



Broadcasting
Board of
Governors



Annual Language Service Review Briefing Book





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Preface

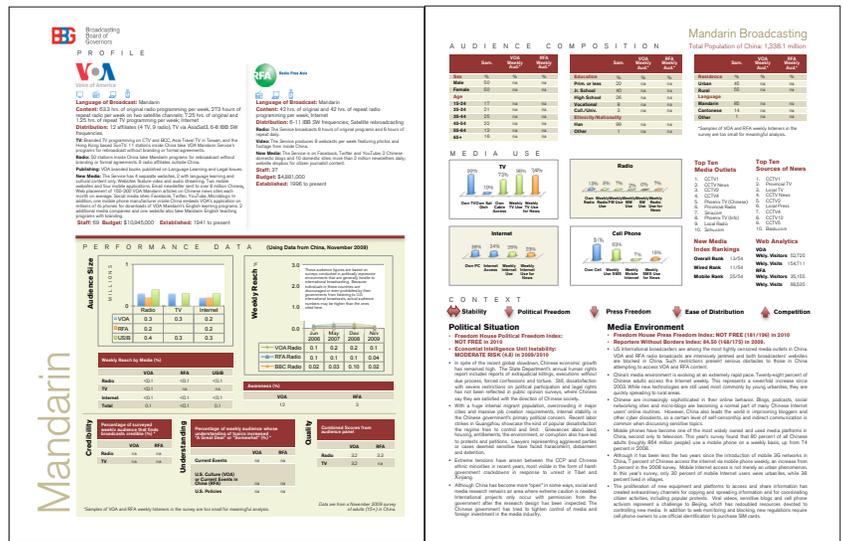
This is the briefing book for 2011 in support of the BBG's congressionally mandated, annual review of all broadcast language services – the process known as Language Service Review.

The book provides BBG governors, managers and employees with quick access to core performance and other data for all language services as well as relevant data and information regarding the media and political environments in which the services operate. While such information is already available across the agency through routine research reports, there is added value in a ready reference document.

This marks the ninth year that the BBG has produced some version of this book. This two-page layout replaces the previous one-page design, and many data points expressed as numbers before are now represented in graphs and charts. All this aims at making the book simpler and easier to use.

It bears noting that the BBG does not attempt to evaluate the performance of the language services based only on a few indicators, regardless of their relevance. The BBG research program yields a host of other data that are fully factored into both program reviews at the broadcast entities and the Language Service Review conducted by the Board.

The Language Service Review Briefing Book is designed to give an overview of the broadcasting environment, programming, and performance of each language in which the BBG broadcasts during the fiscal year under review. This section will explain what is measured and reported in each section and how to interpret the graphic indicators. All survey data are current through FY2011 while profile and context sections are current through Spring 2012.



Profile Section

A Media Icons identify the platforms for which the relevant language service produces content.



P R O F I L E

Language of Broadcast: Mandarin
Content: 63.3 hrs. of original radio programming per week, 273 hours of repeat radio per week on two satellite channels; 7.25 hrs. of original and 1.25 hrs. of repeat TV programming per week; Internet
Distribution: 12 affiliates (4 TV, 9 radio), TV via AsiaSat3, 6-8 IBB SW frequencies.
TV: Branded TV programming on CTV and BCC, Asia Travel TV in Taiwan, and the Hong Kong based SunTV. 11 stations inside China take VOA Mandarin Service's programs for rebroadcast without branding or formal agreements.
Radio: 50 stations inside China take Mandarin programs for rebroadcast without branding or formal agreements. 9 radio affiliates outside China.
Publishing: VOA branded books published on Language Learning and Legal Issues.
New Media: The Service has 4 separate websites, 2 with language learning and cultural content only. Websites feature video and audio streaming. Two mobile websites and four mobile applications. Email newsletter sent to over 8 million Chinese. Web placement of 150-200 VOA Mandarin articles on Chinese news sites each month on average. Social media sites: Facebook, Twitter, YouTube, Microblogs. In addition, one mobile phone manufacturer inside China embeds VOA's application on millions of its phones for downloads of VOA Mandarin's English learning programs. 2 additional media companies and one website also take Mandarin English teaching programs with branding.
Staff: 69 **Budget:** \$10,000,000 **Established:** 1941 to present

RFA Radio Free Asia

Language of Broadcast: Mandarin
Content: 42 hrs. of original and 42 hrs. of repeat radio programming per week; Internet
Distribution: 6-11 IBB SW frequencies; Satellite rebroadcasting
Video: The Service broadcasts 6 hours of original programs and 6 hours of repeat daily.
Video: The Service produces 8 webcasts per week featuring photos and footage from inside China.
New Media: The Service is on Facebook, Twitter and YouTube; 2 Chinese domestic blogs and 10 domestic sites; more than 2 million newsletters daily; website Dropbox for citizen journalist content.
Staff: 37
Budget: \$4,881,000
Established: 1996 to present

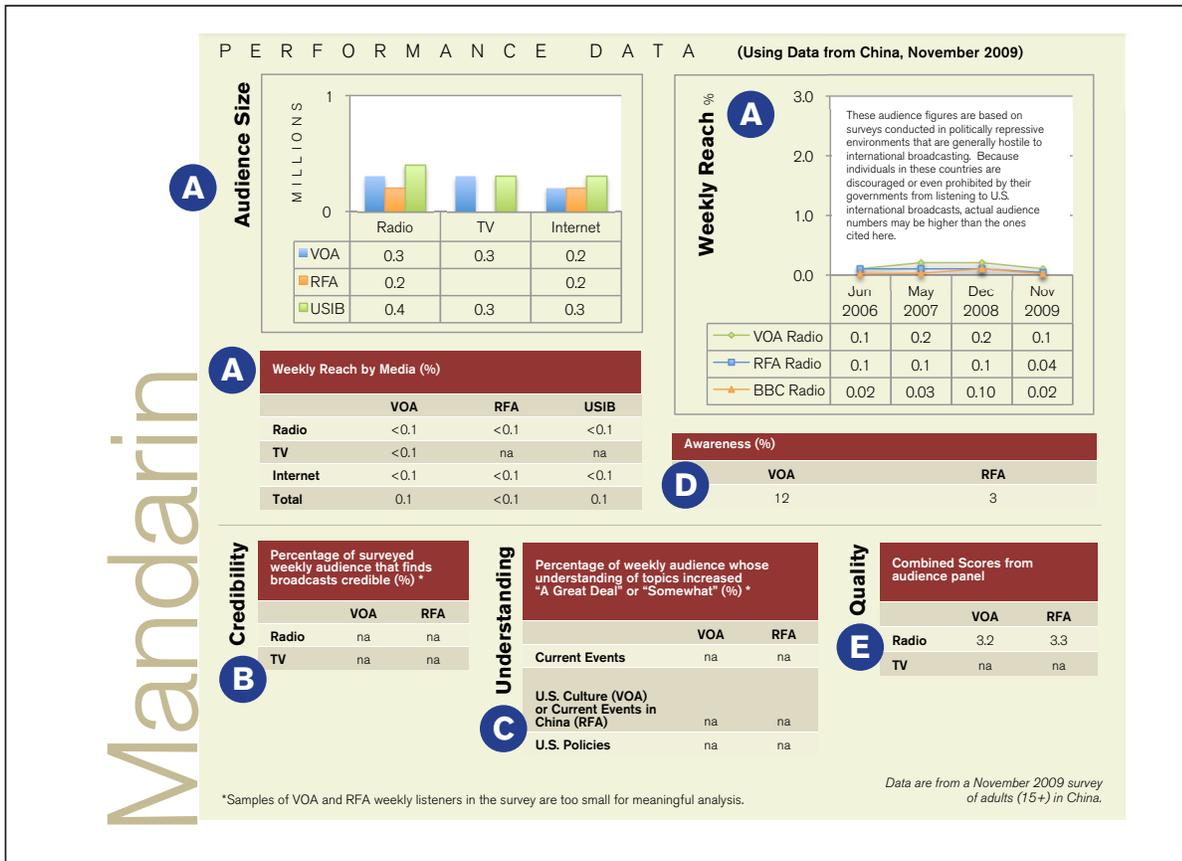
B Affiliates summarize broadcast partners, although those itemized in the distribution section do not include the many small or transitory stations defined as 'low impact' by the Office of Marketing and Placement.

C Staff figures are FY2011, actuals, unless otherwise noted.

D Budget figures include FY2011 employee salaries, benefits and general operating expenses for each language service.

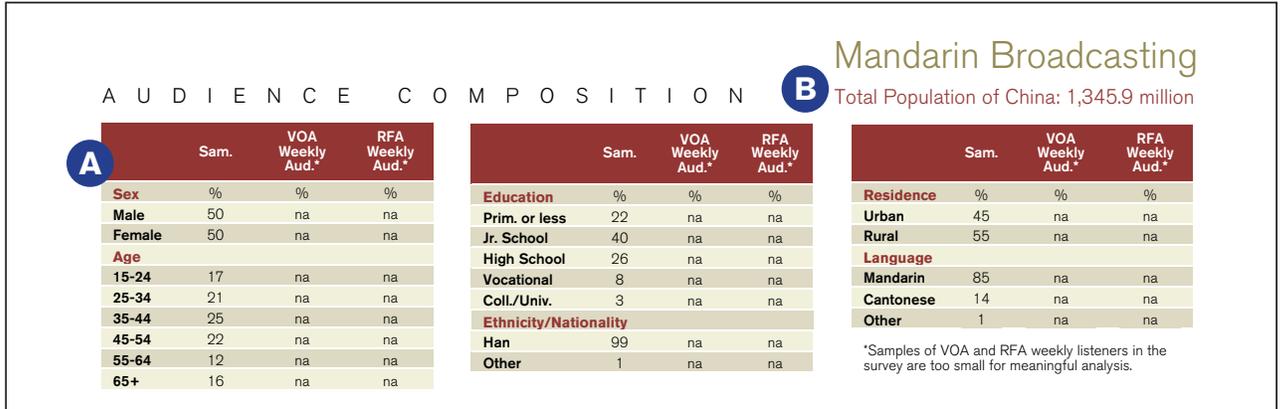
E Map generally display services' target countries for broadcast and/or the source of national market and performance data found in subsequent tables and charts.

