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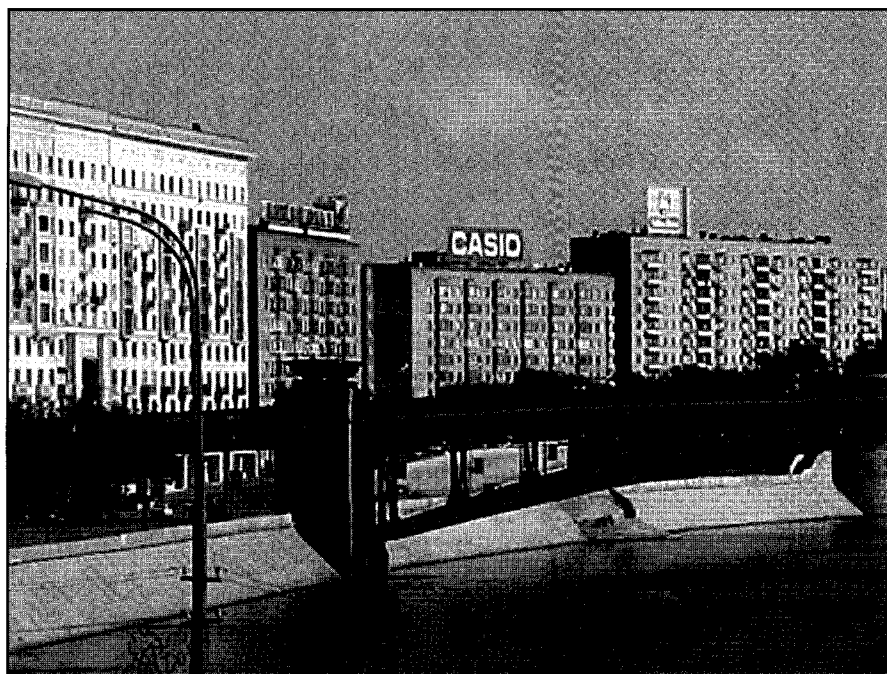
Advertising in Moscow

By Gregory Feifer

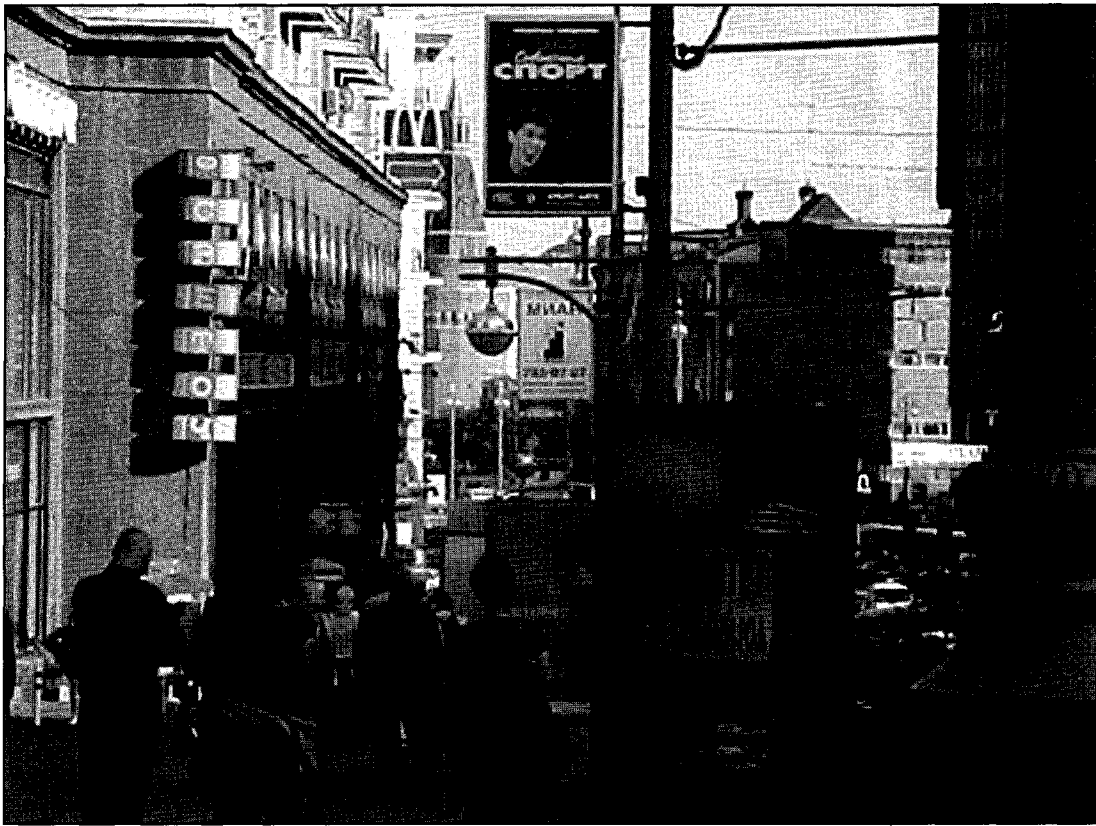
MOSCOW—There it loomed, its large and unmistakable red-and-white design and the "Marlboro" lettering. The advertisement adorned a dreary Stalin-era stone block of apartments, one in a seemingly endless and otherwise grimly monolithic stretch of similar structures lining the Moscow River's central city embankment.

