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Establishing of Georgia's media market

Formulation of the problem

Georgia is a country with a population of 4,5 million people, located in the South Caucasus. It is bounded to the west by the Black Sea, to the north by Russia, to the south by Turkey and Armenia, and to the east by Azerbaijan. Main oil- and gas pipelines go through Georgia, including Baku-Tbilisi-Ceyhan, which connects the Caspian sea to Europe. Georgia is the Caucasian state with the European values. In 2008 Georgia left the Commonwealth of Independent States (the CIS) because of deteriorated relations with the Russian Federation.

After the collapse of the Soviet Union followed by a period of instability, national media felt its influence and responsibility in shaping the public opinion. Nowadays, Georgia, together with the Baltic States, can be regarded as the most pro-western state among all other former Soviet republics, with media acting as an open and public forum for open debates. Leading position of the country in the region in the field of freedom of mass media confirms the country's vector for the European values and its efficient reforms.

Georgia's position in the world ratings

Based on the 'Freedom of the press 2015' report, Georgia is the leader in the region in freedom of mass media[1]. Even though the country belongs to the category of "partially free countries", it received 49 points and held 93rd position out of 199 countries, while Ukraine got 58 points and Moldova got 55 points, holding 126th and 121st places,

[1] Freedom of the press 2015 https://freedomhouse.org/sites/default/files/freedom ofthepress_2015_final.pdf, accessed 7th December 2016.

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respectively. Moreover, the country holds good positions in The Press Freedom Index made by the Reporters Without Borders.

The research conducted by the Pricewaterhouse Coopers in cooperation with The World Bank Group dedicated to the evaluation of Index of Doing Business has demonstrated that Georgia has the lowest taxes among all post-Soviet countries, the general tax burden comprises 16,4%, that also brought the country to the category of business friendly countries[2]. Accordingly, the country holds a high position (26th place) in the Rating of economic freedoms conducted by The Heritage Foundation in conjunction with The Wall Street Journal[3].

In The World Bank's classification, Georgia moved from the sector of countries with an 'income below average' to an 'income above average'[4]. The Prime Minister of Georgia Giorgi Kvirikashvili reported this at the meeting of the Government of Georgia. As the Prime Minister commented on, "Georgia has not had such a success and high achievement for over the last 15 years".

Georgia is the regional leader with the lowest level of corruption according to the report of the Transparency International. According to the Corruption Perception Index, Georgia got 52 points and held 48th place among 168 countries of the world in 2015. This is the best index among 19 countries of the Eastern Europe and Central Asia. Moreover, Georgia has better result than some member states of the European Union, e.g. Hungary, Slovakia, Croatia, Bulgaria, Greece, Italy and Romania[5]. Typical characteristics of leader states are high index of freedom of mass media, access of society to information on budget resources and high level of conscientiousness among public servants.

Georgia became one of the top three safest countries in the 'Crime Index for Country 2016' according to Numbeo. The index of safety for Georgia comprises 80.74 points, and crime index makes 19.26. To compare, only Singapore and South Korea got higher scores[6]. According to the 'Global Terrorism Index 2016' research, Georgia was listed among the countries with the lowest influence of terrorism, having 87th place out of 163 countries of the world with 1,257 points[7]. To compare, the highest influence of terrorism in the region has Turkey (6,738 points, 14th position).

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2 Doing Business Оценка Бизнес Регулирования – http://russian.doingbusiness.org/rankings, accessed 8th December 2016.

3 Рейтинг стран мира по уровню экономической свободы – http://gtmarket.ru/ratings/index-of-economic-freedom/index-of-economic-freedom-info, accessed 10th December 2016.

4 Gross national income per capita 2015, Atlas method and PPP – http://databank.worldbank.org/data/download/GNIPC.pdf, accessed 10th December 2016.

5 Индекс Восприятия Коррупции 2015 – http://transparency.org.ru/images/docs/cpi/CPI2015_Table_RU.pdf, accessed 11th December 2016.

6 Crime Index for Country 2016 Mid Year https://www.numbeo.com/crime/rankings_by_country.jsp, accessed 7th December 2016.

7 Global Terrorism Index 2016 – http://economicsandpeace.org/wp-content/uploads/2016/11/Global-Terrorism-Index-2016.2.pdf, accessed 11th December 2016.

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An international consulting company Mercer included Tbilisi in a rating of the world cities with the most comfortable quality of life, based on the criteria such as healthcare, education, the level of crime, organization of leisure, political stability, transportation, ecology, etc. The capital of Georgia, in the rating 'Quality of living rankings – 2016' holds 188th place out of 230 cities of the world[8]. Although the position itself is not very high, the fact of being presented in this rating proves the progress of the country and the city.

