1, 2024, and September 1, 2025.



*The list of the selected global outlets comprises the New York Times, Washington Post, The Guardian, BBC News, Bloomberg, Reuters, Financial Times, Deutsche Welle (DW), Le Monde, The Economist, Euronews, CNN, France 24, Al Jazeera, The Associate Press.

Sources of citations: The New York Times, Washington Post, The Guardian, BBC News, Bloomberg, Reuters, Financial Times, Deutsche Welle (DW), Le Monde (excluding citations of Le Monde), The Economist, Euronews, CNN, France 24, Al Jazeera, The Associate Press

41 Deutsche Welle Akademie (April 4, 2025), https://akademie.dw.com/en/space-for-freedom-exiled-journalists-need-assessment/a-72065841

3 Weathering the Storm – Surviving the USAID Cut

The past year has been marked by significant financial hardships for Russian exiled independent media – not least because of significant funding cuts due to the shutdown of the U.S. Agency for International Development (USAID). However, through a combination of belt-tightening and innovative ways to generate income, the media space has managed to navigate the tumultuous waters more effectively than the media development organizations that supported them.

Nonetheless, it is worth noting that the impact of the funding cut has been uneven – some media have been particularly hard hit, seeing their funds cut by 30% or more. Moreover, it is likely that the full effects of the decline in available support are yet to be fully felt, with expectations that 2026 could bring further challenges and potential consolidation across the sector.

In February 2025, over the weekend, the U.S. Department of Government Efficiency led by Elon Musk shut down the U.S. Agency for International Development (USAID),[42] sparking a crisis across the broader aid and civil sectors. The independent media sector was especially affected with some $268 million[43] in approved grants being frozen. At the same time, the National Endowment for Democracy's (NED) access to its funds was cut off.[44]

Although some of this funding has been reinstated (often after the different measures suspending funds were challenged in court), the bulk of funds have been terminated and there is no expectation that the U.S. would return to its position as the leading funder of independent media globally during this administration.

Historically, U.S. government funding has accounted for around 40% of the international aid directed at the media sector, which over the 2010s was estimated at around $500-600 million annually (it has likely increased somewhat, notably due to a sequence of crises in Eastern Europe, including the Belarus 2020 protests and the Ukraine-Russia war).[45]

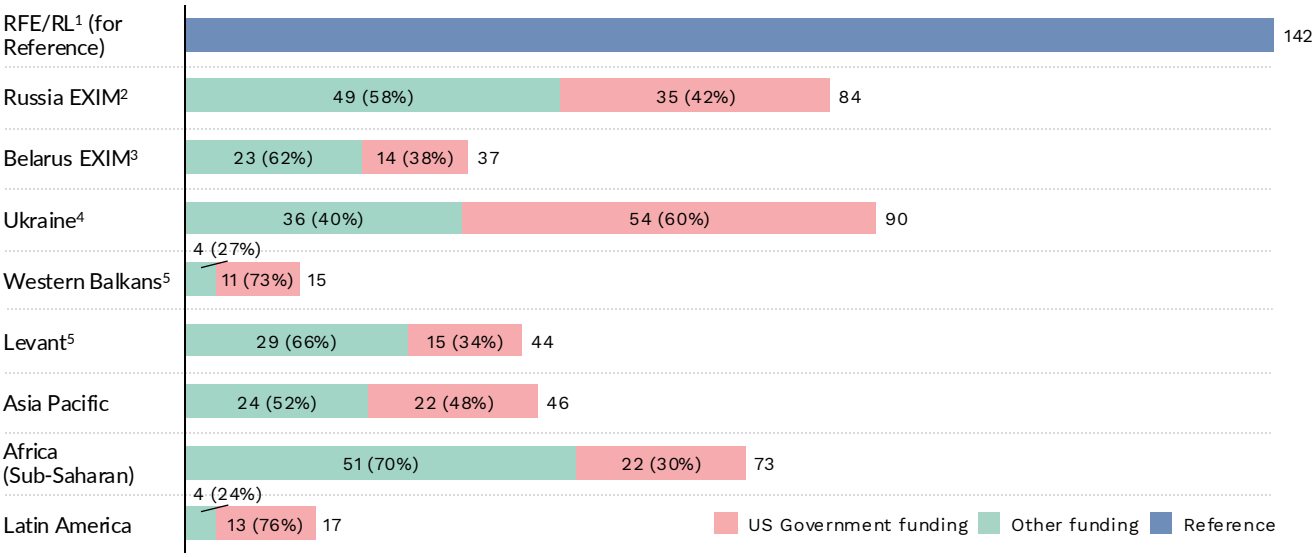
Additionally, it is worth noting that U.S. played a central role in funding various large media projects – including the Organized Crime and Corruption Reporting Project (OCCRP) and Radio Free Europe/ Radio Liberty (RFE/RL),[46] whose vast budgets, by the standards of the media space, suddenly experienced significant gaps that had to be filled by other donors (e.g., RFE/RL received €5.5 million in emergency funding from the European Union).

42 CJR (February 4, 2025), https://www.cjr.org/the_media_today/usaid-and-the-media-in-a-time-of-monsters.php
43 RSF (February 6, 2025), https://rsf.org/en/usa-trump-s-foreign-aid-freeze-throws-journalism-around-world-chaos
44 NED (February 25. 2025), https://www.ned.org/statement-on-neds-funding-disruption-and-program-suspensions/ \
45 On average, official development aid was assessed at $317 million per year between 2010 and 2019, (https://www.cima.ned.org/publication/are-donors-taking-the-journalism-crisis-seriously/), although this only includes official government aid – expert assessments suggest the government accounts for slightly over half of media development funds. It is worth noting that aid spiked 64% in 2014, with the Euromaidan revolution in Ukraine being a major factor.
46 It should be noted that RFE/RL is not categorized as an independent media (on account of quasi-direct Congress funding, via the intermediary of the federal U.S. Agency for Global Media) and is not included in international media development aid estimates (on account of being registered in Delaware).

Exhibit 6

The Impact of US Funding Cuts Differ by Region

Estimated 2024 annual budgets, millions USD



1 Full-year 2024 budget (USAGM). 2 Estimated based JX Fund research and expert analysis. 3. Expert assessment, reflecting input from PCB and BAJ; includes $13.8 million estimated Belsat budget, provided by Poland; note: a 2023–2025 strategic plan for Belarusian media aimed for annual support of €22.3 million, excluding Belsat, for both media and related CSO activity. 4 Estimate compiled by Reporters Without Borders. 5 GFMD estimate (average of 2020–2024 budgets). 6 Estimated share funds sent directly to local media budgets (in the case of Levant funding, this includes civil society organizations working with media). 7 Official Development Aid (note this excludes domestic media support, but would typically include exiled media, as they target non-domestic audiences, with the notable exclusion of direct state funded projects like RFE/RL).

Source: GFMD Estimates, Press Club Belarus, USAGM, JX Fund Research

A Systemic Crisis for the Exiled Media Sector

The funding crisis led to three key trends disrupting the exiled media space: desperate competition over a shrinking pool of funds, a disruption of the chain of funding via media development intermediaries and a sense of deeper crisis in the media sector. Each of these is ongoing, with the full effects likely to be felt over the coming year or even beyond that.

First and foremost, the funding suspensions have drastically reduced the pool of available funding – sparking intense competition over access to those donors that remained on the market. This phenomenon reaches beyond the independent media space outside of the U.S.

For one, entities like the U.S.-registered RFE/RL have started to look to Europe as a source of funding, bringing budget needs into the European funding space that dwarf entire regions of the content (in terms of their independent media funding needs). Moreover, the broader shutdown of funding and services within the U.S. means that some American funders pivoted resources previously sent abroad on challenges at home. This process is only going to become more intense over the coming year as an ever greater funding burden falls on a relatively fixed amount of funding sources.

Secondly, the crisis deeply impacted the media development intermediary space. These organizations de facto serve as middle-men between the “back donors” (e.g., governments, private foundations) in distributing grants among a

specific geography or type of recipient. Examples include Internews, IREX, DT Global, Chemonics, as well as dozens of local or regional partners. Their perception within the media community is mixed – on the one hand they advocate for more media support and provide important expertise in terms of distribution of funds, on the other hand they can take a large portion of the funds earmarked for media support.

Since the beginning of the shutdown, thousands of jobs at such implementing organizations have been cut, including at IREX, Chemonics[47] and DT Global[48] – especially in the U.S. and the capital itself (note: many of the job cuts affect non-media programs).

Finally, the funding cuts have exacerbated a wider sense of doom among the media industry. Russian exiled media managers describe the current financial situation as fragile, uncertain, and increasingly unsustainable, with nearly all outlets experiencing major funding challenges. Moreover, the funding challenges compounded earlier challenges – repressions, exile, censorship and donor dependence – creating what one media manager described as a "cascade effect of exhaustion."

All of these challenges are likely to continue shaping the work of the Russian exiled media, particularly as the delayed effects of the funding crisis kick. As a result, it would be reasonable to assume a more challenging environment going forward.

