

THEORETICAL AND METHODOLOGICAL APPROACHES TO THE STUDYING THE “FREEDOM OF SPEECH” CONCEPT

Aleksei Yuryevich Bykov* Elena Savova Georgieva* Daria Anatolevna Puiu*
Stanislav Sergeevich Lukin* and Iuliia Valerievna Puiu**

Abstract: Present article attempts to reveal the approaches to describing the “freedom of speech” concept. It focuses of the theoretical directions that explain the specifics of its development and realization. One of the key messages of the work is the statement that the concept is related to cultural, political, ideological and other affirmations and processes, which are common for the society. Therefore, freedom of speech is addressed as a political, philosophical, legal, ideological and religious phenomenon. Methodology of the study is based on the analysis and generalization of a system of historic and modern documents that reveal various aspects of freedom of speech in the context of social and political processes. The use of structural-functional and systemic approaches allows revealing the dependence of the phenomenon’s separate elements (comprehension and various manifestations of freedom of speech) from its place and functions in the system of social relations. The results of the study allow making the conclusions that the ideas about freedom of speech have developed under the influence of philosophical, ideological, religious, legal and political traditions, which were established during the historical development of the society. Development of the current situations in different countries and national-cultural formations is still seriously affected by these traditions. They have to be considered during the development of the parameters for conduction of studies, creation of ratings and evaluation of realization of freedom of speech norms.

Keywords: Freedom of Speech, Freedom of Press, Theoretical and Methodological Approach, Philosophical Concepts, Ideology, Liberalism, Conservatism

INTRODUCTION

Describing the content of any concept implies comprehending the meanings that it includes. It is usually possible to establish the main meaning of the concepts by using the reference literature. Working with such range of references is reasonable if it is necessary to reveal the semantic range of the studied statements. This step might become the starting point for the further analysis aimed at specification and more detailed description of a certain phenomenon. Using this approach in studying the “freedom of speech” category is rather appropriate.

However, it is important to consider that the freedom of speech phenomenon is multi-level, complex and is related to different aspects of social reality. Therefore, a mere description of lexical characteristics of the collocation (lexicographical

* Saint-Petersburg State University, Universitetskay naberejnay 7/9., Saint-Petersburg, 199034, Russia.

** Herzen State Pedagogical University of Russia, 191186, St-Petersburg, Russia, Naberejnay Moiki, 48.

analysis) would be limited and would not allow showing other manifestations of the concept, which are important for social processes. Approaches to interpreting this phenomenon have experienced certain changes throughout the history. Its comprehension starts from early remote ages. Thorough reflection on the freedom of speech can be found in the works of ancient philosophers. The freedom of speech concept establishes gradually, reflecting the specifics of a certain historical period. The analysis should consider its connection to a number of social systems, schools, processes, and therefore, should address the concept as a political, philosophical, legal, ideological and religious phenomenon. This would define the theoretical and methodological approaches to studying freedom of speech.

Currently, along with the theoretical approaches, practical approaches, which allow evaluating the level of development of the freedom of speech institution in different societies, are developing. This direction is promising, however, the methods that are used within these processes require critical comprehension in order to exclude subjective evaluations of the situation.

Analysis of the described directions would allow pointing out the approaches to studying the freedom of speech concept, which have already developed and have gained recognition, or which have just started to be used but have promising perspectives of further development.

METHODS

The work focuses on the historical specifics of the freedom of speech concept establishment, the description of its essential characteristics and its manifestation in different conditions. The revealed markers would refer to the essential characteristics of the phenomenon and define the main directions of studying it.

Using the historical method allows analyzing the phenomenon on different stages of its development, pointing out the significant changes that it experienced on each stage and conducting comparative analysis. Comparison can be conducted upon various parameters, and therefore, there are different forms of the historical method. One of them is corresponding comparison (it implies revealing the nature of the study object and correspondence of its unique manifestations on different stages). Another example is comparison that requires the analysis of various influences of the studied object. Within the present work, using such method would allow revealing the society's attitude towards the issues of the freedom of speech on different stages of development. Manifestations of the concept in the conditions of certain political regimes, ideologies and public moods can point to general approaches to comprehending freedom of speech, or to the presence of different interpretations.