In addition to above-mentioned, the country has improved its position in the Global Peace Index. Changing an aggressive rhetoric into the balanced one in relation to the Northern neighbours, Georgia improved its standing and obtained 79th position out of 139th in 2015[9]. The progress of Georgia is also highlighted in the area of rule of law where it holds 34th position out of 113 evaluated countries in 2016[10].

General condition and legal framework of mass media in Georgia

Active development of broadcasting legislation of Georgia saw its beginning in 2001 and was based on the recommendations of the Council of Europe and consultations with the European organizations. The legislation of Georgia in the field of broadcasting consists of the Constitution, international agreements of Georgia, Organic law of Georgia 'Electoral code of Georgia', and other laws of Georgia, including 'On the freedom of speech and expression', 'On broadcasting', 'On independent national regulatory organs', 'On communications and postal service' and 'On copyright and related rights' as well as other laws and by-laws. In addition, the mass media are also regulated by the civil, administrative and criminal codes.

The article 24th of the Constitution of Georgia underlines that 'Mass media are free. Censorship is forbidden". Furthermore, the Constitution guarantees the freedom of speech. The activity of mass media that regularly break the law, promote crime, undermine national security, territorial integrity and breach of the peace is forbidden by the law.

The law 'On freedom of speech and expression' was adopted in June 2004, replacing the law 'On the press and other mass media' enacted in 1991. Numerous amendments and annexes were made into the new document. The guarantees of freedom of speech are clearly given and limits on activity of journalists are outlined in the new law.

The law 'On broadcasting' was adopted in late 2004 envisaging the transformation of the State TV and Radio Broadcasting Company into the public company (based on

[8] Quality of Living Rankings – https://www.imercer.com/content/mobility/rankings/index.html?mkt_tok=eyJpIjoiTmpJeU1Ea3pNR05tWlROObSIsInQiOiJpZHoweEY0elVGUDc1VEo0dkJCSVRWVkRyZVkrYjBLMldkUTlMNkpoNzY5RGN6XC9EcjF1MmxHbGJkNWRvN1RJc3JoK1BOU1pDQzlIZDdRTlF2MXE5WnA2dDl0VHRsNWF5V2pVdEFkU3NYWG1xWGduXC83ZlZtYW0xZGpqRnB4eXlH In0%3D, accessed 12th December 2016.

[9] Global Peace Index – http://www.visionofhumanity.org/#/page/indexes/global-peace-index/2016, accessed 2nd December 2016.

[10] WJP Rule of Law Index 2016 – http://data.worldjusticeproject.org/, accessed 12th December 2016.

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the British BBC model). Taking into account the European experience, the law 'On defence of minors from negative influence' followed by the law 'On independent regulative organs' were also adopted in the country. According to the above-mentioned laws, the age-related classification of movies of the European countries was automatically applied to the movies in Georgia. At the time of the adoption of the law, there was no developed mechanism of the usage of sanctions with regard to broadcasters violating this provision.

After the establishment of an independent regulatory body called the Georgian National Communication Commission (GNCC) in 2003, one was already able to make a complaint to this authority. The possibility to apply different sanctions to broadcasters violating the laws have also appeared after the establishment of the GNCC. After numerous warnings and fining of two broadcasting companies, the Parliament of Georgia urgently repealed the whole chapter of the law 'On defence of minors from negative influence'. This was followed by closing of the scientific-research centre at the Department of the Youth responsible for the classification of movies. As a result of these reforms, and despite recommendations of the Council of Europe, the cinema, television and video-rent remained without any regulation for the next 5 years.

In 2006, on the basis of the agreement of the parliamentary majority and opposition, with the aim to ensure the freedom of speech in the 'Law on Broadcasting', a right to sue to the court and submit complaints to any administrative organs in case of violation of broadcaster of the 'Law on Broadcasting' was abolished. Limitations and sanctions on demonstration of the scenes of violence, consumption of drugs and sexual scenes on television and in cinemas were actually cancelled. These changes were supported by non-government organizations working in the field of protection of human rights. The Patriarchate of Orthodox Church of Georgia, the Union of the Orthodox Parents, and the Union 'Iberiana' acted against these legal changes. The Georgian National Communication Commission did not conduct any monitoring, and as a result, the recommendations of the Council of Europe on defence of minors were violated every day.

