Pal Tamas

Doctor of Sociology, Professor,
Director of Center for Conflict Resolution
of the Hungarian Academy of Sciences,
Budapest, Hungary;
e-mail: tamas@socio.mta.hu

About Technologies and Social Bifurcations. A Delphi Study about the Future of Russian Media Systems. Conceptual Outline

For the 90. Birthday of S. A. KUGEL

I take part from the Spring of 2014 in the preparation of a Delphi Study about the future scenarios of development of Russian media systems at the Lomonosov State University of Moscow, School of Journalism. The notes offered below are my preliminary questions to the concept.

Major drivers of contemporary media industries are social megatrends and disruptive technologies. The technologies here understood as available tools used or less used in local environments. However, we believe, that countries not fully isolated in their global environments are unable to resist to global technological trends and fashions. If the technology is internationally broadly available, the Russian consumer wants to use it. Even more, some important segments of the population dream to be among the pioneers of diffusion and ready to cover the personal costs emerging during first waves of application. And even more, the new Russian middle class is "gadget dependent", its intensively interested in the latest user technologies. Novelties of the future in this field are driven by user's technologies and international firms and technology import usually influence the latest trends. The Russian users here will be among the strongest groups interested in the import. The gadgets will be imported, but Russian content producers should develop the national content or its lion's share? Or the attractively of this market is so large, that international content developers tray to take it — even in some segments — over? And the Russian content industry must fight for them to defend its own traditional markets? Now the Russian gadget consumer is ready to pay, and even a lot for the equipment but not for the content offered for and with them. Will those habits survive the technological changes or not? And in this process, which will be the technologies somehow more welcomed or on the other side, excluded from the international offer?

Debates still continue in Russia about the forms and intensity of modernity in this country. Accepting and observing the fragmentedness of the country in this respect by generations, regions and forms of professionalism of the population, our basic assumption that Russia is already a modern country, therefore the social megatrends listed below in some forms already observable here and even more so in the nearest future, in the next 5–15 years. At the same time it is still an open question that media consumption patters of the 1990–2000ies in the elites will be diffuse in some forms down to other social strata, or less so, due to the fact, that they were to strongly rooted into the cultural shock after dissipation of the Soviet regime. At the same time the emerging genres and consumption habits often in some forms copied forms and stylistic parameters of the American television of the 1960–80ies. Was that only an ad hoc trend and after it the content's fashions will be more Russian and rooted in long-term local cultural traditions? Or coping of new international fashions continues?

Industrial strategies of the media sector can be interpreted in this frame, but naturally could be expressed more or less in business terms in their concreteness.

Trends And Technologies

SOCIAL MEGATRENDS	DISRUPTIVE TECHNOLOGIES
Being always connected	Communication access with high bandwidth available anytime anywhere, also while being modern
Increasing modernity [private + working lives]	Wearable communicating computing power
Less distinction between virtual and real worlds	Natural 3D based displays, spatial audio and multi-sensory communications
Generational change towards information committed people	User generated content available anywhere anytime
Increased user involvement and user power	Personalization of services, media, and devices, natural interfaces
Life-long learning	Cheap interconnected and communicating things
Keeping in touch with communities, friends, acquaintances	Multimedia social networking
Global creative collaboration of individuals	Convergence of intelligent content and connectivity technologies

Business Strategies

From the other side- the local socioeconomic and regulative environment offers different options for the media-industrial business strategies. For the discussion in the project the next business strategies could be listed on the first places.

A. State centered, or state dependent. The state continues to play crucial role in formation of the Russian media system as a. major financial source of quality content production b. with other inclusion, exclusion mechanisms, selection of channels, providers, organizations in the regions, and on the federal level, c. with regulation of advertisement markets d. with investments in general information infrastructural skeleton of the country. Mainly through B. selects content producers and program providers partially or fully dependents on state related programs or other forms of financing. But will that form a stable group of media entrepreneurs or enterprises or it will be a planned change in selection among them or that sub-sector will be somehow stabilized. Could subsectors formed along lines of dependency [fully hanging on the state financial sources, or only slightly, or temporary dependent [but still related to state centered programs].

B. Business giants' competitions. Major holdings cover the market [both in the news industry and in the entertainment sectors together or in different forms] in those sectors which are free from state intervention. For those the next strategic questions emerge; a. can Russian media capital survive alone, separated from other capitals, banks or businesses of "big money" or they are bought by them up, partially or totally? If that model is becoming dominant, which is the remaining place for the independent media entrepreneurs, not affiliated either by "goszakaz" or the banks? How aggressively takes the monopolization of the market place? Will the actual sectorial specificity [press, television] in this respect important, or loosing its weight due to the state dependency-big business interests and forces? Which will be the instruments and rules creating the free market sector? How will be the players on that limited free market defend themselves, which rules of "good behavior" permit them to act freely without challenging the state?