During the description of the empiric material, it is reasonable to use such method of the formal logics, as analysis. This method implies in-depth comprehension of the connections between the elements, in which the studied object

is divided (obviously, it is an abstract mental division). For example, it is possible to separate several components within the freedom of speech concept: meanings – lexical meanings, involvement in various social processes and structures (freedom of speech as a political phenomenon, ideological or philosophical concept), forms and ways of limiting freedom of speech, etc.

Revealing the dependence of freedom of speech from the social institutions and conditions of social development allows creating a theoretical causal model. Such model points to the nature of causal relationships. This means that changes in a parameter of one phenomenon imply the transformation of the characteristics of another concept. Certainly, such model can reflect only the general tendencies, considering multiple interactions and connections within complex social processes. However, creating it would allow establishing significant causal links and noting their robust (or temporary) nature.

It is possible to use these approaches independently from each other. However, their comprehensive use would increase the probability of obtaining more complete and valid results. In order to confirm the theoretical conclusions on the following stage of the study, it is recommended to refer to the analysis of a wider range of empirical data.

RESULTS

The obtained results allow revealing a few directions of studying freedom of speech. They include theoretical approaches that imply generalization of the data from various sources and empirical material, establishment of certain patterns, interpretation of the results and statements of a certain theory. Practical studies, which constitute another group, are aimed at solving practical tasks and overcoming the social problems.

Theoretical approaches: lexicographical analysis

There are certain specifics of working with concepts that contain two words, or more. Lexicographical analysis implies revealing the meanings of the whole collocation, as well as of its components. Studying the elements of the concept allows conducting detailed analysis and revealing multiple semantic specifics, which can be missed by a researcher with a more general approach. However, it is necessary to consider that the integration of meanings of separate words does not always correspond to the range of meanings that is represented by the whole collocation. For example, the result of a mechanical adding of the interpretations of the concepts of “freedom” and “word” might not completely correspond to the range of meanings of the integral collocation of “freedom of speech”. An integral phrase can take in only a part of the concepts, and equally, a completely new meaning can occur as a result of integration of two words in a construct.

The freedom of speech concept implies “absence of limitations or constraints in something”, as well as “the state of somebody who is not in custody or in restraint” (Ozhegov & Shvedova, 2006). Free behavior is incompatible with “obeying someone’s will” (Dal, 1882). English-American language culture uses the concepts of “freedom”, “liberty”, “independence” (Baranova, 2010). According to the compilers of the British defining dictionary – Macmillan English Dictionary, *freedom* implies “the right to do what you want, make your own decisions, and express your own opinions” (Macmillan English Dictionary for advanced learners of American English, 2006); *liberty* is “the freedom to think or behave in the way you want and not be controlled by a government or by other people; a particular kind of freedom, especially one that you have a legal right to” (Macmillan English Dictionary for advanced learners of American English, 2006); and *independence* is “freedom from control by another country or organization, the ability to make decisions and live your life free from the control of other people” (Macmillan English Dictionary for advanced learners of American English, 2006). American reference literature the lexical meaning of these concepts is interpreted in a similar way. According to Webster’s New Dictionary, *Freedom* – is a state or a quality of free existence, *Liberty* – is freedom from slavery or incarceration, a right, a privilege, freedom; *Independence* – is a state of independence, freedom from control of others (Webster’s New World Dictionary of the American Language, 1982).