Performance Data Section



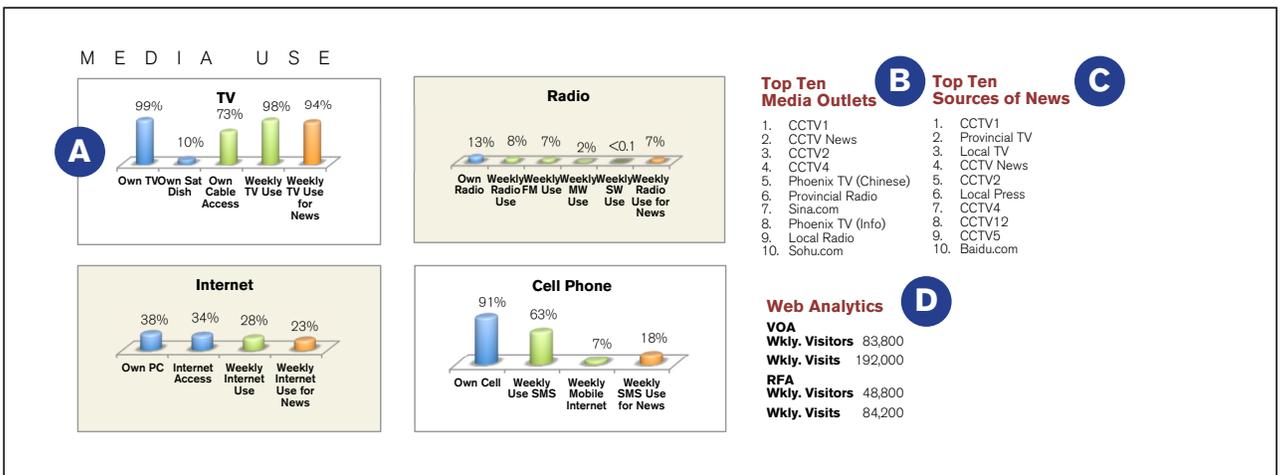
- Data in this section reflect the agency's core performance measures of **Weekly Reach A** (in numbers as well as a percentage of the adult population), **Credibility B** of programming and **Understanding C** of current events and other mission-related topics (both as percentage of weekly audience), by language service. USIB indicates total unduplicated figures for U.S. International Broadcasters where there is language overlap.
- When available, multi-year shifts in reach of U.S. Broadcasters and key competitors is shown in the trend graph in the upper right . Unless otherwise noted in the table below the trend graph, broadcaster weekly reach includes all media platforms.
- Also shown are two other important indicators: **Awareness D** and **Quality E** . Awareness figures reflect the percentage of the population that has heard of the broadcaster, either prompted or unprompted. Quality scores reflect the weighted combined score of internal and external evaluation panels who rate programming for both content and production quality on a scale of 1(poor) to 4 (excellent).
- Data in this section come from the most recent survey in 1 or 2 target countries of the service. Some language services, by definition, target only one country. Others target multiple countries, though not every such service gets a survey in each country every year. In the case of Arabic, however, the BBG conducts annual surveys in 5-12 countries. Two surveys are featured on the Arabic page while data from other countries surveyed can be found in an addendum spreadsheet.

Audience Composition Section



- A** Tables in this section describe what we know of the adult population 15 years and older (in the 'Sample' column), side by side with what we know about our respective broadcaster audiences. The standard demographic indicators: sex, age, education, ethnicity, residence and language are also displayed. 'Language' indicates the language spoken most at home.
- B** The **Total Population** of each target country, found in the upper right, is based on validated data from the Population Reference Bureau. This reflects the total population, including those less than 15 years old.

Media Use Section



- A** In the TV, Radio, Internet and Cell Phone bar charts, blue bars indicate ownership, or more specifically, 'access in the household'. Green bars indicate use of a particular medium at least once per week, and orange bars indicate at least weekly use of that medium for news, regardless of ownership.
- B** **Top Ten Media Outlets** lists the local media outlets that have the greatest daily reach, from highest to lowest, regardless of their news content. Daily reach reflects the percentage of the adult population that tuned into that station the 'yesterday' at the time of the survey. 'Yesterday' listening or viewing is a common proxy for 'daily' listening or viewing in audience research.

- C** ▪ **Top Ten Sources of News** reflects the most frequently cited sources of news, regardless of platform, from highest to lowest. While different from reach, this measure is a very important indicator of impact for our broadcasters. If a page highlights two target countries, top sources of news for both are typically displayed, although are omitted for target countries where researchers cannot ask this question.
- D** ▪ Google Analytics is the source of the **Web Analytics** data for all broadcasters. 'Weekly Visitor' describes the number of unique weekly visitors to a broadcaster's website. 'Weekly Visits' describes the number of total visits to that site in one week. Visits and visitors from USIB IP addresses (agency computers) are filtered out of these figures.

Context Section

C O N T E X T

A ↔ **Stability**

↓ **Political Freedom**

↓ **Press Freedom**

↓ **Ease of Distribution**

↑ **Competition**

Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- While China has continued to grow during the global economic slowdown, the recent purge of a popular Politburo member Bo Xilai and blind activist Chen Guangcheng's sheltering at the U.S. Embassy in Beijing have exposed serious cracks in the regime as it begins a delicate transition of power. Corruption charges against Bo expose the kind of abuses of power that extend to other top leaders.
- The State Department's annual human rights report includes reports of extrajudicial killings, executions without due process, forced confessions and torture. Still, dissatisfaction with severe restrictions on political participation and legal rights has not been reflected in public opinion surveys, where Chinese say they are satisfied with the direction of Chinese society.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. Grievances about land, housing, entitlements, the environment, or corruption also have led to protests and petitions. Lawyers representing aggrieved parties or cases deemed sensitive have faced harassment, disbarment and detention.
- Extreme tensions have arisen between the CCP and Chinese ethnic minorities in recent years, most visible in the form of harsh government crackdowns in response to unrest in Tibet and Xinjiang.
- Although China has become more "open" in some ways, social and media research remains an area where extreme caution is needed. International projects only occur with permission from the government after the research design has been inspected. The Chinese government has tried to tighten control of media, including microblogs and instant messaging, and foreign investment in the media industry.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 136.00 (174/179)**
- U.S. International broadcasters are among the most tightly censored media outlets in China. VOA and RFA radio broadcasts are intensively jammed and both broadcasters' websites are blocked in China. Such restrictions present serious obstacles to those in China attempting to access VOA and RFA content.
- CCTV remains the top source of news for most Chinese. Satellite dish ownership was measured at 10 percent in 2009 with 90 percent of satellite owners living in rural areas.
- China's media environment is evolving at an extremely rapid pace. Internet World Statistics suggests more than half a billion Chinese, 38 percent of its massive population, are using the Web. New technologies are quickly spreading beyond cities to rural areas, where 3G mobile phones are fueling Web growth.
- Blogs, podcasts, social networking sites and micro-blogs are becoming a normal part of many Chinese Internet users' online routines. However, China also leads the world in imprisoning bloggers and other cyber dissidents, so a certain level of self-censorship and indirect communication is common when discussing sensitive topics.
- The proliferation of new equipment and platforms to access and share information has created extraordinary channels for copying and spreading information and for coordinating citizen activities, including popular protests. Viral videos, sensitive blogs and cell phone activism represent a challenge to Beijing, which has redoubled resources devoted to controlling new media. In addition to web monitoring and blocking, new regulations require cell phone owners to use official identification to purchase SIM cards.
- In spite of an aggressive campaign to control online discussion, China's domestic internet sites including QQ, Baidua and Sina are key sources of news and provide forums for the discussion of current events.

- A** ▪ Red arrows quickly describe the state of five key elements in the target country or region. Down arrows imply a poor or declining state, up arrows a good or increasing state, and sideways arrows a middling or static state.
- The states of **Stability**, **Political** and **Press Freedom** are based on both respected external indices, such as Freedom House and the Economist Intelligence Unit, and the judgment of analysts familiar with BBG audience research from that market. (Note: Economist Intelligence Unit had not updated their index of 2011 by publication date.) States of **Ease of Distribution** and **Competition** are based on audience data and the experience of the service. Rarely is any market experiencing a decrease in media competition, even those under heavy state control.



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Language Service Profiles A-Z

P R O F I L E



Language of Broadcast: Albanian

Content: 10.5 hrs. of original radio and 3.5 hrs. of original TV programming per week – an additional 0.25 hrs. of TV broadcasting to Albania per week; Internet

Distribution: 70 affiliates (41 TV, 29 radio), 2 IBB FM and 1 IBB SW frequency

Radio: The service's radio programs are carried by 29 affiliates in Albania, Kosovo, and Macedonia and by 2 IBB FMs, as well as on an IBB SW frequency.

TV: VOA Albanian broadcasts are carried by 18 TV affiliates in Albania, 11 in Macedonia, 9 in Kosovo, 2 in Montenegro, and 1 in Serbia. Two weekly interactives are carried separately by the most popular TV station in Albania, Top Channel, and by the most popular news station, News 24.

Web: The Service has an Internet site and a mobile site, and content is available on Twitter, Facebook and YouTube. It also sends out a daily newsletter to more than 5,000 subscribers.

Staff: 11

Budget: \$1,863,000

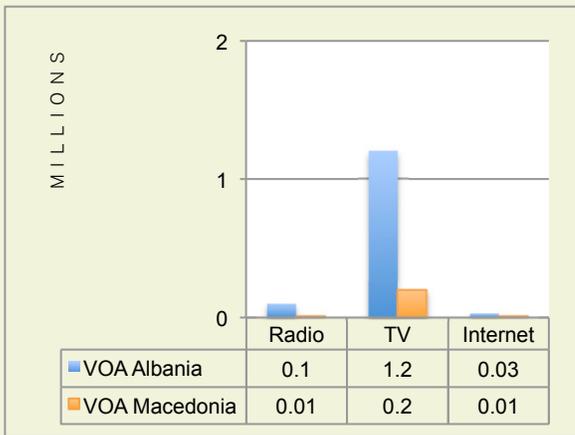
Established: 1943 to 1945; 1951 to present; TV service established in 1999



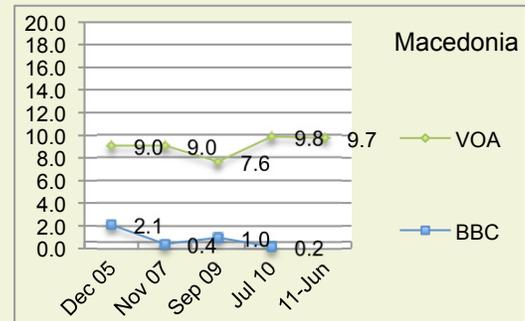
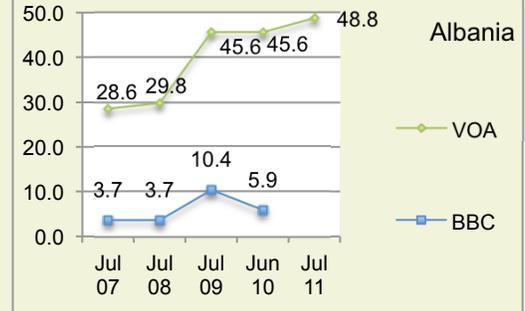
P E R F O R M A N C E D A T A

(Using Data from Albania, July 2011 & Macedonia, June 2011)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)		
	Albania	Macedonia
Radio	5.0	.7
TV	47.1	9.6
Internet	1.1	0.4
Total	48.8	9.7

Awareness (%)		
	Albania	Macedonia
Radio	70	74

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Albania	Macedonia
Radio	96	na**
TV	99	99

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV** Albania	VOA TV*** Macedonia
Current Events	94	95
U.S. Culture	73	83
U.S. Policies	85	69

Quality

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	3.3

* Among the 24% who are ethnic Albanians, VOA's weekly reach is 38.5%.
 **In Albania, understanding ratings for VOA radio are: 94% for Current Events; 82% for U.S. Society; and 81% for U.S. Policies.
 ***In Macedonia, samples of VOA Albanian weekly radio listeners are too small for meaningful analysis.