The above mentioned changes in 'Law on Broadcasting' adopted in 2006, forbidding a right to sue to the court and submit complaints to any administrative organs in case of violation of the law by a broadcaster, including Point 5th of the 56th Article (protecting of children from harmful influence of programs), were appealed in the Constitutional Court of Georgia. After two years of discussion, the Constitutional Court abolished the prohibition on a lawsuit only for the case of obscenity, but kept the prohibition for all other reasons. The Court explained that 'consideration of moral problems in a court would have unfavourable, freezing influence on freedom of mass media, as in most cases it is difficult to define objectively what is moral and what is not'. Thus, the Constitutional Court concluded that it is impossible to discuss in the courts of Georgia whether the program translated by a broadcaster corresponds to the generally accepted or traditional moral norms. In the opinion of the Georgian political scientist George Kipiani, the ultraliberal model of regulation of broadcasting functioning in Georgia 'substantially differs from the European and democratic standards from the point of

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view of reporting and content regulations'[11]. Policy of the Georgian government in the media field intended to move from the direct regulation to self-regulation without elements of the joint regulation.

The liberal media policy had its repercussions in other sphere as well. Advertisements of gambling with a motto 'Sport, ardour, intellect' occupied most of the Tbilisi streets and screens of the Georgian televisions since 2012. For example, according to advertising messages, casino was a sponsor of an intellectual TV-game for children. As a result of numerous public protests, a bill banning advertisement of gambling was adopted in the first hearing, however, it failed in the second one, and limitation of gambling propaganda was postponed for one year. Concern was expressed that prohibition will cause a serious damage not only to gambling business but also to advertising market as such[12].

Complaints of citizens about broadcaster's activities or possibility to appeal an answer of broadcaster is an important aspect of regulation of broadcasting media means. Citizens in Georgia have right to appeal a broadcaster only in Self-government Union connected to the broadcaster. In the first paragraph of the article 10 of Code of conduct of broadcasters that was adopted in March 2009 by the Georgian National Communication Commission, broadcasters as well as the associations of broadcasters can independently create the organs of self-regulation. The right of broadcaster to choose an effective mechanism of self-regulation is underlined in the Code of conduct of broadcasters.

In the European countries, a broadcaster who is not a member of a self-regulation association, becomes a subject of government regulation. In Georgia, broadcaster has the right to avoid membership in association and create its own self-regulation union and even its own appellation body. The system of reporting in the Georgian media field significantly differs from the European practice, where councils of self-regulation associations can impose a wide spectrum of financial sanctions, including confiscation of license, an activity, which is impossible in Georgia. Unfortunately, the discussion of the above-mentioned questions is limited to a court, and also is not raised widely in the mass media. Thus, the change of situation in regulation of broadcasting depends on political will of a legislator.

Development of the Georgian radio and television

First Georgian radio program was broadcast on May 23, 1925. This was a radio concert of folklore choir under the direction of Mapo Tarkhnishvili. Since 1927 a regular broadcasting began in the Georgian, Russian, Armenian and Azerbaijani languages, while first youth and children programs also appeared. During several decades, the content of the youth and other programs was full of communist ideology. But starting from the 70^{s}, themes of programs became more diverse. The most popular among young

[11] Г. Кипиани, Права человека и регулирование вещания в Грузии: приоритет нео-либеральных тенденций – http://georgiamonitor.org/news/254/1299/, accessed 13th December 2016.

[12] Парламент провалил инициативу Давиташвили о запрете на рекламу азартных игр в Грузии 01.05.2013 http://www.apsny.ge/2013/eco/1367469934.php, accessed 13th December 2016.

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people were radio programs such as 'Youth', 'Motherland is not only about beautiful mountains', 'Tenth studio', 'Face to face'. The musical program 'Good evening' (author Ilya Kevlishvili) was the most popular for fifteen years. Well-known actors and actresses such as Akaki Khorava, Akaki Vasadze, Mary Davitashvili participated in first-ever children's programs 'Dapioni' and 'Dzilispiruli', later joined by Medea Chakhava, Ramaz Chikvadze, Erosiy Mandzhgaladze, Salome Kancheli, George Gegechkori. Well-known scientists such as academicians Niko Ketskhoveli, Niko Muskhelishvili, Victor Kupradze, as well as composers, singers and representatives of different professions participated in the cognitive radiobroadcasting for children.

In 1932, together with the socio-political programs, 'Latest news' was aired for the first time. It provided the most substantial facts of socio-political life in the country. Vakhtang Dzamashvili was the editor-in-chief of this program for many years. From 1934, radio presenters appeared in live broadcasting, with David Spirandi being the first among others. Legendary Keto Landia, with more than 60 years of experience, started her work at the radio as a presenter, and later became a founder of the school of radio presenters.

Live radio broadcasting stimulated creation of artistic bands on radio of Georgia. The first symphonic orchestra of television and radio broadcasting of Georgia was created in 1937 led by Alexander Gvelesiani. Most prominent representatives of Georgian musical world cooperated with this band, including Mary Nakashidze, Nadeira Kharadze, Sandro Inashvili, David Andguladze, David Badridze, David Gemrekeli etc. This orchestra became a creative workshop for the Georgian composers. Special attention was paid to the maintenance and popularization of Georgian folklore.

