

# Kazakh Broadcasting

Total Population of Kazakhstan: 16.6 million

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

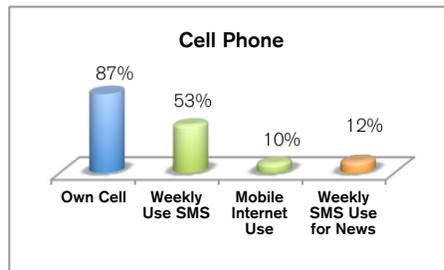
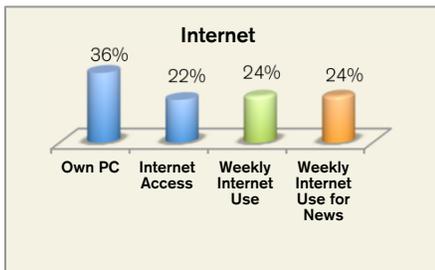
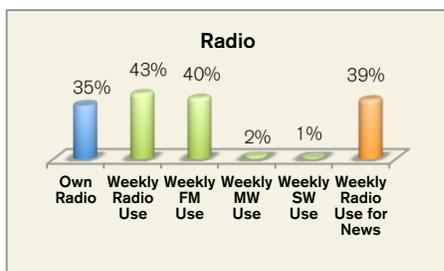
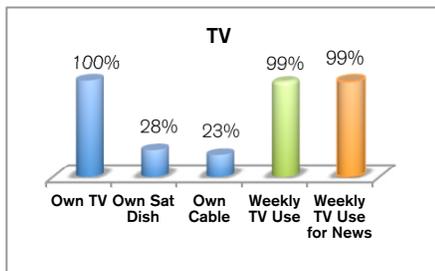
	Sample	RFE/RL Weekly Audience*
<b>Sex</b>	%	%
Male	47	na
Female	53	na
<b>Age</b>		
15-24	23	na
25-34	23	na
35-44	18	na
45-54	17	na
55-64	10	na
65+	9	na

	Sample	RFE/RL Weekly Audience*
<b>Education</b>	%	%
None/Primary	2	na
Inc. Secondary	24	na
Secondary	52	na
Higher	22	na
<b>Ethnicity/Nationality</b>		
Kazakh	54	na
Russian	32	na
Other	14	na

	Sample	RFE/RL Weekly Audience*
<b>Residence</b>	%	%
Urban	54	na
Rural	46	na
<b>Language</b>		
Kazakh	47	na
Russian	48	na
Other	5	na

\* Sample of weekly RFE/RL listeners is too small for meaningful analysis.

## M E D I A U S E



### Top Ten Media Outlets

1. ORT-1
2. Khabar
3. Kazakhstan-1
4. EL Arna
5. KTK
6. NTV
7. NTK
8. 31 Kanal
9. Ren TV
10. Rossia

### 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

### Web Analytics

<b>Weekly Visitors</b>	33,500
<b>Weekly Visits</b>	95,400

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Kazakhstan held parliamentary elections on January 15, 2012, which many believe was a ploy by Kazakh leaders to boost the country's image in the eyes of western governments that see that country as having an unfair and less-than-transparent electoral system. Three parties were able to pass the electoral threshold, however none of the real opposition parties entered the Mazhilis, the lower house of the bicameral parliament.
- President Nursultan Nazarbayev, the first and only president in Kazakhstan since the independence in 1991, won reelections in April 2011 at age 71. In 2007 the parliament voted to allow Nazarbayev to stay in office for an unlimited number of terms. This means that Nazarbayev will be able to control Kazakh politics even when he retires. However, after winning the presidential election, Nazarbayev stated that he was not considering giving up the presidential position. The overwhelming victory has been marred by reports of fraudulent electoral practices.
- Kazakhstani law prohibits political parties on religions, ethnic, or gender bases; stripped of major political rights, all minorities continue to be discriminated against. Corruption and family-ties in all governmental agencies augment legislative discrimination.
- The imbalance of the country's economic position and traditional cultural practices leave the most vulnerable populations – women and migrant workers – the least protected in terms of access to employment, public and medical services, and at-work and domestic violence.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 77.50 (154/179)**
- International observers agree that the recent developments in Kazakhstan are a "disappointment" and a step back from the democratization of the media space, which began around 2000. In the past two years, Kazakhstan has adopted a number of laws and regulations, which favor elected officials while restraining freedoms of speech and press and forcing independent outlets out of the market.
- Nevertheless, Kazakhstanis continue to display a high level of confidence in their government and its policies. Reflective of this attitude, survey findings show that the state-run media sources are trusted most among all media outlets available to the population. Moreover, more than half of Kazakhstanis favor state censorship of media outlets. The population's strong reliance on state-run media sources poses a challenge for USIBs hoping to assume a stronger position in the Kazakhstani media market.
- Internet use is on the rise again after a short period of stagnation. However, low quality Internet connections and oppressive Internet laws restrain Internet freedom and limit Kazakhstanis' online experiences.

P R O F I L E



**Language of Broadcast:** Khmer

**Content:** 10.5 hrs. of original radio programming and 1 hr. of original TV programming per week; Internet

**Distribution:** 5 affiliates (3 FM, 2TV) 1 IBB MW & 3 SW frequencies

**Radio:** VOA Khmer produces 2 radio broadcasts 7 days a week: 60 minutes in the evening (local time), and 30 minutes in the morning.

**TV:** VOA Khmer programming is carried 4 days a week on the Cambodian Television Network (CTN), Cambodia's No. 1 TV station, and 5 days a week on Television Kampuchea (TVK), Cambodian national TV.

**Staff:** 11

**Budget:** \$1,774,000

**Established:** 1955 to 1957; 1962 to present



**Language of Broadcast:** Khmer

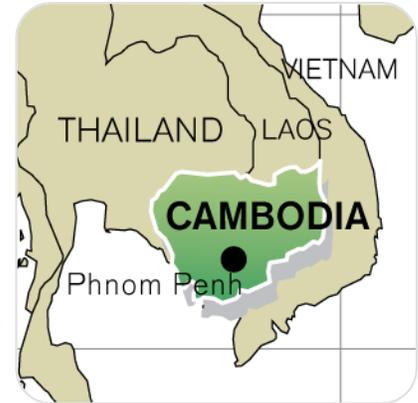
**Content:** 14 hrs. of original radio programming per week; Internet; video webcasts

**Distribution:** 10 FM affiliates in-country, 2 IBB SW frequencies, satellite audio, mobile phone

**Radio:** The Service broadcasts two hours of original programs daily including a weekly Call-In Show.

**Video:** The Service is producing a video webcast five days a week.

**New Media:** Includes a multimedia website, a mobile site, Facebook, YouTube, and a blog.

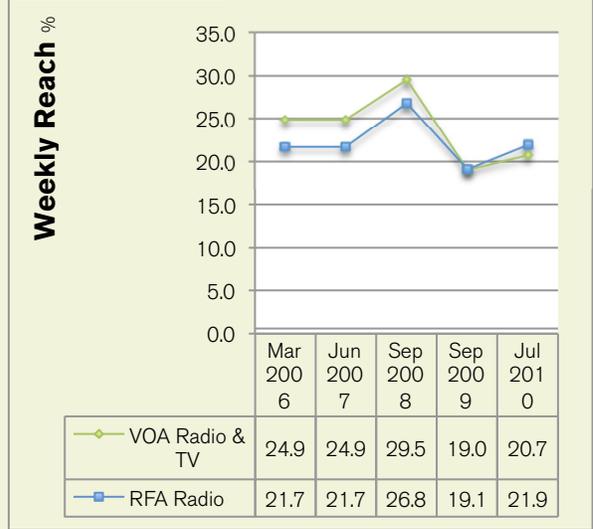
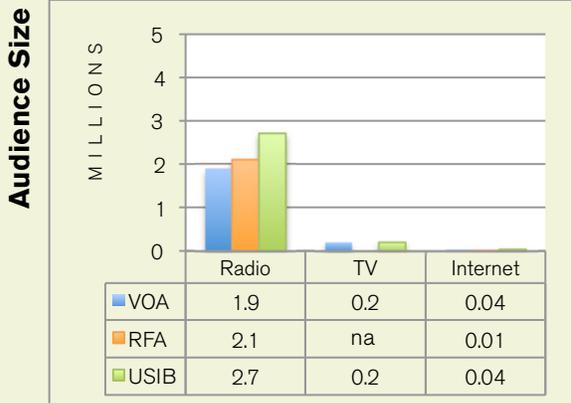


**Staff:** 12

**Budget:** \$1,413,000

**Established:** 1997 to present

P E R F O R M A N C E D A T A (Using Data from Cambodia, July 2010)



Weekly Reach by Media (%)			
	VOA	RFA	USIB
Radio	19.4	21.9	27.3
TV	2.1	na	2.1
Internet	0.4	0.1	0.4
<b>Total</b>	<b>20.7</b>	<b>21.9</b>	<b>28.3</b>

Awareness (%)	
VOA	RFA
66	73

Khmer

Credibility		
	VOA	RFA
Percentage of surveyed weekly audience that finds broadcasts credible (%)		
Radio	91	89
TV	98	na

Understanding		
	VOA Radio*	RFA
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*		
Current Events	78	74
U.S. Culture (VOA) or Current Events in Cambodia (RFA)	50	na
U.S. Policies	42	na

Quality		
	VOA	RFA
Combined Scores from audience panel		
Radio	3.6	3.4
TV	4.0	na

\*Understanding ratings for VOA TV are 67% for Current Events, 23% for U.S. Culture and 18% for U.S. Policies.

Data are from a July 2010 survey of adults (15+) in Cambodia.

# Khmer Broadcasting

Total Population of Cambodia: 14.7 million

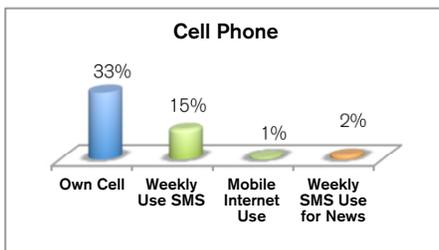
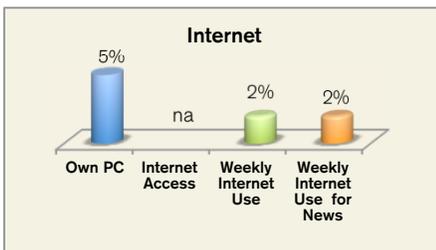
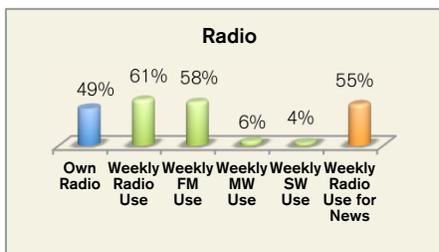
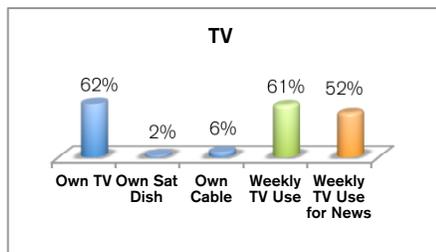
## A U D I E N C E C O M P O S I T I O N

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
<b>Sex</b>	%	%	%
<b>Male</b>	48	67	62
<b>Female</b>	52	33	38
<b>Age</b>			
<b>15-24</b>	34	21	29
<b>25-34</b>	22	20	22
<b>35-44</b>	18	21	19
<b>45-54</b>	13	16	12
<b>55-64</b>	8	12	10
<b>65+</b>	6	10	8

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
<b>Education</b>	%	%	%
<b>No formal</b>	19	15	14
<b>Primary</b>	57	54	56
<b>Secondary</b>	21	26	26
<b>Technical</b>	1	1	0
<b>Higher</b>	3	4	4
<b>Ethnicity/Nationality</b>			
<b>Khmer</b>	96	95	95
<b>Other</b>	4	5	5