Data are from an July, 2011 survey of adults (15+) in Albania and a June, 2011 survey of adults (15+) in Macedonia.

Albanian

Albanian Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Target Country: Albania 3.2 M and Macedonia 2.1 M

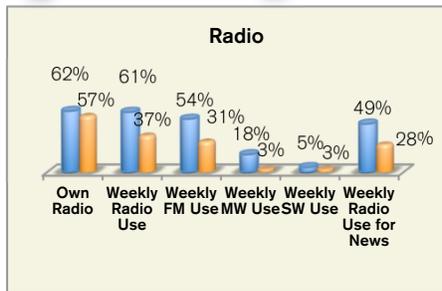
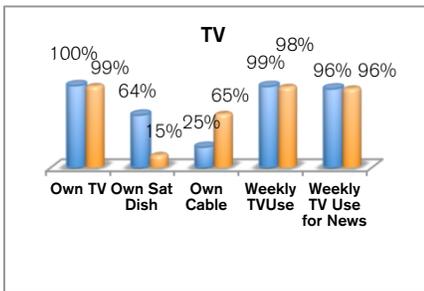
	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Sex	%	%	%	%
Male	50	52	50	59
Female	50	48	50	41
Age				
15-24	25	18	19	23
25-34	18	15	19	22
35-44	17	19	18	24
45-54	17	20	17	14
55-64	12	15	14	10
65+	10	12	14	7

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Educ	%	%	%	%
None	2	2	36	40
Elem/Sec	35	31	na	na
Upper Sec	46	46	51	44
Higher	18	21	13	15
Ethnicity/Nationality				
Albanian	98	99	24	3
Maced.	na	na	65	96
Other	2	1	10	1

	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Residence	%	%	%	%
Urban	47	49	43	75
Rural	53	51	57	25
Language Spoken at Home				
Albanian	98	99	24	96
Macedonian	na	na	71	3
Other	2	1	5	1

M E D I A U S E

Albania Macedonia

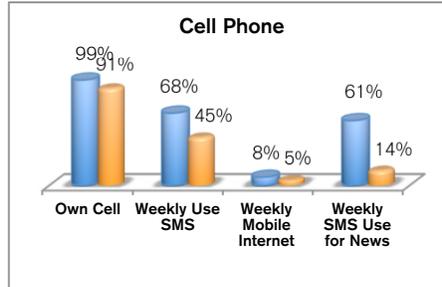
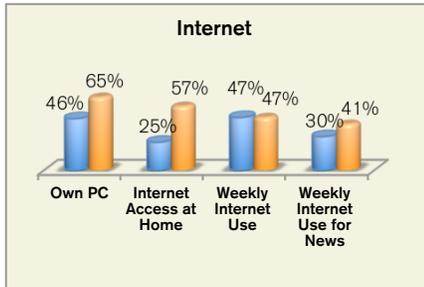


Albania Top Ten Sources of News

1. Top Channel
2. Vizion Plus
3. News 24
4. TV Klan
5. TVSH
6. Google
7. Shekulli
8. Top AIB
9. Panorama
10. Yahoo

Macedonia Top Ten Sources of News

1. A1 TV
2. Sitel TV
3. Kanal 5
4. Alsat TV
5. Macedonian TV 1
6. Google
7. Dnevnik
8. Facebook
9. Telma
10. Vest



Web Analytics

Weekly Visitors	14,200
Weekly Visits	32,000

C O N T E X T

↓ Stability
↔ Political Freedom
↓ Press Freedom
↑ Ease of Distribution
↑ Competition

Political Situation

- **Freedom House Political Freedom Index (2011):** Albania–PARTLY FREE; Macedonia–PARTLY FREE
- **Economist Intelligence Unit Instability (2010):** Albania–HIGH RISK; Macedonia–HIGH RISK
- The Albanian prime minister, Sali Berisha, and his center-right Democratic Party of Albania (DPA) continue to rely on the support of their long-standing political adversary, Ilir Meta, whose Socialist Movement for Integration (SMI) is the junior coalition partner. The SMI's position is precarious, however, with Mr. Meta facing corruption allegations since early 2011.
- Lulzim Basha, the candidate of the DPA and winner by of the mayoral election in the capital, Tirana, took the oath of office on July 25th, two and a half months after polling day. The long delay before Mr. Basha could assume office stemmed from a dispute over the election result. One of the two major political forces – the Socialist Party – boycotted parliament and held rallies over allegations of wide-spread fraud by the rival Democratic Party.
- Animosities between the two major political players are hindering long-awaited economic and social reforms. The country's economy is in dire straits and remittances from emigrants, a large number of whom work in debt-ridden Italy and Greece, have been shrinking. Endemic corruption and unemployment remain major issues of concern among the public.
- The political stalemate is likely to hurt Albania's chances for European Union candidacy status, by the end of 2012, the first step towards an eventual membership, as well as expectations for visa-free travel within the Schengen area.

Media Environment

- **Freedom House Press Freedom Index (2011):** Albania–PARTLY FREE; Macedonia–PARTLY FREE
- **Reporters Without Borders Index (2011):** Albania–34.44 (96/179); Macedonia–31.67 (94/179)
- Media freedom in Albania has regressed in the past year. This is evident in a number of incidents of favoritism and intimidation, but also in the assessment of media freedom watchdog groups. IREX has lowered its media freedom rating of Albania citing "an alliance between the government and powerful business interests against media freedom." The ensuing self-censorship among journalists is a widespread problem. Important issues, such as corruption, might not get the share of investigative reporting they deserve.
- The OSCE is also concerned about media freedom in Albania. The organization has issued warnings when Top Channel received a fine for airing a tape showing a former minister in a compromising situation abusing his power. Lawmakers from the opposition Socialist Party (PS) protested against material on TVSH, accusing the government of misusing the public broadcaster for propaganda purposes.
- Still, focus group participants pointed out increased professionalism of domestic news programs, making them more competitive against international broadcasters. However, they are frustrated with the sensationalism, bias and manipulation still seen in some domestic outlets.

P R O F I L E



Voice of America®



Language of Broadcast: Albanian

Content: 10.5 hrs. of original radio and 3.5 hrs. of original TV programming per week – an additional 0.25 hrs. of TV broadcasting to Albania per week; Internet

Distribution: 70 affiliates (41 TV, 29 radio), 2 IBB FM and 1 IBB SW frequency

Radio: The service's radio programs are carried by 29 affiliates in Albania, Kosovo, and Macedonia and by 2 IBB FMs, as well as on an IBB SW frequency.

TV: VOA Albanian broadcasts are carried by 18 TV affiliates in Albania, 11 in Macedonia, 9 in Kosovo, 2 in Montenegro, and 1 in Serbia. Two weekly interactives are carried separately by the most popular TV station in Albania, Top Channel, and by the most popular news station, News 24.

Web: The Service has an Internet site and a mobile site, and content is available on Twitter, Facebook and YouTube. It also sends out a daily newsletter to more than 5,000 subscribers.

Staff: 11

Budget: \$1,863,000

Established: 1943 to 1945; 1951 to present;



Language of Broadcast: Albanian to Kosovo, Bosnian, Macedonian, Montenegrin, and Serbian

Content: Albanian to Kosovo: 10.5 hours original radio; Bosnian: 10.5 hours original radio; 5 hours TV; Macedonian: 7 hours original radio; 10 minutes TV; Serbian: 7 hours original radio Montenegro: 3.5 hours original radio; Balkans Regional program: 12 hours original radio

Distribution: 193 affiliates (150 FM, 43 TV) RFE/RL's delivery includes affiliates in Bosnia and Herzegovina (49 FM, 29 TV), Kosovo (37 FM), Macedonia (5 FM, 13 TV), Montenegro (12 FM), and Serbia (47 FM, 1 TV), in addition to HotBird and Internet with streaming audio.

Web: All of the Balkan Services are active on Facebook and Twitter, have mobile sites, and have branded YouTube pages in process.



Staff: 12†

Budget: \$4,525,000†

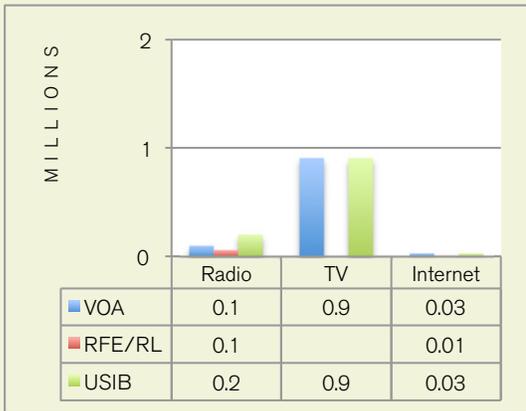
Established: 1994 to present

† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Croatian, Macedonian, Montenegrin and Serbian.

Albanian to Kosovo

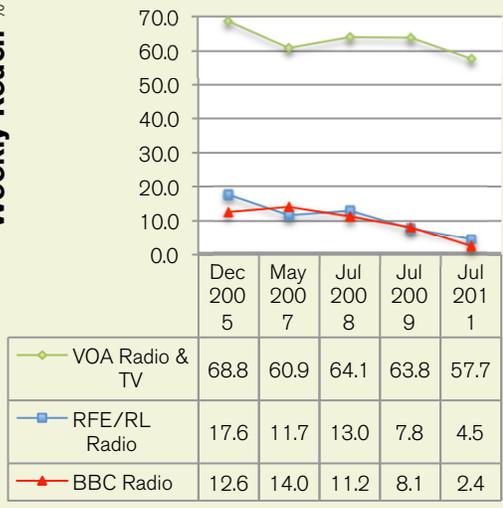
P E R F O R M A N C E D A T A (Using Data from Kosovo, July 2011)

Audience Size



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	8.4	3.9	10.5
TV	55.6	na	55.6
Internet	1.9	0.7	2.2
Total	57.7	4.5	58.2

Weekly Reach %



Awareness (%)	
VOA	RFE/RL
80	73

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)		
	VOA	RFE/RL
Radio	97	92
TV	98	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV*	RFE/RL**
Current Events	94	78
U.S. Society (VOA)/Current Events in Kosovo (RFE/RL)	70	78
U.S. Policies	69	na

Quality

Combined Scores from audience panel		
	VOA	RFE/RL
Radio	3.6	3.2
TV	3.3	na

*Understanding ratings for VOA TV are 94% for Current Events, 70% for U.S. Culture and 68% for U.S. Policies.
**Understanding ratings are for RFE/RL Albanian on any platform.

Data are from a July 2011 nationwide survey of adults (15+) in Kosovo.

