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The Development of Media Management in Central Asia

ABSTRACT

This article presents the results of a comparative study of the development of media management in five Central Asian countries. Based on an analysis of institutional conditions and management practices in media organisations, it demonstrates that similarities and differences in media management in the region are shaped not so much by the degree of formal liberalisation of media markets, but rather by the nature of the interaction between the state, market mechanisms, and institutional legacies. This confirms the analytical value of the media management concept for the study of media transformation in post-Soviet societies. The empirical results reveal the hybrid nature of Central Asian media systems, characterised by contextual adaptation and multi-level governance. Kazakhstan and Uzbekistan exhibit more dynamic development of the digital media environment and an expanding private media sector, while Tajikistan and Turkmenistan maintain poorly diversified and predominantly state-controlled media systems. Kyrgyzstan occupies an intermediate position, combining the presence of private media with increased regulatory restrictions. Overall, media management in the region is characterised by high cross-country variation and a stable hybrid structure.

KEYWORDS: media management, Central Asia, journalism

STRESZCZENIE

Rozwój zarządzania mediami w Azji Środkowej

Niniejszy artykuł przedstawia wyniki badania porównawczego rozwoju zarządzania mediami w pięciu krajach Azji Środkowej. Na podstawie analizy uwarunkowań instytucjonalnych i praktyk zarządzania w organizacjach medialnych wykazano, że podobieństwa i różnice w zarządzaniu mediami w regionie kształtowane są nie tyle przez stopień formalnej liberalizacji rynków medialnych, ile

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raczej przez charakter interakcji między państwem, mechanizmami rynkowymi i dziedzictwem instytucjonalnym. Potwierdza to analityczne znaczenie koncepcji zarządzania mediami dla badań nad transformacją mediów w społeczeństwach postsowieckich. Wyniki empiryczne wskazują na hybrydowy charakter systemów medialnych Azji Środkowej, odznaczających się adaptacją kontekstową i wielopoziomowym zarządzaniem. Kazachstan i Uzbekistan charakteryzują się bardziej dynamicznym rozwojem cyfrowego środowiska medialnego i rozwijającym się prywatnym sektorem medialnym, podczas gdy Tadżykistan i Turkmenistan utrzymują słabo zróżnicowane i w przeważającej mierze kontrolowane przez państwo modele. Kirgistan zajmuje pozycję pośrednią, łącząc obecność mediów prywatnych z rosnącymi ograniczeniami regulacyjnymi. Ogólnie rzecz biorąc, zarządzanie mediami w regionie charakteryzuje się dużą zmiennością między krajami i stabilną strukturą hybrydową.

SŁOWA KLUCZE: zarządzanie mediami, Azja Środkowa, dziennikarstwo

Introduction

Theoretical and empirical research on media management has gained significant prominence in recent years. Driven by the general trend toward comparative research in the broader field of mass communications, media management as an analytical concept and object of scholarly analysis has assumed a central position in media studies. Works by Albarran, Chan-Olmsted and Wirth (Eds.) (2006), Compaine and Gomery (2000), Christensen and Overdorf (2000), Greco (1999), Gershon (2000), Lacy and Blanchard (2003), Picard and van Weezel (2008), and Picard (2004), Mierzejewska and Hollifield (2006) represent just a few examples of the extensive and growing body of literature in this field.

One reason media scholars are increasingly turning to the concept of media management is the recognition that the transformation of media systems cannot be explained solely through the lens of political regimes, normative models of journalism, or issues of freedom of expression. In the face of digitalisation, audience fragmentation, and intensifying competition from global platforms, media organisations increasingly depend on management decisions, economic strategies, and organisational models to sustain their sustainability and ability to adapt to the changing media environment (Mierzejewska & Hollifield, 2006). Although this concept purports to bridge general management theory and the specifics of the media industry, the field of media management itself remains far from clearly defined or theoretically coherent (Küng, 2007).

Another important advantage of using media management as an analytical starting point lies in two key characteristics of the concept of management in the social sciences. First, its interdisciplinary nature, which allows for

the integration of economic, sociological, political, and cultural approaches to the analysis of media organisations. Second, its focus on decision-making processes that link the structural constraints of media systems to the day-to-day activities of editorial offices and media managers (Jung, 2022). This approach enables the analysis of media not only as a public institution but also as an organisational actor operating under conditions of limited resources, regulatory pressures, and market competition. Furthermore, this perspective remains open to the constant rethinking and transformation of journalism, as management itself is a process of continuous change, revision, and redefinition.