Many other foreigners in Moscow found the appearance of such trademarks of western capitalism upsetting ten years ago — if only, I suspected, because the arrival of that and other stand-bys of foreign advertising encroached on a fantasyland world of Soviet isolation and adventurous escape. As if the real world were finally invading the country in which a few coveted dollars would get one all the wine, women and song that could be had in this exotic locale.

Others somehow found those first advertisements reassuring, a sign that the life of deprivation and oppression most of the populace led had a glimmering hope of improvement. Of course western companies were only in it to make a buck for themselves and threatened to deface Russian cities, as they had their western counterparts, by importing the worst of capitalism. However, while the garish yellow sign with neon lettering spelling out "Goldstar" on central Gorky Street ten years ago might have been ugly, it was politically bold. Goldstar's propaganda heralded the upstart South Korean manufacturer's gutsy foray into Soviet sales in a time in which Communism still reigned, if only in name. Such advertisements brought with them the promise of everything good the West could



A stretch of buildings along the Moscow River where one of the first Marlboro advertisements went up. It has long been supplanted by others.



In central Tverskaya Street (called Gorky Street before the Soviet Union's collapse), a Kremlin tower is nearly obscured by a collage of advertisements.

provide — not only decent food, clothes and appliances, but also a completely new way of life in which (in lip service at least) the consumer came first, not the state.

When U.S. Mattel began to paint entire Soviet-era tramcars in hot pink and cover them in advertisements for Barbie dolls, however, the honeymoon was over. Now it's difficult to picture Moscow bare of everything but Communist Party slogans proclaiming this or that factory or group of people heroes, or exhorting others to work ever harder to "build communism." Increasingly slick images and slogans now assault the passerby on Moscow's central streets encouraging the population to buy one product or another.

Nevertheless, Russia and the West remain worlds apart. One might see an advertisement for, say, Nivea skin moisturizer, but one cannot be sure to find it in any one store. Nor if one finds it today should he expect it to be there tomorrow or even ever again, since heavily regulated and corruption-lubricated distribution systems provide an erratic stream of what is most profitable to importers and resellers.

Despite the *ad-hoc* ebb and flow of Russian capitalism, Russian and foreign companies alike continue to step up their efforts in bombarding the population to buy their products.

How successfully, I began to wonder, are the new im-

ages — indeed the entire new medium of advertising — swaying the minds of consumers in a country still trying to figure out whether life was better under so-called communism? Have advertisements contributed to westernization or has the medium been coopted to fit the modus operandi of society as it already existed?

Consumer Quirks

A peek inside a Moscow business telephone directory is enough to show just how much the advertising industry has taken root. Most of the major western firms are represented here, including such big-name companies as Ogilvy and Mather, Grey, and McCann Erickson.

Home-grown companies have also popped up, chiefly in the field of market research, key for understanding why Russians choose what they buy. One directory lists over 90 such firms, which conduct focus groups and carry out surveys to sound out the market and advise advertising companies on how to conduct their campaigns. Industry insiders say only ten or so market-research firms are worth their salt. One of them is Analytics, whose chief work is to carry out focus groups among potential consumers to find out why they like what they like. Another is Validata.

Talking to the founders of two of these two leading market-research companies, I was struck — as one so rarely is in Russia — by their high degree of professionalism, their understanding of the field both at home and abroad and

their willingness to talk openly about their business and advertising in general. They contrasted sharply with representatives of western companies — such as Grey — who refused to say anything about the state of advertising in Russia, let alone how their own business is doing. That is part of a larger phenomenon of reticence. Large multinational companies in Russia seem racked with bureaucratic paranoia that could have given even the highly developed Soviet variety a run for its money.

Analytics's young director, Sergei Sibirtsev, worked in New York for a number of years before returning to Moscow to set up a representative office for Macro International, a U.S. market-research firm, before striking out on his own. Maria Volkenstein, who also worked in the West before creating Validata — which, like Analytics, chiefly conducts focus groups — boasts that she has even come up with some research techniques of her own.