C. Technological "lavochnik" strategies. Surviving smaller providers due to sectorial niches, technologies, regional interests. They can be relatively big, but not related to cross regional holdings, or big bank or business interests. Who will be the survivors, those with complex profiles or those having strongholds in one industry, or technology? Is there really place for real lavochniks, or even new small scale content producers / is a new entrepreneurial sector emerging around new technologies and design? Can we expect new groups of creative organizations, cultural entrepreneurs here?

D. Pirate sectors and strategies. Is the pirate strategy, so deeply rooted in Russia media consumption surviving the change of technology and the regulatory ambitions to kill them, or not? According to our hypothesis they are different by their origin and intensity, but in the most cases they will be able to accommodate themselves to the new environments and will be parts of media consumption in broader sense in the future.

Structural Questions

In this environment 3 major structural questions will emerge:

a. Ability of the traditional mass media industry to defend itself against new invaders, sectors, technological trends. Some sort of integration takes anyhow place, but who will be the winners and losers in the next period? Which are the segments of the near past beautifully surviving and which will be strongly reduced of even dissipated in those fights. Which subfield of content industries will be major organizers of the field? Whose, which are present today or others? Would the existing sectorial importance of subfields change? Can the television industry e.g. defend its strongholds? How can the tradition print media survive and in which subsectors?

b. The major discussion of European media policies in the last 20 years is about the relationship of public media broadcasting and market-related media industries. The state usually regulates those relationships but its not taking over the direct guidance with the PMB. In the Russian case we don't have yet a classical public broadcasting system. Its functions are still covered by state broadcasting, managing and financing stations, and channels, ordering content. We call it government broadcasting. It would be highly nonrealistic to expect liquidation or disappearance of that sector. At the same time, between the government broadcasting and the market, a third sector can emerge; a sort of public broadcasting. In the traditional European PMB model is mainly financed by the state, or by fees collected by the state from users, of general the population, but not controlled by the government. In Russia that can be a third sector in the media system. But how could that emerge in the next years, at all? Transforming and outsourcing some channels of the contemporary government media system? Or not rebuilding it in its actual scope? Not transferring channels but outsourcing topics, genres, fields [high culture, children programming, etc.] to the new public broadcasting? And who will be able and ready to finance the new system; the state sharing its media budgets with the new system, or introducing fees, or maybe collecting new special taxes from the actors on the free media market? Or the public logic will be present only in some forms of program financing in different channels and platforms?

c. Regional, geographical dimensions, changing interpretations of centers and peripheries? What do we expect, more regional varieties both in ownership and programing? Or ownership networks still concentrating and recombining in the next years? Which are the relationships between forms of changing content and industrial structure?

For the first preliminary discussions with experts the list some issues central for our understanding about the future of the Russian media industries:

1. The future can be understood as a specific space of possibilities. At the same time we are interested in realistic, and not totally abstract choices. At the same timed we try to investigate in specific manners into the margins the probable worst and best future versions. Practically those maybe partially abstract exercises draw the space in which different scenarios can be developed further. The best option is that which in already is some form build into the existing order and can be developed based on it. The worst one would be a catastrophic scene emerging from actual preconditions, as well. In this particular respect we don't pay direct attention to the general societal space, but much more to the choices of different concrete actors in and around the media and content industries.
2. At the same time we can in a parallel way list the most absurd, impossible and extreme scenarios and then exclude them from the further investigation. It could have an indicative value to understand the low probability options, which are not realistic according our contemporary knowledge, but which we can take back from the closet, if the socio-political milieus start to change.
3. Can we generate professional judgments about the Russian media industries for 5, and or for 5–15 years? Which are the indicators easy foreseeable and less so? The calculability of its development is improving or not? Do we percept growing order, or disorder, or even chaos in its socio-economic environments? The freedom of actions for media professionals and media managers is growing, or just in opposite in the observable future is becoming narrower?
4. What does it mean center and periphery in the contemporary and future Russian media industries? The technology reinterprets the former peripheries, new accessibilities of equipment, networks and cheaper prices move them towards old centers.

At the same time, new indications of peripheriness will emerge. The relationship is re-established with newly structured environments.