Albanian to Kosovo Broadcasting

A U D I E N C E C O M P O S I T I O N

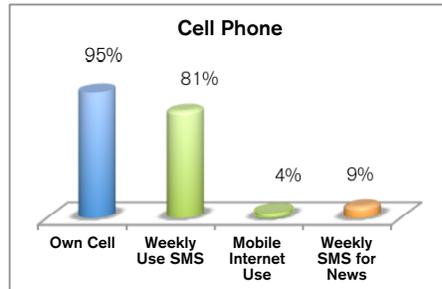
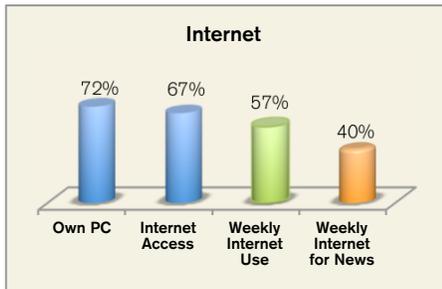
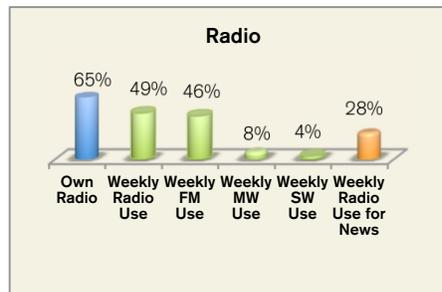
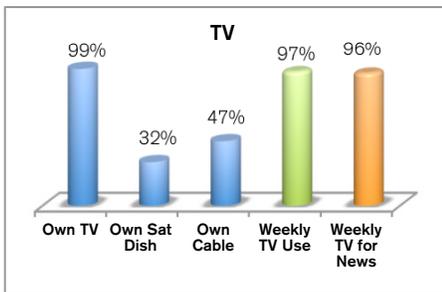
Total Population of Kosovo: 2.3 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	49	54	66
Female	51	46	34
Age			
15-24	31	28	18
25-34	22	23	33
35-44	17	17	20
45-54	13	14	16
55-64	9	10	9
65+	8	8	4

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
None	3	3	1
Primary	38	36	21
Secondary	45	46	57
Coll./Univ.	13	15	21
Ethnicity/Nationality			
Albanian	86	92	77
Serbian	5	<1	1
Other	9	8	22

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	44	46	53
Rural	56	54	47
Language			
Albanian	94	99	98
Serbian	5	<1	<1
Other	1	1	2

M E D I A U S E



Top Ten Media Outlets

1. RTK
2. RTV 21
3. KTV Koha Vizion
4. VOA TV
5. TV Klan Kosova
6. Radio Dukagjini
7. Top Channel
8. Radio 21
9. Radio Kosova
10. TVSH

Top Ten Sources of News

1. RTK
2. RTV 21
3. Koha Vision
4. Koha Ditore
5. Google
6. TV Klan Kosova
7. Kosova Sot
8. Telgeati.com
9. VOA TV
10. RTS Serbia

Web Analytics

VOA Weekly Visitors	14,200
Weekly Visits	32,000
RFE/RL Weekly Visitors	8,900
Weekly Visits	36,800

C O N T E X T



Stability



Political Freedom



Press Freedom



Ease of Distribution



Competition

Political Situation

- **Freedom House Political Freedom Index (2011): Partly Free**
- **Economist Intelligence Unit Instability (2010): NA**
- EU-mediated talks between Serbia and Kosovo were called off in September amid heightened tension in northern Kosovo. Talks had been postponed after 16 ethnic Serbs and four NATO peacekeepers were hurt in clashes in an ongoing dispute over border crossings. NATO said troops had used tear gas and rubber bullets after pipe bombs were fired at positions in northern Kosovo.
- The European Commission has recommended Serbia for EU candidate status but said talks could only start after it normalized ties with Kosovo.
- Belgrade refuses to recognise the territory's self-declared independence and tension involving Kosovo's ethnic Serbs sparked violence this summer.
- A European Union panel agreed to appoint a special prosecutor to probe allegations of organ trafficking and other abuses linked to former commanders of the Kosovo Liberation Army, including current prime minister, Hashim Thaci. Under a plan endorsed in June by EU officials in Brussels, the prosecutor will lead a seven-member international "task force" attached to the EU's rule of law mission in Kosovo (EULEX), according to diplomatic sources.

Media Environment

- **Freedom House Press Freedom Index (2011): Partly Free**
- **Reporters Without Borders Index (2011): 30.00 (86/179)**
- Television viewing was slightly higher in 2011 compared to the previous year—87 percent of Kosovo adults reported watching TV "yesterday" compared to 84 percent in 2010. On a weekly basis, however, viewership remained statistically unchanged at 97 percent. TV viewing for news and current information was also statistically unchanged from the previous year (96 percent compared to 95 percent).
- Radio plays a minor role as a news source in Kosovo. In 2011, its weekly use as a source of news and information declined even further from 33 percent to 28 percent. At present, radio ranks fourth among information sources in Kosovo. Apart from TV, radio is overshadowed by the internet (used weekly for news and information by 40 percent of Kosovo adults) and newspapers (36 percent).
- Aside from TV, the internet was the only medium that continued to grow in one way or another, bolstered by demand from Kosovo's young population and intense competition in a tight market. Within a year, household internet access in Kosovo has grown from 61 percent to 67 percent, and computer ownership from 68 percent to 72 percent. Although "last-week" internet use stood at 57.3 percent in 2011 (statistically unchanged from 57 percent the previous year), the internet sector saw two important developments: the use of the internet for news and current information continued to grow, from 37 percent to 40 percent; and broadband penetration continued to expand, opening up further possibilities for online users.

P R O F I L E

MIDDLE EAST BROADCASTING NETWORKS, INC. **MBN**



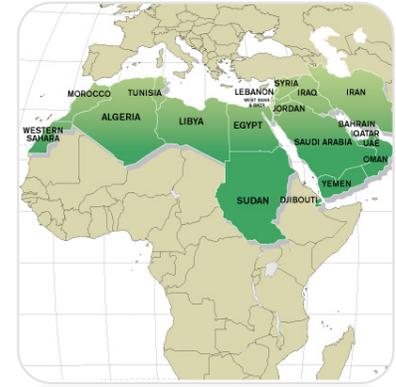
Language of Broadcast: Arabic

Content: Radio Sawa: 24/7 original programming; Alhurra TV: 84 hrs. of original and 84 hrs. of repeat TV programming per week; Internet

Distribution: Sawa: 4 IBB MW and 41 FM frequencies, satellite and the Internet. Alhurra TV: Satellite, 6 terrestrial TV stations in Iraq and the Internet

New Media: Radio Sawa's news and information Website provides live streaming and archives of the latest newscasts. Its mobile Website and Facebook fan page provide headlines and encourages listeners to comment on stories. Twitter feeds the latest Sawa headlines. RadioSawa also posts key interview clips and reports on Audioboo.

Alhurra's Website provides the latest news, live streaming and archived video of most programs. It has a mobile website, Alhurra and key program Facebook pages as well as over 13 fan pages. Twitter feeds include one for the network, one for breaking news, one for flagship program Al Youm, and a YouTube channel at www.youtube.com/alhurra.



Staff: 498

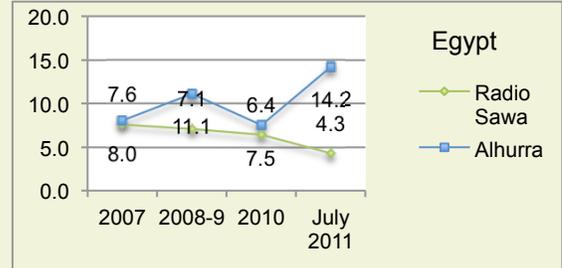
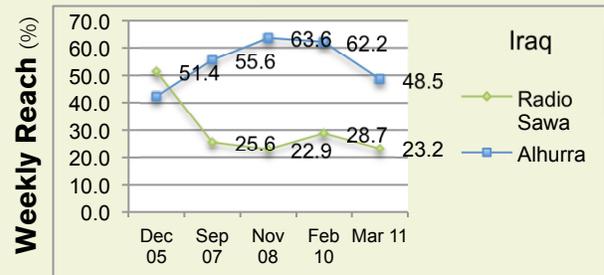
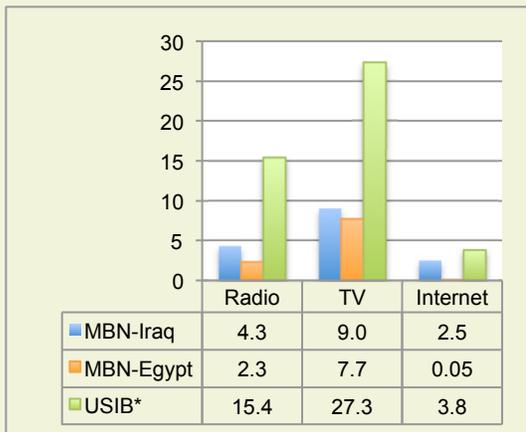
Budget: \$110,332,000†

Established: Radio Sawa; 2002 to present; Alhurra TV 2004 to present

† includes additional indirect costs

P E R F O R M A N C E D A T A (Using Data from Iraq, March 2011 & Egypt, July 2011)

Audience Size



Weekly Reach by Media (%)		
	MBN-Iraq	MBN-Egypt
Radio	23.2	4.3
TV	48.5	14.7
Internet	14.1	1.0
Total	63.0	17.6

Awareness (%)			
Sawa Iraq	Alhurra Iraq	Sawa Egypt	Alhurra Egypt
na	na	na	na

Arabic

Credibility

	Percentage of surveyed weekly audience that found broadcasts credible (%)	
	MBN Iraq	MBN Egypt
Radio	75	98
TV	76	93

Understanding

	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)			
	Sawa Iraq	Alhurra Iraq	Sawa Egypt	Alhurra Egypt
Current Events	93	52	71	75
U.S. Culture	46	29	44	75
U.S. Policies	45	30	45	41

Quality

	Combined Scores from audience panel	
	MBN Iraq	MBN Egypt
Radio	na	na
TV	na	na

*USIB audience estimate is based on data from Algeria, Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Morocco, Oman, Palestinian Territories, Saudi Arabia, Syria, Tunisia and the UAE. The USIB estimate for Iraq includes the impact of Radio Free Iraq (RFI) broadcasts. RFI weekly unduplicated reach is 16.1% or approximately 3.0 million adults in Iraq.

Data are from an March 2011 survey of adults (15+) in Iraq and June/July 2011 survey in Egypt.