Eight to ten participants generally take part in the companies' focus groups and are run through a number of drills aimed at getting them to spill the beans about their preferences. One method is "personification," in which subjects are asked to imagine a product as a person and then to talk about his or her qualities. Volkenstein, whose clients include Coca-Cola and Philip Morris, says such techniques work particularly well in Russia. "In general, Russian con-

sumers are very psychologically oriented."

"If they like advertising, we want to know why they like it," Sibirtsev said of the reasons behind his research. "What are the associations behind it? What's the reasoning? What emotions does it involve?"

Those kinds of questions are key for companies wishing to sell their products in a country with seemingly bizarre preferences. One copywriter at Grey to whom I did manage to speak said that unlike the case in other countries, national pride was a major factor for rationalizing preferences in Russia. "I've seen people shut down when they see a foreign brand," she said. "Oh that's so expensive," they say. "I'm not interested in buying that; I can get everything I want from my Russian product."

The opposite is true just as often, however. An American friend who emigrated from Russia with her parents in 1989 has returned several times to stay with relatives. On one such recent trip, she purposely asked her relatives not to rifle through her luggage as they'd done in the past. This time, as always, the relatives ignored her and even criticized the gifts she'd brought to give to them and others. "'You can't give that,' one of them said about something I'd brought," my friend told me. "'It's made in China!' she said. I told her it made no difference, that the product was



still the same, but she wouldn't let up, telling me I'd embarrass myself."

Western? Russian?

More telling than whether the advertising industry shapes public opinion — it does, no matter in how corrupt a fashion — is how. That, however, is no easy task, in part because it's unclear exactly which products are Russian and which are foreign. That is precisely what companies want.

Perusing the shelves of a local food shop, for example, one would be forgiven for thinking a box of one popular brand of juice, J-7 — or Rio Grande, made by the same company — was imported. After all, both brands' boxes prominently display their names in English. In the case of the more expensive and ornate-looking latter, half the box is adorned in English, along with the words "The Luxury Selection." One would also be pardoned for thinking Doyarushka butter, purported to be made according to a traditional Russian recipe, and whose name in Russian means "little dairy maid," was actually Russian.

In fact, Russian Wimm Bill Dann produces the fruit juices in question, while none other than the New Zealand Dairy Board, or NZDB, makes the butter. Are these cases of mistaken identities? Or marketing gone mad?

Actually, different marketing strategies reflect changes



Russians tend to be highly conscious of the brands of food they buy. Domestic products are seen as the best in the world, testament to the many myths generated by the country's consumer culture.

in consumer attitudes over the past decade since the collapse of the Soviet Union and with it the ban of most foreign goods in Russia. "Under the Soviet Union, everything western was seen as prestigious," Analytics's Sibirtsev said. "There was a serious shortage of western goods." Since then, consumer attitudes about food products have swung in the opposite direction.

"Wimm Bill Dann came onto the market fairly early," "If they'd appeared later, they would have probably chosen Russian names for the same products," Sibirtsev said.



Cartons of Wimm Bill Dann's upscale Rio Grande fruit juice. When it first appeared on the shelves, it looked like a western product.

As the Russian market grows, so does so-called product positioning — that is, aiming products at certain types of consumers and income levels. One major factor companies must now take into account is precisely the growing popularity of domestic food products. That is something New Zealand Milk Products, NZDB's Russia division, did in no small way. To get its hands on research in Russia, NZDB went to Analytics in 1997, when Sibirtsev says the company considered long and hard about how to market its new brand of butter.

Over the past several years, while sales of butter from Australia and the United States plummeted, business from New Zealand grew. Why? Low price was one factor; marketing another. NZDB decided to target its Doyarushka butter toward the majority of Russians who now think Russian food products are the world's best. A number of Western companies also package their products to look like domestic brands, such as food giant Unilever, which sells Tsvey



No, that's not Kong conquering Manhattan, but a Russian bear touting his Zolotaya Yava cigarettes on a central Moscow billboard.

Rossii (Russian Flowers) soap. But perhaps the most visible example of a Western company selling brands purported to be Russian is the case of Zolotaya Yava cigarettes, produced in Russia by British and American Tobacco, or BAT, and bought by over 20 percent of smokers in Russia, according to a survey by Moscow's COMCON market-research company.