“Word” usually means a unit of speech, of language, which has a certain meaning and “serves for naming a separate concept” (Ozhegov, 1986). It can be presented by “a certain system of sounds, a system of visually-perceived signs and images of articulation” (Mescheryakov & Zinchenko, 2003). In the modern Russian language, this concept sometimes also carries such meanings, as “speech”, “presentation”, “sentence”, “promise”. A word is directly related to the thinking process and person’s activity. Social sciences focus on the effects of word’s influences on separate people and on the society. Abusing the power of words evokes a response reaction in the form of introduction of limitations. This contradicts the need to maintain the natural human freedoms. This problem has also reflected in the lexical meaning of the freedom of speech concept, which components were described above.

The most common explanation of freedom of speech in the reference literature is “the right to express any opinion in public without censorship or restraint by the government” (The American Heritage Dictionary of the English Language, 2011). In many dictionaries or reference books, statement of the right of free expression of an opinion is usually followed by references to responsibility or limitations. For example, the Dictionary of Law notes that “the right to express information, ideas, and opinions free of government restrictions based on content and subject only to reasonable limitations (as the power of the government to avoid a clear and present danger) especially as guaranteed by the First and Fourteenth Amendments to the

U.S. Constitution” (Merriam-Webster’s dictionary of law, 2016). The majority of the countries in the world prohibit the abuse of freedom of speech “for appealing to violent overthrow of the legal government, disclosure of national security, or other legally protected, information, for instigating to crimes, for stirring national, racial, religious or other conflicts, insulting and slandering other people, offending public morality” (Dodonov et al., 2003). In state of emergency or war, other constraints can be introduced.

In English language, “free speech” has the same meaning as the “freedom of speech” concept.

Theoretical approaches: studying freedom of speech in the context of social processes

The freedom of speech phenomenon is significant for various fields of social life. It is necessary to consider that ideas about freedom of speech correspond with society’s attitude towards a more general phenomenon – towards freedom. In this hierarchy, “freedom of speech” is often a narrower concept, it is a subordinate category (attitude towards freedom of speech develops with the attitude towards freedom). Perception of freedom was controversial in different societies and on different historical stages. It was interpreted in dependence from the leading philosophical affirmations, ideological approaches, legal norms, religious views, political moods, etc.

A definition of freedom has already been proposed by the ancient thinkers. It is conventionally considered that initially, in Greek and Roman culture, the concepts similar to the modern concept of freedom did not have a philosophical significance. The thinkers discussed, for example, such categories as “necessity” or “destiny”. As we can hypothesize now, that implied a person’s possibility of choice, *i.e.*, freedom to act upon one’s own wishes, according to one’s own will, or to accept life as it is and to follow the predestined will. Concepts of “being free” and “free will” emerged. The researchers relate their use, for example, with the works of Homer (Parkhomenko, 2012).

Consequently, philosophical approaches to interpreting freedom *per se* developed in the later ages. One of the directions of philosophical thinking was related to the fact that freedom was addressed through the actions and capabilities of an individual (so-called individual freedom). Another direction considered external factors of nature and the surrounding world. Other more direction was related to comprehending freedom within society, rights, polis, norms and laws created by humans themselves. During the Middle Age, Renaissance, New and Newest Age, philosophers continued, and continue still, discussing the same categories – “human”, “Divine”, “law”; however, the focus in approaches to evaluating human freedom and capabilities change.

Development of ideological trends in XIX-XX centuries actualized discussions about freedom. Discussion of the concept of freedom gradually exceeded the frames of directly theoretical constructs, which were common for philosophical discussions. Serious works, which directly relate attitude to freedom with social structure, appeared. Different comprehension of the principles of freedom and frames of free behavior and thinking, as well as different responsibility for breaking the established rules were set within the main ideologies – liberalism, conservatism, Marxism and social-democracy, anarchism. For example, in liberalism, the main idea is self-sufficient value of individual's freedom in economic, political and other fields of social life. Followers of conservatism specifically focus on responsibility and, consequently, on possible limitations of freedom in order to avoid its abuse. Conservatism starts from the idea that people are not equal by their nature; it declares the need to balance people's capabilities, to limit any actions that lead to chaos. Supporters of socialistic school admit the possibility of limiting individual freedoms in order to maintain collective interests (this statement corresponds with the well-known formula that "freedom is a conscious need to obey the society"). Social-democratic ideology also has a negative attitude towards economic freedom, because different reward for work and competitive conditions are viewed as predispositions of material success and inequality. Anarchism is characterized by a specific attitude towards following the principles of equality: free wishes are realized in the conditions when individuals are equal in relation to each other. It postulates that the state of freedom is impossible with external control. Positive freedom (self-actualization without external limitations, possibility to organize one's own life in agreement with other free people) prevails over negative freedom (independence from any limitations and prohibitions). Freedom does not end where another person's freedom begins, "one person's freedom implies another person's freedom and cannot be limited by it" (Damier, 2016). During interaction, people find collective solutions to the problems.