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
<b>Residence</b>	%	%	%
<b>Urban</b>	18	20	19
<b>Rural</b>	82	80	81
<b>Language</b>			
<b>Khmer</b>	96	95	96
<b>Other</b>	4	5	4

## M E D I A U S E



### Top Ten Media Outlets

1. TV27 Bayon
2. CTN
3. TV5
4. TVK
5. TV3
6. FM95 Radio Bayon
7. TV9
8. FM103 Radio Phnom Penh
9. RFA
10. TV11 Apsara

### Top Ten Sources of News

1. CTN
2. TV 5
3. Bayon TV
4. TVK
5. RFA
6. VOA
7. FM103 Phnom Penh
8. FM 105 Beehive
9. FM 95 Bayon 21
10. Cambodia National Radio

### Web Analytics

**VOA**  
**Wkly. Visitors** 15,600  
**Wkly. Visits** 38,300

**RFA**  
**Wkly. Visitors** 43,400  
**Wkly. Visits** 109,200

## 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**
- Cambodia's Prime Minister Hun Sen and his Cambodian Peoples' Party (CPP) maintain a tight grip on political power in Cambodia. National elections are scheduled for 2013, but the main opposition leader, Sam Rainsy, has lived in exile for the past couple of years and faces imprisonment should he go to Cambodia. Thus, there is no effective opposition.
- There is little separation of powers in the government. Public confidence in the court system and the police remain low. The Cambodian government continues to silence critics through the targeted use of laws and detention. Freedom House described the rule of law in Cambodia as "marred by a inefficiency, corruption and a lack of independence."
- The legitimacy of the high profile Khmer Rouge trials is in doubt now that two international judges have resigned due to interference from the Cambodian government.
- BBG surveys found less than half of Cambodian adults (45 percent) believe "people like them" are free to discuss political opinions openly and 69 percent believe that official corruption is the biggest problem in Cambodia today.
- Chinese influence is growing economically and politically. In early 2010, China gave \$850 million in aid to the Cambodia after the Phnom Penh government repatriated to China 20 Uyghurs who had been seeking political asylum.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 55.00 (117/179)**
- In 2011, press freedom in Cambodia continued to backslide. While Cambodia still enjoys more media freedom than neighboring Vietnam and Laos, Freedom House's most recent Freedom of the Press Index reduced its status from "partly free" to "not free" as violence against journalists has increased.
- As the domestic media becomes more restricted, the role of international media as sources of news and information is even more vital. VOA and RFA are the most trusted sources of news in the country.
- The FM radio market, particularly in the capital of Phnom Penh, has become increasingly competitive. There are at least 54 radio stations operating in Cambodia with approximately 30 broadcasting in the capital, Phnom Penh. The majority of stations both in Phnom Penh and beyond broadcast on FM.
- However, in line with the increasing strength of the CCP and declining media freedom, most domestic radio stations are under strong government control. Many, including FM 96, FM 97, FM 98, FM 99 and FM 103 are perceived as affiliated with Cambodian People's Party, the major ruling party. There are however several independent local stations such as FM 90, FM 93.5 and Radio Beehive FM 105. RFA and VOA remain two of the most widely heard international stations in Cambodia.
- Almost all Cambodian households (95 percent) have at least one mobile phone. Mobile phone users are increasingly using smart phones and accessing mobile data.
- Internet penetration in Cambodia is still limited, but mobile use now outstrips access in Internet cafes. Although Internet cafes are beginning to appear in ever more far-flung provincial towns, regular Internet use is still largely confined to the capital and a few larger cities such as Siem Reap and Battambang.

P R O F I L E



**Language of Broadcast:** Korean  
**Content:** 29 hrs. of original and 6.5 hrs. of repeat radio programming per week; Internet  
**Distribution:** 2 MW, 7 IBB SW frequencies  
**Radio:** VOA Korean broadcasts on 2 MW (AM) transmitters, one in South Korea and one in far eastern Russia, near the northern North Korean border. In addition, VOA Korean broadcasts from shortwave transmitters in the Philippines, Thailand, and Russia.  
**New Media:** The Service has an Internet site and a multimedia mobile website and sends an email newsletter. The Service has recently launched Facebook, Twitter and YouTube pages.  
**Staff:** 21 **Budget:** \$3,010,000  
**Established:** 1942 to present

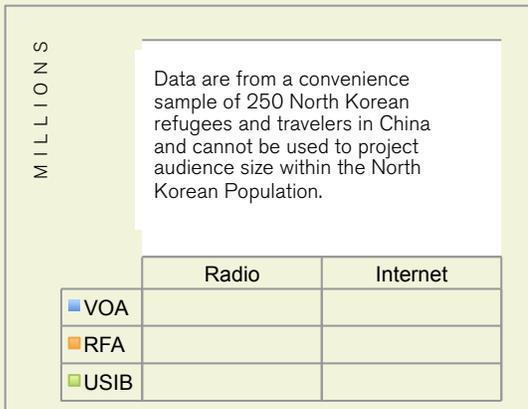


**Language of Broadcast:** Korean  
**Content:** 24.5 hrs. of original and 10.5 hrs. of repeat radio programming per week; Internet  
**Distribution:** 3 SW frequencies; Satellite rebroadcasting  
**Radio:** The Service broadcasts three-and-a-half hours of original program and one-and-a-half hours of repeat daily.  
**Video:** On a daily basis the Service updates with staff-generated photos and videos, as well as selected ones from Yonhap, the largest South Korean news agency.  
**New Media:** The Service has web and mobile sites. Two broadcasters are running private blogs to promote RFA programs. Social media sites include Facebook, Twitter, and Me2Day (popular microblog in South Korea). An iPhone app to play Korean programming was developed in May 2011.



P E R F O R M A N C E D A T A (Using Data from Sample of North Korean Refugees, August 2009)\*

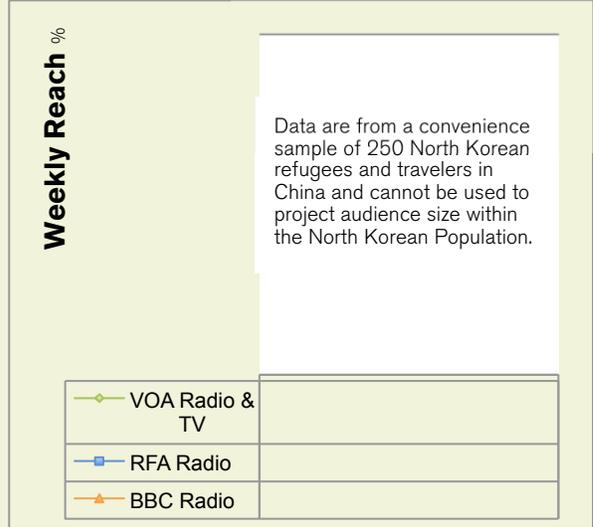
**Audience Size**



**Weekly Reach by Media (%) \*\***

	VOA	RFA	USIB
Radio	19.6	22.0	22.8
TV	na	na	na
Internet	1.2	1.6	1.6
Total	19.6	22.0	22.8

**Weekly Reach %**



**Awareness (%)**

VOA	RFA
28	24

**Credibility**

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

	VOA	RFA
Radio	na	na
TV	na	na

**Understanding**

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

	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in Region (RFA)	na	na
U.S. Policies	na	na

**Quality**

Combined Scores from audience panel

	VOA	RFA
Radio	3.4	3.0
TV	na	na

\*Data are from a non-probability sample of North Korean travelers and refugees in the PRC and cannot be used to project audience size or for trend analysis.  
 \*\*Weekly reach figures are for listening while in North Korea; 15.2% reported listening to RFA and 12.4% to VOA while in transition. Media use data reflect while respondents were in North Korea.

Data are from an August 2009 non-probability sample of North Korean travelers and refugees in the PRC.

# Korean Broadcasting

Total Population of North Korea: 24.5 million

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

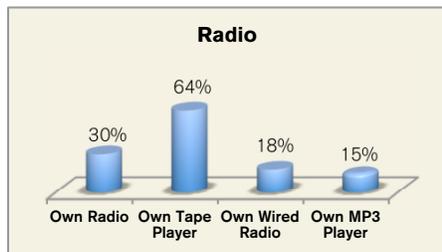
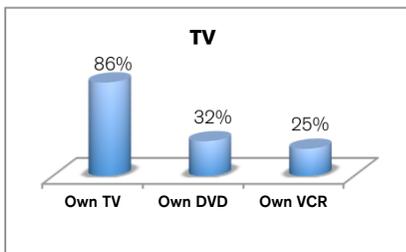
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
<b>Sex</b>	%	%	%
<b>Male</b>	40	53	51
<b>Female</b>	60	47	49
<b>Age</b>			
<b>15-24</b>	2	2	4
<b>25-34</b>	22	25	24
<b>35-44</b>	50	41	42
<b>45-54</b>	20	25	24
<b>55-64</b>	6	8	7

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
<b>Education</b>	%	%	%
<b>Elementary</b>	0	0	0
<b>Mid-high</b>	88	96	98
<b>Coll./Univ.</b>	11	4	2
<b>Ethnicity/Nationality</b>			
<b>na</b>	na	na	na

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
<b>Residence</b>	%	%	%
<b>Urban</b>	6	6	4
<b>Rural</b>	20	0	0
<b>Semi-urban</b>	74	94	96
<b>Language</b>			
<b>na</b>	na	na	na

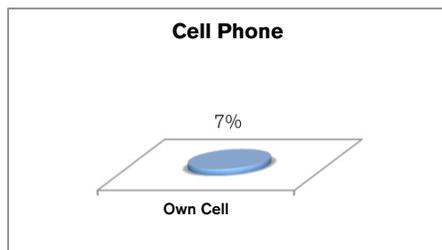
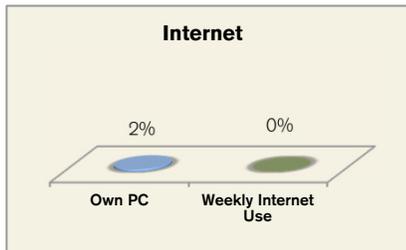
\*\*Weekly reach figures are for listening while in North Korea; 15.2% reported listening to RFA and 12.4% to VOA while in transition. Media use data reflect while respondents were in North Korea.

## M E D I A U S E \*\*



### Most Important Sources of Information

1. Friends and relatives
2. Chinese TV
3. Chinese merchants/smugglers
4. Domestic TV
5. South Korean radio
6. Foreign radio in Korean
7. North Korean radio



### Web Analytics

**VOA**  
**Wkly. Visitors** 6,300  
**Wkly. Visits** 10,000

**RFA**  
**Wkly. Visitors** 4,800  
**Wkly. Visits** 8,400

## 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**
- North Korea remains one of the most closed and repressive societies in the world. The impoverished country continues to struggle to feed people, and is largely dependent on Chinese economic assistance. Under the rule of Kim Jong-un and the Korean Workers Party, serious and large-scale human rights abuses are common.
- The death of Kim Jong-il in December 2011 further complicated the security environment on the Korean Peninsula, as his 28-year-old son and successor Kim Jong-un has demonstrated the same reclusive tendencies as his father.
- An increasingly porous border with China has provided North Koreans with a greater window to the outside world than in the past, along with smuggled goods. Refugees describe a domestic environment of increasing disillusionment and despair, though this has not produced open protest.
- Relations between North and South Korea remain very tense after an official investigation into the sinking of the South Korean naval ship "Cheonan" concluded that the vessel was sunk by a North Korean torpedo. In response, South Korea has suspended trade with the North, resumed psychological operations and is appealing to the UN and the international community to condemn North Korea's actions.
- North Korea launched its first nuclear weapon in 2006, and multi-lateral talks with China, the U.S. Japan, Russia and South Korea have failed to curb the country's nuclear program. It tested another nuclear weapon in May 2009. In April 2012, North Korea launched a long-range rocket that disintegrated shortly after blast-off.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 141.00 (178/179)**
- The domestic media serve as direct mouthpieces of the regime. Although the constitution provides for freedom of speech and freedom of the press, in reality citizens are banned from access to all outside sources of information on threat of stiff penalties, including detention in labor camps.
- North Korea ranks at the bottom of all indices of media freedom. However, research suggests the enforcement of media restrictions is inconsistent; many North Koreans seem willing to accept the risk to access outside information.
- An increasingly porous border with China, North Korea's chief trading partner, is allowing for greater inflow of media equipment and content – radios, TVs, and South Korean and Chinese DVDs are all sold in North Korea by Chinese traders. Illegal mobile phone ownership and use is making direct contact between ordinary North Koreans and those outside the country possible.
- Among elites, use of computers, MP3 players and flash drives is growing. Those who smuggle South Korean media say flash drives are popular because their small size and easy removal make them safer during household inspections.
- The field of international radio broadcasters into North Korea has grown markedly over the last few years. At least four defector-run NGO broadcasts out of Seoul add to the field of stations sending Korean-language content to the North.
- Although impossible to quantify, it is clear that some North Koreans are listening to international radio. Among recent North Korean refugees international radio listening is a more common behavior than it was among earlier refugees.
- While discussing sensitive information in public is still very dangerous, it appears state social controls no longer to extend into the home or among close friends. As a result, word of mouth communication of outside information appears to be more common.