In the second half of the 1940s, voice recording on a magnetic ribbon gave new possibilities to the radio that was able to save the cultural heritage for future generations. In the funds of the Georgian radio there are such masterpieces of Akaki Tsereteli as 'Gantiadi', also recorded voices of Galaktion Tabidze, Shalva Dadiani, Konstantine Gamsakhurdia and many others. From 1946, a broadcast recorded beyond the studio started, that became the most substantial stage in the history of Georgian radio. A new genre called 'radio reportage' was launched and with that listeners got possibility to participate in events and reportages. The football reporting was a new practice of the Georgian radio of this period and soon it became a common routine.

In the 1950s, the formation of radio drama started. Appearance of radio drama as an independent genre determined the new stage of the Georgian radio development. In the next decades many radio theatre productions were created. They became very popular in Georgia as well as in other countries. The Georgian radio shows were broadcast in Germany, Hungary, Slovenia, Slovakia, Iceland, Yugoslavia, Estonia, Russia, Belorussia. Enlargement of Georgian radio began in 1956 when the broadcasting of the Armenian and Azerbaijani radio programs started. Also broadcasting of radio programs from Greece were aired a bit later. All mentioned above was complemented by the Georgian drama-musical programs. The new program 'For compatriots living abroad' was created in the 1960s .

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For many years the Moscow broadcast occupied a substantial place in the Georgian radio-broadcasting schedule. Approximately one third of it was filled by the programs from Moscow. Actually, we can say that the population of Georgia perceived the world through the eyes of Moscow. Filling in the information vacuum and search for the new partners became an extra important task. From 1986 the Georgian radio significantly shortened the broadcasting of central Moscow radio programs and broadened the national broadcast. Only after becoming an independent state, Georgia managed to develop its international relations. Georgian radio found such partners as 'Voice of America', 'Radio Freedom', 'Deutsche Welle' and 'BBC'.

The 70th anniversary of Georgian radio was celebrated in May, 1995. Since that time May 23 officially became a Day of Georgian radio replacing May 7 that used to be a Day of Radio of former Soviet Union[13]. Despite the growth of the number of the Internet users and popularity of television, Georgian radio has its loyal audience, especially in smaller settlements.

Georgia was the first country in the South Caucasus to start a television broadcasting[14]. History of Georgian television began in the mid of 20th century with building of a TV-tower and a house of main studio Mtatsminda. Its whole construction was completed in one year. A studio-hardware unit and television transponder were located there as well. A well-known graphic artist Tengiz Samsonadze was invited to create a design of TV studio. He also became an author of emblem for the first TV channel. The first telecast was aired on December 30, 1956.

From the first days of appearance of the Georgian television, enormous attention was paid to children and youth programs. Programs of various themes and genres were prepared for children depending on their age and interests, including cognitive, art, sport, musical programs etc. First foreign guests of the TV studio were such stars as an English ballet dancer Beryl Gray, an Italian actress Lucia Bose, a famous Spanish matador Miguel Dominguin, a Greece singer Yovanna, a soloists of a well-known American band 'Ice Review', a singer Dean Reed and a pianist Van Cliburn, to mention just a few.

Tbilisi TV studio organized the first mobile TV station in March 1957. The first reportage from 'Dynamo' stadium was hosted by a sport commentator Erosiy Manzhgaladze. A small TV transponder was built in 1958, followed by the broadcasting of two Russian programs 'News' (15 min) and 'To Soldiers' (30 min). Nine years prior to the establishment of the Georgian film studio, the first full-length film 'Mother's Hand' was shot based on the story of Tamara Chkhaidze. The premiere of film took place on the third anniversary of foundation of Georgian television on December 31, 1959. The film got the first award at the contest of the Soviet films in 1960. In same year, Shota

[13] Из истории создания радио Грузии – http://pandia.ru/text/77/140/227.php, accessed 15th December 2016.

[14] Всемирный день телевидения 2016: история и традиции – http://sputnik-georgia.ru/spravka/20161121/233879980/Vsemirnyj-den-televidenija-2016–istorija-i-tradicii.html, accessed 15th December 2016.

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Qarukhnishvili made a TV performance 'Kako Kachagi' based on Ilia Chavchavadze's poem, dedicated to the poet's anniversary. The performance was staged in the open air and broadcast by the mobile TV studio. This was the first experiment of this kind of performance not only in Georgia but also on the territory of the Soviet Union.