Arabic Broadcasting

Total Population of Iraq: 32.7 million

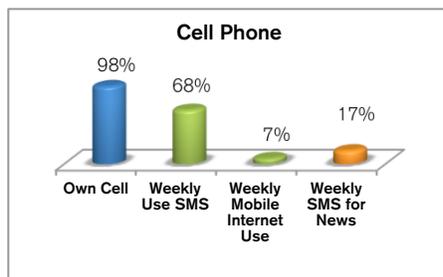
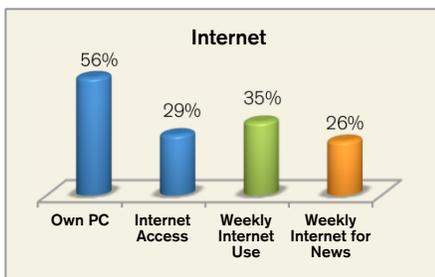
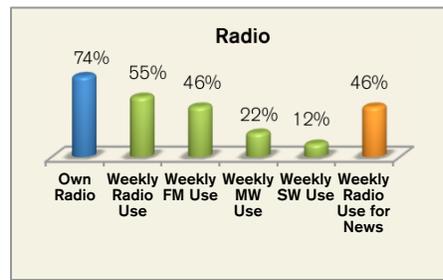
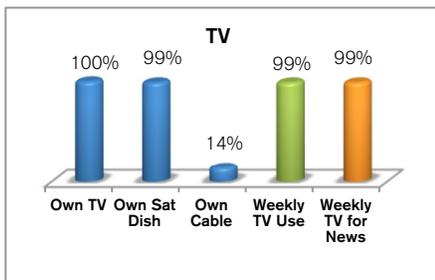
A U D I E N C E C O M P O S I T I O N

	Sample	Radio Free Iraq Weekly Audience
Sex	%	%
Male	51	53
Female	49	47
Age		
15-24	26	17
25-34	24	27
35-44	22	25
45-54	15	18
55-64	11	12
65+	2	2

	Sample	Radio Free Iraq Weekly Audience
Education	%	%
Illiterate/No Formal	24	26
Elem./Inter.	33	26
Secondary	20	19
Coll./Univ.	24	29
Ethnicity/Nationality		
Arabic	80	93
Kurdish	16	4
Other	4	3

	Sample	Radio Free Iraq Weekly Audience
Residence	%	%
Urban	67	71
Rural	33	29
Language		
Arabic	80	93
Kurdish	17	4
Other	3	3

M E D I A U S E



Top Ten Media Outlets

1. Al Arabiya
2. Al Sharqia
3. Al Iraqia
4. MBC 1
5. MBC Action
6. Abu Dhabi Al Oula TV
7. Al Jazeera
8. Al Sumeria
9. Al Baghdadi
10. MBC 4

Top Ten Sources of News

1. ORT-1
2. Khabar
3. Kazakhstan-1
4. KTK
5. NTV
6. El Arna
7. www.mail.ru
8. Russkoe Radio
9. 31 Kanal
10. Evropa Plus

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- The drawdown of US forces and the continued weakness of central authority may allow militia and insurgent groups to re-establish themselves in some areas. The government of national unity, which brings together the four largest political groups, has been weak and divided, and some blocs have threatened to pull out to join the parliamentary opposition.
- More than eight years after the US invasion in 2003, Iraq continues to be wracked by intense violence. So far during 2011, around 11 civilians have been killed on average every day, mainly by suicide and other bombings. August, which coincided with Ramadan, was the bloodiest month in a year, with an estimated 395 civilian deaths according to a preliminary figure from Iraq Body Count (IBC).

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 75.36 (152/179)**
- Although Iraq has a thriving media environment with many ethnic and religious groups represented, media freedom and freedom of speech are still an issue of contention. Reporters Without Borders reported in February 2011 that the offices of their partner group in Baghdad— Journalistic Freedoms Observatory (JFO)—was raided by security forces whereby its computers and archives were stolen. The worst of the criticism came after February 25, 2011, known as the “Day of Rage,” when Iraqis took to the street to protest government corruption, faulty infrastructure, unemployment, electricity and water cuts. Reporters without Borders called it the “Black Day” for media freedom in Iraq because Iraqi Security Forces detained 300 leading journalists and intellectuals who took part in covering the protests.
- Reports of government arrests and intimidation of NGO workers in Iraq, and anyone that criticizes the current government are prevalent. In the first four months of 2011, five journalists have been killed in Iraq. In 2010, seven journalists were killed in total. Although actual violence due to war has decreased since the height of the Iraq war, intimidation and threats against journalists and regular citizens have increased, even—according to the New York Times—to the point of death threats by text message, suspected by many as coming from Iraqi authorities. Human Rights Watch also reported widespread crackdowns on protesters in Iraq, including detention and torture.
- Reporters without Borders has been pressing the Iraqi parliament to pass a law protecting journalists amid the many abuses, detentions and assaults committed against journalists and photographers in Iraq trying to cover recent protests, which although significant, have not compared in size to the 2011 Arab Spring protests around the region.

P R O F I L E



Language of Broadcast: Arabic

Coverage: 28 hrs. of original and 91 hrs. of repeat radio programming per week; Internet

Distribution:

Radio: 13 FM transmitters, One cross-border MW

New Media: Interactive and multimedia website with live streaming and MobileTech supported mobile site. Social Media activities include Facebook page, Twitter feed, and YouTube page

Staff: 11

Budget: \$2,215,000

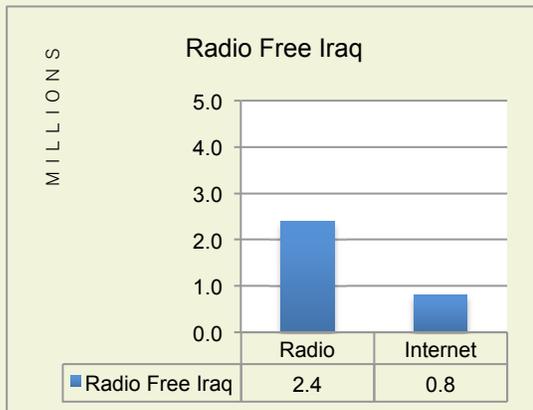
Established: 1998 to present



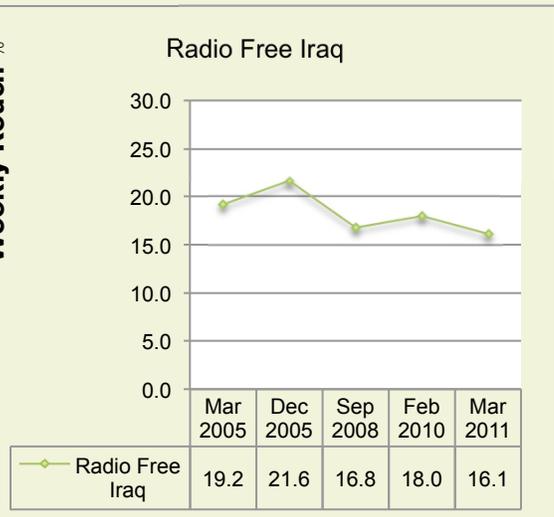
P E R F O R M A N C E D A T A

(Using Data from Iraq, March 2011)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)

Radio Free Iraq	
Radio	12.9
TV	na
Internet	4.3
Total	16.1

Awareness (%)

Radio Free Iraq	
Awareness (%)	46%

Arabic

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)	
Radio Free Iraq	
Radio	72
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
Radio Free Iraq	
Current Events	75
Current Events in Iraq	94

Quality

Combined Scores from audience panel	
Radio Free Iraq	
Radio	3.1
TV	na

Data are from a March 2011 nationwide survey of adults (15+) in Iraq.

Arabic Broadcasting

Total Population of Iraq: 32.7 million

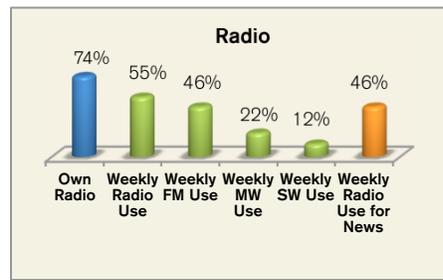
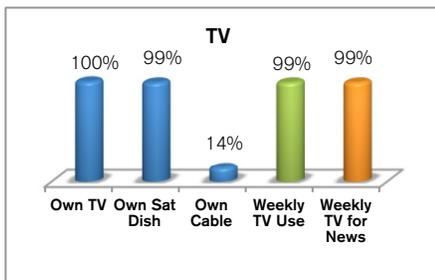
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M E D I A U S E

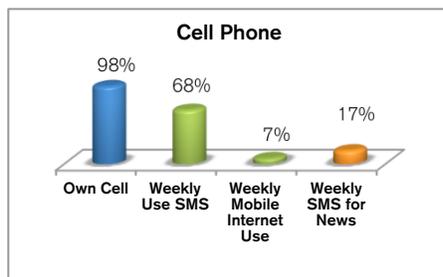
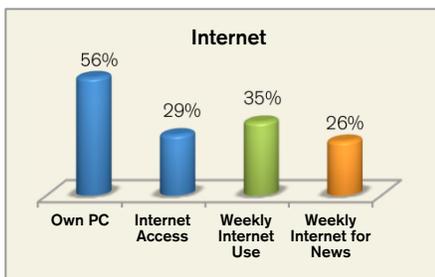


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C O N T E X T



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E X P A N D E D P E R F O R M A N C E D A T A

Audience Size & Weekly Reach

Country	Population	Radio Audience Size	Radio Weekly Reach %	TV Audience Size	TV Weekly Reach %	USIB Internet Audience Size	USIB Internet Weekly Reach %
Algeria	36,000,000	54,748	1.4	410,607	10.5	7,821	0.2
Egypt	82,600,000	2,264,466	4.3	7,741,314	14.7	526,620	1.0
Iraq	32,700,000	5,355,360	28.8	9,018,575	48.5	2,621,895	14.1
Jordan	6,600,000	659,295	16.1	900,900	22.0	57,330	1.4
Kuwait	2,800,000	434,067	33.7	274,351	21.3	54,097	4.2
Lebanon	4,300,000	354,750	11.0	277,350	8.6	16,125	0.5
Morocco	32,300,000	3,327,897	33.5	1,658,982	16.7	99,340	1.0
Oman	3,000,000	31,484	1.7	557,452	30.1	64,820	3.5
Palestinian Territories	4,200,000	154,560	6.9	206,080	9.2	24,640	1.1
Saudi Arabia	27,500,000	345,239	3.3	1,663,426	15.9	52,309	0.5
Syria	22,500,000	1,509,490	11.5	3,228,996	24.6	262,520	2.0
UAE	7,900,000	292,406	37.4	189,204	24.2	21,109	2.7

Awareness, Credibility & Understanding

Country	Radio Awareness %	Radio Cred. %	Radio Under. Current Events %	Radio Under. U.S. Culture* %	Radio Under. U.S. Policies* %	TV Aware. %	TV Cred. %	TV Under. Current Events %	TV Under. U.S. Culture* %	TV Under. U.S. Policies* %
Algeria	6%		53%	47%	45%	46%		53%	47%	52%
Egypt	na		76%	48%	48%	na		75%	47%	43%
Iraq	na		RFE/RL-76% MBN-93%	RFE/RL-95% MBN-46%	RFE/RL-na MBN-45%	na		89%	44%	41%
Jordan	na		47%	26%	25%	na		47%	29%	27%
Kuwait	80%		89%	59%	58%	75%		86%	68%	70%
Lebanon	na		52%	29%	30%	na		64%	57%	59%
Morocco	na		82%	63%	59%	na		75%	66%	65%
Oman	7%		86%	80%	71%	67%		84%	75%	74%
Palestinian Territories	33%		46%	71%	67%	34%		41%	69%	59%
Saudi Arabia	na		69%	41%	39%	na		72%	57%	52%
Syria	51%		68%	43%	41%	na		54%	43%	44%
UAE	na		76%	55%	50%	na		95%	79%	75%

Credibility: Percentage of surveyed weekly audience that found broadcasts credible (%)

Understanding: Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%) * RFE/RL's question was "Understanding of Current Events in Country"

Culture: Percentage of surveyed weekly audiences that found broadcasts increased their understanding of U.S Culture (VOA/MBN) or Current Events in Country (RFE/RFA)

Culture: Percentage of surveyed weekly audiences that found broadcasts increased their understanding of U.S Policies (VOA/MBN) or International Developments that Affect Country (RFE/RFA)

Data are from Algeria, June 2007; Egypt, June 2010; Iraq, March 2011; Jordan, March 2011; Kuwait, January 2010; Lebanon, March 2011; Morocco, April 2011; Oman, January 2009; Palestinian Territories, March 2010; Saudi Arabia, April 2011; Syria, March 2010; UAE April 2011.