P R O F I L E



**Language of Broadcast:** Kurdish (dialects Sorani and Kurmanji)

**Content:** 21 hrs. of original programming per week; Internet

**Distribution:** 6 IBB FM, 1 MW, and 3 SW

**Radio:** VOA's Kurdish Service broadcasts three hours of radio programming seven days a week. IBB FM transmitters in the Kurdish-populated cities of Sulaimaniya, Kirkuk, Mosul and Erbil carry all three hours daily. One hour per day is carried on IBB FM transmitters in Baghdad and Basra. One hour per day is repeated via the IBB MW frequency out of Kuwait.

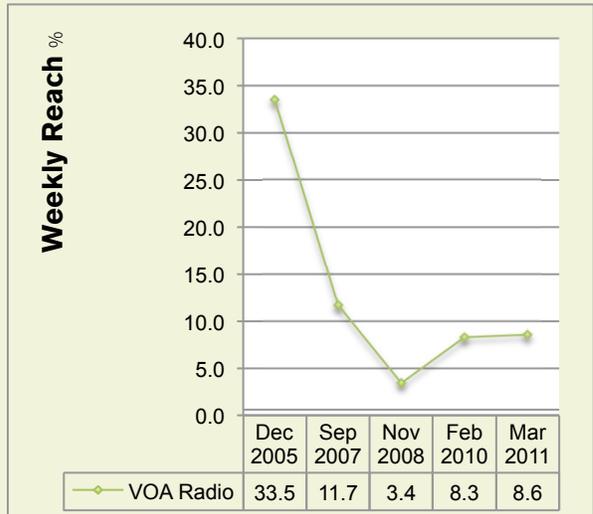
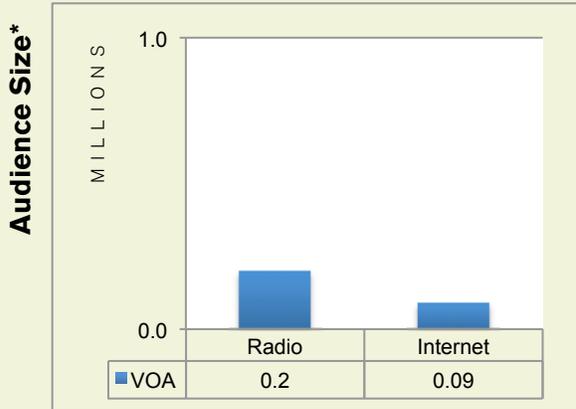
**TV/Video:** VOA Kurdish has been engaged in a continuing effort to upgrade TV and video production skills. Already, both original and "versioned" features are a significant component of its web offerings. The Service is also launching a weekly, fast-paced, 10-minute TV show (*Kurd Connection*) for web use and placement with prospective affiliates in the broadcast region.

**New Media:** The Service has two websites (in Kurmanji and Sorani dialects) a Facebook fan page, a Twitter feed, and a YouTube page as well as five blogs. The Service utilizes such area-specific social networks as Paltalk to provide audience contribution to the call-in shows.



**Staff:** 9  
**Budget:** \$1,595,000  
**Established:** 1992 to present

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



Weekly Reach by Media (%) *	
VOA	
Radio	6.0
TV	na
Internet	3.0
<b>Total</b>	<b>8.6</b>

Awareness (%)	
VOA	
	na

Kurdish

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	76
TV	na

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	Radio	TV
Current Events	63	na
U.S. Culture	37	na
U.S. Policies	45	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.4
TV	na

\*All weekly reach rates and audience estimates are based on the total sample of ethnic Kurds only.

Data are from a March 2011 survey of adults (15+) in Iraq with a booster sample of ethnic Kurds.

# Kurdish Broadcasting

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

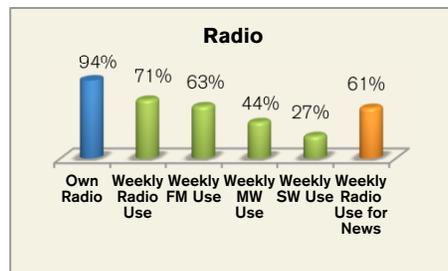
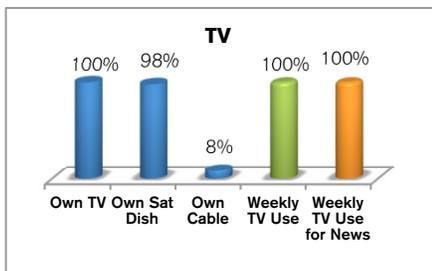
Total Population of Ethnic Kurdish population in Iraq: 3 million

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
<b>Male</b>	51	53
<b>Female</b>	49	47
<b>Age</b>		
<b>15-24</b>	25	12
<b>25-34</b>	25	38
<b>35-44</b>	22	24
<b>45-54</b>	16	17
<b>55-64</b>	11	9
<b>65+</b>	2	0

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
<b>Illiterate/ No Formal</b>	28	28
<b>Elem./Inter.</b>	36	30
<b>Secondary</b>	15	17
<b>Coll./Univ.</b>	21	24
<b>Ethnicity/Nationality</b>		
<b>Kurdish</b>	100	100

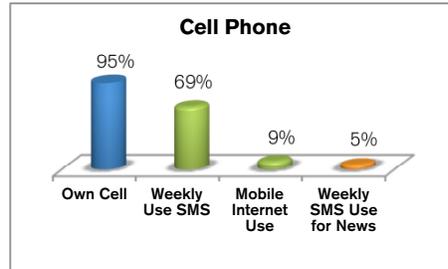
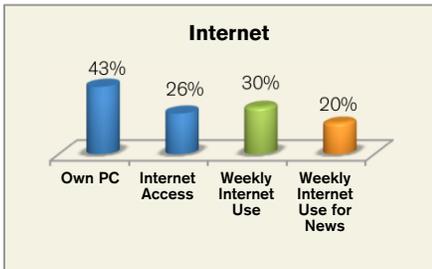
	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
<b>Urban</b>	65	70
<b>Rural</b>	35	30
<b>Language</b>		
<b>Kurdish</b>	100	100

## M E D I A U S E



### Top Ten Media Outlets

1. Kurdistan TV
2. PUK TV
3. Zagros TV
4. Alhurra
5. Aljazeera
6. Alarabiya
7. Yekgirtu TV
8. Yekgirtu Radio
9. KDP Radio
10. PUK Radio



### Web Analytics

**Weekly Visitors** 20,600  
**Weekly Visits** 46,500

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE (Iraq)**
- **Economist Intelligence Unit Instability (2011): VERY HIGH RISK (Iraq)**
- Kurdish Iraqis have largely joined the central Iraqi government, yet difficulties and disagreements persist over rights to oil-rich Kurdish areas, such as Kirkuk. Kurds hope to hold a referendum on Kirkuk in order to adjoin the historically Kurdish city to the Kurdish autonomous region in Iraq.
- Turkish warplanes attacked 60 targets in the mountains and border areas of northern Iraq in August in pursuit of Kurdish separatist rebels suspected of responsibility for a deadly quadruple bombing ambush on a military convoy in southeast Turkey.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE (Iraq)**
- **Reporters Without Borders Index (2011): 75.36 (152/179)**
- In the past few years Kurdish media has advanced both in quality and quantity of channels, especially television for news and entertainment.
- Satellite television is widespread in Kurdish areas of Iraq and beyond where viewers primarily watch stations affiliated with Kurdish political movements.
- Many Iraqi Kurds also watch Arab satellite stations and local Iraqi channels. Kurdish Iraqis also listen to radio in large numbers, particularly Kurdish language stations. Although they look to radio and TV for news and information, TV is the favored source.
- Internet use has risen significantly in the Kurdish areas of Iraq, where users log on for news, communication, social networking and entertainment.

P R O F I L E



**Language of Broadcast:** Kyrgyz

**Content:** 25.3 hrs. of original and 27 hrs. of repeat programming per week; Internet

**Distribution:** 8 affiliates (6 FM, 1 TV, 1 Satellite TV), 2-3 IBB SW frequencies  
RFE/RL's delivery includes 1 national UkV/FM network and 5 regional FM radio affiliates plus 1 national and 1 satellite TV affiliate carrying 2 weekly primetime programs; HotBird, AsiaSat, Yamal.

**New Media:** Internet with streaming audio (Kyrgyz and Russian site), Facebook, YouTube, and Twitter pages, and mobile site.

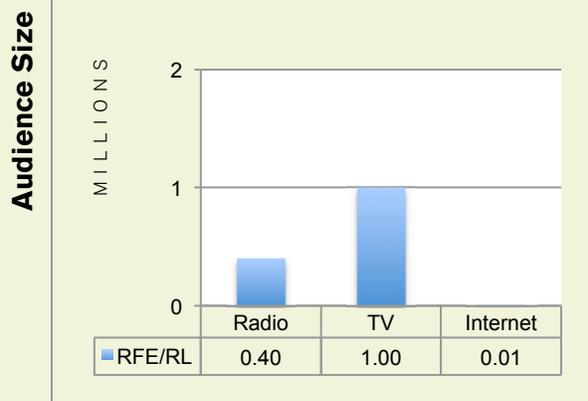
**Staff:** 7

**Budget:** \$1,685,000

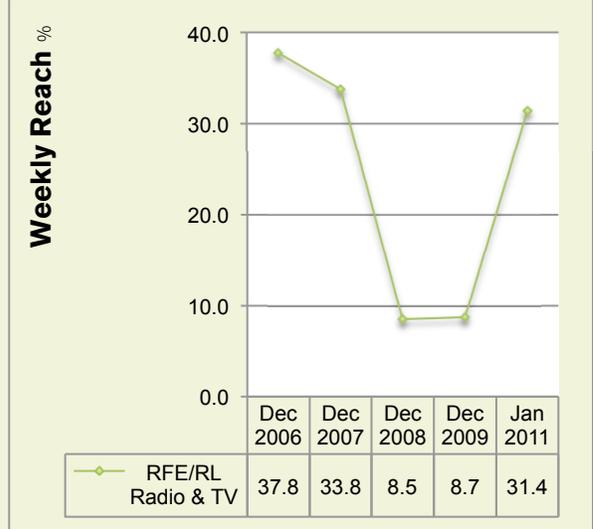
**Established:** 1953 to present



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



Weekly Reach by Media (%)	
RFE/RL	
Radio	10.1
TV	27.1
Internet	0.3
<b>Total</b>	<b>31.4</b>



Awareness (%)	
RFE/RL	
<b>Total</b>	<b>59</b>

Kyrgyz

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
RFE/RL	
Radio	97
TV	95

Understanding	
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
RFE/RL Radio*	
Current Events	93
Current Events in Kyrgyzstan	93
U.S. Policies	na

Quality	
Combined Scores from audience panel	
RFE/RL	
Radio	3.4
TV	2.8

\* Understanding ratings for RFE/RL TV are 91% for Current Events and 92% for Current Events in Kyrgyzstan.