Thus, the concept of media management integrates earlier research examining how news routines and professional cultural norms shape journalists' work (Hirsch, 1977), as well as how media production technologies, as elements of organisational culture, influence the formation and evolution of the professional norms underpinning news routines (Abbott & Brassfield, 1989; Killebrew, 2003).

To avoid conceptual ambiguity, the distinction between media management and media governance is clarified early in the paper. Media management refers to the practical management of media organisations, which includes leading teams, producing content, and developing business strategies. Media governance, on the other hand, refers to the broader framework of rules, policies, and institutional processes that shape the functioning of the media system within society.

In this study, we examine media governance in Central Asia through the lens of media management, as these everyday practices reveal how governance operates and how it is applied, negotiated, and experienced within the region's media systems.

This perspective allows us to consider media production as the outcome of the interaction among journalists' professional values, management decisions, and institutional constraints, which is particularly valuable in analysing media systems in the context of hybrid political regimes and constrained media markets that characterise Central Asian countries.

The primary goal of this study is to analyse media governance in Central Asian countries in the context of the interaction between established theoretical models of media management and local management practices. The article examines the key factors that shape media management in five countries of the region: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan, including state regulation, economic sustainability, digital transformation, and human resource constraints. It focuses on the following research questions:

RQ1: How is media governance conceptualised in academic studies of Central Asian media systems?

RQ2: What dominant models of governance and state regulation have emerged in relation to media organisations in the region?

RQ3: How do state regulation, institutional legacies, and digital transformation shape media governance practices in Central Asia?

RQ4: To what extent does the existing research reflect hybrid models of media governance that combine market-oriented, state-oriented, and legacy-based approaches?

We recognise that such descriptive comparisons can provide only a broad approximation of the complex, multi-layered differences among media management models, as substantial systemic variation also exist within individual countries. In this sense, this article is viewed as a first step in a comprehensive analysis of media governance in Central Asia through the lens of media management practices.

Literature Review and Conceptual Framework.

This study distinguishes between media governance, media management, and media systems as analytically distinct yet interrelated levels of analysis. Media management refers to organisational and strategic practices of individual media outlets, including decision-making processes, resource allocation, and business models. In the Central Asian context, these practices are shaped by hybrid ownership structures, political influence, and ongoing digital transformation. Media governance refers to the legal, regulatory, and institutional frameworks that shape media activity. It encompasses both state regulation and interactions between state institutions, media actors, and, increasingly, international organisations and digital platforms. In Central Asia, governance remains largely state-centred, although it is gradually incorporating more complex, multifaceted dynamics. Media systems describe the broader structural configuration of relationships among media, politics, and society.

An important starting point for this study is the assumption that media governance is operationalised through organisational practices and should therefore be analysed not only at the institutional level but also through the actions of media organisations, institutional mechanisms, and managerial decision-making, rather than solely through formal ownership structures or regulatory frameworks. This approach allows us to view media management as a process in which economic interests, professional journalistic norms, technological capabilities, and political constraints interact to shape the operating models of media organisations (Jung, 2022).

Within the existing literature, media governance is most often conceptualised as a set of strategic and operational practices aimed at ensuring the sustainability of media organisations in the face of uncertainty and structural constraints (Albarran, 2002; Picard, 2004). These practices include resource allocation, the formulation of editorial policy, business model adaptation, and

the management of human resources and technological processes. At the same time, media management differs fundamentally from management in other sectors of the economy because of the dual nature of media as both economic organisations and public institutions with social and cultural responsibilities (Küng, 2007; Picard & van Weezel, 2008).

A substantial body of research emphasises that media management decisions cannot be examined outside the institutional context in which they are made. The institutional approach emphasises the role of formal rules, informal norms, and historically established practices that constrain and guide the actions of media managers (North, 1990; Hall & Taylor, 1996). In media studies, this approach has been productively used to analyse the influence of government regulation, political pressure, and the legacy of previous media systems on contemporary forms of media governance, particularly in post-socialist and transitional societies.

Concurrently, research drawing on organisational theory and the sociology of professions demonstrates that media management is shaped by the interaction between management strategies and the professional culture of journalism. Editorial routines, values of autonomy, and notions of the media's social mission can both support and constrain the implementation of managerial innovations (Abbott & Brassfield, 1989; Hirsch, 1977; Killebrew, 2003). In this sense, media management should not be understood as a hierarchically imposed process, but as the outcome of ongoing negotiations among managers, editors and journalists.