Exiled Media Push Through with Resilience and Innovation

Russian exiled independent media have gone through a volatile few years from a financial perspective. After the full scale invasion of Ukraine began in 2022, the overwhelming majority of outlets relocated outside of Russia (some had been exiled previously; a minority of small outlets remained in the country, but most of those left in subsequent years). Alongside logistical and personal challenges, this meant re-establishing entities abroad and securing new funding – which effectively meant significant budget growth in 2022-2024.[49]

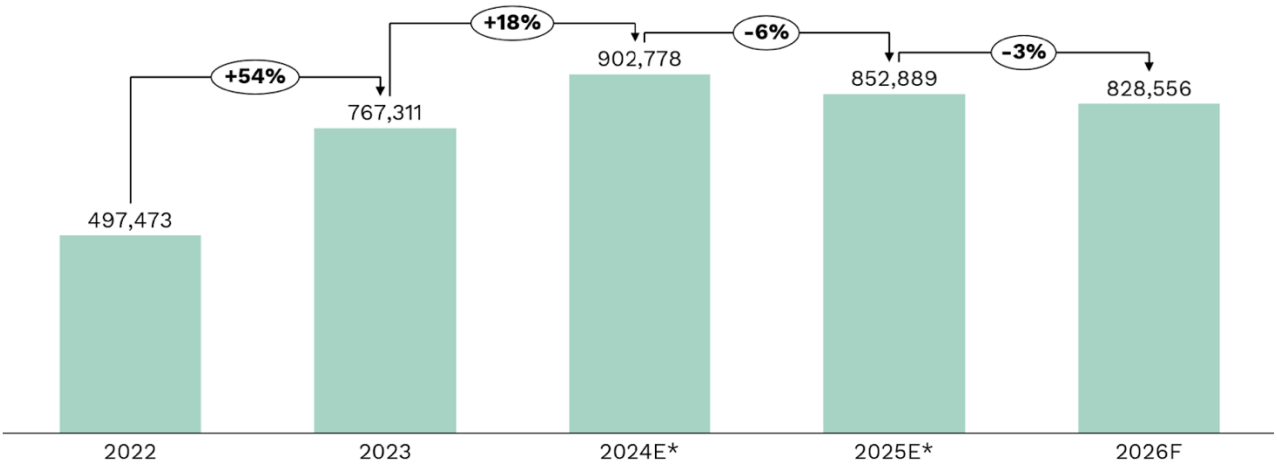
Over the current year, however, budgets have fallen – by 6% on average for a sample of mid-sized media (with budgets of €100,000 to €500,000), and large ones (with budgets of up to €2,000,000 per year).[50] Most media expect further consolidation over the coming year, with budgets falling on average by 3%.

47 DOES (2025), https://does.dc.gov/page/industry-closings-and-layoffs-warn-notifications-2025
48 DEVEX (January 31, 2025), https://www.devex.com/news/exclusive-up-to-3-000-dc-aid-workers-laid-off-by-next-week-ceo-says-109235
49 JX Fund (2022), https://jx-fund.org/newsroom/news/study-russian-media-in-exile-needs-for-2023/. JX Fund (2023), https://jx-fund.org/newsroom/news/sustaining-independence-the-current-state-of-exiled-media-from-russia/. JX Fund (2024), https://jx-fund.org/newsroom/news/study-locking-down-the-windows/
50 Note: this excludes a handful of very large media, by the standards of exiled independent media, with larger budgets.

Exhibit 8

The Rise and Fall of Russian EXIM Budgets

Average annual budget for Russian mid-sized and large EXIM (2022-2025), (survey, N=9)



*Media provided full-year estimates in September-October of both years.

Source: JX Fund Research

However, the figure above requires some additional context. Firstly, Russian independent media in exile are in the midst of a multi-year process of shifting towards more expensive jurisdictions. During the initial phase, many relocated to neighboring, relatively inexpensive countries, like Georgia, Latvia, Armenia or Kazakhstan – or in some cases splitting staff between places like Georgia and Germany to manage costs.

Over the past two years, many of those lower-cost jurisdictions faced their own challenges (media crackdown and protests in Georgia, war in Armenia, restrictions for Russian nationals in Latvia), leading to a further migration to Europe – primarily to Germany but also other West European countries. This led to a further increase in costs, which is reflected in growing budgets despite stable or declining levels of staffing.

One of the main effects of the crisis on exiled independent Russian media has been prioritization on core activities. Outlets that once experimented with podcasts, video explainers, and long-form features have been forced to cut back to core news operations.

Staff reductions have also been significant – major media such as Meduza and Mediazona have publicly announced layoffs and suspended projects. These measures have damaged morale and public perception: repeated pleas for donations, though necessary, reinforce a sense of vulnerability that Kremlin propaganda exploits by portraying independent outlets as “beggars with outstretched hands.”

Such rhetoric, amplified by pro-government and even some opposition influencers, further undermines trust among potential supporters. The collapse of advertising revenue has deepened the crisis. Per one media manager:

> ***Practically, all advertisers have scattered; only VPN services remain, and only those that have no assets or staff in Russia.***

The legislative bans on placing ads on “foreign agent” or blocked sites, along with restrictions on crypto, VPNs, and social-media promotions, have eliminated most commercial income streams. Even for exiled media operating outside Russia, Western advertisers are wary of reputational or legal risks.

Greater Reliance on Innovation, Community Support

Many newsrooms have turned to their communities to support them with small donations, although these are limited by legislation punishing support for media designated as foreign agents or undesirable organizations within Russia. There has also been an effective push to diversify funding – reaching out to private foundations and expanding the geography of government donors. For the time being, this has allowed a portion of media to successfully navigate the crisis, while others were less successful in doing so.

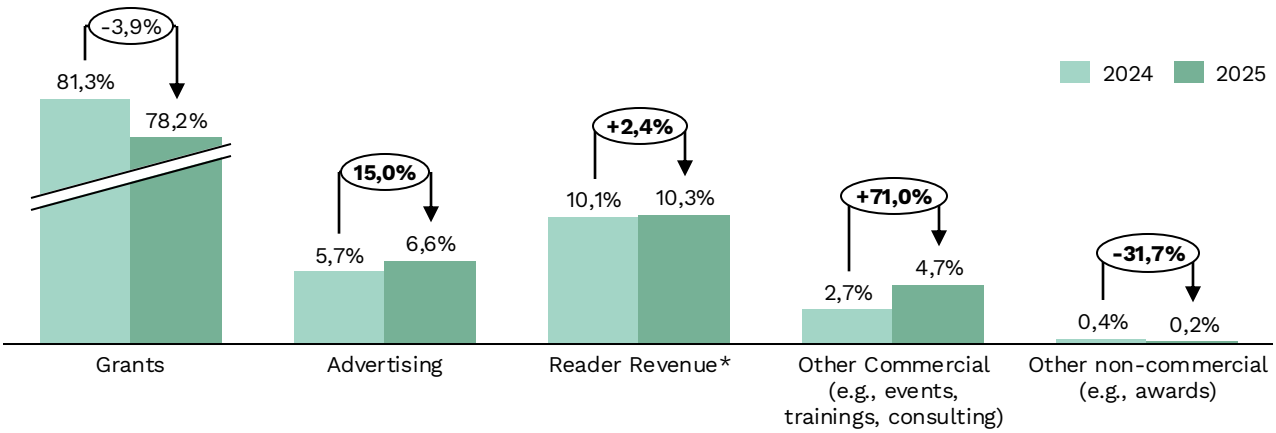
One of the more uplifting aspects of this community outreach have been the successful events held by media such as Ekho. The audio-content focused media is holding a series of events, often with more than one a week, in different European cities, with tickets ranging from €20 to €130 or even more.

In general, Russian exiled independent media have proactively sought to find new ways to finance their activities, which is already bearing fruit and provides an encouraging perspective for the year ahead – although continued support is essential so that media can successfully scale these ventures (and even then, grants will likely account for a significant share of revenues).

Exhibit 8

Initial Success in Reducing Donor Dependency

Breakdown of sources of revenue for Russian mid-sized and large EXIM (2024-2025), (survey, N=13)



*Media provided full-year estimates in September-October of both years.

Source: JX Fund Research

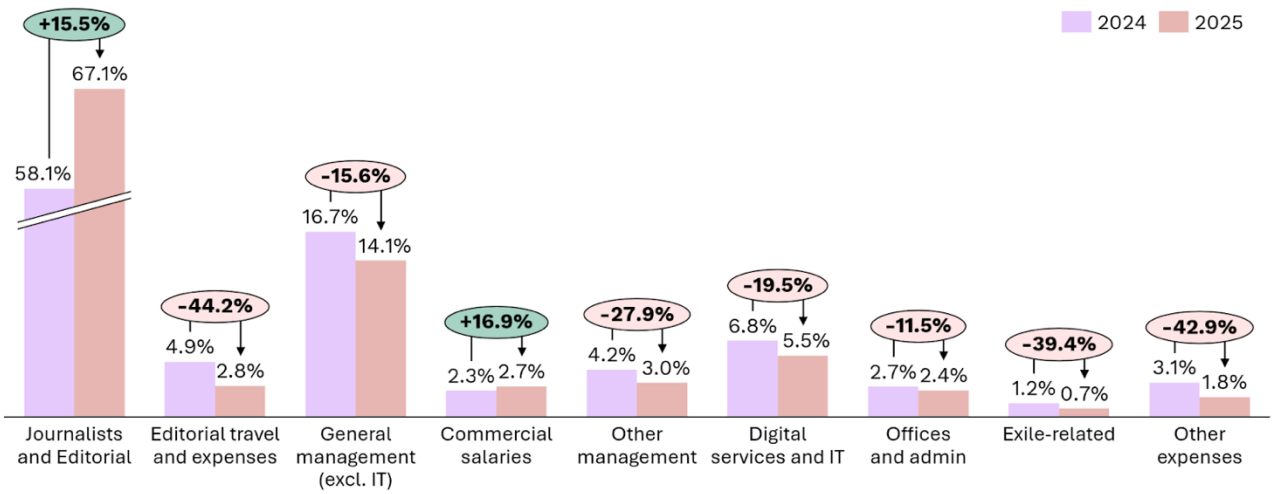
Nonetheless the general view is that budgets in both 2025 and 2026 will see meaningful declines. The actual figures likely undercount the general impact, especially since the sampling has a certain amount of survivorship bias (media that have struggled or gone dormant are not included).

Moreover, it is worth noting that all categories of expenditures declined between 2024 and 2025, except for spending on journalist salaries and commercial personnel. Two main trends drive this. Firstly, the spending, defined as anything outside the core editorial activity, was first to be cut as funding was reduced. Secondly, emergency donor funds were dedicated to maintaining journalist employment. While this has allowed the media to maintain a core level of content production, it could create sustainability issues in the future.