The brand's billboard advertising campaign shows the cigarettes "invading" U.S. territory. One advertisement shows a U.S. astronaut on the moon recoiling backward from a giant pack of Zolotaya Yavas lodged in a moon crater. The campaign's slogan reads "Otvetniy Udar" (Counter Strike). It is no coincidence that many Russians remain deeply conscious of the fact that the United States put men on the moon and the Soviet Union didn't. The appearance of advertisements such as BAT's coincided with a rise in nationalism and anti-Western (especially anti-American) feelings. Those sentiments reached a peak in March 1999, when NATO began a bombing campaign in Yugoslavia — seen by many Russians as a traditional Slavic ally — during which angry crowds pelted the U.S. Embassy with paint, bottles and other projectiles.

Some find BAT's tactics despicable. "BAT and other companies exploit patriotic feelings in Russia by selling cigarettes marketed as Russian but which are completely foreign," said Maria Vakotova, COMCON's public-relations director.

But Sibirtsev is not so quick to criticize such strategies. He even points out that the definition of such so-called

pseudo-Russian products as Zolotaya Yava is not clear-cut. "If products are made in Russia by Russian workers, not everyone necessarily cares if the operations are run by a foreign company," he said. "If people want to be patriots, they can smoke Zolotaya Yavas. If not, there are other brands from which to chose."

The director of the Russian Advertising Agency Association, Sergei Koptev, agreed during a telephone interview, saying he avoids making distinctions between Russian and foreign companies. "Many multinationals producing in Russia are more loyal to consumers than are Russian companies," he said. The same can be said for advertising companies. "The question of what is a Russian or a foreign company is an issue in itself," Koptev added.

Consumer Perception

The advantages for multinationals to present their products as domestic are clear.

"Russians have many myths about Russian products," Sibirtsev said. Chocolate is one example. "It's seen as the best in the world, a 'fact' no one in the West knows. One can go to any provincial town and hear people saying that the chocolate produced in that region is the best, and that foreigners come to the town precisely to buy the chocolate and take it back to, say, Switzerland."

Preference for domestic products ends with food, however. For almost all other goods, including electronic equipment such as televisions and stereos, imports are preferred.

But even marketing those kinds of products has its nuances in Russia.

"In the West, a Sony is a Sony no matter where it's made," Sibirtsev said. "In Russia, the country of origin is more important than the brand." Japanese electronic products come out on top among consumers. Korean brands are seen as middling. Chinese goods are frowned upon. "Each country has its stereotypes and its positive and negative image aspects."

As in the case of food products, advertisements exploit those images. According to the Russian Advertising Agency Association's Koptev, the market tendency is moving ever more steadily toward selling "Russian" brands. He also says "international" brands — such as Coca-Cola — are beginning to supplant pseudo-import brands such as Wimm Bill Dann's juices. At the same time, such brands won't be seen as foreign because they will be "appropriated" by Russian society. "In time, Coca-Cola will be just as 'ours' as it is in many other countries," he said.

That is a good sign for the development of the advertising industry, says Yuri Zapol, the director of Moscow television-advertising mammoth Video International. "The most important thing is that the products are good," he said. "Wimm Bill Dann, for example, stands behind its products."

That in itself is a giant step forward from the days under the Soviet Union in which quality meant nothing. Meanwhile, Wimm Bill Dann, which sells juices under various

brands including those with Russian names, said it will continue to sell under the J-7 and Rio Grande labels because they continue to sell. "The names came on the market when society suspected the quality of Russian products," said Wimm Bill Dann's director of strategic development, Olga Nechayeva. "We had to find a name that wouldn't produce a negative image for a quality product. But the brands are strong and we won't change them."