The TV antenna was put into operation and a special equipment for TV broadcasting was installed in Mtatsminda in 1972. As a result, six hundred thousand families of the republic got possibility to receive the programs of the Georgian television. Nowadays, in spite of the rapid development of the Internet, television still remains one of the most popular mass media means in Georgia, significantly influencing public opinion in the country.

Development of cable TV

Paid cable television has started to develop in Georgia since 1988. Taking into consideration the mountainous landscape of Georgia, there were regions with difficulty to get service of terrestrial TV, while satellite technologies were not widespread. Cable technologies have been developing based on the model 'from cities into regions', e.g. from Tbilisi, Kutaisi, Batumi to the rural fields, where a cable was brought in the period of the USSR. The development of cable technology was slow at the beginning. But situation improved in 1997, when the economy of the country began to come out from crisis. At that time, an American operator 'Ayety' entered the market with a package of 36 channels at an attractive price (while local operators broadcast maximum 15–20 channels). Aggressive marketing policy of the new operator made local suppliers to accept new rules of the competitive market and became a subject for creation of the Cable television union of Georgia, registered in January 1998. The Rose Revolution gave an additional impetus to the increase of competition. As a result, nowadays, Ayety (working under the brand Super TV) is an equal and average player at the market of cable television. In 2007, more than 40 cable operators worked in Georgia, with 18 of them present in Tbilisi[15].

Currently famous brands such as Caucasus TV, SilkNet and GNN entered the market between 2009–2010. They were focused on increasing subscriber bases, reducing prices and earning profits on volumes, offering new services, including the Internet, IPTV and OTT. According to the Chairman of Cable television union of Georgia Guram Beruashvili, the functioning of cable networks has been regulated by only two laws since 2007 – the Law on broadcasting and the Law on electronic telecommunications. Licensing of cable television was abolished in Georgia in 2006. Nowadays all operators have the status of the authorized entities. In case of will, a new company may submit an application, receive a certificate of authorisation valid for 19 years in a week and start its operations right after. The Georgian National Communication Commission (GNCC) is the only body regulating the industry nowadays[16].

[15] Телевизионные дела Грузии http://uadigital.tv/2014/10/17/by/, accessed 16th December 2016.

[16] Как кабельные операторы создавали семью – http://mediasat.info/2016/10/20/georgia-cable-tv/, accessed 16th December 2016.

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Satellite operators entered the Georgian market in 2012. Mobile operator MagtiCom announced the launch of its DTH offer MagtiSat broadcasting via Astra satellites in January 2012. Two months later local platform of Black Sea SAT broadcasting via Turksat appeared with its offer of satellite television. At the end of 2013, the third player – satellite platform Global TV – started broadcasting the content via Eutelsat 36B, the company owned by JSC Global Contact Consulting.

In sum, if the number of TV channels in Tbilisi cable networks varied from 30 to 50, and in smaller towns – from 18 to 35 in 2007 (monthly payment was from $3,5 to $8 per month, respectively), a standard package included no less than 65 channels, including 44 Georgian channels in 2014. Nowadays, standard TV package generally includes about 30% of local Georgian TV channels; 10% of international musical and entertaining channels; 8% of film channels; about 6% of information and sport channels. It is worth mentioning that Ukrainian TV channels are quite popular in Georgia, obtaining approximately 5–6% of the audience since 2007.

Modern media space of Georgia

According to the recent information, there were about 70 TV and Radio broadcasters and up to 200 printed media in Georgia in 2016.

Television

According to the National democratic institute (NDI), the main source of receiving of information for 77% of the Georgian respondents was television and for 14% of respondents – the Internet[17]. According to the TV ratings, the highest rated TV channel in Georgia is 'Rustavi-2', while its evening news programme 'Courier' has the biggest audience (shown at 21.00 daily). It is followed by news programs of TV companies 'Imedi' and 'Maestro'. Comparing to them, less audience watches news at 1st Channel (Public broadcaster), followed by evening news programs of 'Caucasia' and 'Maestro 24' channels[18].

As stated in the interim report of the OSCE Pre-election mission, conducted before the elections in 2013, 'media-space of Georgia is considered less polarized comparing to the parliamentary elections in 2012. It is considered that journalists comprehensively highlight all major political events. However, there is a lack of critical analysis and analytical coverage. The national television remains the main information source for the majority of electorate. The printed media offer a wider spectrum of opinions, however, their influence has been weakening, while printed media have been gradually replaced by on-line resources[19]. Another monitoring, conducted within the framework

[17] 32% грузинских граждан не пользуются интернетом – http://sovetreklama.org/2016/07/32-gruzinskix-grazhdan-ne-polzuyutsya-internetom/, accessed 17th December 2016.

[18] Political TV shows' pre-electing ratings – Rustavi 2 ahead, GPB struggling to remain relevant-http://www.transparency.ge/en/blog/political-tv-shows-pre-electing-ratings-rustavi-2-ahead-gpb-struggling-remain-relevant, accessed 17th December 2016.