Exhibit 9

Increased Emphasis on Editorial Expenses

Average annual expenditure breakdown for Russian mid-sized and large EXIM (2024-2025), (survey, N=13)



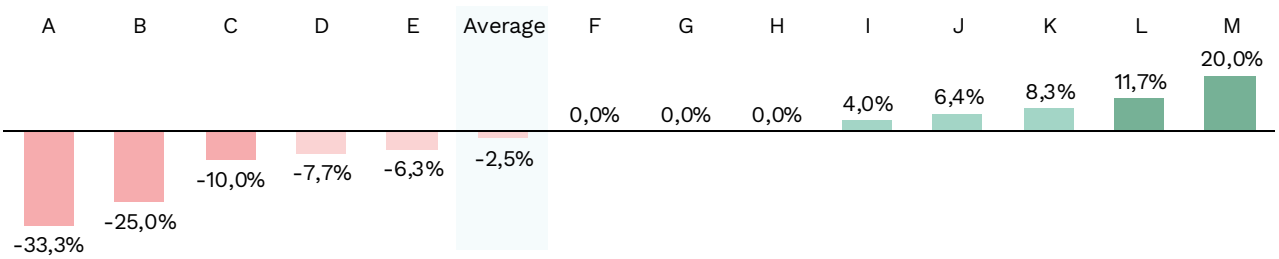
*Media provided full-year estimates in September-October of both years.
Source: JX Fund Research

Many exiled outlets now depend almost entirely on ad-hoc grants and crowdfunding, leaving them vulnerable to shortfalls. What used to be occasional fundraising appeals have become near-permanent campaigns, reflecting an existential reliance on audiences that are themselves under mounting pressure.

Exhibit 10

Diverse Expectations for 2026

Expected changes to mid-sized and large EXIM media budgets in 2026 vs 2025E, (survey, N=13)



Note: Media names have been replaced by letters to maintain anonymity.
Source: Media Survey

4 From Censorship to Public Manipulation: The State on the Informational Battlefield

The Russian government continues to generate a steady stream of repressive legislation designed to consolidate state control. Key laws restrict access to VPN information, ban advertising on platforms owned by "foreign agents," and expand the "undesirable organizations" framework. These measures are part of a broader toolkit used to silence dissent. As one expert summarized, the regime's "*struggle against independent information turns out to be one of its key activities. This is what they are continuously busy with day after day.*[51]"

Exhibit 11

Media-related Laws Introduced or Amended Since September 2024

November 1, 2024	The Ministry of Digital Development, Communications and Mass Media, and Roskomnadzor's bill and order to demand the registration of social media pages with over 10,000 subscribers.
December 17, 2024	A bill on special bank accounts for "foreign agents." "Foreign agents" will be able to use any money collected on these accounts only after their foreign agent status has been removed.
March 25, 2025	The State Duma of the Russian Federation bans the placement of advertisements on the websites of "undesirable" organizations and resources, "access to which is restricted in accordance with the law."
April 8, 2025	New law allows or trials in absentia against citizens abroad for various crimes, including "fakes" and "discrediting" the Russian army.
June 10, 2025	The law to establish the national messenger Max, which will serve as a national registry, platforms for identification, and state services.
July 31, 2025	Amendments to the Code of Administrative Offenses (CAO) introduced fines for "intentional searches" on the internet for materials deemed extremist by Russian authorities.
September 1, 2025	A package of restrictive laws, including a ban on advertising on "extremist" and "undesirable" websites, fines for deliberate access to extremist materials and for "VPN advertising," new restrictions on "foreign agents", and mandatory pre-installation of a national messenger.

51 Expert interview 1

The "foreign agent" label remains one of the key measures, with journalists constituting a significant portion of those targeted. "*As of 2025, a third of all foreign agents in Russia are journalists... So, being a foreign agent and a journalist is the baseline.*[52]" This status is now used for invasive surveillance, as authorities "*are now using Rosfinmonitoring* [the financial monitoring service] to *carry out surveillance on people's bank accounts. Banking secrecy in Russia no longer exists.*[53]"

The state has moved decisively to control online influencers and content consumers. The 2024 law requiring bloggers with over 10,000 followers to register with Roskomnadzor is a primary tool of this effort. The ultimate goal, according to one expert, is "*to keep people under constant psychological pressure, in a constant state of stress.*[54]" Additionally, as of September 2025, it is illegal to: advertise on the pages and platforms, recognized as "extremist" or "undesirable"; advertise VPN services; search for the content of "extremist" and "undesirable" organizations.[55]

Technically, censorship is becoming more opaque and absolute. One expert described the ultimate goal as "*a complete closure of the borders within the internet. Because what they are testing now means that when the internet is completely disconnected, only the number of sites present in the white list will work. This is a technology against which there is no defense yet*". This move toward "white lists" is a practical shift in the landscape of censorship, creating a system where access is denied by default. The cumulative effect of these measures is a significant reduction in the visibility of the state's repressive actions. The blocking of independent media, the throttling of platforms, and the criminalization of journalism create an environment where reporting becomes an act full of personal risks. As the mechanisms of control become less transparent, "*censorship becomes an absolutely dark affair – and in this black room it is difficult to understand who is making decisions and how exactly certain services are being restricted.*[56]"

This can be exemplified by the practice that unfolded during the last months: two new tools for identifying "extremist" content, Okulus and Vepr, work based on machine learning and flag the undesirable content; this content is later automatically reported to the Main Radio Frequency Center (in Russian: GRCHC), which later puts the resource into the state's censorship system The Technological Means for Countering Threats (in Russian: TSPU),[57] and the content becomes unavailable.

In practice, this means that even those resources that are not included in the Roskomnadzor's lists of extremists can be automatically blocked after being reported to the Main Radio Frequency Center. This creates a blurred understanding of why certain resources are not recognised as "extremist" or "undesirable," while still blocked through TSPU technology.[58] This digital control makes it increasingly difficult for citizens to know which of the alternative sources are safe to access.

52 Expert interview 3
53 Expert interview 5
54 Expert interview 1
55 Roskomsvoboda (September 1, 2025), https://roskomsvoboda.org/ru/post/russian-censorship-laws-september-2025/
56 Expert interview 2
57 Read more on how TSPU works here: Human Rights Watch (July 30, 2025), https://www.hrw.org/report/2025/07/30/disrupted-throttled-and-blocked/state-censorship-control-and-increasing-isolation
58 Expert interview 2

> ***We're noticing concerns among our audience that consuming our content in Russia could lead to unpleasant consequences, including administrative and even criminal ones. And even though under the current, horrific and harsh legislation, consuming our content isn't criminalized—meaning, subscribing to us or reading us isn't punishable under current legislation—it seems the overall atmosphere and propaganda, the constant threats, and the hype are forcing people to take a step further and unsubscribe from the Telegram channel. They do this just in case, because they're afraid the law on searching for extremist information could affect them if they read us.***[59]

For some, this may become a reason to completely avoid the news from non-state resources, which will further increase the distance between audiences of the Russian independent media and the readers of pro-state sources. As one of the experts points out, "*by limiting and manipulating the informational space and creating gaps in media infrastructure, the Russian state aims to create a gap in the values of the citizens. It is a fight for minds rather than a fight against the dissenters.*[60]"

Aside from that, authorities have intensified their technical assault on Western platforms hosting independent content. The throttling of YouTube, which began in August 2024, is a prime example of a strategy of internet manipulation described as slowly boiling the frog: "*they are not inventing anything new. It is obvious the frog has been thrown in the pot, and they are slowly turning up the heat.*[61]"

At the same time, major technology companies are seen as increasingly passive. One expert stated, "*Big Tech companies do not want to consider political pressure factors in any way... they prefer to passively observe the situation, formally complying with the demands of the Russian authorities.*[62]" Media surveyed for this study outline that BigTech companies continue to restrict their services which put a lot of operational pressure on the media teams:

> ***The most difficult experience remains with TikTok, which blocked our account in the EU without any official complaints, warnings, or violations of the platform's rules. Furthermore, the platform lacks transparent and clear mechanisms for challenging this decision.***[63]

59 Media interview 4
60 Expert interview 1
61 Expert interview 2
62 Expert interview 1
63 Media survey respondent

This is compounded by internal changes within the industry, where "*Big Tech has been firing a huge number of these "extra" people who were involved in policy-making, Human Rights, and so on. It seems they have become even less receptive to any calls from civil society.*[64]" Looking ahead, the pressure is expected to increase, with some experts predicting Russian authorities to "*start criminalizing even the use of VPNs.*[65]"

Simultaneously, the state heavily funds its own platforms as part of its "alternative" ecosystem strategy. Since 1 September 2025, it is mandatory to pre-install RuStore on all the devices by Apple and Xiaomi.[66] After developing a domestic streaming platform, the plan is to "*block YouTube, and smoke people out into VK Video.*[67]" However, this approach has limitations. Unlike the competitive, high-tech Chinese model, Russia is building a non-competitive system with single services. An analyst commented: "*The lack of competition and market competitiveness, in my opinion, will lead to them remaining crappily working services. A year has passed with VK Video, and nothing is configured. It's simply inconvenient for people.*[68]" Thus, the state can force users toward domestic platforms, but it struggles to make them functionally appealing.

An illustrative example of the public's resistance to the state's alternative ecosystem can be found in the rollout of the new government-backed messenger, MAX. So far, depending on estimates, between 6%[69] and 9%[70] of Russians use the app MAX, 32% of Russians had never heard of it[71] and 47% claim they will avoid installing the app by all means.[72] Among the most used messengers, most of Russians name WhatsApp and Telegram.[73]

Most Russians have experienced internet blockages: between 70%[74] and 80%[75] of Russians have faced mobile internet blockings during the last months. Many Russians are openly against the blockages of the foreign messengers, such as WhatsApp and Telegram.[76] As such, in the survey by Russian Field, 70% have expressed they "rather oppose" the blocking of WhatsApp and Telegram.[77]

By censoring these platforms and flooding the landscape with state-controlled content, the Kremlin aims to shape public opinion and legitimize its actions.[78] While strangling independent voices, the state aggressively promotes its own narratives.