Contemporary scholarship places particular emphasis on the impact of digital transformation on media management. The proliferation of online platforms, algorithmic content distribution systems, and audience analytics has transformed managerial decision-making, increasing the emphasis on metrics, short-term efficiency, and flexible organisational structures (Küng, 2017; Picard, 2011). However, research indicates that digitalisation does not lead to the convergence of management models but rather exacerbates differences among media systems, depending on their level of economic development, degree of state control, and institutional legacy.

In the context of the Central Asian countries, these theoretical approaches allow media management to be understood as a hybrid phenomenon that combines elements of market-oriented governance models, state-centred control mechanisms, and practices inherited from the Soviet media system (Shafer & Freedman, 2003). Despite growing interest in the region, existing research remains fragmented and tends to focus either on issues of political influence and media freedom or on the structure of media markets, leaving the managerial dimension comparatively underdeveloped. This study addresses this gap by offering an integrative conceptual framework for analysing media governance in Central Asia through the integration of institutional, organisational, and professional approaches.

Central Asian Media Studies

Contemporary media studies on Central Asia demonstrate a steadily growing scholarly interest in the transformation of media systems amid digitalisation, political change, and globalisation. Since the region's independence, several key research areas have emerged over the past three decades, allowing for a comprehensive analysis of the evolution of Central Asian media landscape.

One major area is the study of the transformation of journalism from the Soviet model to the media systems of independent states. Researchers note institutional changes associated with the dismantling of party-state control, the emergence of private media and formally pluralistic structures, as well as the persistence of elements of the Soviet professional legacy in editorial culture and journalistic practice (Shafer & Freedman, 2003; Kenny & Gross, 2008; Mickiewicz, 2008; Cengiz, 2016; Nussipov, 2019). Despite structural reforms, political and economic constraints continue to significantly influence the development of independent journalism, contributing to the emergence of hybrid media systems. The second significant area of research concerns the role of the media in democratisation processes and freedom of expression. This approach views media as both a potential institution of public accountability and an object of state regulation and political pressure. Research shows that even with constitutionally guaranteed freedom of expression, media systems in Central Asian countries operate predominantly under authoritarian or hybrid political regimes, which limit the autonomy of editorial boards and journalists (Freedman, Shafer, & Antonova, 2010; Freedom House, 2023; Kenny & Gross, 2008; Kudaibergenova & Laruelle, 2022). The third area of research focuses on issues of professional ethics and the quality of journalism. Scholars analyse issues of self-regulation, objectivity, and journalistic responsibility, as well as the prevalence of self-censorship as an adaptive strategy in the face of political, legal, and economic constraints (Freedman, 2011; Kurambayev & Freedman, 2020; Kurambayev & Myssayeva, 2025; Mould & Schuster, 1999; Voltmer, 2013). These studies highlight the gap between normative models of journalism and actual professional practice in the region. The fourth area of research comprises studies of journalism education in Central Asian countries. Researchers point to the inertia of the Soviet educational model, the inadequacy of curricula to meet the demands of the digital media environment, and the limited effectiveness of educational reforms, despite the influence of international initiatives and projects (Freedman & Shafer, 2012; Gross & Kenny, 2008; Skochilo, Toralieva, & Jonbekova, 2020; UNESCO, 2018). At the same time, gradual changes associated with digital technologies and the transformation of media consumption patterns are noted.

Finally, interest in media culture and media development research has increased in recent years. These studies focus on the management of media organisations, the economic sustainability of media outlets, digital business

models, and strategies for competing with global platforms (Kurambayev, 2022; Muratova, 2023; Nurumov et al., 2021; Picard, 2011). Despite the growing body of research, media management in Central Asia remains underdeveloped, particularly from a comparative and empirical perspective.

Overall, media research in Central Asia is interdisciplinary in nature and reflects an effort to move beyond universalist Western models, by taking into account local political, cultural, and economic contexts. The limited development research in media management and strategic governance within media organisations creates a research gap that this study aims to address.

Methodology

Country selection was based on the principle of purposive sampling, aimed at identifying key institutional and governance-related variations in media systems within a single macro-region (Patton, 2015). The study included Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan, enabling a comparison of media organisations operating under different levels of state regulation, market development, and digitalisation, while sharing a common historical and institutional legacy rooted in the Soviet media system (Hallin & Mancini, 2004). The study relies on secondary data analysis, a method widely used in the social sciences to investigate hard-to-reach or politically sensitive areas, including media governance and institutional practices in authoritarian and hybrid regimes (Johnston, 2017; Heaton, 2004). Secondary analysis not only enables a reinterpretation of previously collected empirical material but also identifies recurring patterns, inconsistencies, and theoretical gaps in existing research (Bryman, 2016).