Data are from a January 2011 nationwide survey of adults (15+) in Kyrgyzstan.

# Kyrgyz Broadcasting

Total Population of Kyrgyzstan: 5.6 million

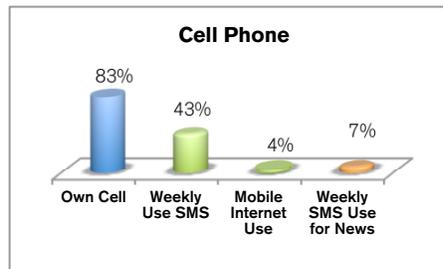
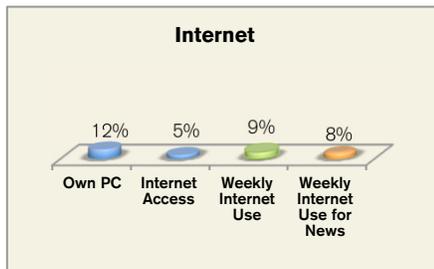
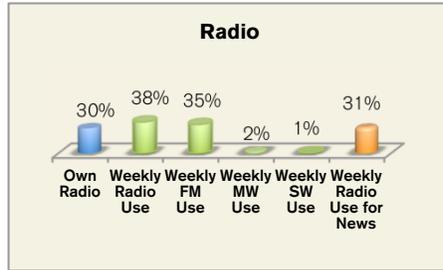
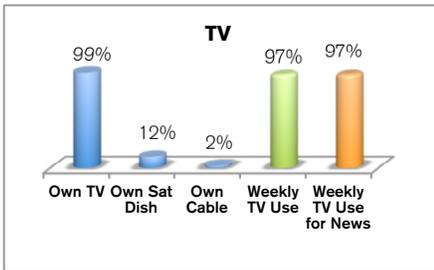
## A U D I E N C E C O M P O S I T I O N

	Sample	RFE/RL Weekly Audience
<b>Sex</b>	%	%
Male	48	54
Female	52	46
<b>Age</b>		
15-24	30	27
25-34	22	22
35-44	18	19
45-54	14	16
55-64	9	12
65+	8	5

	Sample	RFE/RL Weekly Audience
<b>Education</b>	%	%
None/Primary	2	<1
Secondary	70	71
Technical	17	17
Coll./Univ.	11	12
<b>Ethnicity/Nationality</b>		
Kyrgyz	68	92
Russian	7	<1
Uzbek	16	7
Other	9	1

	Sample	RFE/RL Weekly Audience
<b>Residence</b>	%	%
Urban	31	22
Rural	69	78
<b>Language</b>		
Kyrgyz	68	92
Russian	15	1
Uzbek	15	6
Other	2	<1

## M E D I A U S E



### Top Ten Media Outlets

1. OTRK
2. ORT-1
3. RTR
4. ELTV
5. 5 Kanal
6. Uzbek TV
7. Kyrgyzstan Obonduru
8. Piramida
9. NTV
10. NBT

### Top Ten Sources of News

1. OTRK
2. ORT-1
3. ELTR
4. 5 Kanal
5. RTR
6. Uzbek TV
7. RFE/RL Radio
8. NBT
9. Super Info
10. RFE/RL TV

### Web Analytics

Weekly Visitors	13,400
Weekly Visits	53,200

## C O N T E X T



### Political Situation

- Freedom House Political Freedom Index (2011): **NOT FREE**
- Economist Intelligence Unit Instability (2010): **HIGH RISK**
- On October 30, 2011, Former Prime Minister Atambayev, leader of the Social Democratic Party of Kyrgyzstan and seen as the "flagbearer of reforms," won the presidential election by a large margin in the first round of voting, replacing Interim President Roza Otunbayeva.
- Voters approved a new constitution on June 27, 2010, which transformed the state into a parliamentary republic. Previously, like other Central Asian countries, it was a presidential republic, albeit with more genuine political competition. In October, the first parliamentary elections were held under the new constitution after a campaign season hailed by international observers for its genuine pluralism. The revolution had a dark side, however: it seemed to create the opening for an outbreak of inter-ethnic violence in Osh and Jalalabad in June 2010, in which over 400 people were killed.
- The political situation in Kyrgyzstan continues to be volatile. The revolution is somewhat unpopular (51 percent deny that Bakiev's departure has benefited the country), yet survey data give grounds for guarded optimism that the political transition is solving some of the country's major problems.

### Media Environment

- Freedom House Press Freedom Index (2011): **NOT FREE**
- Reporters Without Borders Index (2011): **40.00 (108/179)**
- The past few years have witnessed dramatic changes in media technology worldwide, as Internet, satellite TV and mobile phones with sophisticated new features have spread throughout the developing world. By contrast, Kyrgyzstan in the past year has experienced technological stasis or even retrogression. Fewer Kyrgyzstanis had PCs and mobile phones at the start of 2011 than a year previously, likely because of the economy. A decline in radio set ownership, including both home and car radio sets, accelerated. There was no increase in access to satellite TV or Internet.

P R O F I L E



**Language of Broadcast:** Lao  
**Content:** 3.5 hrs. of original radio programming per week; Internet  
**Distribution:** 7 affiliates (7 FM), 2 IBB MW and SW frequencies  
**Radio:** All Lao Service broadcasting is done from outside Laos. In addition to broadcasts on IBB facilities, the Service's 7 radio affiliates are based in Thailand near the border with Laos. They broadcast the Service's programming into Laos.  
**New Media:** The Service has a website, a Facebook page, and sends an email newsletter.  
**Staff:** 5 **Budget:** \$679,000  
**Established:** 1962 to present



**Language of Broadcast:** Lao  
**Content:** 12 hrs. of original radio programming per week; Internet  
**Distribution:** 4 FM affiliates in Thailand, 2 IBB SW frequencies, satellite audio; mobile phone  
**Radio:** The Service broadcasts two hours of original programs daily.  
**New Media:** Includes a multimedia website, a mobile site, YouTube, Facebook and Twitter.  
**Staff:** 13 **Budget:** \$1,399,000



**Established:** 1997 to present

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

(Using Data from Laos, May 2011)

Audience Size

MILLIONS

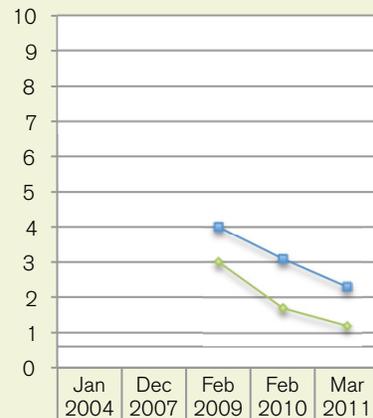
Audience figures are based on surveys conducted in politically repressive environments that are generally hostile to international broadcasting, particularly of domestic news coverage. Discouraged, and even prohibited by governments from listening to USIB programming, actual audience figures may be higher than cited.

	Radio	Internet
VOA	0.02	< 0.01
RFA	0.03	< 0.01
USIB	0.04	< 0.01

Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	1.1	2.3	2.9
TV	na	na	na
Internet	0.2	0.1	0.3
Total	1.2	2.3	3.0

Weekly Reach %



Awareness (%)

VOA	RFA
10	26

Credibility

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

Understanding

	VOA	RFA
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)**		
Current Events	na	na
U.S. Culture (VOA) or Current Events in Laos (RFA)	na	na
U.S. Policies	na	na

Quality

	VOA	RFA
Combined Scores from audience panel		
Radio	3.3	3.0
TV	na	na

lao

\*Due to differences in the sample areas and in weighting, trend data for the Laos surveys conducted before February 2009 are not available.

\*\*Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

May 2011 survey of adults (15-64) in urban Laos. They are representative of the entire urban adult population only (about 27% of the total population of Laos).

# Lao Broadcasting

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

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
<b>Sex</b>	%	%	%
Male	50	na	na
Female	50	na	na
<b>Age</b>			
15-24	37	na	na
25-34	23	na	na
35-44	17	na	na
45-54	11	na	na
55-64	12	na	na
65+	0	na	na

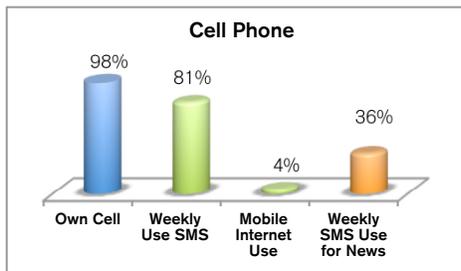
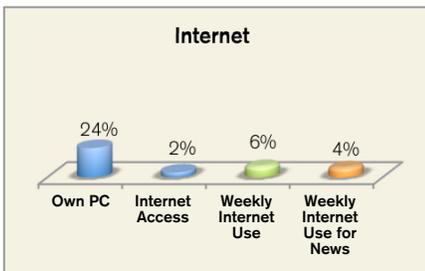
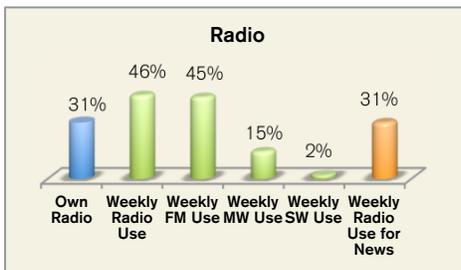
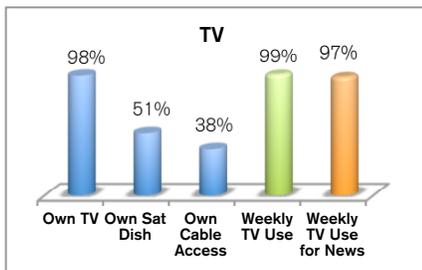
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
<b>Education</b>	%	%	%
No formal	1	na	na
Primary	23	na	na
Lower Sec.	29	na	na
Upper Sec.	23	na	na
Technical	14	na	na
Higher	11	na	na
<b>Ethnicity/Nationality</b>			
Lao	90	na	na
Hmong	3	na	na
Other	7	na	na

Total Population of Laos: 6.3 million

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
<b>Residence</b>	%	%	%
Urban	69	na	na
Rural	31	na	na
<b>Language</b>			
Lao	95	na	na
Hmong	3	na	na
Other	2	na	na

\*\*Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

## M E D I A U S E



### Top Ten Media Outlets

1. TV 7 (Thai)
2. TV 3 (Thai)
3. TV 5 (Thai)
4. TV Lao Channel 3
5. Sabaidee TV
6. TV 9 (Thai)
7. Local provincial TV stations
8. TV Lao National
9. TV 11/NBT (Thai)
10. Local provincial radio stations

### Web Analytics

<b>VOA Weekly Visitors</b>	3,400
<b>Weekly Visits</b>	9,300
<b>RFA Weekly Visitors</b>	5,000
<b>Weekly Visits</b>	9,900

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- The Lao People's Democratic Republic is a poor, land-locked country with a one-party socialist government, little civil society and weak legal and institutional frameworks. In 2012, Freedom House gave Laos the lowest possible ratings for electoral process, political pluralism and functioning of government – a distinction shared only by North Korea and Somalia.
- Laos' per capita income of \$1050 puts it among the least developed countries in the world. International organizations give Laos a low rating for transparency and ease of doing business because of endemic corruption and weak legal system. Laos is heavily dependent on international aid.
- Neighbors have vied for influence in Laos. While Laos has had a "special relationship" with Vietnam since it signed a treaty of friendship and cooperation in 1977, its relationship with China has grown in recent years with growing investment and an influx of Chinese laborers. Ties with traditional rival, Thailand, also have increased since the government signed a Memorandum of Understanding with Thailand in 2007.
- Land confiscations and illegal logging are serious issues in the country where, officials have provided foreign investors access land and forests in exchange for bribes.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 89.00 (165/179)**
- In spite of recent investment in communications infrastructure and a new 2008 law ensuring media freedom, Laos is among the most repressive media environments in the world. Laos' criminal code allows imprisonment of journalists for publishing materials that "weaken the state" and for importing media "contrary to national culture."
- While linguistic similarities make Thai media popular among those who can receive it, RFA and VOA are the only Western broadcasters providing content in Lao. China Radio International has Lao broadcasts easily available on the FM dial in some Lao cities.
- Any media that does not conform to the Communist party line is dealt with swiftly. In January of 2012, a popular call-in show and host were taken off the air after allowing discussion of land confiscations.
- Mobile phone ownership is almost universal in urban Laos, where 51 percent of households also have a satellite dish.
- Web use is limited but growing in Laos, especially among young elites. Among those who do use the Web, getting news, watching videos and accessing social media sites (including Facebook and Yahoo360) are popular activities.