Audience Size & Weekly Reach (cont.)

Country	Population	USIB Audience Size	USIB Weekly Reach %	BBC Unduplicated Audience Size	BBC Unduplicated Weekly Reach %	Other International Broadcaster Audience Size	Other International Broadcaster Weekly Reach %
Algeria	36,000,000	449,712	11.5			Aljazeera- 2,338,504	59.8
Egypt	82,600,000	9,268,512	17.6	10,058,442	19.1	Aljazeera- 32,492,454	61.7
Iraq	32,700,000	12,328,485	66.3	7,047,505	37.9	Aljazeera- 9,873,945	53.1
Jordan	6,600,000	1,322,685	32.3	1,011,465	24.7	Aljazeera- 3,576,816	84.2
Kuwait	2,800,000	575,750	44.7	503,621	39.1	Aljazeera- 842,373	65.4
Lebanon	4,300,000	574,050	17.8	316,050	9.8	Aljazeera- 1,327,560	46.0
Morocco	32,300,000	4,182,223	42.1	2,205,353	22.2	Aljazeera- 8,632,664	86.9
Oman	3,000,000	609,308	32.9	287,060	15.5	Aljazeera- 1,227,876	66.3
Palestinian Territories	4,200,000	224,000	10.0	241,920	10.8	Aljazeera- 1,552,320	69.3
Saudi Arabia	27,500,000	1,893,585	18.1	2,772,376	26.5	Aljazeera- 6,193,384	59.2
Syria	22,500,000	4,279,076	32.6	3,425,886	26.1	Aljazeera- 10,172,650	77.5
UAE	7,900,000	377,625	48.3	312,733	40.0	Aljazeera- 522,500	85.9

Media Use

Country	Own TV	Own Sat. Dish	Own Cable Access	Weekly TV Use	Weekly TV For News	Own Radio	Weekly Radio Use	Weekly FM Use	Weekly MW Use	Weekly SW Use	Radio Use for News
Algeria	98%	88%	35%	95%	93%		57%	51%	7%	2%	
Egypt	99%	82%	23%	99%	97%	59%	39%	25%	21%	3%	24%
Iraq	100%	99%	14%	99%	99%	74%	55%	46%	22%	12%	44%
Jordan	100%	99%	2%	99%	98%	43%	61%	59%	4%	1%	48%
Kuwait	100%	99%	40%	91%	89%	72%	62%	56%	34%	20%	60%
Lebanon	100%	44%	67%	99%	97%	88%	63%	63%	5%	1%	42%
Morocco	100%	95%	7%	100%	100%	88%	71%	74%	20%	6%	67%
Oman	100%	99%	5%	98%	80%		74%	66%	40%	20%	
Palestinian Terr.	98%	93%	25%	89%	86%	59%	47%	40%	9%	2%	38%
Saudi Arabia	100%	98%	12%	99%	97%	67%	72%	67%	24%	10%	61%
Syria	100%	98%	18%	99%	83%	72%	58%	41%	10%	5%	
UAE	100%	100%	40%	100%	98%	70%	78%	77%	28%	17%	68%

Country	Own PC	Own Int. Acc.	Weekly Internet Use	Weekly Internet For News	Own Cell Phone	Weekly Use SMS	Weekly SMS For News
Algeria	45%	31%	24%	22%	82%	na	
Egypt	46%	27%	23%	20%	94%	44%	5%
Iraq	56%	29%	35%	26%	98%	68%	7%
Jordan	61%	32%	36%	30%	97%	77%	8%
Kuwait	87%	82%	77%	71%	99%	99%	
Lebanon	72%	58%	49%	27%	94%	82%	8%
Morocco	48%	47%	39%	32%	99%	79%	3%
Oman	52%	35%	32%	16%	97%	94%	
Palestinian Terr.	50%	39%	32%	30%	88%	55%	8%
Saudi Arabia	80%	73%	59%	42%	99%	87%	15%
Syria	60%	44%	28%	19%	86%	63%	
UAE	93%	91%	68%	49%	100%	90%	20%

P R O F I L E



Language of Broadcast: Armenian

Content: 1 hr. of original and 1 hr. of repeat TV programming per week; Internet

Distribution: 1 affiliate (1 TV)

TV: VOA Armenian broadcasts through its affiliate, Armenia TV, one of the most watched stations in Armenia. Service airs two programs: *Armenian Daily TV* and *Armenian Magazine TV*.

Web: The Service has web and mobile sites, is available on Facebook, Twitter, YouTube, and sends a daily e-mail newsletter. The website also hosts video streams.

Staff: 2

Budget: \$386,200

Established: 1951 to present; TV programming established in 2004



Language of Broadcast: Armenian

Content: 25 hrs. of original and 14 hrs. of repeat radio programming per week; 2.5 hours of TV programming; Internet

Distribution: Radio: RFE/RL has 4 FM partners: 2 National and 1 Yerevan affiliate covering the whole country in addition to HotBird.

New Media: The Service has a multimedia-rich Web site (Armenian-language site with Russian and English sub sites) with streaming audio and video as well as mobile sites and is active on Facebook, Twitter, and YouTube.

Video: Weekly: *Crossroad Of Opinions* is carried by 7 local TV stations; *Writer And Reality* (20 min) is carried by 5 local TV stations. The service also produces a daily *Video News Of The Day* (12-15 min) which is carried by 5 local TV stations.

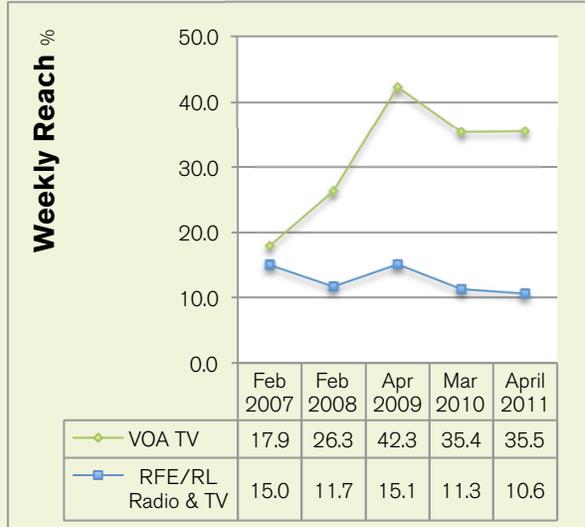
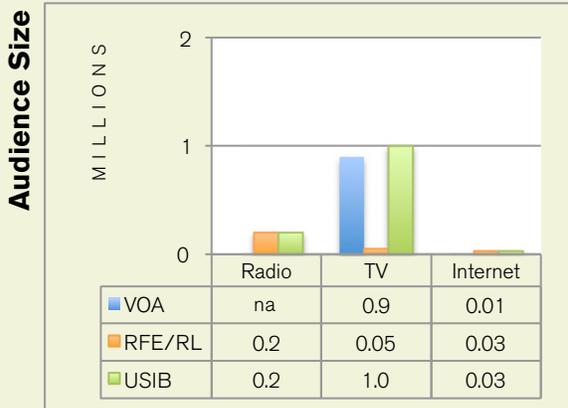


Staff: 6

Budget: \$1,499,000

Established: 1953 to present

P E R F O R M A N C E D A T A (Using Data from Armenia, April 2011)



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	na	9.1	9.1
TV	35.4	1.4	35.8
Internet	0.2	0.9	1.0
Total	35.5	10.6	41.2

Awareness (%)*	
VOA	RFE/RL
48	64

Armenian

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	VOA	RFE/RL
Radio	na	63
TV	89	85

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA TV	RFE/RL Radio**
Current Events	73	76
U.S. Society (VOA) or Current Events in Armenia (RFE/RL)	58	76
U.S. Policies	63	na

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
Radio	3.2	3.6
TV	3.5	na

* Awareness measured in the context of questions on radio stations.

**Understanding ratings for RFE/RL TV are 67% for Current Events and 69% for Current Events in Armenia.

Data are from an April 2011 survey of adults (15+) in Armenia.

Armenian Broadcasting

Total Population of Armenia: 3.1 million

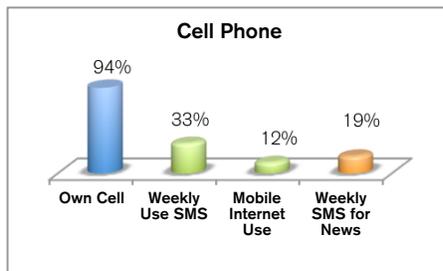
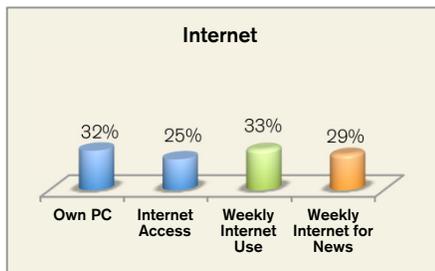
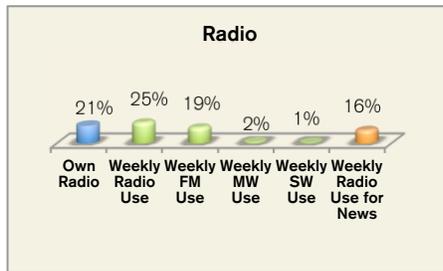
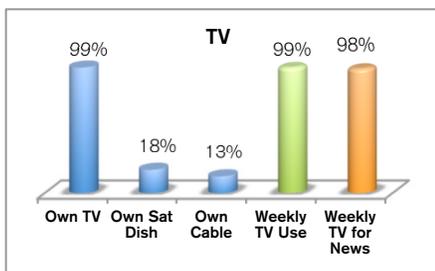
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	45	42	55
Female	55	58	46
Age			
15-24	20	20	16
25-34	27	27	23
35-44	16	18	21
45-54	12	13	18
55-64	11	13	12
65+	14	9	10

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
None	20	14	8
Primary	31	30	27
Secondary	21	25	25
Technical	26	30	40
Coll./Univ.	20	14	7
Ethnicity/Nationality			
Armenian	98	99	99
Russian	<1	0	0
Other	2	1	1

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	67	72	76
Rural	33	28	24
Language			
Armenian	99	100	99
Russian	1	0	1

M E D I A U S E



Top Ten Media Outlets

1. Armenian TV 1H1
2. Armenia
3. Armenian TV 2H2
4. Shant
5. Google
6. RTR Planeta
7. ORT
8. TV5
9. ALM
10. Armenakob

Top Ten Sources of News

1. Shant
2. Electronika.ru
3. Armenian Public TV 1
4. Armenian TV
5. RTR Planeta
6. Armenian TV H2
7. Google
8. Azatutyun (RL)
9. Erkir Media
10. ORT

Web Analytics

VOA Weekly Visitors	1,800
Weekly Visits	2,900
RFE/RL Weekly Visitors	16,000
Weekly Visits	68,700

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Although, freer than other FSU countries, only limited political and civil freedoms are supported in Armenia. International observers noted widespread fraud during the 2008 elections; bribes defined the candidates' success. Rallies opposing the current government were allowed to be organized in 2011.
- Government corruption persists. Police crimes perpetrated during the events of March 2008 remain unpunished and many jailed journalists are still behind bars. While academic and religious freedoms are respected, the government severely restricts freedom of assembly.
- Armenia's legal framework is generally supportive of the freedom of speech. However, low awareness of laws surrounding this freedom furthers self-censorship among journalists.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 27.00 (77/179)**
- When commenting on the most recent developments in the Armenian media market, experts appeared very enthusiastic about the "solid improvement...in freedom of speech, primarily as a result of decriminalization of libel and defamation laws and the government finally moving forward with awarding broadcast licenses." (Media Sustainability Index 2011, IREX, p. 131.) The completion of Armenia's digitalization process is still slated for 2015. However, in December 2010 "the National Commission on Television and Radio announced the results of frequency license tenders for digital broadcasting" and, thus, addressed the concern of domestic and international observers that the government was creating artificial barriers to the digital switchover.
- Despite the positive changes, journalists' professional standards and ethics remain a concern for media experts as well as for news consumers. Both experts and consumers are particularly uneasy about the increasing confrontation between pro-government and pro-opposition media outlets. In qualitative studies, participants complained that state-run and oppositional outlets are biased when it comes to reporting on current events in Armenia: both sides tend to underreport and misrepresent information to their advantage.