Sources were selected based on clearly defined inclusion criteria. In addition to academic credibility, priority was given to publications in English and Russian, reflecting the dominant languages of scholarship on Central Asia. The temporal scope primarily covered the period from the late 1990s to 2025, capturing the post-Soviet transformation and digitalisation of media systems. Sources were included if they directly addressed media management, media governance, or media systems in Central Asia or comparable post-socialist contexts. Publications lacking empirical grounding, clear methodological frameworks, or regional relevance were excluded.

The empirical base of the study comprised several categories of sources. First, 11 academic publications (e.g., Fredman & Kurambayev, 2020; Gross & Kenny, 2008; Kurambayev & Freedman, 2020; Kurambayev & Myssayeva, 2025; Skochilo, Toraliev, & Jonbekova, 2020; Mould & Schuster, 1999; Nussipov, 2019; Oates, 2007; Rizoev, 2025; Voltmer, 2013; Vartanova, 2018) were analysed. Second, three policy and NGO reports (e.g. UNESCO, 2021; Internews, 2024; Statista, 2024) were examined. Academic sources focused on

media systems, journalism, and media management in Central Asia and other post-socialist contexts, while policy and NGO reports provided empirical data on media markets, regulation, and governance. Third, regulatory acts, government strategies, and official documents defining the institutional framework for media governance were included in the analysis. Efforts were made to ensure a balanced representation of sources across Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan; however, this balance was partially constrained by uneven data availability and differing levels of research coverage across countries. These reports often serve as a key source of empirical information for regions with limited media transparency.

Central Asian Media System

The Central Asian media system is a hybrid structure shaped by the historical legacy of the Soviet media system, political control, and economic constraints (Hallin & Mancini, 2004; Voltmer, 2013). The region is characterised by highly concentrated media ownership, significant reliance on state subsidies (Kurambayev & Myssayeva, 2025), and limited editorial freedom, particularly in Turkmenistan and Uzbekistan, where the state controls key television channels and print media (Freedom House, 2022; Oates, 2007).

In Kazakhstan and Kyrgyzstan, media organizations enjoy relative autonomy, which facilitates the development of market-oriented management models and experimentation with digital platforms. These countries have witnessed the expansion of the private media sector, the emergence of independent online news outlets, and the adoption of audience analytics to support audience engagement (Picard, 2011; Küng, 2017).

Digitalisation is a key driver of media system transformation, enabling media organisations to adopt new formats, expand their audiences, and optimise management processes. However, its impact is constrained by infrastructural barriers and political control in some countries in the region, particularly Tajikistan and Turkmenistan (UNESCO, 2021).

Professional standards of journalism in Central Asia also retain elements of Soviet practice, such as formalised routines and procedures, but are simultaneously influenced by international norms and market logic. This creates a dynamic interplay between journalists' professional values, managerial decision-making, and institutional constraints, shaping distinctive national models of media management (Abbott & Brassfield, 1989; Hirsch, 1977; Voltmer, 2013).

Thus, the Central Asian media system is characterised by hybridity, contextual adaptation, and multi-level governance, in which state-centred, market-oriented, and inherited practices interact to shape media organisations' resilience and capacity to adapt to changes in the digital and political environment.

Analysis of Central Asian Media Systems by Country

As international monitoring organisations indicate, Central Asian media systems exhibit marked differences in ownership structures, levels of digitalisation, and degrees of state control. Kazakhstan and Uzbekistan are characterised by mixed ownership models with state dominance in key sectors and relatively high internet penetration (approximately 90% and 83%, respectively), while Kyrgyzstan retains a more developed private media sector (approximately 80%), albeit under increasing regulatory pressure (Freedom House, 2022; Reporters Without Borders, 2025).

According to Reporters Without Borders (2025), Tajikistan and Turkmenistan remain media environments characterised by predominantly or entirely state-controlled media, low levels of digital pluralism, and limited internet access (~56–67%). The World Press Freedom Index confirms this pattern—from moderately restricted conditions in Kazakhstan (141/180) and Kyrgyzstan (144/180) to a highly repressive environment in Turkmenistan (175/180), demonstrating the persistence of hybrid models of media governance that combine digital transformation with enduring state regulation practices (Voltmer, 2013; Reporters Without Borders, 2025) (see Table 1).