P R O F I L E



**Language of Broadcast:** Macedonian  
**Content:** 0.75 hrs. of original TV programming per week; Internet  
**Distribution:** 15 affiliates (12 TV, 3 radio simulcast)  
**TV:** The Service's 8-minute pre-recorded *NewsFlash* show (Mon-Fri) airs on Alfa and Vesti 24 (nationwide stations), TV Tera and TV Orbis regional network (covering Central Macedonia), and local stations (covering towns) throughout Macedonia. An additional weekly, 2 to 3-minute interactive Q & A segment is aired as part of Alfa's prime time evening newscast.  
**Web:** Content updated daily, with text, video and audio. Facebook, YouTube, and Twitter accounts. The website focuses on Service-originated content and interactivity. A VOA Macedonian link to its *U.S. News in One Minute* program and the top headlines on its website is advertised at no cost on "Time.mk" Internet portal and Internet sites of "Dnevnik" daily and "24 Vesti" TV.  
**Staff:** 2  
**Budget:** \$463,000  
**Established:** 1999 to present; TV service established in 2004



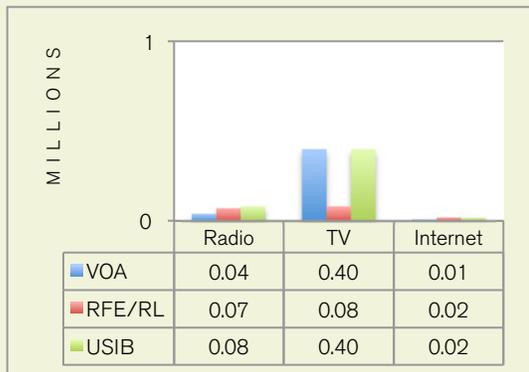
**Language of Broadcast:** Albanian to Kosovo, Bosnian, Macedonian, Montenegrin, and Serbian  
**Content:** Albanian to Kosovo: 10.5 hours original radio; 5 hours TV; Macedonian: 7 hours original radio; 10 minutes TV; Serbian: 7 hours original radio Montenegrin: 3.5 hours original radio; Balkans Regional 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 (6 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, Macedonian, Montenegrin and Serbian.

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

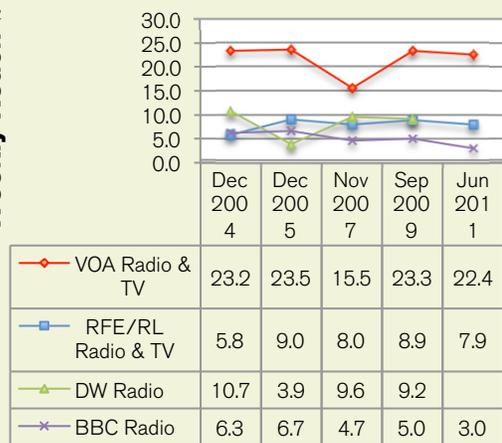
**Audience Size**



**Weekly Reach by Media (%)**

	VOA	RFE/RL	USIB
Radio	2.3	4.1	4.7
TV	21.3	4.6	22.4
Internet	0.7	0.9	1.3
<b>Total</b>	<b>22.2</b>	<b>7.9</b>	<b>23.7</b>

**Weekly Reach %**



**Awareness (%)**

VOA	RFE/RL
74	57

**Credibility**

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

	VOA	RFE/RL
Radio	97	96*
TV	95	96*

**Understanding**

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

	VOA TV*	RFE/RL
Current Events	74	94
U.S. Culture (VOA)/Current Events in Macedonia	95	92
U.S. Policies	75	na

**Quality**

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.4	3.3
TV	3.5	na

\*Credibility and understanding ratings are for RFE/RL on any platform.  
 \*\*Understanding ratings for VOA TV are 76% for Current Events, 94% for U.S. Culture and 92% for U.S. Policies.

Data are from a June 2011 nationwide survey of adults (15+) in Macedonia.

# Macedonian Broadcasting

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

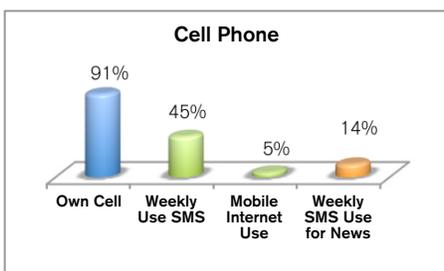
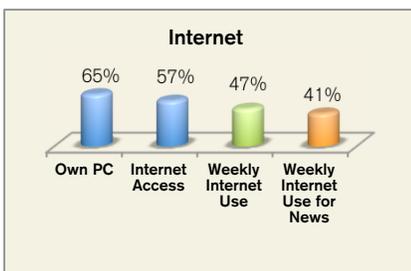
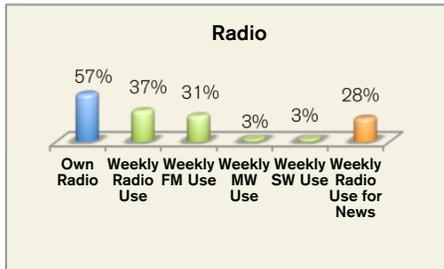
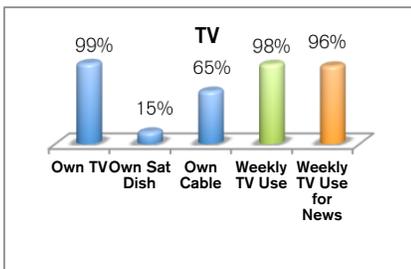
Total Population of Macedonia: 2.1 million

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
<b>Sex</b>	%	%	%
<b>Male</b>	50	57	64
<b>Female</b>	50	43	36
<b>Age</b>			
<b>15-24</b>	19	13	12
<b>25-34</b>	19	20	22
<b>35-44</b>	18	18	27
<b>45-54</b>	17	18	17
<b>55-64</b>	14	18	14
<b>65+</b>	14	13	9

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
<b>Education</b>	%	%	%
<b>None</b>	1	0	0
<b>Primary</b>	35	20	18
<b>Secondary</b>	51	62	61
<b>Higher</b>	13	18	21
<b>Ethnicity/Nationality</b>			
<b>Macedonian</b>	65	79	74
<b>Albanian</b>	24	12	18
<b>Other</b>	10	9	8

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
<b>Residence</b>	%	%	%
<b>Urban</b>	43	34	63
<b>Rural</b>	57	66	37
<b>Language</b>			
<b>Macedonian</b>	71	85	94
<b>Ser./Bos./Croat.</b>	1	1	1
<b>Albanian</b>	24	12	4
<b>Other</b>	4	4	1

## M E D I A U S E



### Top Ten Media Outlets

1. A1 TV
2. Sitel TV
3. Kanal 5
4. Telma
5. Macedonian TV 1
6. TV Alfa
7. A2 TV
8. Alsat TV
9. VOA TV
10. Macedonian TV 2

### Top Ten Sources of News

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

### Web Analytics

<b>VOA Weekly Visitors</b>	1,200
<b>Weekly Visits</b>	1,600
<b>RFE/RL Weekly Visitors</b>	5,100
<b>Weekly Visits</b>	14,300

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Shortly after its inauguration in July, the coalition government presented a five-point program for the next four years. The program is in essence a repeat of the priorities outlined by the previous coalition government (of 2008-11), also led by the Internal Macedonian Revolutionary Organisation-Democratic Party of Macedonian National Unity (VMRO-DPMNE). It calls for greater economic development, Euro-Atlantic integration, cementing the rule of law, combating corruption, improving inter-ethnic relations and continuing reforms in general.
- According to Prime Minister Nicola Gruevski, strategic foreign policy priorities remain NATO membership, overcoming the country's name dispute with Greece and starting negotiations on EU membership. The prime minister reiterated earlier pledges that any final solution on the name issue would need to be approved by the public via popular referendum. Although a referendum could delay resolution of the name issue for the foreseeable future, it would also shield the government from criticism over unpopular decisions. Another pillar of the government's foreign policy agenda is to deepen neighborly relations and enhance co-operation in south-eastern Europe, a goal that will also work towards Macedonian EU membership.

### Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 31.67 (94/179)**
- As in the other Balkan countries, the media market is overcrowded, with more than 200 TV and radio stations vying for a population of just over 2 million. In addition, the government last year granted 17 new satellite TV licenses. Media sources have further diversified with the growth of the Internet, extension of the cable networks through IPTV and the first DVB-T operator licensed in 2009.
- Local analysts, however, are worried about a downward trend in professional standards. Political interference in the licensing procedure is also a source of concern.
- The public broadcaster, Macedonian Radio-Television, is susceptible to influence by the government. Over the last few years the public broadcasting service has been losing audience in the face of stiff competition from private networks whose entertainment programs and reality shows are drawing an ever larger audience.
- Self-censorship is quite common, fed by continuing intimidation of journalists, government preferences for certain "friendly" media and the fact that Macedonia's legislation still treats defamation as a criminal offence. In general, media are perceived as biased politically and subject to pressures from the government and business interests.
- The press and, to a lesser degree, radio and television are divided along ethnic lines, with Macedonians following Macedonian-language content and Albanians opting for Albanian sources, including Albania- and Kosovo-based outlets.

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 Hong Kong based SunTV. 11 stations inside China take unbranded VOA Mandarin Service's programs for rebroadcast.

**Radio:** 50 stations inside China take unbranded Mandarin programs for rebroadcast. 9 radio affiliates outside China.

**Publishing:** VOA branded books published on Language Learning and Legal Issues.

**New Media:** 4 websites, 2 with language learning and cultural content only, all feature video and audio streaming. 2 mobile websites, 4 mobile apps. Email newsletter sent to over 8 million Chinese. Placement of avg. 175 articles on Chinese news sites per month. Facebook, Twitter, YouTube, other microblog accounts. One mobile phone manufacturer inside China embeds VOA's app on millions of its phones for downloads of VOA Mandarin's English learning programs. 2 additional media companies and one website also take branded English teaching programs.

**Staff:** 69 **Budget:** \$10,945,000

**Established:** 1941 to present



**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

**Radio:** 6 hours of original programs and 6 hours of repeat daily.

**Video:** 8 webcasts per week featuring photos and footage from inside China.

**New Media:** Facebook, Twitter and YouTube; 2 Chinese domestic blogs and 10 domestic sites; more than 2 million newsletters daily; website dropbox for citizen journalist content.