[19] Georgia, Presidential Election, 27 October 2013: Interim Report – http://www.osce.org/odihr/elections/107052, accessed 17th December 2016.

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of project 'Professional mass media for elections' and financed by the European Union and the United Nations Development Program, also proves the presence of the balanced media space and a variety of political opinions[20].

The TV stations are clearly divided based on political preferences, especially in Tbilisi, and each of them serves interests of one or two leading political forces: either the United National Movement or the Georgian Dream. The regional broadcasters have more limited numbers of programs and less local audience when compared to the national TV channels.

The dynamics of rating of freedom of mass media in Georgia indicates that in the first two years after the 'Rose Revolution' in 2003 and the presidential elections in 2004, certain improvement of media environment took place. For example, during the above-mentioned period, the Public Broadcaster was created based on the State TV-radio corporation. In that period, one opposition channel 'Imedi' broadcast on the whole territory of Georgia, whereas the opposition channels 'Kavkasia' and 'Mze' broadcast in Tbilisi. One of the reasons of a relatively low world rating of Georgia was related to media ownership. The peak of drop in ratings and worsening of media-environment was in 2008, particularly, related to the developments in the opposition broadcasting company 'Imedi', to the Russian-Georgian war in 2008 (3 journalists died during the hostilities) and to an unstable political environment and its coverage by mass media.

The period between 2011–2012 could be characterized by both problems and achievements in the media field. On the one hand, the so-called "photographers' case" happened at that time, when four photographers, including personal photographer of the president, were arrested on charges of espionage. Several non-governmental organizations believed that the state failed to present persuasive arguments in connection to those charges, and demanded to remove the confidentiality label from that case[21]. In 2012, apart from the pre-election pressure on journalists, a substantial problem was also the fact that the authorities made an effort to limit distribution of broadcasting of companies 'Maestro' and '9th channel' (that was owned by then-opposition leader Bidzina Ivanishvili) by sealing the television satellite dishes[22].

After the parliamentary elections in 2012, significant changes were introduced in the ownership of the leading TV channels. As internet-portal www.media.ge reports, during the first months after elections, the broadcasting company 'Imedi' was returned to the family of businessman Badri Patarkatsishvili; a broadcasting company 'Real TV' ceased its broadcasting; the Russian-language broadcasting company 'TV PIK' was closed; a broadcasting company "Rustavi 2" changed several owners during the same period; a broadcasting company 'Sakartvelo' was closed and its broadcasting license

[20] Latest Media Monitoring reports – http://www.mediamonitor.ge/en/, accessed 17th December 2016.

[21] ჟურნალისტების ეთიკის ქარტიის საბჭო ფოტოგრაფების საქმეზე – http://www.civil.ge/geo/article.php?id=24314, accessed 18th December 2016.

[22] 'გლობალ TV'–ის სატელიტური ანტენები დაყადაღებულია – http://www.civil.ge/geo/article.php?id=25615, accessed 18th December 2016.

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was purchased by 'The Fund of civil education' that also owns magazine 'Tabula' (nowadays, 'Tabula TV' broadcasts on this channel); owner of the '25th channel' changed several times.

On the other hand, the period of 2011–2012 is characterized by important changes towards an improvement of the media environment. In particular, especially notable was an amendment made by the Parliament of Georgia in the Law on broadcasting that forbids ownership of broadcasting licences to the companies registered in offshore zones and also envisages transparency of incomes of broadcasters[23]. It was an important step towards providing transparency of media owners. Other amendments to the law were adopted in June 2012 regarding the acceptance of principles 'Must carry' and 'Must offer', that gave possibility to TV-viewers to receive all licensed TV channels by means of private cable networks in a pre-election period (from August 1, 2012)[24], including the then-opposition channels '9th channel', 'Maestro' and 'Kavkasia'. On the background of media polarization, such a decision increased media diversity in the country and let TV viewers obtain opposite political visions in the pre-election period.

Positive dynamics of improvement of the media environment in Georgia was reflected in the ratings of freedom of speech mentioned at the beginning of this article.

The press

Currently up to 600 newspapers are published in Georgia, 2/3 of them – in Tbilisi. The most common problems that the printed newspapers face involve law circulation, lack of advertisement, lack of financing, poor quality of the content, small number of readers and low quality of their web sites. At the same time, the growth of magazines' popularity can be observed. There are yellow magazines offering content with gossips about celebrities and politicians printed on a law-quality paper as well as high quality magazines with serious articles and analytical information. 7–9% of population declares that they get major information about political news from magazines, that considerably exceeds the percentage of population that receives information from newspapers.