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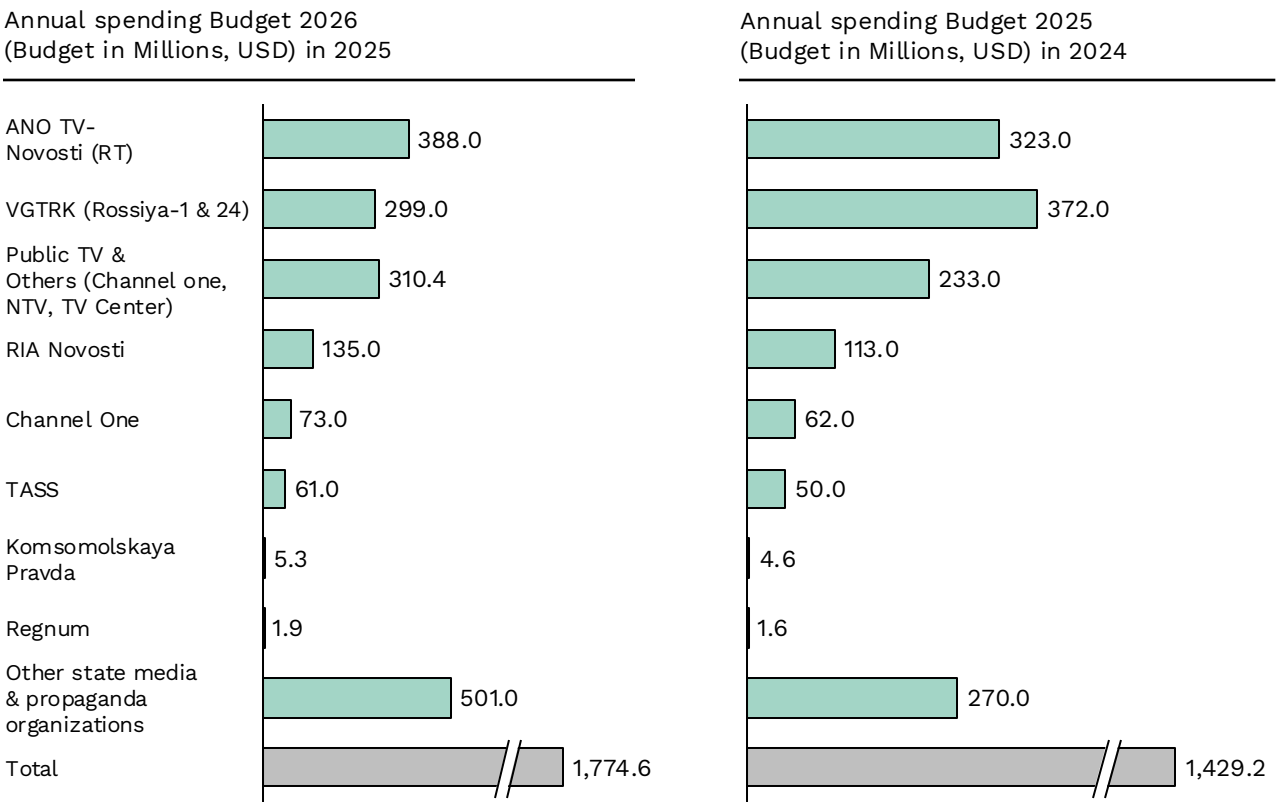
64 Expert interview 2
65 Expert interview 4
66 Roskomsvoboda (September 1 , 2025), https://roskomsvoboda.org/ru/post/russian-censorship-laws-september-2025/
67 Expert interview 6
68 Expert interview 6
69 Levada Center (September 2, 2025), https://www.levada.ru/2025/09/02/problemy-s-mobilnym-internetom-i-blokirovka-inostrannyh-messendzherov/
70 Current Time (September 8, 2025), https://www.currenttime.tv/a/extreme-scan-maks-ustanovka-opros/33524594.html
71 Russian Field (12-15 August 2025), https://russianfield.com/maxim
72 Current Time (September 8, 2025), https://www.currenttime.tv/a/extreme-scan-maks-ustanovka-opros/33524594.html
73 These estimates differ depending on the survey. In Levada's poll: WhatsApp (70%) and Telegram (62%). Levada (September 2, 2025), https://www.levada.ru/2025/09/02/problemy-s-mobilnym-internetom-i-blokirovka-inostrannyh-messendzherov/. In ExtremeScan's poll WhatsApp 59% and Telegram 35%. Current Time (September 8, 2025), https://www.currenttime.tv/a/extreme-scan-maks-ustanovka-opros/33524594.html
74 Levada Center (September 2, 2025), https://www.levada.ru/2025/09/02/problemy-s-mobilnym-internetom-i-blokirovka-inostrannyh-messendzherov/
75 Current Time (September 8, 2025), https://www.currenttime.tv/a/extreme-scan-maks-ustanovka-opros/33524594.html
76 It is worth mentioning that a significant difference in responses appears when the question on blockages includes the explanation of authorities' motivation to launch blockages. This can be exemplified by a higher degree of approval of blockages in Levada's survey that provides such explanation in the question
Levada Center (September 2, 2025), (https://www.levada.ru/2025/09/02/problemy-s-mobilnym-internetom-i-blokirovka-inostrannyh-messendzherov/) with Russian Field that does not provide the explanation within the question (https://russianfield.com/maxim).
77 Russian Field (12-15 August 2025), https://russianfield.com/maxim
78 The Moscow Times (April 11, 2025), https://www.themoscowtimes.com/2025/04/11/heres-why-more-russians-dont-read-independent-journalism-a88695

Propaganda in 2025 focused on justifying the war in Ukraine as a defensive conflict against NATO, undermining Western democratic institutions, and promoting a state-enforced version of "traditional values.[79]"

Exhibit 12

Annual Spending on State Television, News Agencies, and Online Propaganda

The Russian government has allocated a record-high budget for state media and propaganda in its draft 2026 budget. The new proposal significantly increases annual spending on state television, news agencies, and online propaganda projects to 146.3 billion rubles ($1.77 billion). This represents a 7%* increase compared to the current year's 137.2 rubles ($1.42 billion).



*Sources: The Moscow Times, UNITED24 Media, *The increasement refers to ruble, USD exchange rate usually fluctuates*

79 Novaya Gazeta (January 10, 2024), https://propaganda.novayagazeta.eu/en/

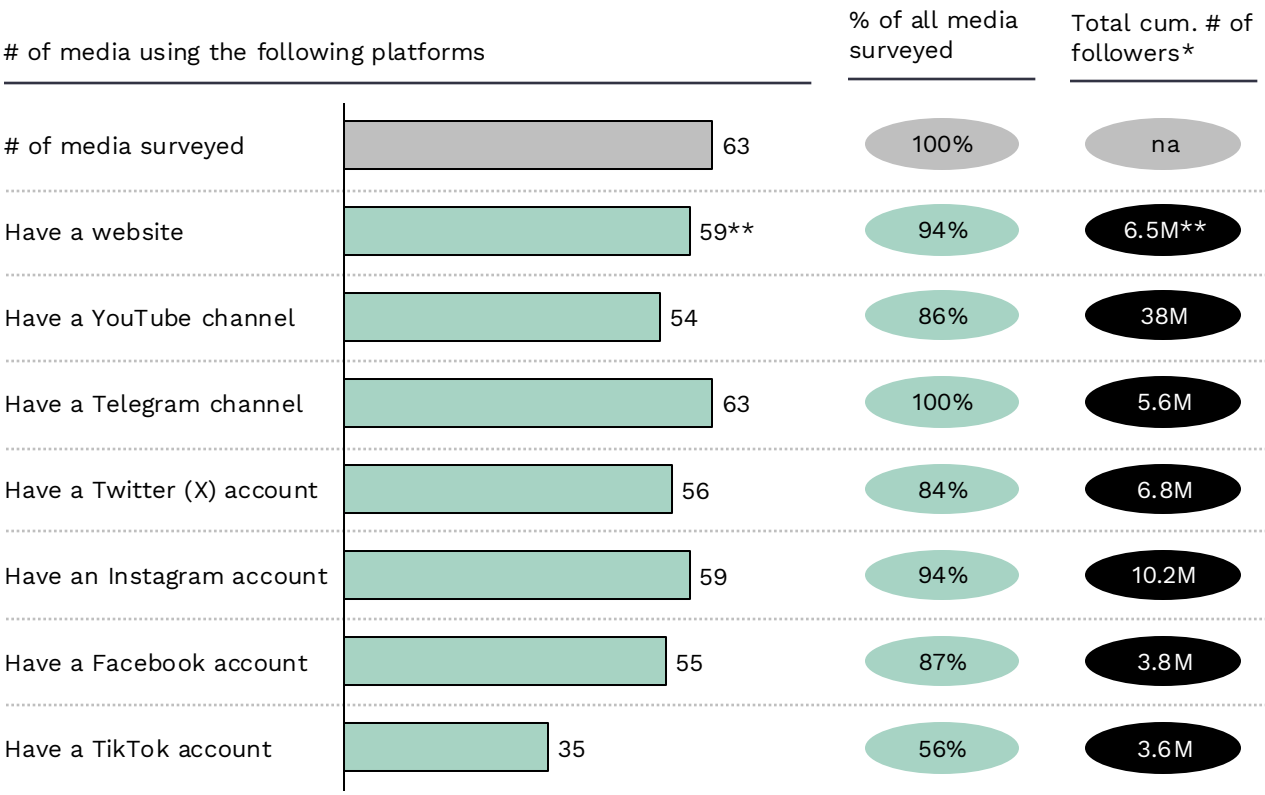
5 Reaching the Disengaged Audience and Expanding the Readership

Some studies reveal that only a small fraction of the Russian population, around 6–9% of adults, regularly engages with independent media.[80] However, the audience of the Russian independent media in exile continues to reach millions of people. What is more important, these are the only actors with an agenda and an alternative to the state, capable of such outreach inside Russia.

Exhibit 13

Key Statistics of Russian Independent Media in Exile

Descriptive statistics for media surveyed within the context of the JX Fund Exiled Media Dashboard (September 2025, N=63).



* Refers to amount of people following or subscribing to a social media account.
** Total cumulative unique users of all websites surveyed. Data as of September 2025 (last date for which data is available across all sites).

Source: JX Fund Dashboard; data as of September 2025 except where otherwise indicated

Over the past year, the independent media have lost about 22% of unique website visits and 8% Telegram followers. However, the Russian media sector in exile grew immensely on Instagram (+108%) and TikTok (+90%), and YouTube (+11%). This indicates that the Russian media have not only been able to compensate for audience loss on webpages and Telegram, reinforced by the pressure on the audiences. They have managed to grow the rapidly developing TikTok in Russia, and accessible through VPN only Instagram.