Attitudes to Westernization

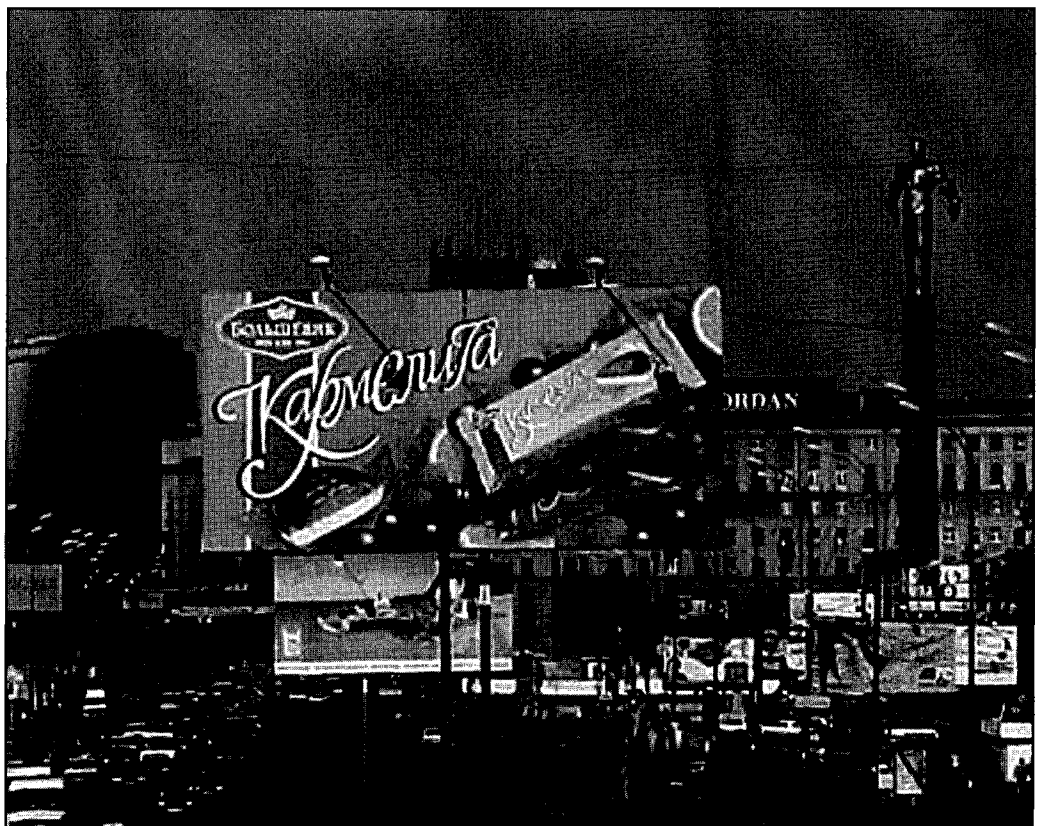
Koptev's statements about Russians appropriating foreign brands, together with Russian companies' selling of their own products packaged as western, struck me as key.

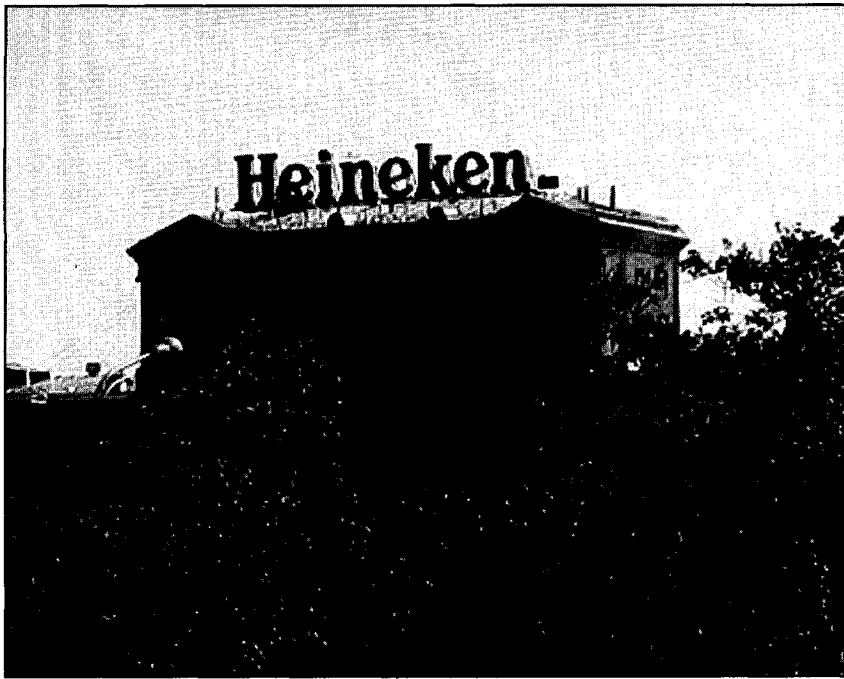
Arguments have raged throughout Russian intellectual history over whether the country is fundamentally western or eastern. Westernizers, as they are generally called, have said that Russia has been a part of Europe all along; while their opponents have said Russia's proximity to Asian countries — not to mention the fact that most of today's Russia is in Asia — means it has had a path of development separate from the West.

What does that have to do with advertising, which many would argue has almost nothing to do with what can be called "intellectual?" For one, the fact that advertising is an often shrewd means of reflecting feelings in society as a whole. In this case, whether Russia is better than the West.

While the East-West argument stands at the center of

An advertisement for Russian Red October chocolate. The name might sound Soviet, but the company's executives are cashing in on the Russian market, dominated by the perception that Russian chocolate is the best. To the right stands a titanium statue of Yuri Gagarin, the first man in space, and once a symbol for the Soviet Union's might.





Heineken This advertisement sits atop a typically Stalinist building in central Moscow. The large letters dwarf and almost belittle the structure's grandiose style.