Table 1. Comparative Media Environment, Digital Indicators, and Press Freedom in Central Asian Countries (2025)

Indicator	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
Media ownership structure	Mixed; state-dominant in key outlets	Mixed; relatively more independent outlets	Predominantly state-controlled	Fully state-controlled	Mixed; strong state influence
Internet penetration rate	High (~90%+)	Moderate-high (~79.8%)	Moderate (~56.8%)	Limited (~60–67%)	High (~83.3%)
Mobile & 4G coverage	Extensive	Near nationwide	Moderate, rural gaps	Limited, uneven	High nationwide
Press Freedom Index (2025)	141/180	144/180	153/180	175/180	148/180
Trend in press freedom	Declining	Declining	Very limited	Extremely restrictive	Limited improvements
Digital media diversity	Growing, constrained	Exists, under pressure	Limited	Minimal	Expanding
Degree of state control	High (traditional sectors)	Increasing	Very high	Near total	High with some openings

Compiled from RSF (2025), Internews (2023), and national data sources.

As shown in Table 1, qualitative indicators such as ownership structure, digital infrastructure, and press freedom provide a more reliable basis for assessing media governance conditions.

Comparative analysis indicates that the region’s media systems are shaped by historical legacies, the level of digital infrastructure, and the degree of state control. Kazakhstan and Uzbekistan have relatively more developed digital environments and a growing private media sector, while Tajikistan and Turkmenistan remain characterised by limited media diversity and comprehensive state control. Kyrgyzstan occupies an intermediate position: private media exist but operate under increasing regulatory restrictions. These data confirm that media governance in Central Asia is characterised by hybridity and significant variation across countries.

A key observation is that internet penetration is an important indicator of media consumption and digital media management: Kazakhstan and Uzbekistan demonstrate high levels of internet usage, reflecting a broader digital audience; Kyrgyzstan also exhibits significant digital engagement, while Tajikistan and Turkmenistan lag significantly behind, which impacts the development of digital media and their governance models.

The analysis process included several stages. The first stage involved a systematic selection of sources based on their thematic relevance, academic credibility, and temporal scope, primarily covering the period since the early 2000s, which corresponds to a period of active transformation of the region’s media systems (Picard, 2011). The second stage employed qualitative thematic analysis to identify recurring categories related to media management models, the role of the state, economic strategies, and digital transformation (Braun & Clarke, 2006). The third stage involved a cross-country comparison of the findings to identify both general patterns and context-specific differences (see Table 2).

Table 2. Analytical Categories of Content Analysis

Category	Analytical Focus	Indicators in Literature
Institutional legacy	Persistence of Soviet-era structures	Vertical management; centralised decision-making; limited editorial autonomy
Role of the state	State involvement in media governance	Regulation; ownership; political influence; censorship mechanisms
Economic and business models	Financial sustainability and revenue strategies	Advertising dependence; state subsidies; diversification; platform monetisation
Digital transformation	Impact of digitalisation on management	Cross-platform strategies; audience engagement; newsroom convergence

Professional culture	Editorial autonomy and journalist–manager relations	Self-censorship; ethical norms; professional standards
Hybrid management models	Coexistence of market, state, and legacy-based governance	Integration of commercial logic and political control

The authors' elaboration based on the literature.

As shown in Table 2, the analytical categories operationalise the study's theoretical concepts by translating them into observable indicators, thereby enabling a systematic examination of hybrid media management models across Central Asian contexts.

Table 3. Stages and Procedures of Qualitative Content Analysis

Stage of Analysis	Analytical Task	Description	Output
Open coding	Identification of key themes	Initial coding of texts to capture recurring concepts	Preliminary codes and thematic clusters
Axial coding	Conceptual integration	Linking initial codes to broader theoretical categories	Refined analytical categories
Selective coding	Theory building and comparison	Integration of categories into higher-order dimensions	Typology of media management models

Adapted from Braun and Clarke (2006).

Table 3 illustrates how the coding process links empirical material to theoretical constructs, ensuring consistency and comparability in the cross-country analysis.

The results of the content analysis were interpreted in relation to the research questions, revealing dominant patterns and country-specific differences in Central Asian media systems. Particular attention was paid to the emergence of hybrid models of media governance shaped by digital pressures, political constraints, and inherited institutional frameworks.

The adopted methodology provides the foundation for future empirical research, including interviews with media managers, analyses of strategic policy documents, and comparative case studies to advance media governance research in Central Asia.