Radio

The number of radio stations has grown in the last few years. There are up to 50 radio stations in the country which are mostly concentrated to Tbilisi, among which there are a few regional radios that are aiming to compete with the Tbilisi stations broadcasting content for the local audience. The major part of airtime is filled with music. Nevertheless, news, analytical programs and talk shows are also becoming popular and getting more and more of airtime. Most radios can be also listened in the Internet. Majority of stations have websites which offer live broadcasting and the archives of programs. Web-

[23] Broadcast Media Ownership Transparency Bill Passed – http://www.civil.ge/eng/article.php?id=23324, accessed 18th December 2016.

[24] 'Must-Carry' Rules in Pre-Election Period Approved – http://www.civil.ge/eng/article.php?id=24940, accessed 18th December 2016.

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sites of some radio stations sometimes are more popular than the stations themselves. Radio 'Freedom' is a good example of this trend. About 20% of Georgian population claims that they learn about political news from the radio.

Internet portals are also actively developing in the country. Users perceive news websites as the only source of diversified information and especially as a platform where it is possible to express their own opinion. The news portals take part in journalistic investigations and try to do reportages based on facts.

An independent TV studios produce programs with journalistic investigations and documentaries and become influential part of the Georgian media landscape. For example, studios such as 'Reporter', 'Monitor', GNS prepared a number of widely discussed documentary programs about crimes committed after 'The rose revolution'.

Social media

Social media platforms play more and more important role in Georgia. The growth of Facebook usage created a new platform for political and public discussions. The population of Georgia are experienced Internet users, most of them using mobile devices to surf the Internet. The indexes of the Internet's penetration in Georgia grow rapidly, for example it increased 4,5 times up to 45,5% of population in 2012 as compared to 2008[25].

Considerable investments were made in the infrastructure, particularly in Tbilisi, in order to meet the growing demand on broadband access to the Internet. The largest Internet providers carried out fiber-optic cables, connecting their centres with households, increasing in that way the circle of potential subscribers. According to reports about freedom of Internet after 2012, Georgia was included into the list of countries, where the Internet is free. In 2013 Georgia held the 12th position in the world in this rating[26]. According to this report, not a single method of limitation of the Internet from 10 available was used in Georgia.

More than 320 licensed suppliers and network operators provide their services in Georgia. According to the annual report GNCC, in 2011 the telecommunications sector of the country made 0,5% of GDP[27]. Most of the Internet users in Georgia are private persons and more than half of them – 55% – are women. Two thirds of all the Internet users have a profile in social media, which points out to the fact that 30% of all Georgian population use social media.

Georgians are active users of social networks, where obvious leadership belongs to Facebook. In spite of the fact that the Internet in Georgia is mainly used for enter-

[25] Доступ в интернет и интернет-услуги – https://digital.report/gruziya-dostup-v-internet/, accessed 20th December 2016.

[26] Freedom on the Net 2013 – http://www.freedomhouse.org/report/freedom-net/freedom-net-2013, accessed 20th December 2016.

[27] Georgia's MagtiCom breaks into the quad play market – https://www.budde.com.au/Research/Georgia-Telecoms-Mobile-and-Broadband-Statistics-and-Analyses, accessed 21st December 2016.

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tainment, users do not simply consume variety of electronic materials, but also actively engage in discussions with politicians and public leaders. Russian is widely used in the Internet space of Georgia. The second, when it comes to the popularity of social media is Odnoklassniki and it is also the fifth most frequently visited website in Georgia.

As it was observed in the above research, the Internet occupied the second place among the news and information sources after television. The results of the study showed that 6% of respondents find political news on-line and other 12% of respondents consider the Internet as a quite important source of information. Opening of the online media does not require licensing, and what is more, launching of an on-line platform is characterised by a minimum number of obstacles and low price. The online media in Georgia present an alternative source of information.

There were approximately 3000 of blogs in Georgian blogosphere in 2011[28]. The Russian-language blogosphere in Georgia is more politicized than English or Georgian language resources. When bloggers write in Russian, they can engage with colleagues in the whole CIS region. Georgians actively use the Internet to discuss political issues, in many aspects it became a new 'public platform' for exchange of opinions. Observers in Georgia notice that politicians often express their opinions and publish news in Facebook even before issuing of official press release. Before the parliamentary elections in 2012 and in 2016 both the government and opposition used social networks and on-line media for dissemination of information.

At the same time, according to data of organization 'International Transparency-Georgia', 'the Internet in Georgia is actually free from censorship from government's side. There are no proofs of blocking of online-services and applications'[29]. Monitoring of Google about the traffic of its consumption in Georgia shows that there are not limitations on access. Accordingly, from the point of view of freedom of the Internet in Georgia today, the main task is to expand an access to the network, especially in small settlements.