Religious factor is also significant in the development of society's ideas about freedom and freedom of speech. The experience of world religions (Christianity, Islam, Buddhism), which are common among the people of different countries and continents, vividly illustrates this statement. These religions usually protect the principles of freedom of conscience, choice, self-expression, etc. Obedience to the Almighty God occurs in the context of the freedom paradigm. However, religious confessions establish rather defined frames of the abovementioned freedoms. For example, "Islam does not approve of Muslims changing their religious affiliation" (Ovechkin, 2007). In Islam, freedom corresponds with moral obligations and responsibility: respect to other people, their norms of behavior and values. Personal freedoms are related, for example, to the limited right to travel, when there is an obvious profit for a person himself and for other people, or prohibition of intruding

in the private life. Christian theological works emphasize spiritual freedom, which is gained during the right life, represents the highest value and is opposed to the external freedom. “External” freedoms always have to be limited. An example of these limitations might be the Biblical commandments that prohibit violence, theft, etc.

Political freedoms predefine the specifics of person’s interaction with the political system and governmental political institutions. They represent an integration of rights and capabilities, which are legally fixed and which guarantee individual’s participation in the political life. Political freedoms usually include freedom of conscience, speech and print, freedom of assembly and manifestations, participation in public organizations, etc. Limitations of such freedoms are usually stated in the laws. It is necessary to point out that the content and frames of political freedoms can be predefined by ideology, religion and public moods that dominate in the society and country on a certain historical stage.

The described factors had a significant effect on the development of ideas about the freedom of speech concept. They define the main approaches to studying this phenomenon and allow revealing its essential characteristics.

The group of practical studies

Practical studies of freedom of speech correspond with the possibility of using their results in practice and with making practical decisions. They are conducted by appropriate mercantile and non-profit organizations that either get a certain order, or follow their mission, which is defined in the establishing documents. The most famous studies of freedom of speech in the global scales are freedom of speech ratings, which are annually published by recognized foundations and organizations. The method used by these structures has been validated for many years. It is the basis for the most significant and currently demanded applied approaches to studying the freedom of speech concept on global scale.

Reporters Without Borders organization conducts the World Press Freedom Index study. The rating is compiled on the basis of the survey of representatives from different countries – journalists, mass media representatives and other specialists. As the key criteria (approaches) of the evaluation of the freedom of speech level, the organization names pluralism, media independence, environment and self-censorship, legislative framework, transparency, development of media infrastructure and abuses of journalists’ work (World Press Freedom Index: Detailed methodology, 2016). The respondents rate each of these indicators on a 100-point scale.

International non-profit organization “Freedom House” annually publishes the study of the state of mass media and Freedom of the Press rating, which rates the countries by the freedom of speech level. Questions and evaluative indicators, which

are proposed to the experts, address several main categories. They include studying the *legal environment* – laws and normative acts that affect mass media and establish the limitations of their activity. They focus on the *political environment* category – it evaluates the level of political influence of the mass-media messages content, independence of editorial teams, etc. It addressed *economic environment* of mass media functioning. In this case, this implies structure of property, transparency of business conduction, concentration of actives and a number of other characteristics (Freedom of the Press Methodology, 2016).