Table 4. Mass Media in Central Asian Countries (February 2025)

Type	Kazakhstan	Kyrgyzstan	Uzbekistan	Tajikistan	Turkmenistan
Newspapers	1923	92	600	179	27
Magazines	1061	50	866	154	28
TV channels	235	31	89	53	8
Radio stations	96	24	29	34	4
News agencies	6491	2662	–	–	–
Online media	554	34	738	23	4
Bulletins	–	–	21	–	–
Production studios	–	–	–	14	1
Foreign TV & radio corporations	305	–	190	–	–
Foreign media accredited by MFA	37	29	32	18	32
Total	4860	272	2571	481	106

Data compiled from Rizoiev (2025) and national statistical sources; figures are not fully comparable across countries.

Table 4 provides an overview of the scale of media sectors across the region; however, these figures should be interpreted with caution. Differences in national statistical methodologies and reporting practices limit direct comparability. Moreover, the number of media outlets does not necessarily reflect diversity, autonomy, or managerial independence, as quantitative expansion may coexist with strong state influence.

This table provides a comparative overview of the media sectors in Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan as of February 2025. According to Rizoiev (2025), the governments of the Central Asian countries seek to develop a media system that combines democratic freedoms with the degree of control over the information space considered necessary to maintain political stability (Rizoiev, 2025). The categories included comprise newspapers, magazines, television channels, radio stations, news agencies, online media, newsletters, production studios, foreign television and radio broadcasters, and accredited foreign media. The data reveal significant differences among countries in media diversity, state control, and digital development. The presence of foreign media is noticeable only in Kazakhstan and Uzbekistan, reflecting their more open media environments. The differences in Central Asia’s

media systems support the concept of hybrid media management: the combination of market models, state-oriented practices, and historical legacies creates unique national media structures. Overall, the findings underline the need to consider the institutional, economic, and digital context when analysing media organisations in the region.

Media Management in Central Asia: Per-country Overview

In Kazakhstan, the media system developed under Soviet-era centralised control and censorship. Following independence in 1991, private outlets expanded, which was accompanied by increasing commercialisation. Junisbai (2011) notes that financial-industrial groups associated with former President Nursultan Nazarbayev acquired substantial media assets, influencing multiple sectors of the media industry. Today, Kazakhstan's media system is characterised by a hybrid model: strong state influence coexists with private and digital initiatives, with an emphasis on multimedia and digital platforms.

In Uzbekistan, the Soviet media model dominated until 1991; after independence, private media emerged, yet state control remained strict. By 2025, the number of online media outlets had reached 738, while traditional newspapers and radio declined. Television broadcasting and magazine publishing expanded. Media management follows a hybrid model, combining state oversight with emerging digital and market-oriented initiatives.

Kyrgyzstan developed a liberal media environment after 1991, despite initial state monopoly over broadcasting and limited resources (Ibraeva & Kulikova, 2002). Independent newspapers, radio, and television channels expanded, supported by the adoption of digital technologies. Media management combines market-based and state-centred mechanisms and characterised by strong online engagement.

In Tajikistan, most media remained state-owned following the collapse of the USSR. By 2024, newspapers, magazines, and news agencies continued to largely operate under government control. Television reaches 96% of the population, while internet penetration is 66.6%. Press freedom remain limited, and independent media outlets face challenges. Media management is totalitarian, with low editorial independence and slow digital transformation.

Turkmenistan maintains full state control over the media, with virtually no independent outlets. Digital media remain underdeveloped; social media penetration is only 3.2%. Media management is fully state-controlled, with negligible market-oriented or hybrid approaches.

Results

The analysis of secondary data reveals several interconnected patterns of media management across five the Central Asian countries: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan.

One of the most consistent findings is the enduring influence of institutional legacies and state regulation. In countries where state control remains strong, particularly Turkmenistan and Tajikistan, media organisations operate under tight regulatory oversight. Editorial decision-making and personnel management are often shaped by political considerations, limiting managerial autonomy and constraining innovation. By contrast, media organisations in Kazakhstan and Kyrgyzstan function in comparatively more flexible regulatory environments, which allows managers greater scope to adapt organisational strategies and respond to changing market conditions (Hallin & Mancini, 2004; Voltmer, 2013).

Economic conditions further shape management practices across the region. Limited advertising markets, reliance on public funding, and insufficient revenue diversification place media organisations under persistent financial pressure. These constraints create ongoing tension between economic sustainability and professional standards. While media organisations in Kazakhstan and Kyrgyzstan have been more successful in experimenting with diversified revenue models, organisations in Tajikistan, Turkmenistan, and Uzbekistan face structural financial barriers that limit managerial innovation (Albarran, 2002).