80 The Moscow Times (April 11, 2025)
https://www.themoscowtimes.com/2025/04/11/heres-why-more-russians-dont-read-independent-journalism-a88695

Diversification of Platforms and Formats

Russian independent media in exile report growing audience fatigue, especially around coverage on war and repression. Multiple interviewees said that war updates are increasingly scrolled through, even by their loyal readers. One of the interviewed outlets noted the audience response has “petered out” due to a constant stream of political news, while another described “extreme exhaustion” rooted in hopelessness and a sense of powerlessness to influence events. At the same time, a recent Levada Center survey found that 66% of the Russian population say they do not feel news fatigue. This is the inverse of U.S. and EU trends, where same shares of citizens report being tired of news.[81]

Several outlets observed a divergence between stable or growing views on their content, while a declining number of followers. Some of the interviewed editors interpret this as *Belarusization*: just as in Belarus during the last years, users seek out a media channel by name to read news but avoid subscribing to it for security reasons. As a result, audiences are still consuming independent news, but are erasing the digital traces (subscriptions, likes, comments) that could expose them.

> ***“Our subscriber count is declining, but our views aren't falling and are even growing. What does this mean? Someone logged in, typed "Media Name" into the search bar, looked at all the news, left, and didn't subscribe. That's the Belarusian scenario.”***[82]

Respondents consistently stressed that recognizable journalists serving as the public “face” of an outlet maintain trust in the media, while a fully anonymous brand feels distant. This explains a continuing personalization of the Russian media landscape in exile. Public experts, including political scientists, journalists, technologists, lawyers, and economists, run their own channels that deliver analysis within their domain. A cohort of tech professionals continuously tracks the shifting Runet terrain: blocking, throttling, deep packet inspection activation (a technology that allows filtering, blocking specific content and rerouting the traffic), platform shutdowns, and exile. Larger outlets routinely turn to them for rapid diagnostics and on-the-record commentary during new repression waves. Legal analysts and policy bloggers likewise monitor fast-moving regulatory changes affecting broad user groups (e.g., channels like Faridaily), while international beats in Russian are covered by experts and journalists who translate global developments into a timely, Russia-relevant context. This might be a key reason YouTube remains the largest and most trusted platform, where audiences connect with a familiar face and voice, which strengthens credibility in an era of information overload and AI-generated content. Outlets are leaning into presenter-led formats, Q&As, and explainers where journalists show their work and reasoning.

81 Levada Center (April 17, 2025), https://www.levada.ru/2025/04/17/istochniki-informatsii-chastota-polzovaniya-i-doverie-ustalost-ot-novostej-populyarnye-zhurnalisty-i-blogery/
82 Expert interview 4

> ***We plan to work on developing personal brands, because in a world of artificial intelligence, it's better to connect with a personal brand, with a real person who shares not only dry facts, but also their attitude towards them.***[83]

At the same time, Telegram still dominates in a share of personalized channels because its entry costs and production demands are lower than those of YouTube for a standalone creator amid intense competition. For Russian-language audiences, these personal channels provide an alternative lens on the news cycle; within the liberal exile sphere, they host a plurality of viewpoints (including critiques of current events from a left perspective or debates about Western approaches) while remaining anti-war. Outlets are doubling down on Instagram, YouTube, and TikTok to reach younger users. One regional outlet reports that 3/4 of its Instagram viewers are still inside Russia (via VPN), justifying continued investment despite the Instagram ban in Russia.[84] Others are building YouTube shows, podcasts, and email digests. The logic is simple: in 2025, a multi-platform approach is more effective and reliable than a website-centric one. As a result, the ecosystem is dispersed across dozens of formats, which is costly in terms of resources, but broadly effective at preserving (and even growing) reach under pressure.

To counter disengagement and sustain trust, outlets are investing in community-building: live online/offline discussions, reader clubs, and fundraising livestreams. According to our data, almost every Russian EXIM now operates a Telegram chatbot for feedback, questions, and news aggregation. These create a signal of responsiveness ("we hear you") and help to preserve fragile trust even when the news agenda is heavy.

The downside of the multiplatform presence is in algorithms. Most interviewees flagged a constant algorithm volatility and moderation risk as the price of this strategy. Among the mentioned examples, the media point out to unpredictable downranking of political content, sudden demonetization, retroactive deletions of their content, and channel bans. Media teams now see account churn as a norm. This is especially relevant for TikTok, where virality spikes matter more than subscriber count, and some outlets simply relaunch new channels after bans. Strategy is shifting from "growing one big channel" to "growing a repeatable content pipeline that can catch waves" across multiple accounts. Interestingly, in some cases, the strategic work with algorithms is not required, as they catch the content and promote it naturally.

> ***This year, Facebook lifted the Shadow Ban, and it became our fastest-growing platform. But we didn't do anything to make it happen; we just ran Facebook as usual... It's our most successful growth case with 1,000 new users a week.***[85]

83 Media interview 7
84 Media interview 7
85 Media interview 10

Interviewees flagged the role of open-web algorithms. Several report a persistent blind spot in Google Discover, which continues to ignore independent outlets while surfacing pro-Kremlin propaganda media in the suggestion feed and giving them thousands of views. Respondents further note anomalies in Google Search: high-impact investigations from independent outlets often fail to surface for obvious keyword queries, suggesting ongoing ranking or indexing issues.

VPNs and Circumvention Tools

Since many independent outlets' websites and entire social networks like Instagram are blocked in Russia, VPNs and other circumvention tools are now essential for audience access. Exiled media don't just recommend these tools; they actively facilitate uptake and, in some cases, operate as tech providers themselves. Several respondents described partnership with a VPN provider to distribute their service via an affiliated network that pays commissions to participating independent outlets.

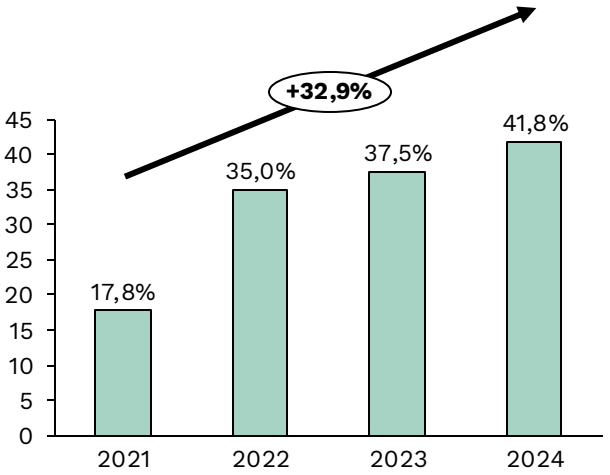
With direct advertising of VPNs banned in Russia, outlets are treading carefully and choosing different strategies. Some mention VPN as the right tool to get to an unblocked part of the web, while others launch and sell their own VPN services. Many publish step-by-step guides to mirrors, circumvention browsers or extensions, and keep instructions updated as new anti-censorship methods emerge. In practice, exiled media have become technology educators, ensuring audiences can actually reach the produced content.

Exhibit 14

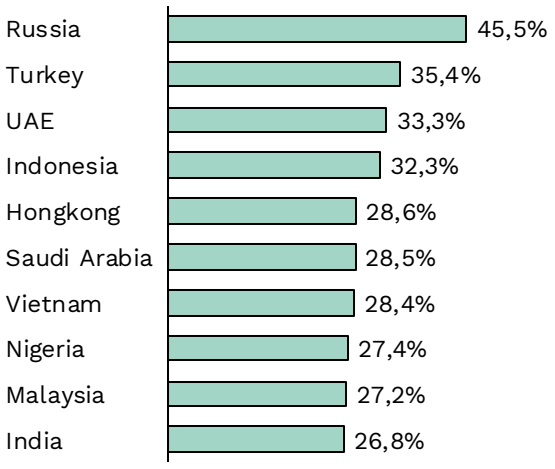
Russia's Rising Virtual Private Network Usage

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 internet users* using VPNs in Russia (%)



VPN use by country (%, as of Q4, 2024)



Sources: GWI, We Are Social, Datareportal
**Sources: Share of internet users using VPNs in Russia (%), Datareportal, GWI (Q3, 2021-2024)*

Opinion polls inside Russia indicate that 28% of Russians use VPN, while 60% never do.[86] At the same time, according to the global metrics, Russia ranks first in the world by the VPN usage per capita, with 45,5% using VPN services.[87]

Journalism and Sources Inside Russia

The whole independent Russian media landscape can be divided into two uneven groups: outlets that maintain professional reporting networks in Russia and those that rely primarily on anonymous intake or open sources. The first group operates at the very frontier of protection protocols: single-person access to contact lists, pre-briefs and de-briefs, and 24/7 editorial and security support while a reporter is on a field trip, minimizing potential mistakes and exposure.[88] The second group handles a different risk profile: they often do not collect personal information about informants and rely instead on non-attribution and generic descriptors.

A related development is the rise of intermediaries with reporters inside Russia: organizations that commission, vet, and package stories from local contributors. Several such networks now operate in parallel. Notably, one media respondent reported that even after donor freezes of 2025, demand for commissioned pieces from media clients did not decrease. The other media respondent mentioned the value of such a company.

> ***"For some serious materials, we try to work through partners who already have everything set up, all channels secured, all paths taken, and this falls on their shoulders both the responsibility and the work of interacting with journalists and informants located in Russia."***[89]

Thus, independent exiled media have built layered, low-profile pipelines from field journalists to anonymous tip systems and intermediary hubs that keep them connected to realities on the ground. By minimizing data collection on informants and professionalizing safety support, they reduce risk for everyone involved while preserving access to first-hand information from inside Russia.

Regional newsrooms continue to be indispensable and are not "dying out." Independent media awards such as Redkollegia consistently recognize region-focused work alongside national and international coverage: in 2025, outlets such as People of Baikal, Novaya Vkladka, 7x7, and Takie Dela received honors for regionally anchored reporting. These newsrooms surface everything from deeply personal stories and regional social problems to war-related analysis and investigations that is later cited by independent national media, bringing verified, community-rooted facts into the national conversation. Their proximity to sources, fluency in local contexts, and ability to surface underreported stories make them a critical backbone of the broader independent media ecosystem, including for investigations that begin with a single regional lead.