Among other recognized studies there are Media Sustainability Index (2016), issued by IREX, as well as African Media Barometer Country Reports (2016), prepared by the Friedrich-Ebert-Stiftung Foundation.

Methodology, which is used in the conduction of these studies, often implies respondents' subjective statements of evaluation (e.g., the respondents are asked to evaluate the level of self-censorship in the mass media). The aim of such surveys of understandable: they make an attempt to complete the quantitative data with evaluative statements. However, because of this, the final results can be subjective to a large extent. Moreover, normative nature of stating a number of problems can raise questions. For example, authors of the study initially ascribe negative characteristics to governmental property in the mass media, or governmental grants to private mass media. This method can be criticized: obviously, it is reasonable to evaluate the described criteria with consideration of cultural and political traditions of society development.

The method of measuring the freedom of speech level, which was proposed by UNESCO some time ago, was more thought-through; subjective evaluations and normative nature were minimal. The main parameters of the method are reflected in Media Development Indicators. They were developed during international consultations, which began in 2006 during the 25th session of IPDC Intergovernmental Council. These categories include the following statements:

1. A system of regulation conducive to freedom of expression, pluralism and diversity of the media;
2. Plurality and diversity of media, a level economic playing field and transparency of ownership;
3. Media as a platform for democratic discourse;
4. Professional capacity building and supporting institutions that underpins freedom of expression, pluralism and diversity);
5. Infrastructural capacity is sufficient to support independent and pluralistic media (International Programme for the Development of Communication, 2016).

Initially, it was accepted that the use of this method in each specific case has to consider national specifics of the mass media development and originality of a certain mass-media system. The studies were conducted in Bhutan, Bolivia, Columbia and other countries (National MDI assessment reports, 2016).

The revealed theoretical and methodological directions can be used as a basis of the studies of the freedom of speech concept.

DISCUSSION

It is necessary to take into account that the range of scientific approaches presented in the work is not exhaustive. We would like to additionally describe certain groups of approaches, which are discussed and which produce new developments of theoretical and applied nature.

The position of the present article's author is closest to the approach of the researchers, who relate the level of freedom of speech development to the certain characteristics of the society. This can include the influence of historical and political processes, social institutions, legal norms and other factors on the phenomenon. V.N. Kudryavtsev (2006) proposes following the civilizational approach in the freedom of speech evaluation. The author notes that, by using this method, it is possible to highlight the specific life conditions of East and West. Understanding the traditions would allow stating a corresponding attitude towards the freedom of speech institutions in the countries of South-Eastern Asia and Western Europe. The British researcher Eric Barendt (1985) addresses the issue in the legal context. He gives a characteristic of legal systems in the USA and Eastern Europe, which have different attitude towards the realization of separate freedom of speech norms, despite the unity of many principle statements. He explores the legal systems of the United States of America, Great Britain, Federative Republic of Germany, as well as the legal norms of the united Europe. Defamation law is used as an example of specific interpretation.

Legal approach is one of the most well-developed, especially in the United States of America. The subjects of the works in this field is variative, however, a significant part of American authors' publications addresses the First Amendment of the United States Constitution. Scientific discussions reveal the positions of their participants about the realization of the freedom of speech doctrine in the conditions of democracy, and simultaneously point to the specifics of the paradigm manifestation within a corresponding social system. For example, at the end of the first – at the beginning of the second decade of the XXI century, American scientific circles discussed the theories of “participatory democracy” and “individual autonomy”, which concerned the comprehension of the freedom of statements. The discussion was initiated by James Weinstein, Amelia Lewis Professor