Digital transformation has emerged as another important driver of change in media management. The growing adoption of online platforms, audience analytics, and digital content strategies is most evident in Kazakhstan and Kyrgyzstan. In the remaining countries, however, infrastructural limitations and political constraints continue to slow the integration of digital technologies into everyday management practices (Küng, 2017).

Taken together, these findings indicate the widespread presence of hybrid media management models that combine elements of state oversight, market logic, and inherited institutional practices. Such models allow media organisations to maintain operational stability while selectively adapting to economic and technological change (Voltmer, 2013).

Discussion

Media governance in Central Asia is considerably more nuanced than a simple distinction between market-driven or state-controlled. Across the region, media organisations operate within a hybrid environment shaped by historical legacies, politics, economics, and journalistic practices. Soviet-era legacies, state

oversight, and financial pressures intersect in ways that challenge one-dimensional frameworks. This supports Mierzejewska and Hollifield's (2006) multi-dimensional approach while also providing new insight into how hybrid governance operates in practice rather than merely in theory.

Historical legacies remain a powerful influence. In Kazakhstan and Uzbekistan, for example, centralised hierarchies and entrenched bureaucratic norms continue to shape managerial decision-making, reflecting patterns identified in post-Soviet media studies (Hallin & Mancini, 2012). At the same time, economic pressures require media organisations to balance financial sustainability with professional autonomy, a tension also observed in transitional media systems more broadly (Picard, 2011). Kyrgyzstan, by contrast, exhibits a more pluralistic model, in which editorial diversity coexists with increasing regulatory oversight, highlighting how different historical and political contexts give rise to distinct hybrid forms.

Digital transformation adds a further dimension. In Kazakhstan and Uzbekistan, digital technologies have expanded audience reach and enabled more flexible, market-oriented strategies. By contrast, in Tajikistan and Turkmenistan, digital transformation remains fragmented, constrained by limited infrastructure and extensive state control. These patterns are consistent with Küng's (2017) argument, showing that technology alone does not reshape governance; it interacts with existing institutional and political conditions, sometimes reinforcing established practices rather than overturning them.

Two broader conclusions emerge. First, hybrid governance is inherently context-dependent: historical legacies, political structures, and economic conditions jointly shape the operations of media organisations. Universal models that ignore these factors risk oversimplifying the realities of transitional media systems. Second, digital transformation is uneven and conditional; its impact depends on institutional capacities and political openness. These findings extend beyond Central Asia, offering a conceptual lens for other transitional or semi-authoritarian media environments where hybrid governance persists.

This study has several limitations. It relies primarily on secondary sources, which cannot fully capture internal managerial perspectives. Rapidly changing digital infrastructures and regulatory frameworks mean some observed patterns could shift over time. Additionally, while regional trends are evident, significant country-level differences caution against broad generalizations.

In sum, media governance in Central Asia is a hybrid, context-sensitive phenomenon shaped by the interplay of historical legacies, political oversight, economic pressures, and digital transformation. Recognising this complexity enriches our understanding of post-Soviet media systems and provides a framework for analysing transitional media systems other transitional media environments, in which historical legacies continue to shape organisational practices and the media of the future.

Against this background, the study addresses its first research question:

RQ1: How is media governance conceptualised in academic studies of Central Asian media systems?

Academic studies of Central Asian media systems conceptualise media governance as a multidimensional process extending beyond formal regulation. Governance is commonly understood as the outcome of interactions among state institutions, media organisations, digital infrastructures, and audiences, encompassing regulatory control, editorial autonomy, market mechanisms, and digital innovation (Cabar.asia, 2023; Freedom House, 2022). A recurring finding in the literature is the enduring influence of the Soviet media legacy, which continues to shape organisational structures and managerial practices, particularly in Kazakhstan, Uzbekistan, and Tajikistan. This perspective conceptualises media governance as historically embedded rather than institutionally neutral.

RQ2: What dominant models of governance and state regulation are identified for media organisations in Central Asia?

The literature identifies three dominant models of media governance across the region. Kazakhstan and Uzbekistan are most frequently characterised as operating under hybrid governance models characterised by strong state influence, the presence of private media, and ongoing digital development. Kyrgyzstan is commonly associated with a pluralistic yet regulated model, in which a relatively diverse media sector coexists with periodic legislative constraints. Tajikistan and Turkmenistan represent highly centralised governance models, marked by extensive state control and minimal editorial independence. Together, these models illustrate varying configurations of political control, market openness, and institutional capacity.