86 Current time (September 8, 2025), https://www.currenttime.tv/a/extreme-scan-maks-ustanovka-opros/33524594.html
87 Statista (October 23, 2025), https://www.statista.com/statistics/1382869/use-of-virtual-private-networks-vpn-by-country/
88 One third of surveyed respondents have reported they have either correspondents on the ground or support cooperation with the citizens and informants.
89 Media interview 4

Investigative Journalism Impact

Investigations remain a core way to focus attention on political, economic, and social harm. Mostly, outlets pursue stories tied to the war (abuses, mobilization, casualties), violence and discrimination, corruption, and environmental damage. These pieces often travel widely inside Russia's information space, even when produced from exile, because they are fully related to Russian readers.

In the international-focused segment, investigations target sanctions evasion, procurement chains, and a range of other political and economic issues. Their on-platform reach can be modest, but the audience is different: foreign newsrooms, investigators, and policymakers. Thus, investigations that rarely go viral domestically can still meaningfully constrain the Kremlin's capacity and shape international responses.

> ***"For example, we stopped Russia from purchasing Taiwanese high-precision machines, which accounted for 50% of all Russian Defense Ministry purchases. I don't think the public even noticed these materials, but the impact on Russia was, of course, colossal. Yes, that's a huge, multi-billion dollar loss for the Russian military."***[90]

Some interviewees and experts questioned the current emphasis on investigations by donors, outlets, and investigators themselves, arguing that the bet has not paid off, with the limited impact, especially on domestic audiences under repression, while costs and timelines are high.

> ***"My personal opinion is that the endless focus of Russian journalists and, unfortunately, donors, on investigations has not justified itself at all... There is no impact from these investigations."***[91]

Several editors stressed that the months of reporting and legal vetting can consume scarce resources with little measurable effect on behavior or policy—and when success is judged by reach, funds are often better allocated to video-native formats (YouTube, Shorts, TikTok) that reliably deliver audience growth and engagement. In the view of some, investigations remain essential but should be selective and strategic, with expectations calibrated to their real (often slow, indirect, or international) pathways to impact.

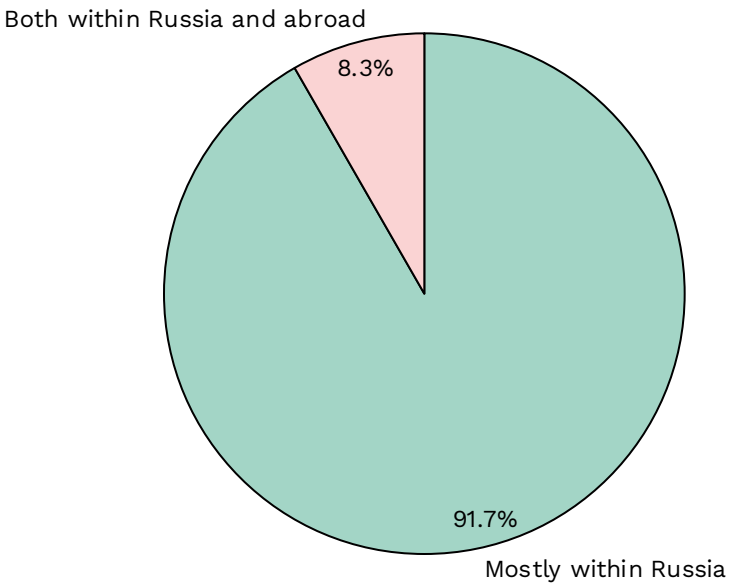
90 Media interview 10
91 Expert interview 4

Targeting the Russian-Speaking Diaspora

Russian independent outlets consistently report that their core audience is inside Russia. At the same time, financial sustainability depends disproportionately on audiences abroad: donations, memberships, ticketed events, and book sales come largely from the diaspora. This creates a structural mismatch in the most valuable reach at home, but revenue comes primarily from abroad.

Exhibit 15

Audience of the Russian Independent Media in Exile (Based on Data Shared by the Media, N=12)



In terms of content production, rather than dividing audiences into “relocants” and those inside Russia, most outlets intentionally cultivate a common information sphere, designed to keep conversation and information exchange continuous across borders.

> ***The idea is not to divide these people. On the contrary, we're trying to be a bridge between them, so that we all speak the same language, so that we don't divide. We want to create a common space for both those who left and those who stayed, so that we can continue to speak the same language, on the same topics.***[92]

Approaches to the diaspora vary widely, from no active work yet (but a desire to start) to full-fledged programs: newsletters, webinars and workshops, offline meetups and exhibitions, region-specific community events, and even books sold exclusively outside Russia. Where resources allow, outlets lean on recognizable personalities (hosts, editors, reporters) to draw in-person attendance and convert it into recurring support.

92 Media interview 4

The diaspora "market" is finite, and several interviewees say they cannot or do not want to compete with larger media brands. Many initiatives target post-2022 relocants who are still adapting abroad, and whose immediate needs skew toward host-country content, rather than Russia-focused news. As a result, capacity, timing, and creativity determine how far an outlet can go with diaspora work and whether it pays off.

> ***"I believe that objectively, we can't compete for crowdfunding with media outlets that are either far more powerful in terms of social significance or that function as public institutions. Their entire purpose is to provide a public service. They have greater potential for crowdfunding than we do, even though crowdfunding is challenging for them. We believe this is the ultimate red ocean, where we shouldn't venture because we'll lose and gain nothing; we have other strengths."***[93]

Most probably, for the post-2022 diaspora, Russian-language content will remain highly relevant over the long term. In response, experienced independent media actors are launching lifestyle-oriented networks with a clear anti-war editorial line. These outlets blend content about the host country (bureaucracy, housing, jobs, and culture) with curated updates on Russia. This allows helping audiences integrate locally while staying connected to developments in Russia.

Targeting Global Audiences

Across outlets, there is clear interest and effort to reach international audiences. Some plan to launch English-language YouTube channels, while others run bilingual newsletters targeting civil society or niche topics closely aligned with their primary areas of focus. Investigative outlets, in particular, define their external audience as policymakers and investigative journalists abroad.

> ***"A significant portion of our investigations relates to Russia's activities abroad, including interference in the domestic politics of other countries, acts of sabotage, and the activities of Russian intelligence agencies. Consequently, this attracts the attention of Western audiences and leads to criminal cases and arrests. Some of these arrestees are later exchanged for Russian political prisoners. So this is an important part of our work, one of our specialties."***[94]

93 Media interview 6
94 Media Interview 2

Tactics and success metrics differ from domestic work. For policy-facing stories, “reach” is measured less in views and more in citations, briefings, follow-up reporting, and actions. Several outlets report traction in the Barents region, translating Russia-focused pieces into English and, in some cases, licensing or selling translations, and gaining recognition and modest revenue while building a bridge to non-Russian readers.

> ***“We have an agreement with a Norwegian newspaper; they publish our weekly column. Our author writes it every Thursday. We've also hired an English-language editor this month. They pay us for this and want more content from us; they're genuinely interested in simple life and how people live in Russia.”***[95]

At the same time, nearly all respondents recognize that sustained global work is resource-consuming and can’t always be prioritized over core Russian-language reporting. One outlet noted that an English site existed but could not be maintained after the USAID funding freeze.

As a result, most outlets either are moving toward or already operate some global-facing materials, but depth and consistency vary depending on resources.

Adjustments in Editorial Voice and Storytelling

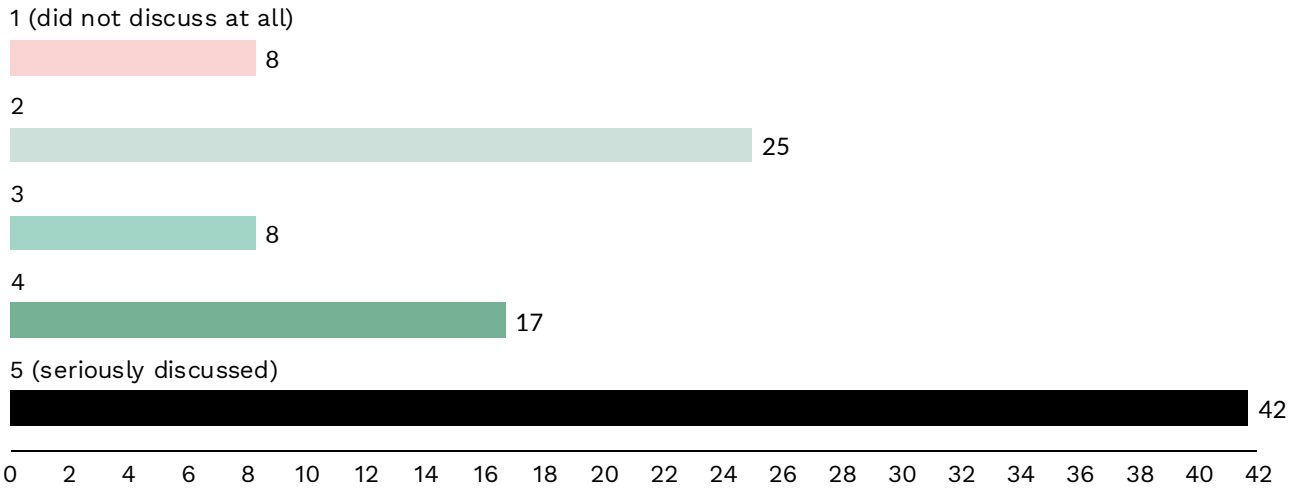
To hold the attention of an increasingly wary audience, exiled outlets are experimenting with new content formats and storytelling approaches. Many have recognized that the traditional diet of hard news, especially when it’s relentlessly bleak, must be blended with other styles to prevent fatigue. One major trend is the incorporation of “infotainment” and interactive elements into their content. Rather than only publishing straight news articles, outlets are packaging information in more engaging ways. It can also be aligned with easier reach in video-first social media.

> ***“We use infotainment content like a 'layer cake': we cover serious issues under seemingly light topics. We've started producing much more infotainment content for Instagram and TikTok, where algorithms naturally help distribute short videos to a larger audience.”***[96]

94 Media Interview 2
95 Media interview 3
96 Media interview 7

Exhibit 16

Over the Past Year, the Media have Seriously Discussed Rethinking of Tone of Voice in Response to Audience Fatigue (Audience Survey, %, N=12)



On platforms like Instagram and TikTok, they create short videos with memes, humor, or pop-culture references, which are more likely to catch a scrolling user's interest. Over the past year, one of the interviewed media outlets has increased its production of interactive content, such as quizzes and mini-games. In 2023, they experimented with one interactive "role-playing game" in Telegram; in 2024, they published three, and in 2025, they have already released six such projects.