of Constitutional Law, Sandra Day O'Connor College of Law, Arizona State University. He described some details about the participants and the content of the discussion in *Virginia Law Review* journal (2011a). The paradigm of participatory democracy implies the involvement of a large part of the society in the political activity. Moreover, the theory views democracy as a general principle of organizing life, which is not limited only by the field of politics, but is also true for any other field of human activity. Freedom of speech provides realization of the proposed approach. Such model of American democracy was supported by James Weinstein (2011b), Robert C. Post (Post et al., 2000), and others. Individual autonomy implies following values and priorities, which a person establishes for himself independently from external influence. The issues of using freedom of speech with consideration of individual autonomy principles became the subject of studies by Edwin Baker, Seana Valentine Shiffrin, etc. The materials of the "Individual Autonomy and Free Speech" discussion are presented in the issue of Law School of University of Minnesota (Constitutional Commentary, 2011).

The discussion of the key questions about more demanded and reasoned approaches to studying the freedom of speech concept still remains significant. Traditionally, the positions of supporters of established philosophical, political-studies and legal paradigms are strong. They usually focus on comprehending the reasons of the need to maintain the freedom of speech standards, as well as on the possible scenarios of future development of the situation in case of establishment or disregard of this paradigm. In this case, the list of authors can be rather abstract. Among the researchers, who focused on philosophical, social and legal aspects of the issue, it is possible to refer to Merris Amos, Jackie Harrison and Lorna Woods (Amos et al., 2012), Alan Haworth (1998), Robert Hargreaves (2002), Anthony Lewis (1991), Jonathan Rauch (2013), and many others. The authors of other techniques design normative sociological models. They address the freedom of speech principle as a necessary norm of the modern democracies. Sociological theory is among such approaches. Its supported Harry Melkonian notes that freedom of speech, as well as its limitations, is a consequence of social development. According to him, any unreasonable attempts to decrease or expand this freedom can disrupt the way of social development and bring unbalance (Melkonian, 2012).

It is reasonable to note the work on generalizing theoretical paradigms of journalism, which was conducted by the researchers from the School of Journalism and Mass Communications of Saint-Petersburg State University. Sociological, philosophical and political methods, which are studied by I.N. Blokhin (2016), V.A. Sidorov (2016), Z.F. Khubetsova (2016), S.B. Nikonov (2013), R.V. Bekurov (Bekurov et al., 2015) and J.S. Danilova (Danilova et al., 2015), can be also used in the analysis of the freedom of speech phenomenon.

CONCLUSION

It is obvious that the modern science has not reached a consensus on which approaches to studying the freedom of speech should be considered higher-priority. It is largely related to the fact that the methods complement each other, and their comprehensive use allows revealing different aspects of the studied phenomenon. Moreover, it is necessary to consider that the researchers prefer the techniques, which solves the tasks of their study in the most efficient way.

A practical approach to studying freedom of speech has begun to develop recently. The studies of freedom of speech levels in different countries are conducted, terminological system is being updated, attempts to reach a consensus on the interpretation of legal norms, which establish the principle of free expression of opinion, are made. These factors demonstrate the significance of the problem for many aspects of the social life.

Wide variety of theoretical and methodological approaches to studying freedom of speech points to the researchers' attention towards this subject. Many paradigms described in the scientific literature are related to different fields of social life and concern different aspects of the phenomenon. Many of them become subjects of discussions, and a number of theories is still being developed. Due to the development of theoretical foundation and emergence of new techniques, one of the prospective directions of work might be the creation of a detailed classification of the paradigms, definition of new criteria for analysis and generalization of the material, based on a wider range of data about different countries of the world.

Studying freedom of speech in the context of social processes shows the dependence of the phenomenon from various manifestations of social life; a causal relationship between them is possible. Causal link implies that changing one parameter leads to changing the other. It is thought that direct causal relationships occur under a number of conditions: cause and consequence change together (covariation relations); cause precedes the consequence; there is a possibility to identify the causal link between the hypothesized cause and consequence; covariation does not occur because of a third factor (Manheim & Rich, 1997). In case of non-obvious causal pattern, it is reasonable to design a causal model regarding the "freedom of speech" category. This would allow summarizing the necessary data and reflect the existing connections.

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