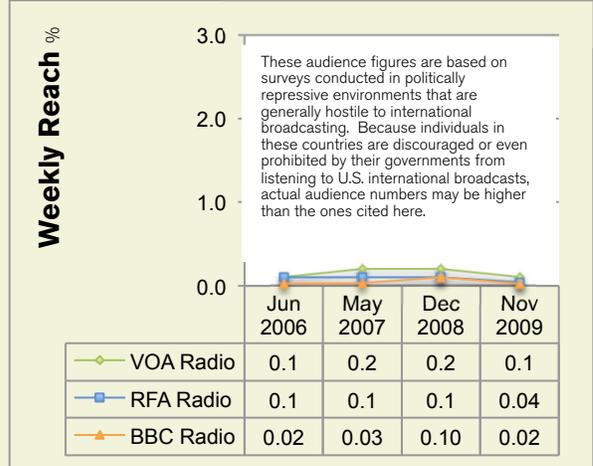
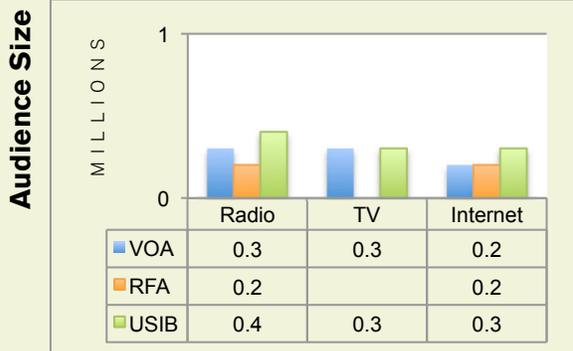
**Staff:** 37

**Budget:** \$4,881,000

**Established:** 1996 to present



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



Weekly Reach by Media (%)			
	VOA	RFA	USIB
Radio	<0.1	<0.1	<0.1
TV	<0.1	na	na
Internet	<0.1	<0.1	<0.1
Total	0.1	<0.1	0.1

Awareness (%)	
VOA	RFA
12	3

Mandarin

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

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%) *	
	VOA	RFA
Current Events	na	na
U.S. Culture (VOA) or Current Events in China (RFA)	na	na
U.S. Policies	na	na

Quality	Combined Scores from audience panel	
	VOA	RFA
Radio	3.2	3.3
TV	3.2	na

\*Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

Data are from a November 2009 survey of adults (15+) in China.

# Mandarin Broadcasting

Total Population of China: 1,345.9 million

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

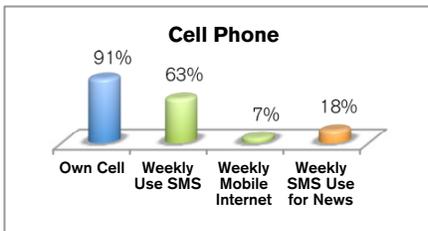
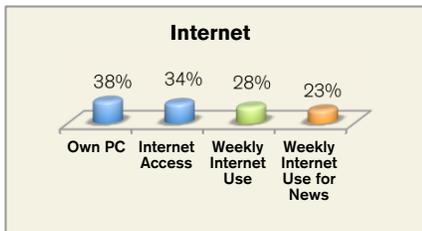
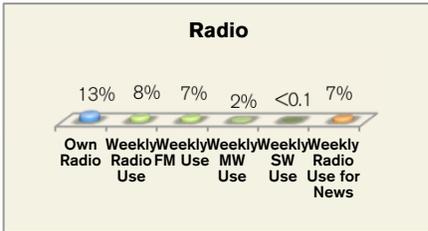
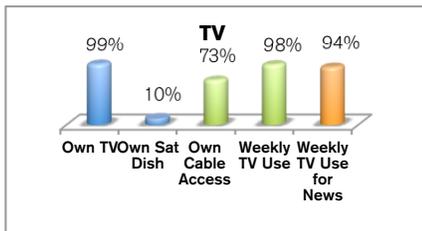
	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
<b>Sex</b>	%	%	%
Male	50	na	na
Female	50	na	na
<b>Age</b>			
15-24	17	na	na
25-34	21	na	na
35-44	25	na	na
45-54	22	na	na
55-64	12	na	na
65+	16	na	na

	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
<b>Education</b>	%	%	%
Prim. or less	22	na	na
Jr. School	40	na	na
High School	26	na	na
Vocational	8	na	na
Coll./Univ.	3	na	na
<b>Ethnicity/Nationality</b>			
Han	99	na	na
Other	1	na	na

	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
<b>Residence</b>	%	%	%
Urban	45	na	na
Rural	55	na	na
<b>Language</b>			
Mandarin	85	na	na
Cantonese	14	na	na
Other	1	na	na

\*Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

## M E D I A U S E



### Top Ten Media Outlets

1. CCTV1
2. CCTV News
3. CCTV2
4. CCTV4
5. Phoenix TV (Chinese)
6. Provincial Radio
7. Sina.com
8. Phoenix TV (Info)
9. Local Radio
10. Sohu.com

### Top Ten Sources of News

1. CCTV1
2. Provincial TV
3. Local TV
4. CCTV News
5. CCTV2
6. Local Press
7. CCTV4
8. CCTV12
9. CCTV5
10. Baidu.com

### Web Analytics

**VOA**  
**Wkly. Visitors** 83,800  
**Wkly. Visits** 192,000  
**RFA**  
**Wkly. Visitors** 48,800  
**Wkly. Visits** 84,200

## C O N T E X T



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, Baidu and Sina are key sources of news and provide forums for the discussion of current events.

P R O F I L E



**Language of Broadcast:** Romanian, Russian

**Content:** 10.5 hrs. of original radio programming per week; Internet

**Distribution:** 4 affiliates (FM, MW & UKW)

RFE/RL's delivery includes 4 national FM affiliates and 6 regional affiliates including 2 FM stations covering Transnistrian region, HotBird and Internet with streaming audio (Romanian site with Russian page). RFE/RL's Chisinau bureau chief frequently participates on Moldova's most popular TV show, providing the service a regular TV presence.

**New Media:** The Moldovan Service has a popular bi-lingual Facebook page; a Pangea website which features high levels of interactivity, blogging, and audience comments in both Moldovan and Russian languages - a unifying aspect which makes it unique within the country; and a mobile site.

**Staff:** 4

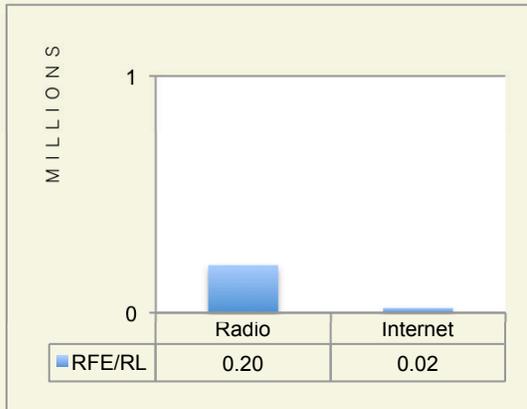
**Budget:** \$1,029,000

**Established:** 1950 to present



P E R F O R M A N C E D A T A (Using Data from Moldova, October 2010)

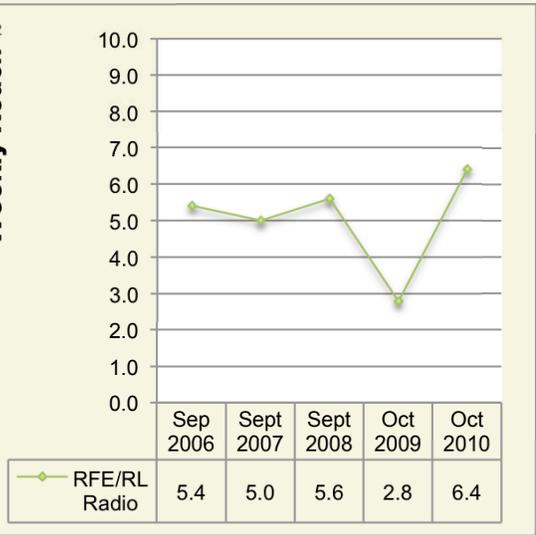
**Audience Size**



**Weekly Reach by Media (%)**

	RFE/RL
Radio	6.2
TV	na
Internet	0.6
Total	6.4

**Weekly Reach %**



**Awareness (%)**

	RFE/RL
	52

Moldovan

**Credibility**

	RFE/RL
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
Radio	88
TV	na

**Understanding**

	RFE/RL
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
Current Events	99
Current Events in Moldova	99

**Quality**

	RFE/RL
Combined Scores from audience panel	
Radio	3.5
TV	na

\*A November 2010 survey of adults in the breakaway region of Transnistria indicated a weekly reach of 0.3% for RFE/RL in Romanian/Moldovan.

Data are from a October 2010 survey of adults (15+) in Moldova

# Romanian & Russian to Moldova Broadcasting

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

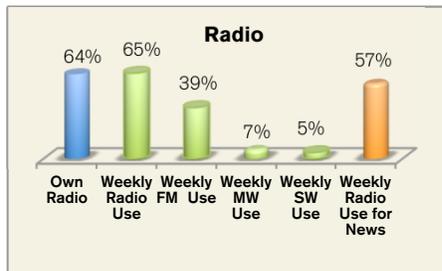
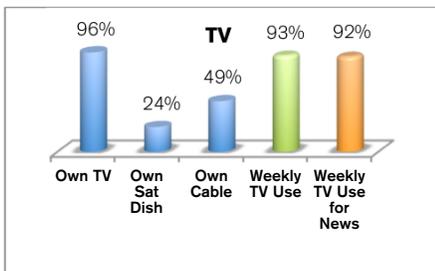
Total Population of Moldova: 4.1 million

	Sample	RFE/RL Weekly Audience
<b>Sex</b>	%	%
Male	45	62
Female	55	38
<b>Age</b>		
15-24	20	11
25-34	19	16
35-44	15	19
45-54	16	20
55-64	17	16
65+	14	18

	Sample	RFE/RL Weekly Audience
<b>Education</b>	%	%
None/Primary	21	16
Secondary	23	14
Vocational	22	18
Higher	34	52
<b>Ethnicity/Nationality</b>		
Moldovan	80	87
Russian	6	4
Ukrainian	6	2

	Sample	RFE/RL Weekly Audience
<b>Residence</b>	%	%
Urban	43	40
Rural	57	60
<b>Language</b>		
Moldovan/Romanian	78	89
Russian	18	9
Other	4	3

## M E D I A U S E

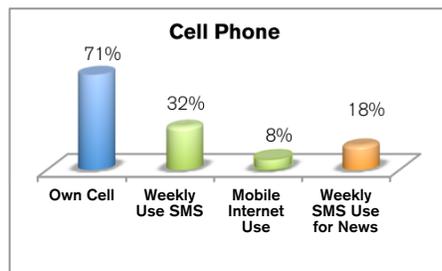
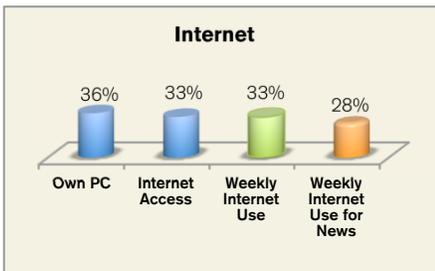


### Top Ten Media Outlets

1. Prime TV (ORT)
2. Moldova 1
3. NIT
4. Pro TV
5. NTV (TV 7)
6. Rossia (RTR)
7. Google
8. Radio Moldova
9. 2 Plus
10. Romania 1

### Top Ten Sources of News

1. Moldova 1
2. Prime TV (ORT)
3. PRO TV
4. NIT
5. Google
6. Radio Moldova
7. Rossia (RTR)
8. NTV (TV7)
9. Radio Noroc
10. România 1



### Web Analytics

<b>Weekly Visitors</b>	5,500
<b>Weekly Visits</b>	12,200

## 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**
- Moldova's politics continue to be dominated by the ramifications of the breakaway region of Transnistria, which has impeded Moldova's economic growth and political goal of closer integration with the European Union. The Transnistria issue also colors Moldova's foreign relations, given Moldova's continued economic dependence on Russia, and Russia's continued support for the Russian-speaking separatist regime.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 16 (53/179)**
- The 2010 IREX Media Sustainability Index ranks Moldova as an "unsustainable mixed media system" due in part to the "media sector's inability to meet the information needs of citizens." IREX panelists point to a particular decline in professionalism, where media outlets continue to fail to include multiple viewpoints in their reporting on controversial issues. The 2010 Freedom House Press Freedom assessment still considers Moldova as "not free," but the country moved up several dozen places in the world ranking, due to reduced censorship and restrictions on news coverage.
- The OSCE expressed concerns over the draft law on Freedom of Expression in the spring of 2010, stating the draft lacks some safeguards for ensuring journalists pursue their reporting without obstacles.
- Investigative journalism continues to carry risks. After reporting on corruption in the National Railway Company, newspaper journalists were threatened by phone and email.