5. Russia in 2012 was not among the most dynamic digital hot spots on the global level, but the changes were positive and significant. Its already in a group of "hot in mobile" countries; with mobile> 75 % and Internet <40 %. Can it overcome to 2020 those thresholds dramatically, or we will expect a sort of saturation soon due to lifestyles and social forms of organization?
6. Which forms of regional "energy potentials" [in manpower, audience, and local capital] are significant in the Russian media industries in the next years? Where and in which forms exist innovative and creative groups and capacities among journalists, or maybe among the audience, as citizens.
7. Around public [state owned, or directly controlled] media systems usually we describe 3 dominant models. In which sector of the Russian content industries will be on of those dominant in 5–10 years [with 20 % grades] a. monopoly [already experienced, but in some forms it will be around us in the future, as well. b] dual system – stable cohabitation of public and private institutions. The smaller partner is not so small at all – it covers min 30–40 % of the market. c] convergence of the two sectors [min 20–30 % around new technologies].
8. The system itself can be investigates along 3 axes a. volumes of content b. size of employed journalist/creative groups [estimations] c. shares of audience [maybe this would be the most important parameter of the systems].
9. How do we move here towards a multiplayer environment; speed, major players, drivers, antagonistic partners, "enemies"? Means, audiences, focus?
10. How, in which forms is able the state and public broadcasting system to survive the digital turn? Governance, funding, access – basic dimensions – further integration, or disintegration of the system? Contradictions and conflicts of interest?
Changes of program quality, quantity, and variety in the dual system. Ability to enter into the commercial sectors [to sell contents there]. Joint ventures of state/PM and the private-commercial sector? Are those hybrid forms promoted, supported by state regulation or in opposite? What is better for journalists and the audience – full, totally open and responsible state systems. Or the pseudo-state-related system? The channels could be privatized by form, but as long as I am feeding and controlling them I have the same impact and audience without to be formal responsibility to anybody.
11. What would be the dynamics of reforms and counter reforms in the state/public regulation? And in which form will those programs and changes be different from who's used in the 1090ies? Can a new form of public service communication emerge from that in 5–10 years?
12. Online content is commodity- what does it means in 5 years and beyond that? Will be have here in the respected sectors more markets for supply and demand?
13. Do interpretations of high profile journalism change parallel with the social environment? Which are the national constants in interpretations? Which are the generational differences in self-images of journalists? We have more or less professional autonomy in the professional community in the next years? And where in which segments will that be crucial and in which not? Would be important to offer during media consumption to offer lifestyles, social conflict processing, interpretations of personal growth to the audience, or that will be strongly secondary with economic and political consumption patterns ordered by owners and advertisements in media?

How can the industry collect revenue beyond advertisements? Could the directly paid content introduced in different Russian environments? Which schemes online newspapers for their financial survival could use? Which quality contents are sellable; high brown opinions, analytical stuff, exlusiveness?

14. Problems of organizational dependence-interdependence [relative independence] of state/public platforms – which are the new dominant models; networks of small independent units, channels, institutions, or big concerns, or surviving forms emerged in Soviet times, surviving in the new conditions, as well.
15. What will be the role of civil society in influencing, defending, content design, and general representations of PM? Can somebody offer legal mandates to the civil society? Can that be in the next years realistic at all? Could cost of public media collected by authorities – even partially from the audience in this country?
16. Public broadcasting structures and political intervention; 2 possible basic models[both are already existing in the world] a. politics-in-broadcasting system [different local and federal structures taking part in supervising media councils and control bodies] b. politics-over-broadcasting [state organs or chinovniks of different levels will intervene or manage directly, without any formal consultations and feed-backs. Which form will be used at which points on which levels? Do we expect any dynamics of replacements between the basic forms of regulation?
17. Which will be the new management techniques used in the Russian media sectors? From where do the come; together with investments, or accompanying new technologies?
18. Can we reach consensus about expected revenue growth in Russian advertising? Since the devastating 2008 global economy and advertising industry crisis, a steady pattern of growth is emerging, particularly in the Internet, television and out-of-home advertising sectors. Print media has experienced a decline in 2011–12, while broadcast and Internet have enjoyed a rebound effect. While overall advertising rose 4.7 percent in 2011 and 5 percent in 2012, the Russian advertising revenue growth was spectacular, 11 % from 2011 to 2012. Was that result accidental or we expecting a significant growth in the next years? Is Russia able to land in 2020 among the 10 top countries with largest advertising revenues [it was not there in 2012]?
19. Ways of corporative cohabitation with social media? Is that able to influence the traditional models of professional journalism and the role of professional journalist itself? Do we expect new professions in the media industry, and which of them would be the most visible of them in Russia?
20. Which are the supply-demand trends in the media professions of the next years? Which will be the gender ratio in the professions? Will an elitist stratification of incomes among journalist survive or partly eliminated? Which will be the sectorial differences here?
21. Ambitions of public participation in the content production — entertainment and/or hedonism, organized and grass-root learning, civil involvement [different forms, scales intensities].
22. National and international in the content industry A. [emergence of imported content, from the contemporary e.g. 50 % is going up/or down? Sectorial differences between Entertainment/highbrow subindustries? B. Emergence and growth of international share in channels, institutions, content industrial facilities c. Expansion

of Russian media capital to the SNG countries? Scope, forms, if at all? And maybe to other regions [for example in film industry].