Russian cultural identity, the actual dispute is largely moot since Russia is in many ways unique and in fact therefore neither western nor eastern. Indeed, one of the country's traits is the very ability to adapt to changing situations and assimilate outside influences into its own way of doing things.

Many examples exist in history. For one, when Ivan III (the Great) — considered the founder of the Muscovite state in the 15th century — began searching for symbols to represent the state's new sovereignty after a couple of centuries' domination by the so-called Mongol Empire, he first looked to those who had held sway in the region during those centuries.

Ivan — who quite literally built the foundations of present-day Moscow by erecting the Kremlin to replace the wooden structure that preceded it — saw himself and his entourage as successors to the khans of the Golden Horde, one of the descendants of the Mongol Empire. So the tsar, eager to provide himself with the trappings of the imperial style of the day, appropriated Golden Horde attire and called himself a "White Khan."

But times were changing. It became quickly apparent to the aspiring new regional power that terms such as "White Khan" were not recognizable to the crowned heads of Europe, into whose orbit Muscovy was beginning to fall as it grew. The Mongol names were dropped. The clothing was also out. That did not mean Ivan changed how he ruled. The Muscovite state continued to function as it had when it had looked east. Only the symbolism of its power became projected in a new language. Like any self-respecting European autocrat, Ivan sent to Italy for the new Kremlin's architects.

Back to the present day, and one interesting point the

Advertising Association's Koptev raised: Coca-Cola as a national Russian drink. Perhaps that does not sound so absurd to those who grew up with it in the West. But ten years ago, the introduction of Pepsi was heralded in Russia as a revolution in its own right. For carbonated sugar-water to now be seen as a patently Russian product shows how quickly the country has absorbed the trappings of western society.

That does not necessarily mean Russia has become any more westernized. Coca-Cola is not distributed around the country as it is in the West. Commerce is controlled to a large degree by a Byzantine bureaucracy and criminal groups who take a cut from most transactions and participants. If the Communist Party hid behind "building communism" to carry out its nefarious actions, today's capitalists put up Coca-Cola signs and herald free trade to obscure corrupt activities that have very little to do with fair commerce and resemble

very closely the incentive-stifling activities their Soviet cousins carried out so recently. It is the obscuring symbolism that has changed. Communism, too, was a western import.

There are many other examples in Russian history reflecting the country's appropriation of western symbolism in a uniquely Russian way. Most Russia watchers know Alexander Pushkin wrote about St. Petersburg as Russia's "window to the West." More telling, however, is that the term was originally meant to signify that the city was a shop window. In that understanding, St. Petersburg wasn't a window through which Russians looked at the West, but rather a city that itself contained all of Europe put on display right here in Russia. The country's capital therefore stood for Russia's very own Europe separate from the real thing.

In today's time of anti-Westernism and nationalistic fervor, how better to show up the West than to say once more "We do it better!" That Western companies, pretending to be Russian, are doing it is perhaps a new twist.

Research Application

To a large degree, the question of whether capitalist consumerism has taken root in Russia is moot. Russians are deeply concerned about which products they buy — or are given. At the same time, the advertising industry is working hard to capitalize on consumer perceptions, and top-level research and analysis is taking place.

Making use of the information, on the other hand, reflects what's generally wrong with the Russian brand of

capitalism. Western companies and the tiny handful of Russian ones hitting the big-time among consumers understand that knowing the market helps them craft appeals targeting consumers' desires and fears. However, many Russian companies with smaller budgets and less grand visions of market domination see research as something to be carried out in name only.

Industry insiders say many companies have a long way to go to function like their counterparts in the West. "There is a lot of bad positioning by Western companies as well as Russian ones," Sibirtsev said. "Gathering data is one thing. The problem is that many companies don't interpret market-research information correctly, and that task is at least half the job.

"Russian companies *have* begun to spend more on market research," Sibirtsev admitted. "But the amount is still very small." For example, Russian companies make up only 20 percent to 25 percent of Analytics' client base. "When companies come onto the market, they need information," Sibirtsev added. "But they're not prepared to pay very much for it." Analytics conducts focus groups for around \$1,200, whereas other companies offer them for as little as \$400. "The companies don't understand they're getting something very different from what we offer," Sibirtsev said. "And bad information is worse than no information."

Initial negative encounters with sloppy market research also sometimes scare off small companies without the resources to conduct ongoing projects. As opposed to larger firms that can track profit increases and sequence them in comparison to money spent on information gathering, smaller companies often do not see direct benefits of conducting market research. Corruption also affects the quality of research. Common cases within companies include embezzlement of cash allocated for re-

search, resulting in cheaper and inferior services.