Conclusions

In conclusion, we can agree with the director of GO Group Media, Eye Witness Studio and Caucasian school of authors Margarita Akhvediani that 'Mass media in Georgia have two sides: free and dynamic network environment, and a world of traditional media strictly controlled by political forces'[30]. At the same time, every side can freely express their opinion that gives citizens of the country an opportunity to get the real information from different sources.

[28] Информационные кампании и интернет-активизм – https://digital.report/gruziya-internet-aktivizm/, accessed 21st December 2016.

[29] Медия-практика в Грузии -10 лет http://www.osce.org/fom/108530?download=true, accessed 21st December 2016.

[30] Маргарита Ахвледиани СМИ в Грузии: Предвзятые, но плюралистичные – От традиционных к сетевым СМИ: Передовая практика и перспективы 9-ая южнокавказская конференция СМИ Тбилиси, Грузия 11–12 октября 2012 г. – С. 77–85 (147).

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Abstract: The article examines the establishment of media market in Georgia – one of republics of the former Soviet Union. Today Georgia is one of the leading countries of the Caucasian region recognized in various international ratings. Georgia holds the first place in the index of freedom of mass media in the region, which demonstrates a real democratic transformation in the country. The article considers national legislation regulating mass media and analyses the key media market players. While describing the major stages of the establishment of the Georgian radio and television, authors pay attention to the fact that some media genres, for example, radio-performances, were very popular in all post-Soviet space and abroad. Nowadays Georgia is a country with the developed media market with leading world players present in all media segments (television, radio, press, cable television, satellite television, internet, blogosphere, independent TV studios). In addition, citizens of Georgia are active Internet, social media and blog users. The authors conclude that despite certain existing difficulties and problems of the Georgian media market, the country has good prospects of sectoral development in the case of a political will.
Key words: Georgia, media market, television, radio, press, internet, blogosphere.

Powstanie rynku mediów w Gruzji

Streszczenie: W artykule dokonano analizy powstania rynku mediów w Gruzji – jednej z republik byłego Związku Radzieckiego. Dziś Gruzja jest jednym z wiodących krajów regionu Kaukazu, co potwierdzają różne oceny międzynarodowe. Gruzja zajmuje pierwsze miejsce w indeksie wolności mediów w regionie, co świadczy o demokratycznej transformacji kraju. W artykule przedstawiono ustawodawstwo krajowe regulujące mass media i analizujące kluczowe podmioty rynku medialnego. Opisując główne etapy procesu formowania gruzińskiego radia i telewizji, autorzy zwrócili uwagę na to, że niektóre media-gatunki, na przykład radiowe, były bardzo popularne we wszystkich przestrzeniach postsowieckich i za granicą. Współczesna Gruzja jest krajem o rozwiniętym rynku medialnym z wiodącymi graczami światowymi obecnymi we wszystkich segmentach mediów (telewizja, radio, prasa, telewizja kablowa, telewizja satelitarna, internet, blogosfera, niezależne studia telewizyjne). Ponadto obywatele Gruzji są aktywnymi użytkownikami internetu, mediów społecznościowych i blogów. Autorzy konkludują, że pomimo pewnych istniejących trudności i problemów gruzińskiego rynku mediów ma on dobre perspektywy rozwoju.
Słowa kluczowe: Gruzja, rynek mediów, telewizja, radio, prasa, internet, blogosfera

Создание медиарынка в Грузии

Аннотация: В статье анализируется создание медиарынка в Грузии, одной из республик бывшего Советского Союза. Сегодня Грузия является одной из ведущих стран Кавказского региона, что подтверждается различными международными оценками. Грузия занимает первое место по индексу свободы СМИ в регионе, что свидетельствует о демократических преобразованиях в стране. В статье представлено национальное законодательство, регулирующее деятельность

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СМИ и анализирующее ключевые субъекты медиарынка. Описывая основные этапы процесса становления грузинских радио и телевидения, авторы обратили внимание на то, что некоторые медиа-жанры, например радио, были очень популярны на всем постсоветском пространстве и за рубежом. Современная Грузия – это страна с развитым медиарынком с ведущими мировыми игроками, представленными во всех медиа-сегментах (телевидение, радио, пресса, кабельное телевидение, спутниковое телевидение, интернет, блогосфера, независимые телевизионные студии). Кроме того, граждане Грузии являются активными пользователями интернета, социальных сетей и блогов. Авторы приходят к выводу, что, несмотря на некоторые существующие трудности и проблемы грузинского медиарынка, у него хорошие перспективы для развития.

Ключевые слова: Грузия, медиарынок, телевидение, радио, пресса, интернет, блогосфера.

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