P R O F I L E



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

**Content:** Albanian to Kosovo: 10.5 hours original radio; 5 hours TV; Macedonian: 7 hours original radio; 10 minutes TV; Serbian: 7 hours original radio Montenegrin: 3.5 hours original radio; South Slavic 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+

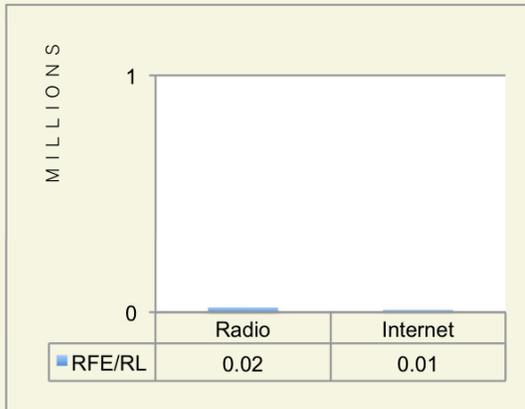
**Established:** 1994 to present

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

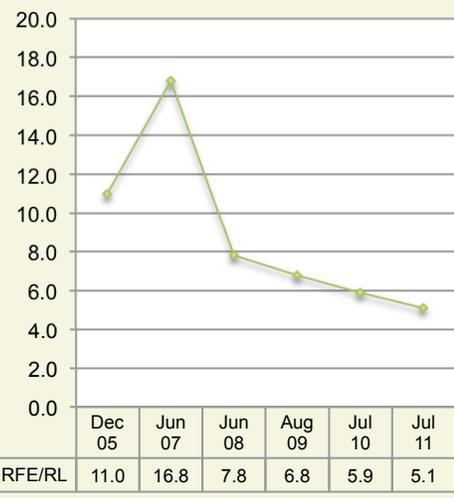


P E R F O R M A N C E D A T A (Using Data from Montenegro, July 2011)

Audience Size\*



Weekly Reach %



Weekly Reach by Media (%)*	
	RFE/RL
Radio	3.8
TV	na
Internet	1.5
Total	5.1

Awareness (%)	
	RFE/RL
	65

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	RFE/RL
Radio	93
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	RFE/RL
Current Events	96
Current Events in Montenegro	92

Quality

Combined Scores from audience panel	
	RFE/RL
Radio	3.4
TV	na

\*VOA Serbian attracts a weekly total media audience of approximately 0.1 million in Montenegro, based on weekly reach of 27.5% (4.7% for radio, 26.6% for TV and 1.0% for Internet.)

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

Montenegrin

# Montenegrin Broadcasting

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

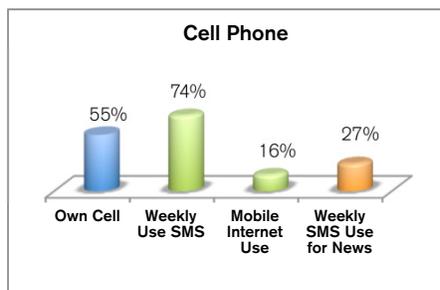
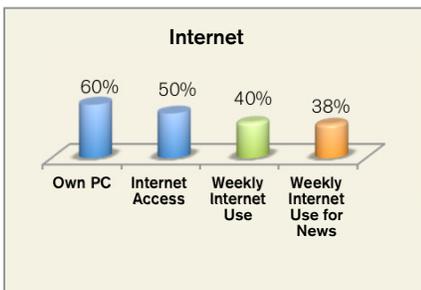
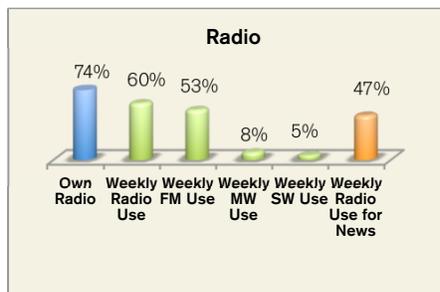
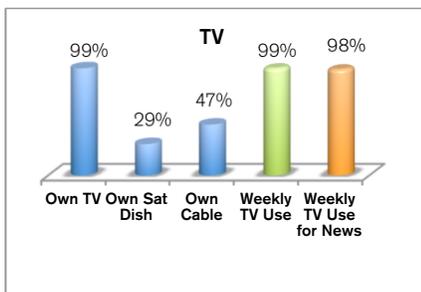
Total Population of Montenegro: 0.6 million

	Sample	RFE/RL Weekly Audience
<b>Sex</b>	%	%
Male	49	64
Female	51	36
<b>Age</b>		
15-24	19	10
25-34	21	15
35-44	16	15
45-54	17	23
55-64	16	18
65+	12	18

	Sample	RFE/RL Weekly Audience
<b>Education</b>	%	%
Elementary	25	10
Secondary	53	60
Higher	22	30
<b>Ethnicity/Nationality</b>		
Montenegrin	55	45
Serbian	27	35
Other	13	8

	Sample	RFE/RL Weekly Audience
<b>Residence</b>	%	%
Urban	62	72
Rural	38	28
<b>Language</b>		
Mon/Ser/Bos/Cro	97	90
Other	3	10

## M E D I A U S E



### Top Ten Media Outlets

1. TV In
2. TV Crna Gora (1 program)
3. TV Vijesti
4. Atlas TV
5. TV Pink Montenegro
6. TV Crna Gora (2 program)
7. Vijesti
8. Dan
9. TV B92
10. RTS (TV Beograd) 1 or 2

### Top Ten Sources of News

1. TV Vijesti
2. TV Crne Gore
3. TV In
4. Vijesti (newspaper)
5. Dan
6. TV Pink Montenegro
7. TV Atlas
8. Pobjeda (newspaper)
9. Radio Crne Gore
10. Vecernje Novosti

### Web Analytics

**Weekly Visitors** 19,200+

**Weekly Visits** 52,500+

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

## C O N T E X T

↓ **Stability**

↑ **Political Freedom**

↔ **Press Freedom**

↑ **Ease of Distribution**

↑ **Competition**

### Political Situation

- **Freedom House Political Freedom Index (2011): FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Montenegro went through a government transition in 2011, with Igor Lukšić as the new Prime Minister. The new government set forth an ambitious agenda that includes greater cooperation with civil society, though challenges remain. Corruption continues to be a serious problem; one that the new government promised to attack.
- Montenegro continues in its trajectory toward NATO and EU membership, including the implementation of further political reforms required for EU accession. The reform progress led the European Commission to recommend the start of accession negotiations in October 2011.

### Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 39.00 (107/179)**
- Montenegro made an important step towards increased media freedom when it decriminalized libel in spring 2011. However, with Montenegro's rather poor record on implementing media protection laws, it remains to be seen how this legal reform will be executed once put to the test.
- Apart from yet more market entrants, there have been few real changes in the Montenegrin media environment. The market remains very crowded, which not only leads to audience fragmentation but also to little economic viability for many outlets that need to seek alliances with powerful political and business figures to ensure their financial survival.

P R O F I L E



Voice of America



**Language of Broadcast:** Pashto

**Content:** 3 hrs. of original TV programming per week; 42 hrs. of original radio programming per week; Internet. Radio Deewa airs 9 hours of live radio programming a week, 3 hours of repeat radio programs a day; 1 hour of TV per day; Internet.

**Distribution:**

**TV Ashna:** 1 affiliates (TV); 8 IBB FM, 1 IBB MW, and 2-3 SW frequencies

VOA Afghan's *TV Ashna* is carried throughout Afghanistan on state-owned RTA-6 evenings a week in Dari and Pashto. The *Services* radio content is on FM in 5 Afghan cities 7 days a week; AM & SW throughout the region. On Fridays, RTA also airs *Karwan* a 30 minute program targeted at youth.

**Radio Deewa:** 1 IBB MW and 4 IBB SW frequencies

Deewa's *Newshour* radio broadcast is also carried live on AsiaSat 3 daily.

**Staff:** TV Ashna: 21; Radio Deewa: 7

**Budget:** TV Ashna: \$3,052,000; Radio Deewa: \$2,236,000

**Est.:** TV Ashna: 1982 to present; Radio Deewa: 2006 to present



**Language of Broadcast:** Pashto

**Content:** To Afghanistan, 42 hrs. of original radio programming per week.

**Distribution:** 4 affiliates (4 FM); 8 IBB FM, 1 MW, and 2-3 SW frequencies, Satellite

**Radio Mashaal:** 1 IBB MW, 3 IBB SW frequencies

**Staff:** RFE/RL Afghanistan: 26†; Radio Mashaal: 21

**Budget:** RFE/RL Afghanistan: \$5,030,000 million; Radio Mashaal: \$2,267,000

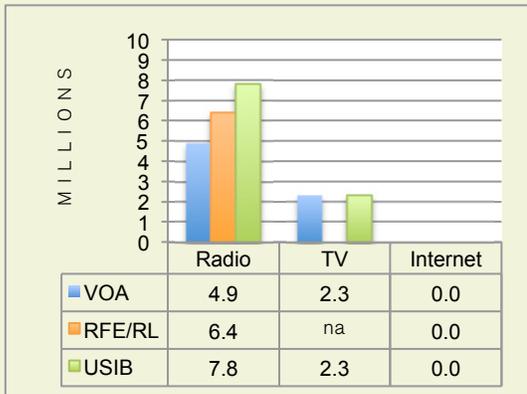
**Established:** 1985 to 1993; 2002 to present



† Totals for Radio Free Afghanistan including both Dari and Pashto broadcasts.

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

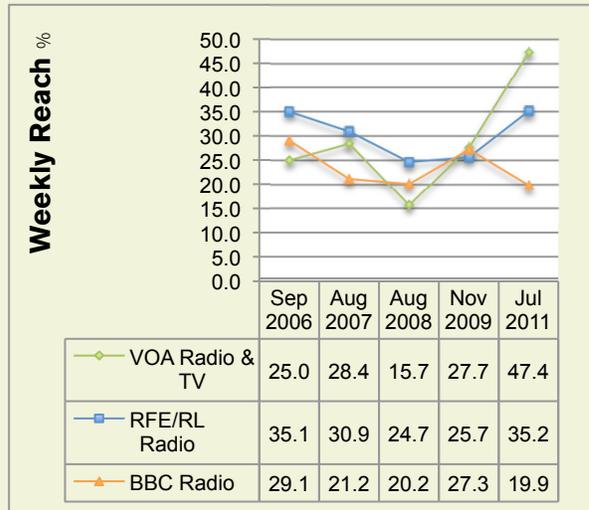
**Audience Size**



**Weekly Reach by Media (%)**

	VOA	RFE/RL	USIB
Radio	26.9	35.2	42.8
TV	12.7*	na	12.7*
Internet	0.0	0.0	0.0
Total	47.4	35.2	48.1

**Weekly Reach %**



**Awareness (%)**

VOA	RFE/RL
58	81

Pashto

**Credibility**

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

	VOA	RFE/RL
Radio	86	86
TV	95	na

**Understanding**

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

	VOA Radio**	RFE/RL
Current Events	92	90
U.S. Culture (VOA) or Current Events in Afghanistan (RFE/RL)	75	86
U.S. Policies	67	na

**Quality**

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.3	2.8
TV	na	na

\*Viewing in "Pashto only" or "Dari and Pashto".

\*\*Understanding ratings for VOA TV are 95% for Current Events, 80% for U.S. Culture and 67% for U.S. Policies.