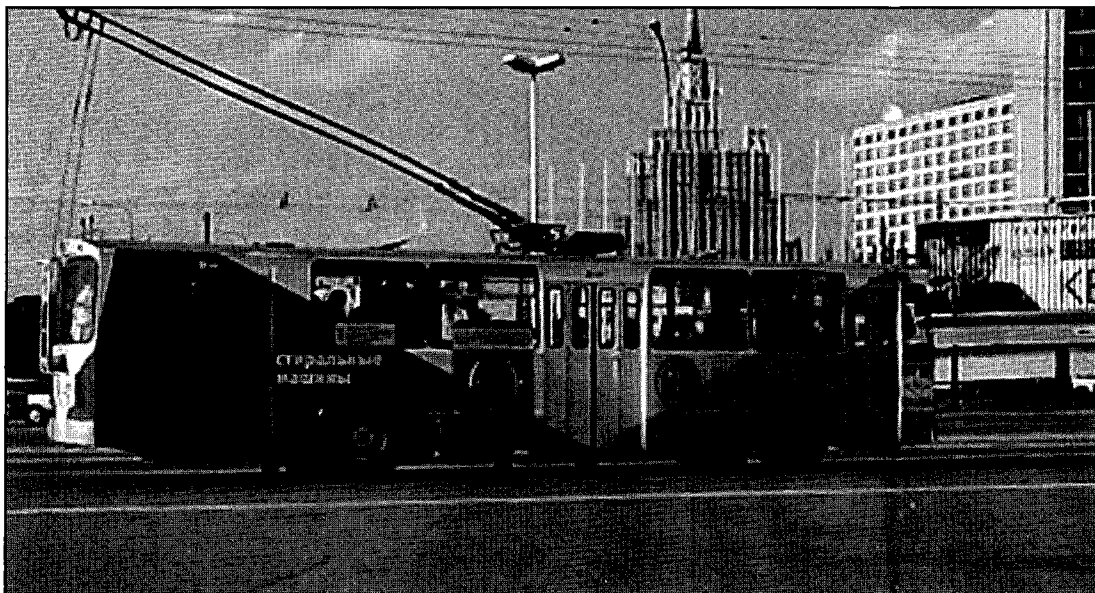
Farther upstream in advertising production, the situation gets worse. Distribution to the most valuable advertising medium, television, is dominated by a few companies that usually have direct or indirect connections to the television companies themselves. One prime example is ORT television, the country's most-watched. While the channel is owned by the state, in fact one shareholder — controversial billionaire Boris Berezovsky, who is also unofficially a top Kremlin adviser — can say who sells the channel advertising. It is no mistake that advertising giant Video International Group, co-headed by a former "reformer," ex-Privatization Minister Maxim Boycko, dominates the television market.

Advertising Gaffes

As is true everywhere in the world, slick advertising campaigns in Russia don't always work. One example of a Russian company's misdirected advertisement is a campaign for Zhiguli cars. Mimicking Western counterparts, the ads showed the obsolete, 30-year-old model as a prestigious commodity rather than concentrating on its cheap price and ease of maintenance.

"The advertisement would work for a Toyota Land Cruiser in the United States, but not for Zhigulis in Russia," Sibirtsev said. "If the advertisement was tested, it means its producers were working from bad information," he added. "If not, whoever picked it was an idiot."

Western companies also tend to make mistakes by launching advertising campaigns without adequately testing whether they correspond to Russian perceptions. Colgate toothpaste, which occupied a large part of the market early last decade, lost out precisely for that reason. The company played advertisements showing tooth brushing



Public transportation hasn't escaped the advertising boom.

as a pleasant, positive experience. What could have been wrong with that? In this case, failure to understand that most Russians see tooth brushing as a necessary evil.

Procter & Gamble's successful Blend-a-Med toothpaste, on the other hand, ran ads showing doctors exhorting viewers to brush in order to reduce tooth trouble and visits to the dentist. While focus groups showed viewers generally disliked the Blend-a-Med campaign — unlike the Colgate advertisements, which carried approval — consumers nonetheless bought Blend-a-Med.

"Advertisements don't have to be liked," Sibirtsev said sagely. "They have to sell."

Crisis effects

One New Russian (a member of the country's *nouveau-riche*) bumps into another on the street, a recent joke has it.

"Ivan! Great to see you!" says one to the other. "Heeey! Nice tie you've got there."

"Oh thanks," replies his acquaintance. "You like it? Christian Dior. I just spent four hundred dollars on it."

"Really? Well then, you're a fool!" replies the other. "I just bought the same one for a thousand!"