P R O F I L E



Language of Broadcast: Azerbaijani

Content: 3.5 hours of original audio programming per week for Internet; 1 hr. of original and 2.49 hrs. of repeat video programming per week; Internet

Distribution: Satellite

Radio: The 15 minute VOA Azerbaijani audio show is available on Turksat and Internet.

TV: VOA Azerbaijani airs programs *Azerbaijani Daily* and *Review of the Week* via Eutelsat Hotbird in addition to Internet.

Web: The Service has web and mobile sites, a Facebook fan page, Twitter, YouTube accounts, and sends an email newsletter. VOA Azeri produces 3 web-only audio products (including a 15 minute Internet audio also broadcast on Turksat) and 2 web-only video products (including a daily video newscast on Hotbird & Eutelsat), and maintains 5 blogs. The website also hosts video streams and a biweekly live forum. The Service maintains boards on the Pinterest site.

Staff: 4 | **Budget:** \$741,000

Established: 1951 to 1953; 1982 to present



Language of Broadcast: Azerbaijani

Content: 27 hrs. of original and 39 hrs. of repeat radio programming per week; Internet; weekly newspaper

Distribution:

Radio: RFE/RL's delivery includes multiple SW frequencies, TurkSat, HotBird, AsiaSat -- (4 hours of live programing daily and 5 hours of repeats daily). Alternative delivery includes weekly publication of newspapers with web content.

New Media: The Service has a multimedia, bi-lingual Web site (Azeri and Russian language sites). The Service is also active on Facebook and Twitter in Azeri and Russian languages and has a branded YouTube page in Azeri.

Staff: 6

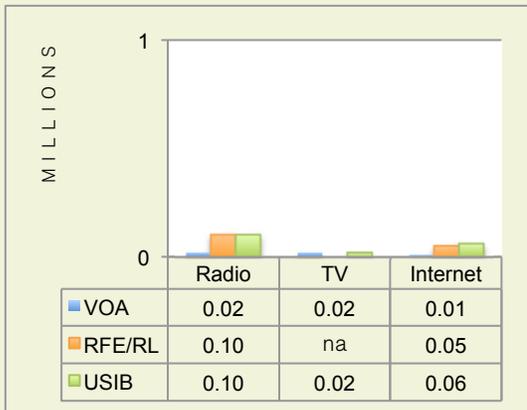
Budget: \$1,654,000

Established: 1953 to present



P E R F O R M A N C E D A T A (Using Data from Azerbaijan, April 2011)

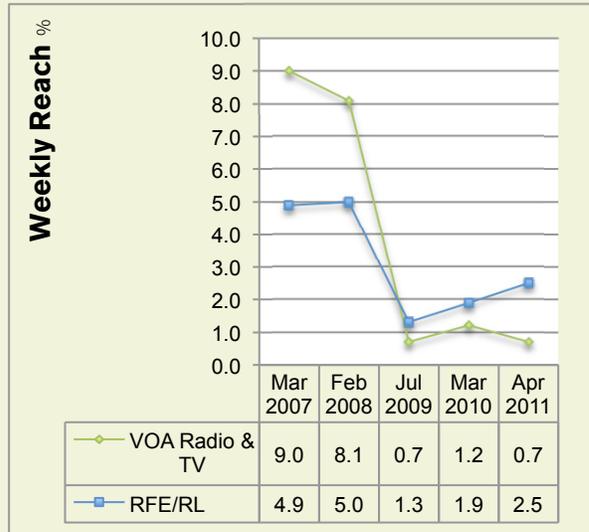
Audience Size



Weekly Reach by Media (%)

	VOA	RFE/RL	USIB
Radio	0.4	1.9	2.10
TV	0.4	na	0.40
Internet	0.1	0.9	1.0
Total	0.7	2.5	2.9

Weekly Reach %



Awareness (%)

VOA	RFE/RL
36	52

Azerbaijani

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)*

	VOA	RFE/RL
Radio	na	na
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*

	VOA	RFE/RL
Current Events	na	na
U.S. Culture (VOA) or Current Events in Azerbaijan (RFE/RL)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.4	3.3
TV	3.4	na

*Samples of VOA and RFE/RL weekly audiences in the survey are too small for meaningful analysis.

Data are from an April 2011 survey of adults (15+) in Azerbaijan.

Azerbaijani Broadcasting

A U D I E N C E C O M P O S I T I O N

Total Population of Azerbaijan: 9.2 million

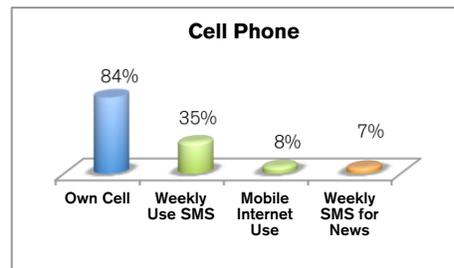
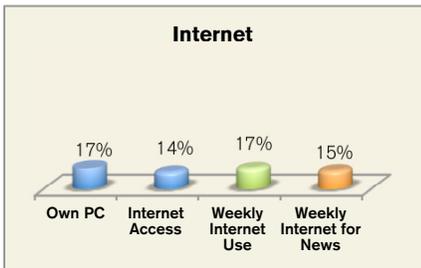
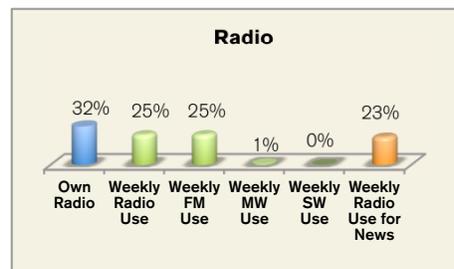
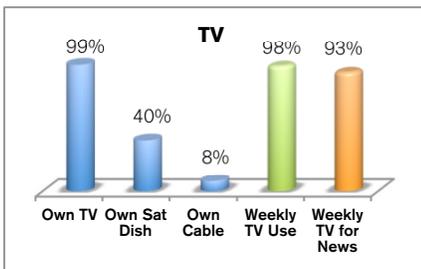
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Sex	%	%	%
Male	48	na	na
Female	52	na	na
Age			
15-24	28	na	na
25-34	15	na	na
35-44	13	na	na
45-54	14	na	na
55-64	15	na	na
65+	16	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Education	%	%	%
None/Primary	18	na	na
Secondary	60	na	na
Technical	8	na	na
Coll./Univ.	14	na	na
Ethnicity/Nationality			
Azerbaijani	95	na	na
Russian	1	na	na
Other	4	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Residence	%	%	%
Urban	56	na	na
Rural	44	na	na
Language			
Azerbaijani	94	na	na
Russian	2	na	na
Other	4	na	na

*Samples of VOA and RFE/RL weekly audiences in the survey are too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. ANS TV
2. ATV
3. Azerbaijan Public TV
4. Khazar
5. AzTV
6. Space
7. Lider
8. STV (Turkey)
9. Radio ANS
10. ORT-1 Evraziya

Top Ten Sources of News

1. ANS TV
2. Khazar
3. ATV
4. Azerbaikam Public TV
5. AZTV
6. Linder TV
7. ANS 102 FM
8. Google
9. day.az
10. ORT

Web Analytics

VOA Weekly Visitors	3,000
Weekly Visits	5,100
RFE/RL Weekly Visitors	35,700
Weekly Visits	123,000

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Azerbaijan held parliamentary elections on November 7, 2010. Conditions necessary for fair and transparent elections were missing. A deficient candidate registration process, limited freedoms of peacefully assembly, unbalanced media coverage, lack of effective campaign resources all created an uneven playing field in favor of the candidate from the ruling party. Overall, these elections were not sufficient for meaningful democratic development in the country.
- Azerbaijan is an authoritarian petro-state, in which all power is held by president Ilham Aliyev, oil revenues dominate the government budget, and the government dominates the economy.
- A March 2009 referendum, which eliminated presidential terms limits, has further consolidated the effective dictatorship of Mr. Aliyev.
- Opposition parties exist and have token representation in the Azeri parliament, but enjoy no real influence or hope of gaining power through ordinary political processes.
- Public opinion is dominated by resentment over the continuing Armenian occupation of Nagorno-Karabakh and surrounding provinces.
- Azerbaijan is highly corrupt even by the standards of the former Soviet Union. Oil revenues have fueled a building boom in Baku, but have not dispelled the problem of persistent unemployment in the regions.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 87.25 (162/179)**
- Although the government exerts a high degree of control over the media in Azerbaijan, newspapers, the Internet, and satellite TV give Azeris access to some independent sources of information.
- Despite Azerbaijan's record of jailing opposition journalists on trumped-up charges, there continue to be opposition journalists to arrest. While the government dominates Azerbaijani TV and radio, some of the country's leading newspapers favor the opposition.
- On March 7, 2011, RFE/RL journalist Khadija Ismailova received a letter from authorities threatening to 'defame' her if she didn't 'behave.' The smear campaign against her is a reminder of the dire state of freedom of expression in Azerbaijan. Ismailova is renowned for her investigative reporting, uncovering several cases of elite corruption in Azerbaijan – including against members of President Ilham Aliyev's family.
- Since January 2009, international broadcasters, including RFE/RL, are no longer able to use national frequencies. RFE/RL has responded by aggressively working to attract new audiences to the TurkSat audio stream that launched in April 2009 and the service has dedicated additional resources to its website.
- Newspapers and the Internet, the freest media in Azerbaijan, reach only a small minority of the population, and radio is in decline as well.
- By far the most important medium of communication in Azerbaijan is TV, to which virtually all Azerbaijanis have access. On average, Azeris spend 5.5 hours per day watching TV.