23. Can we expect in the future a division of labor among post-Soviet [SNG] media industries with cooperation of export units? There are already positive examples of it, leading Uzbek pop music in Central Asia, popular and exported to the region. Tatar cultural export to the post-soviet Muslim areas. And can we expect birth of a regional Bollywood e.g. in Odessa in Russian?
24. Future intra-industrial debate about Russianness of the media content. What does it means; main elements, differences and similarities in the lowbrow and highbrow sectors?
25. Forms of modernization in the country and its regions and structural changes in the media industry — concentration, de-concentration, more-less participatory forms, changing forms of journalism.
26. Which would be major parameters of elite consumption and elite's reaction to new media contents and forms as part of their lifestyles?
27. User centric media in the Russian clusters. Convergence of real and virtual worlds allowing for novel paradigms of active and social experience of media ["friends meet virtually in social networking websites as well in the local bar"].
28. Active and passive media consumption [parallel existence of consumable media e.g. video on demand] and interactive media [e.g. games]. Common and different consumption strategies in news industries and entertainement.
29. New scales of economy: key sectors — broadband market and video/audio market, their parameters in 2020 and 2025? In details — and as an experiment to identify a media delivery technologies road map.
30. What is the meaning of hybridization of media stylistic in Russian the next 5—10 years: the entertainisation of politics and the politisation of political culture? What would be the specificity of different scenarios on forms of journalism.
31. How significant are the next tendencies and professional standards – among others- in the new Russian journalism; a] new advertiser-inspired themes in media content increase the amount of service journalism b] news and debates are still socially important, but demand for analytic journalism declines and investigative journalism is being developed only in some daily and regional papers c] within commercial media systems research and selection is substituted by ready made information, d] public relations attract the best of media professionals, pseudo-events flood media space, e] media value development is substituted by clientelism in relationships between journalists and their sources, f] the audience is viewed as consumers rather then citizens.
32. In this situation how are re-examined in the media industry principles and function of diversity?
33. Can we maximize [and should we?] development of local content across industry sectors?
34. Can we expect a sort of dialogue among industry stakeholders on copyright levies. We expect, like in many countries a levy on products that can copy content, driving up technology prices...
35. Can be at the very end identify sectorial or holding level business scenarios, like the next ones:

As examples of FUTURE SCENARIOS [more or less realistic, with local combinations] we offer a few models:

A. Survivor consolidation. Reduced consumer spending leads to revenue stagnation and decline, investors' loss of confidence in the sector produces a cash crisis and elicits industry consolidation.
B. Market shakeout. Under a prolonged economic downturn or a weak recovery, investors force providers to disaggregate assets into separate businesses with different return profiles. The market is further fragmented by government, municipality and alternative providers. Service providers look for growth through horizontal expansion and premium connectivity services.
C. Clash of giants. Mega-carriers expand their markets through selective verticals. Providers consolidate, cooperate and create alliances to compete with freshly arriving international players.
D. Generative Bazaar. Barriers between regional and federal network providers blur as regulation, technology and competition drive open access. Infrastructure providers integrate horizontally to form a limited number of network cooperatives.

Александр Нимиевич Родный

доктор химических наук,
главный научный сотрудник
Учреждения Российской академии наук
Института истории естествознания и техники им. С. И. Вавилова,
Москва, Россия;
e-mail: anrodny@gmail.com

Институциональные и когнитивные барьеры профессиональной мобильности ученых

Впервые в 1990-е годы на основе концепции профессиональной мобильности ученых С. А. Кугель с коллегами стал изучать дисциплинарные сообщества в процессе их становления и развития. Предложен историко-социологический подход изучения механизмов профессиональной мобильности. Барьеры профессиональной мобильности ученых, которые имеют когнитивную, институциональную, социальную и дисциплинарную природу, рассматриваются как в науке, так и в области технологий, включая образовательные и социальные. Историко-научный анализ вскрывает тенденцию роста когнитивно-институциональной разобщенности специалистов. Однако логика развития профессиональных сообществ указывает на то, что есть и противоположная тенденция — размывания дисциплинарных, национальных и региональных границ и роста мобильности ученых.

Ключевые слова: С. А. Кугель, профессиональная мобильность ученых, профессиональное сообщество, дисциплинарное сообщество, научное сообщество, когнитивно-институциональные структуры, барьеры мобильности.