Another key adaptation is a deliberate adjustment of editorial tone and topic mix in response to fatigue. In general, editors are consciously varying their storytelling, mixing hard news with human-interest features, regional stories, cultural coverage, and even some humor or nostalgia. The goal is to provide emotional relief without abandoning the core mission of truth-telling. It's a fine line to walk: they must remain critical and cover tough issues, but in a way that doesn't drive an already traumatized audience into further apathy. Most of the respondents mentioned they seriously discussed a shift in tone of voice in 2025.

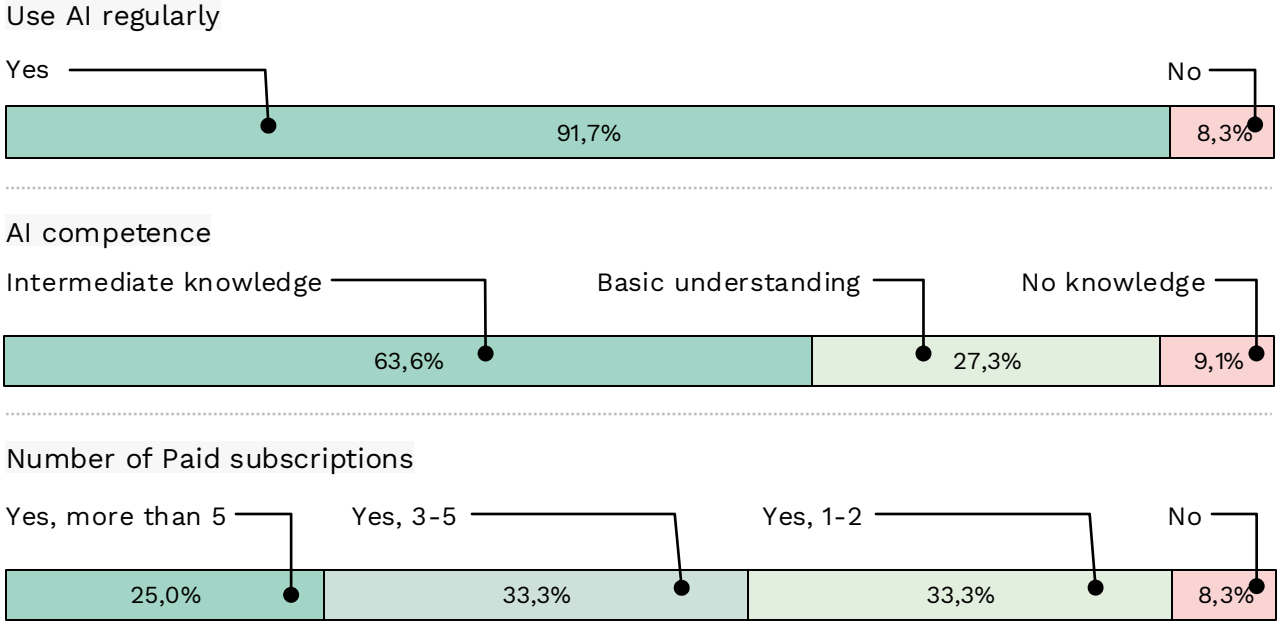
6 AI in Newsrooms: Possibilities and Uncertainties for the Russian Media in Exile

The diffusion of artificial intelligence technologies into the media sphere has generated both optimism and anxiety across global journalism. While major media organizations have adopted AI to optimize workflows, enhance data processing, and support journalists, Russian media, both domestic and exiled, face AI within a dramatically different political and ethical landscape. For exiled Russian journalists, AI represents both a tool of optimization and a technology of repression, while also exposing the deep asymmetry between democratic innovation and authoritarian control.

In the dedicated survey on AI usage in the media organizations of the Russian media in exile, most of the respondents state that they use AI regularly (daily or weekly).[97] At the same time, none of the newsrooms have an advanced knowledge of the AI tools they are operating. While obtaining competence in integrating AI takes time and most of the surveyed media already had an internal or external training, a study on BBC found that in a long-term insufficient AI literacy limits the ability to adapt existing tools to specific editorial needs.[98]

Exhibit 17

Usage of AI by the Independent Russian Media in Exile[99]



97 The survey was conducted in October 2025, N=12. See more in the appendix 7a.
98 Jones, B., & Jones, R. (2025). Action research at the BBC: Interrogating artificial intelligence with journalists to generate actionable insights for the newsroom. *Journalism*, *26*(8), 1708-1725. https://doi.org/10.1177/14648849251317150.
99 Source: AI survey, N=12.

Most of the surveyed media indicated that they pay for subscriptions on AI tools; half of them – centrally, and half is on the expense of the individual employees. On average, the Russian media in exile spend about €120-130 monthly on AI subscriptions, with an exception of some media outlets spending over €2.000. Among those mostly used are ChatGPT, DeepL, and Claude. One of the media outlets reported that they have developed their own AI media tool for securely transcribing interviews, as the trust to existing solutions is rather low.

Exhibit 18

AI Tools Mostly Used by the Russian Independent Media in Exile (AI Survey, N=12)

Among other tools, the respondents mentioned Adobe Podcast, AI or Not, Amazon Recognition, Bolt, Descript, Exactly, Findclone, Gladia, Google Pinpoint Google Translate GPT (generic), HeyGen, Hunchly, Hygen, Llama, NotebookLM, Perplexity, Pimeyes, Runway, Scholarcy, Topmedia, Vidiq, ru-BERT-tiny2, gpt-4o-mini, OpenAI platform API.

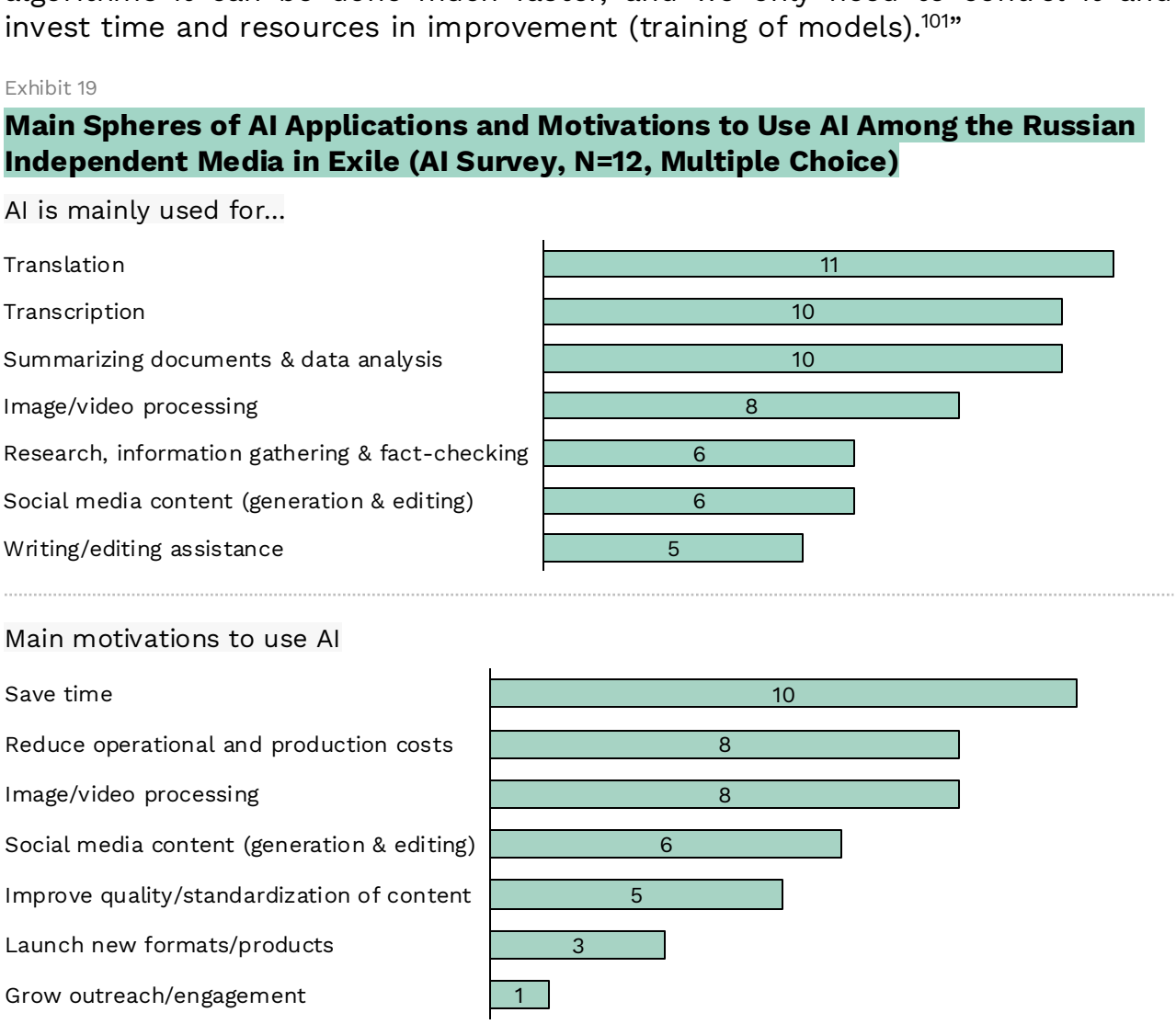
AI in media organizations globally functions as an assistive instrument — used to summarize press conferences, automate transcription, and manage data flows. The AP's Local News AI initiative, for instance, initially arose from overinflated expectations but evolved into a pragmatic support system, freeing journalists to focus on original reporting and reducing burnout.[100]

100 Schaetz, N., & Schjøtt, A. (2025). AI Hype and its Function: An Ethnographic Study of the Local News AI Initiative of the Associated Press. *Digital Journalism*, 1–18. https://doi.org/10.1080/21670811.2024.2443163

Our study shows, that the Russian media in exile have begun to appropriate AI for similar purposes — data analysis, verification, and content production. As some clarify, AI is primarily used to "optimize our limited human resources and automatize technical work - it would take many hours and days to analyse, range and compare information in 1.000 lines of a table. Thanks to developed algorithms it can be done much faster, and we only need to control it and invest time and resources in improvement (training of models).[101]"

Exhibit 19

Main Spheres of AI Applications and Motivations to Use AI Among the Russian Independent Media in Exile (AI Survey, N=12, Multiple Choice)



Operating with small teams and limited funding, the journalists rely on AI to sustain investigative work that would otherwise be impossible. In this sense, AI transforms into a technology of resistance — reclaiming informational agency in an environment dominated by censorship and surveillance.