To some, that kind of attitude is no laughing matter. In 1998, a major importer of liquor sold brandy for \$160 a bottle. Sales remained healthy even four months after the country's ruinous financial collapse in August 1998 — but then suddenly dropped. Was it time to finally slash prices? Not exactly: the problem was that a competitor had introduced a \$400 brandy, at a price that commanded more attention among prestige-hungry, high-end buyers.

Those kinds of consumers were among the few left standing after the crisis, when the country's nascent middle class took a major blow. While the middle class has begun to re-emerge, the market is still largely driven by the tiny minority with scads of cash and a desire to find new ways to spend it.

The crisis affected advertising dynamics in other ways, too. Before the financial collapse, foreign and Russian companies rushed to get a piece of the country's growing consumer-goods market last decade, and hundreds of advertising, market-research and public-relations companies began cropping up, seeking to cash in on an advertising industry whose profits grew to an all-time high of \$1.43 billion in 1997.

That giddy ride ended with the crisis. A ruble devaluation and ensuing high inflation simultaneously priced most imported goods out of the market, while an implosion of the banking sector contributed to wiping out many Russians' savings. Unsurprisingly, the economic crisis that followed also hit the advertising market, whose turnover came

to \$760 million last year, according to the Russian Advertising Council.

"In the six months to a year following the crisis — practically all of 1999 — advertising significantly lost importance," said the Russian Advertising Agency Association's Koptev, who is also head of the DMB&B advertising agency. "At the same time, consumers became extremely price-conscious."

Low price tags became the key factor for selling products among the bulk of the population during the crisis, when price wars made companies significantly force down the cost of their products. "That's no longer possible," said Koptev. "Prices can't go any lower."

But the crisis did not mean food-products and consumer-goods markets also contracted. On the contrary. The high cost of imports opened a window of opportunity for cheaper domestic producers. That created a glut of new products coming onto the market. As long as prices remained competitive, companies did not have to spend on creating images for the new brands popping up.

"They can't even really be called brands, since having a brand name also entails communications and marketing," Koptev said, adding that the market will no longer be able to support the proliferation of many new "brands."

As competitors begin to fall this year, advertising will begin to regain its importance, Koptev said. Some companies, however, said they did not treat advertising differently during the crisis. Wimm Bill Dann's Olga Nechayeva agreed that price was an important factor. "But if a product is to be long-lived and have loyal consumers, one cannot stop advertising during crisis periods despite the fact that budgets are smaller," she added.

Market statistics

Today, more than 60 percent of overall spending on advertisements comes from multinational companies. Procter & Gamble was last year's biggest spender, doling out \$105 million. Meanwhile, smaller Russian companies cannot afford to mount significant ad campaigns, leaving the market largely to mobile telephone operators and food producers such as Wimm Bill Dann.

Despite its recovery since the crisis, however, the advertising market still remains small. Companies spent \$5 per reachable person on television advertising last year, as opposed to \$250 to \$300 in Europe. While television has the broadest reach, with an audience of 90 to 95 percent of the population, smaller Russian companies tend to advertise in print and on the radio, which has a mixed audience of lower-income listeners and higher-income car owners.

Television is by far the most desired and expensive advertising medium, with Western companies providing 80 percent of that market, according to Koptev. Meanwhile,



August 1998's Russia's economic crisis ate most Russians' already meager savings. Industry insiders say advertising lost its importance in the many months that followed.

60 percent of outdoor billboards advertise Western products. That dynamic changes with print-media advertising, which is considerably cheaper. Russian companies take up 80 percent of that market and 90 percent of the radio advertising business.

Meanwhile, advertising sales on the Internet remain tiny. "Russia has so far not been included in the [advertising] boom, in which Yahoo, whose turnover is in the billions, gets 70 percent to 80 percent of its profits from advertising," Analytics' Sibirtsev said. "Most advertisers in Russia are small companies not up to real market research."

Advertising with a Difference

As effects of the crisis finally subside, advertising companies say they are increasingly upbeat over growth in Russia — at least judging by the fact that the industry saw greater profits last spring than expected. Advertising has more than taken root here. It has plastered Moscow. At the

same time, the country has professionals who are competent and stand at the forefront of an industry that continues to develop. The days in which the first jarring ads, such as Marlboro's, started cropping up are long gone.

However, Russian advertising is clearly not just an analog of the western industry, and that speaks volumes about the country's developing attitudes. While local advertising feeds off common myths, it also reinforces them and contributes to the new idea of what is or should be Russian. The dynamic is chiefly a reaction to the West, since products are either touted as western or Russian — meaning better than western.

Images produced by commerce in Russia therefore cannot but indirectly contribute to an ongoing debate over Russia's place in the world. In that, they are symptomatic of Russian society's process of defining itself, in no small part an eternal struggle to deal with the West and its omnipresent influence. □

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