RQ3: How do state regulation, institutional legacies, and digital transformation shape media governance practices in the region?

State regulation remains the primary factor shaping both media content and organisational structures, particularly in countries with limited press freedom. Institutional legacies inherited from the Soviet media system continue to be reflected in centralised decision-making and bureaucratic governance arrangements. At the same time, digital transformation has created new opportunities for independent and private media by expanding audience reach and enabling more flexible governance practices. These dynamics are most evident in Kazakhstan, Uzbekistan, and Kyrgyzstan, whereas limited internet penetration and infrastructural constraints continue to limit digital media development in Tajikistan and Turkmenistan.

RQ4: To what extent does existing research reflect hybrid models of media governance that combine market-oriented, state-centred, and legacy-based approaches?

Across the literature, hybrid media governance emerges as the dominant analytical framework in Central Asia. In most countries, state regulation

intersects with market dynamics and digital transformation rather than functioning as a single governing logic. Kazakhstan and Uzbekistan exemplify this hybridity through the coexistence of state oversight, market competition, and digital development. In Kyrgyzstan, hybridity assumes a more pluralistic form shaped by editorial diversity alongside legislative oversight. By contrast, Tajikistan and Turkmenistan exhibit limited hybridity due to entrenched centralised regulation and underdeveloped digital infrastructure (Freedom House, 2025).

Collectively, these findings demonstrate that media governance in Central Asia is best understood as a context-dependent, hybrid phenomenon shaped by the interaction of historical legacies, political regulation, and uneven digital transformation.

Conclusion

This study demonstrates that media systems in Central Asia are shaped by a complex interaction of global media management dynamics and the enduring influence of post-Soviet institutional legacies. Although countries in the region differ in important respects, they share a common feature: hybrid models of media governance in which market forces and digital transformation coexist with strong state regulation.

The findings contribute to the literature on media management by showing that hybridity in non-democratic and semi-authoritarian contexts is not merely a temporary phase between state-centred and market-oriented systems. Instead, it constitutes a relatively stable and deeply embedded form of governance. This challenges assumptions often found in Western-centred theoretical frameworks, where media systems are expected to move toward greater market autonomy. In Central Asia, state influence remains not only pervasive but also adaptable, continuing to shape the governance and management of media organisations. In this way, the study offers a more grounded understanding of hybrid governance, emphasising the enduring significance of political control and institutional history.

Looking more closely at the region, several common patterns emerge. The state continues to play a dominant role in media governance and management, particularly in traditional media sectors, limiting both managerial and editorial autonomy. At the same time, Soviet-era institutional legacies, such as hierarchical structures and centralised decision-making, remain evident in many media organisations. Digital transformation is also reshaping the media landscape, albeit unevenly. In countries like Kazakhstan, Kyrgyzstan, and Uzbekistan, it has created some space for adaptation and limited media pluralism. In contrast, in Tajikistan and Turkmenistan, digital development remains constrained and fragmented. These shared characteristics exist with important

national differences, reflecting each country's specific political, economic, and institutional context.

Theoretical implications

Beyond the regional context, the findings contribute to broader debates in media management. First, they highlight the importance of context, demonstrating that media governance cannot be fully understood without considering historical legacies and political conditions. Second, they challenge the idea that media systems follow a single, linear path toward liberalisation, showing instead that hybrid governance can be a stable outcome in its own right. Third, they suggest that digital transformation is not inherently disruptive; its impact depends on the surrounding regulatory and infrastructural environment. Collectively, these findings underscore the need for more flexible and globally inclusive theoretical frameworks.

Limitations and future research

As has been said, this study has several limitations. It relies primarily on secondary sources, which means it cannot fully capture what happens inside media organisations. In addition, the rapidly evolving nature of digital technologies and regulatory environments means that some of the patterns identified here may evolve over time.

Future research could build on these findings by incorporating primary data, such as interviews with media managers and journalists, as well as in-depth case studies of individual media organisations. Longitudinal and comparative studies would also help to enhance understanding how hybrid governance develops over time. Expanding the focus to include audiences and digital platforms could further deepen our understanding of how media governance operates in practice.

In conclusion, Central Asia provides an important lens through which to rethink media management in hybrid and semi-authoritarian contexts. Rather than converging towards a single global model, media governance in the region is shaped by the ongoing interaction of state power, market forces, historical legacies, and digital transformation. Recognising this complexity not only deepens our understanding of the region but also offers valuable insights for scholars studying media systems in other parts of the world.

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