> ***"We are now witnessing, paradoxically, a flourishing of investigative and data journalism. While the authorities close registries, there are still many leaks and open sources. Russian data journalism is mastering AI in many ways."[102]***

101 Media respondent 6
102 Media interview 6

The Duality of AI in the Russian Context: Automation of Repression

At the same tine, in Russia, AI has been absorbed into the system of state surveillance and censorship. The interviewed internet freedom expert described this shift: "There's no longer any need for an FSB officer to sit with headphones listening manually — all of this now happens automatically.[103]"

Here, automation replaces human labor not to liberate workers but to intensify the efficiency of repression. Another respondent elaborated on this process, referring to it as the **algorithmization and automation of censorship**.

> ***"AI systems scan the internet according to pre-set patterns and keywords, detect forbidden content, and either flag it for review or remove it automatically." The respondent also referenced two AI-driven surveillance systems: "There are two powerful systems in the service of the Russian censor — Oculus and Vepr. One detects static images and text, and the other processes video.[104]"***

Other interviewees echoed this interpretation: "the authorities aim to introduce more artificial intelligence, more automation into repression," reducing reliance on human agents to "make everything as efficient as possible." The respondent also mentioned the case of an exiled media outlet that believed it was being used to train the state's AI systems that flag undesired content, using the language and stylistic patterns typical of independent journalism.

Main Concerns and Uncertainties in AI as a Resource for Exiled and Independent Media

Research into the AP and the BBC shows that successful AI integration in journalism depends on human oversight, realistic expectations, and strong institutional leadership.[105]

A similar opinion is expressed by the Russian exiled media: most survey respondents name *Accuracy and fact-checking ensured by human oversight* as one of the main principles that should guide the integration of AI into newsrooms.[106]

In line with this, the highest AI-related concern of Russian independent media in exile is security of data and accuracy of provided assistance. One respondent also highlighted the risk they foresee in a growing competition among the media, that will be "won by those outlets mastering AI quicker than others."

Just as in other spheres of AI application, the Russian media in exile see the risks and challenges. The exhibit below demonstrates that current AI-related challenges faced by the Russian media in exile are lack of technical knowledge, costs of the tools, and security & privacy.

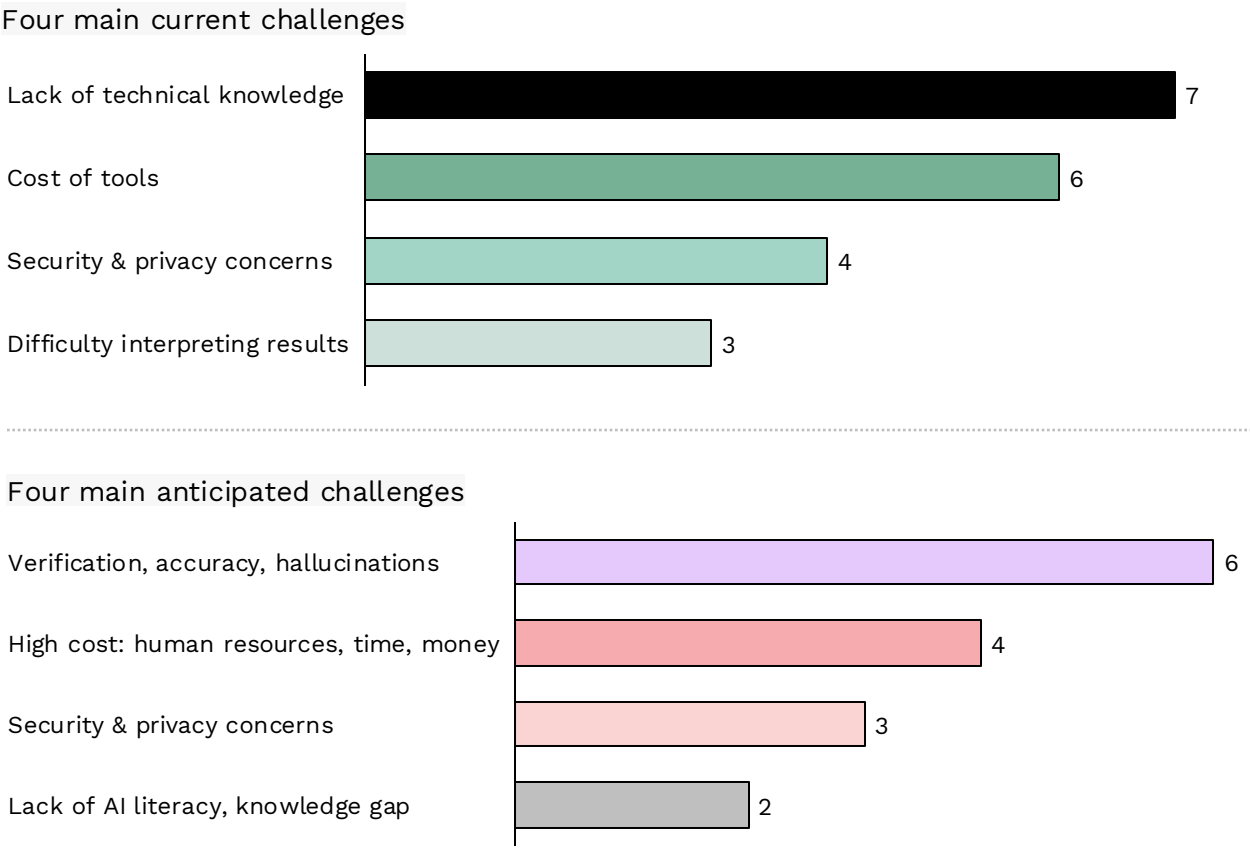
103 Expert interview 2
104 Expert interview 2
105 a) Jones, B., & Jones, R. (2025). Action research at the BBC: Interrogating artificial intelligence with journalists to generate actionable insights for the newsroom. Journalism, 26(8), 1708-1725. https://doi.org/10.1177/14648849251317150; b) Schaetz, N., & Schjøtt, A. (2025). AI Hype and its Function: An Ethnographic Study of the Local News AI Initiative of the Associated Press. Digital Journalism, 1–18. https://doi.org/10.1080/21670811.2024.2443163
106 AI survey (N=12)

At the same time, the main AI-related challenge, anticipated by the Russian EXIM, is accuracy and verification of AI-generated content and information.

While for many media organizations, AI tools serve as daily assistants, the integration of these tools into the work of media is still chaotic, rather than strategic. This is partially related to the fact, that media do not entirely trust the AI tools, lack financial capacity for purchasing subscriptions centrally, and most importantly, knowledge and competence of using these tools at an advanced level. Simultaneously, the Russian media in exile see a great potential of AI in assisting with data analysis, managing teams and projects, as well as generate content (assist in repackaging content for the social media, creating visualizations for the publications, etc.).

Exhibit 20

Current and Anticipated Challenges in AI Integration into the Media Work (AI Survey, N=12)



7a 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 2025. 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), three media surveys and working with researchers on data generation (e.g., labeling media activity).

Exhibit 21

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 (passive outlets) 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 twelve representatives of the independent Russian media in exile. Additionally, six experts in media legislation, internet rights protection and advocacy of independent media interests contributed to the present report.
Surveys	• The first survey (N=13) covered the financial situation within the Russian EXIM sector during the last year. The second survey (N=12) addressed the topic of audience engagement during the past year. The third survey (N=12) concerned integration of AI tools into the work of media outlets.

7b Appendix I: Approach and Methodology

This report is grounded on a mixed-methods research approach. First, three surveys were filled in by the representatives of the Russian independent media in exile. The first survey covered the financial situation within the Russian EXIM sector during the last year. In the survey, we collected responses from 13 media organizations. The second survey covered the topic of audience engagement during the past year and was filled in by 12 media representatives. The third survey collected responses from 12 media representatives regarding the integration of AI tools into the work of the media.

Qualitative data for this report were collected via interviews with 12 media managers and editors. For reasons of the interviewees' safety, all quotes in this report are anonymous. Various experts have also provided their input to this report, including Andrei Zakharov, investigative journalist; Sergey Parkhomenko, journalist and project coordinator of Redkolegija; legal media experts; representatives from RSF; Galina Timchenko, publisher at Meduza, and cyberlawyer, founder $ CLO at RKS Global, VPN Guild Sarkis Darbynian.

The study data were collected following the formal ethical requirements, outlined in GDPR, and additional ethical procedures guided by research ethics of work with sensitive contexts.

7c 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.

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. Overall, this 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.

Exhibit 22

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.
	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.
Indepen-dent	**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, as the media vary from region to region.

7d 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 23

Exiled Media Dashboard: Key Objectives and Features

Dashboard objectives

- Help outlets better understand media sector trends – making it easier to adjust and deal with them;
- Aggregate data on the market level, allowing media to benchmark themselves vs. peers and market averages;
- Media can easily showcase their achievements and needs to potential donors (all information in one place).

- Help donors unfamiliar with the sector understand needs and activities, expanding pool of available funds;
- Provide a detailed view of the sector's breadth and diversity, incl. funding allocated (enable coordination);
- Formulate impact metrics (jointly with media) to guide donors and facilitate data-driven decisions.

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JX FUND

JX Fund – European Fund for Journalism in Exile
Published in Germany, November 2025

Publisher: JX Fund

JX Fund gGmbH I c/o Publix
Hermannstr. 90
12051 Berlin
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The report publication was led by JX Fund, with support of The Fix Research and Advisory.

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The research report was made possible by funding from the Minister of State for Culture and the Media.

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