P R O F I L E



Language of Broadcast: Bangla

Content: 3.5 hrs. of original radio programming per week; 3.5 hrs. of repeat radio programming per week; 0.25 hrs. of original TV programming per week; Internet

Distribution: 3 affiliates (1 FM, 2 TV), 1 IBB MW and 2 SW frequencies

Radio: The Service's FM affiliate is Radio Today, the top-rated private FM station in the capital, Dhaka. The Service broadcasts two five-minute Bangla newscasts daily.

TV: Bangla's 10 to 12 minute TV program, *Hello America*, is broadcast every Friday on NTV, the 5th most watched TV channel in Bangladesh, and repeated on Saturday. In March 2012, the Bangla Service reached agreement with DESH TV to broadcast the *USA VOTES 2012* version of VOA 60 once per week on the Dhaka outlet. VOA 60 is a 60-second audio/video element.

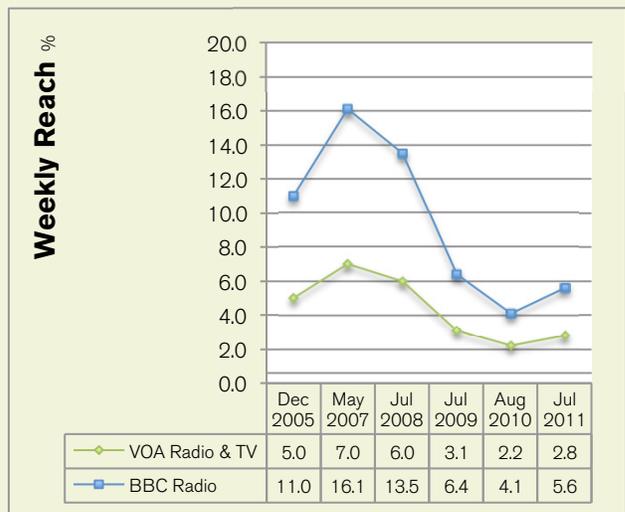
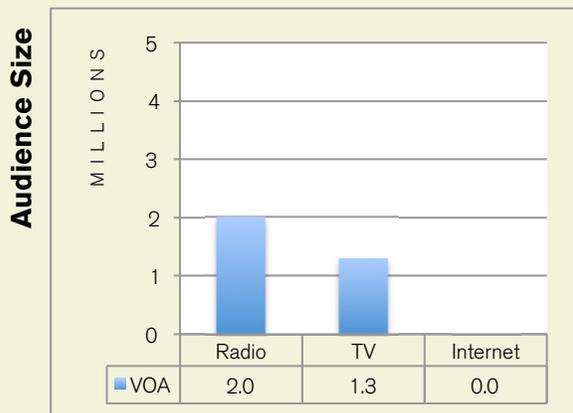
Staff: 7

Budget: \$1,324,000

Established: 1958 to present



P E R F O R M A N C E D A T A (Using Data from Bangladesh, July 2011)



Weekly Reach (%) By Media	
VOA	
Radio	1.8
TV	1.2
Internet	0.0
Total	2.8

Awareness (%)	
VOA	
Total	31

Bangla

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	96
TV	na

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA Radio	VOA TV
Current Events	90	na
U.S. Culture	31	na
U.S. Policies	25	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.3
TV	3.3

* Understanding ratings for VOA TV are 89% for Current Events, 22% for U.S. Culture and 50% for U.S. Policies.

Data are from a July 2011 survey of adults (15+) in Bangladesh.

Bangla Broadcasting

Total Population of Bangladesh: 150.7 million

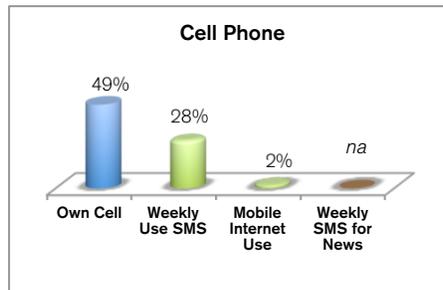
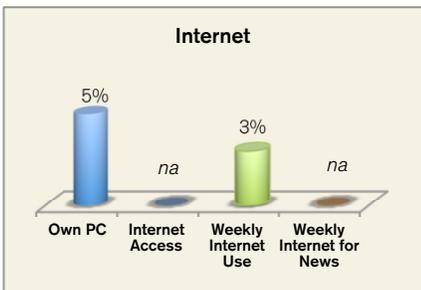
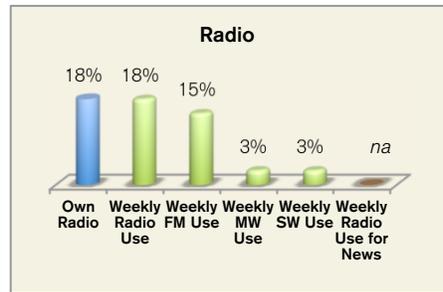
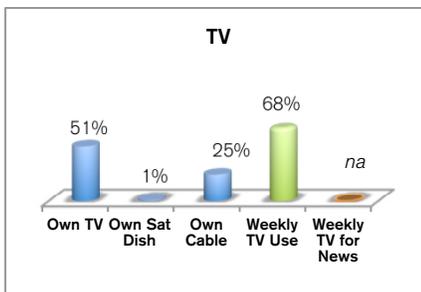
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	51	74
Female	49	26
Age		
15-24	26	41
25-34	31	22
35-44	20	21
45-54	11	9
55-64	8	6
65+	5	1

	Sample	VOA Weekly Audience
Education	%	%
No Formal	43	24
Primary	22	11
Secondary	19	26
SSC/HSC	11	20
Higher	5	20
Ethnicity/Nationality		
Bangladeshi	99	97
Other	1	3

	Sample	VOA Weekly Audience
Residence	%	%
Urban	24	43
Rural	76	57
Language		
Bangla	100	100

M E D I A U S E



Top Ten Media Outlets

1. Bangladesh TV
2. ATN Bangla
3. Ekushey TV
4. Channel I
5. NTV
6. Baishakhi TV
7. ATN News
8. Desh TV
9. RTV
10. ETV

Top Ten Sources of News

1. Bangladesh TV
2. ATN Bangla
3. Channel I
4. Ekushey TV
5. ATN News
6. Bangladesh Betar
7. NTV
8. Diganta
9. BBC
10. Baishakhi TV

Web Analytics

Weekly Visitors 2,000
Weekly Visits 3,200

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- The ruling Awami League is expected to serve a full five-year term, having secured a large majority at the 2008 general election. The main opposition Bangladesh Nationalist Party has just 31 of the 300 seats in parliament.
- The government faces no immediate challenge to its rule, but there are two potential sources of political instability: a rise in social unrest, and a new campaign of violence by militant groups.
- Bangladesh's political scene has been dominated recently by preparations for the visit of the Indian prime minister, Manmohan Singh. The visit was the first by an Indian prime minister in 12 years and the first by a statesman from that country's ruling Indian National Congress in nearly four decades. The two sides marked the occasion by signing several trade and co-operation deals. However, measured against the high expectations that the historic occasion evoked in Bangladesh, the visit was a disappointment. The two countries failed to sign agreements on the transit of Indian goods through Bangladesh or resolve a long-standing disagreement over water-sharing.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 57.00 (129/179)**
- Bangladesh has a free and outspoken press, although journalists are frequently subject to violence and intimidation by both government and other activists.
- Bangladesh has just one state run TV channel, BTV. Large portions of the population now have access to cable channels that provide reliable news along with Indian channels for entertainment. The most popular cable channels draw up to a third of the population weekly, providing access to non-state news sources.
- Within the past 3 years a number of private FM radio channels have been licensed and are able to broadcast news. However these are limited to the largest cities only; elsewhere only state run Betar is available.
- Internet is still limited to an urban elite but mobile phone ownership is widespread even in rural areas.

P R O F I L E



Language of Broadcast: Belarusian

Content: 21 hrs. of original and 35 hrs. of repeat radio programming per week; 0.5 hrs. of original and 0.5 hrs. of repeat TV programming per week; Internet

Distribution: 1 affiliate (1 MW), 2 IBB SW frequencies

RFE/RL's delivery includes 1 cross border MW affiliate from Lithuania, multiple SW frequencies, HotBird, Internet with streaming audio plus 30 minutes weekly TV on Warsaw-based BelSat's Astra and Sirius satellite (suspended as of December 2010 for financial reasons)

New Media: Active on 6 social networking sites including Facebook, VKontakte and Live Journal; active UGC via Pangea website; placement of content and videos on independent local partner sites in Belarus; branded YouTube channel; and mobile site.

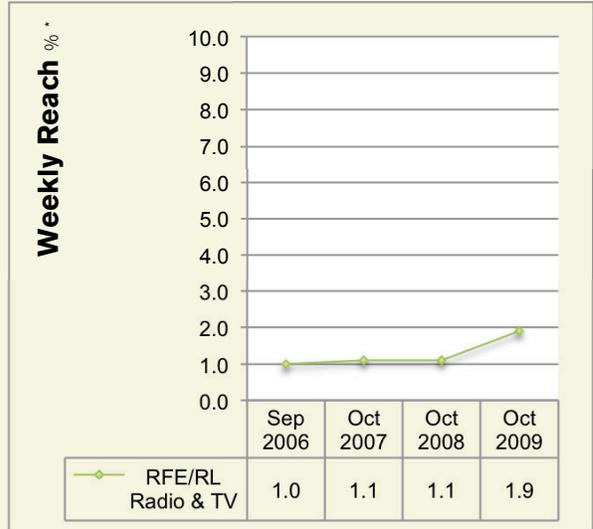
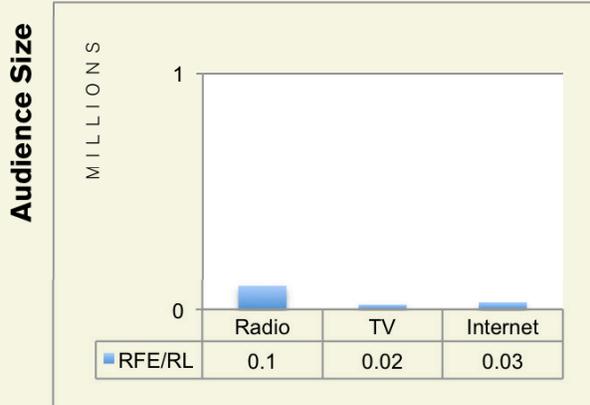
Staff: 12

Budget: \$2,379,000

Established: 1954 to present



P E R F O R M A N C E D A T A (Using Data from Belarus, October 2009)



Weekly Reach (%) by Media	
	RFE/RL
Radio	1.7
TV	0.3
Internet	0.4
Total	1.9

Awareness (%)	
	RFE/RL
Total	29

Belarusian

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)**	
	RFE/RL
Radio	na
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**	
	RFE/RL
Current Events	na
Current Events in Belarus	na
U.S. Policies	na

Quality

Combined Scores from audience panel	
	RFE/RL
Radio	3.3
TV	na

* Weekly reach figures include TV beginning in October 2008.
 ** Sample of weekly RFE/RL audience is too small for meaningful analysis.

Data are from an October 2009 nationwide survey of adults (15+) in Belarus.