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

# Pashto Broadcasting

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

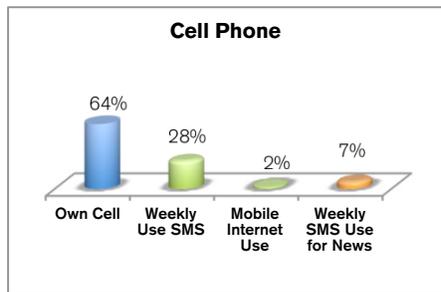
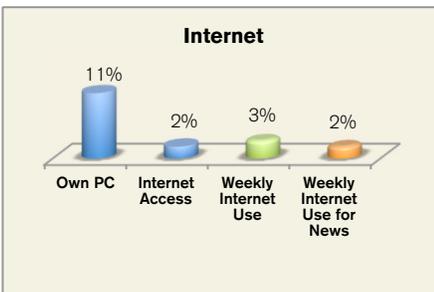
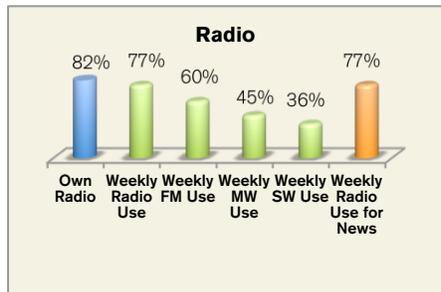
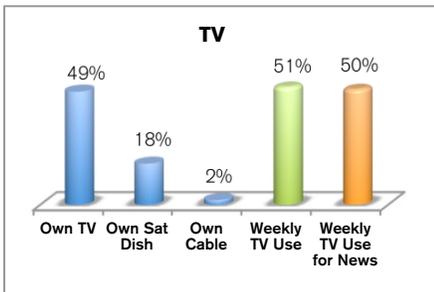
Total Population of Afghanistan: 32.4 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Sex</b>	%	%	%
<b>Male</b>	58	61	66
<b>Female</b>	42	39	34
<b>Age</b>			
<b>15-24</b>	31	33	35
<b>25-34</b>	23	22	22
<b>35-44</b>	22	21	20
<b>45-54</b>	15	15	14
<b>55-64</b>	7	7	7
<b>65+</b>	2	2	2

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Education</b>	%	%	%
<b>Illiterate/None</b>	61	54	56
<b>Primary</b>	18	20	18
<b>Secondary</b>	17	21	20
<b>Higher</b>	4	6	5
<b>Ethnicity/Nationality</b>			
<b>Pashtun</b>	42	55	74
<b>Tajik</b>	36	29	21
<b>Uzbek</b>	9	8	2
<b>Other</b>	14	9	4

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
<b>Residence</b>	%	%	%
<b>Urban</b>	78	71	81
<b>Rural</b>	22	29	19
<b>Language</b>			
<b>Dari</b>	48	39	25
<b>Pashto</b>	39	52	71
<b>Uzbek</b>	9	8	2
<b>Other</b>	3	2	2

## M E D I A U S E



### Top Ten Media Outlets

1. RFE/RL Radio (any language)
2. Radio Afghanistan
3. VOA Radio/TV (any language)
4. TV Afghanistan
5. Tolo TV
6. Ariana TV
7. BBC Radio (any language)
8. Radio Ariana
9. Radio Arman
10. Lemar TV

### Top Ten Sources of News

1. Tolo TV
2. RFE/RL
3. TV Afghanistan
4. VOA
5. BBC
6. Ariana TV
7. Radio Afghanistan
8. Radio Arman
9. Lemar TV
10. Ariana Radio

### Web Analytics

<b>VOA Weekly Visitors</b>	6,900
<b>Weekly Visits</b>	18,100
<b>RFE/RL Weekly Visitors</b>	9,500++
<b>Weekly Visits</b>	34,800++

++ Totals include Pashto to Afghanistan and Pakistan as well as Radio Mashaal and Radio Azadi.

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2011): VERY HIGH RISK**
- In 2011, the legitimacy of the government led by the president, Hamid Karzai, remained compromised as a result of the flawed nature of the electoral process in both the 2009 presidential poll and the 2010 parliamentary elections. The president has been even less effective in his second term than he was in his first. The judicial system is also in a weak state.
- The security outlook is highly unsettled, attacks by elements linked to the Taliban remain at a high level. In 2011, a series of high-profile assassinations further weakened the government and have raised doubts that the country could manage itself once the coalition troops transferred security over to the Afghan police and military. The government's credibility is further diminished because of the corruption in the ranks, violence against women and prisoners, and the large number of civilian casualties.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 74.00 (150/179)**
- Although Afghan media continued to grow and diversify in 2011, access to media outlets differs radically among ethno-linguistic groups. Those in Afghanistan who speak Dari at home, for example, are more likely to use TV for news every day than are Pashto speakers, who are more likely to listen to radio for news.
- Journalists have continually faced difficulty with government interference, threats, arrests and harassment by politicians and those in power. Kabul displays a relatively higher media freedom and diversity than anywhere else in the country. There are currently dozens of independent and private radio and several private television stations in the country.
- Internet and mobile telephone use has increased rapidly, providing news and information to particularly urban residents. The Taliban has picked up their effort to damage telecommunications and transmission infrastructure to curb this trend.
- In September 2011, an Afghan journalist reporting for the BBC was killed by NATO forces during a fight against insurgents. He was mistaken for a suicide bomber.

P R O F I L E



**Language of Broadcast:** Persian

**Content:** 6 hrs. of original TV programming daily, 6p-12m in Iran. Repeats and acquired programming fill the remainder of a 24/7 program stream. VOA Persian also produces one hour of daily original radio and maintains a robust web and social media presence.

**Distribution: TV:** VOA Persian television (PNN) is available via direct-to-home satellite transmission. Five satellites carry the PNN program stream. Though illegal, many Iranians have dishes since more than a quarter of survey respondents report having a dish at home, penetration of satellite technology is at least that high. VOA Persian radio broadcasts daily on 3 IBB SW frequencies: BBG-owned facilities in Germany and Thailand and a leased BBG facility in Germany. In addition to TV and radio, PNN maintains a 24/7 news website, 6 blogs, at least 10 Facebook fan pages and a Twitter account. It also posts extensively on YouTube. It has mobile apps for Android and iPhones.

**Staff:** 80 **Budget:** \$17,824,000

**Established:** 1942 to 1945; 1949 to 1960; 1964 to 1966 (radio feed service); 1979 to present; TV service established in 1996



**Language of Broadcast:** Persian

**Content:** RFE/RL's Radio Farda News and Info airs 66.5 hrs. of original and 5.5 hrs. of repeat radio programming per week; Radio Farda Music – 96 hrs. of original radio programming per week; Internet

**Distribution:** Delivery includes 24-hour cross-border MW from the Persian Gulf, multiple SW frequencies covering the whole country, and four satellite platforms including Hotbird. In addition to an extensive website with 16 hours a day of fresh news updates with proxies and streaming audio, Farda is also active on social media with its Facebook pages boasting more than 240,000 fans. Farda's mobile apps are the most recent addition to its web based content delivery strategy.

**Staff:** 57

**Budget:** \$6,982,000

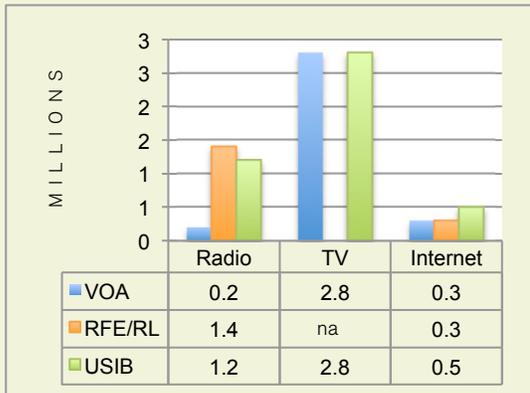
**Established:** 2002 to present



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

(Using Data from Iran, February 2011)

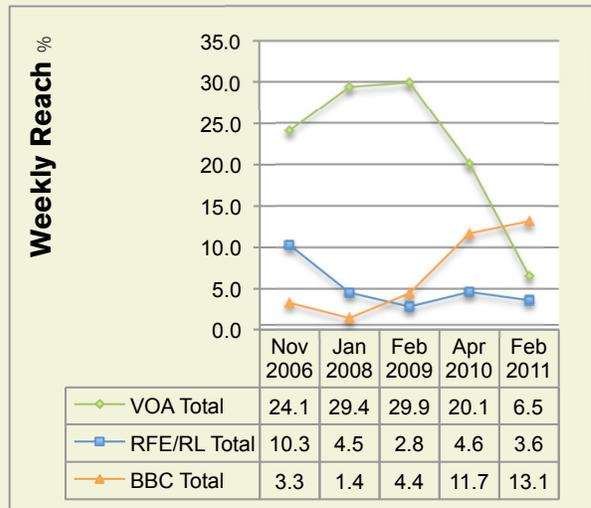
**Audience Size**



**Weekly Reach by Media (%)**

	VOA	RFE/RL	USIB
Radio	0.5	3.1	2.7
TV	6.1	na	6.1
Internet	0.6	0.7	1.1
<b>Total</b>	<b>6.5</b>	<b>3.6</b>	<b>8.5</b>

**Weekly Reach %**



**Awareness (%)**

	VOA	RFE/RL
	28	39

**Credibility**

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

	VOA	RFE/RL
Radio	na*	83
TV	75	na

**Understanding**

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

	VOA	RFE/RL
TV	81	na
U.S. Culture (VOA) or Current Events in Iran (RFE/RL)	68	na
U.S. Policies	65	na

**Quality**

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.2	3.1
TV	2.9	na

Persian

\*Sample of VOA weekly radio listeners is too small for meaningful analysis.

Data are from a February 2011 survey of adults (15+) in Iran. The survey is representative of telephone households only (estimated at 90%).

# Persian Broadcasting

Total Population of Iran: 77.9 million

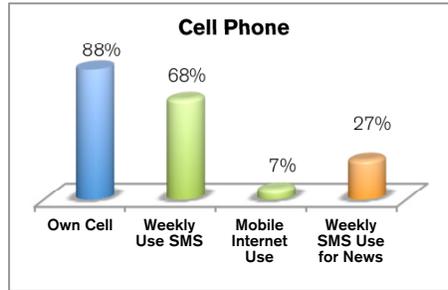
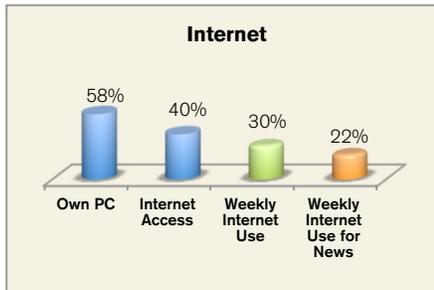
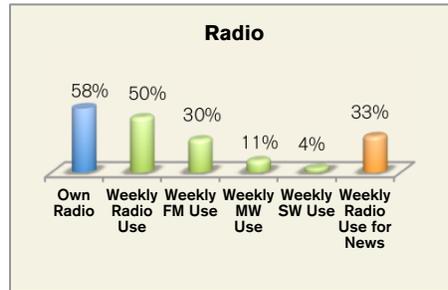
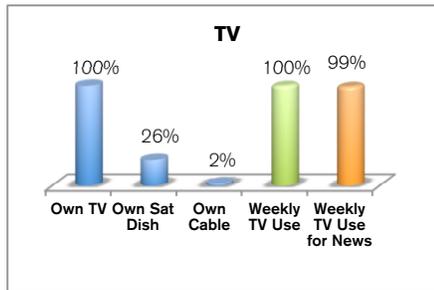
## A U D I E N C E C O M P O S I T I O N

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
<b>Sex</b>	%	%	%
Male	50	65	66
Female	50	35	34
<b>Age</b>			
15-24	33	38	36
25-34	24	21	24
35-44	17	18	17
45-54	12	15	17
55-64	8	8	5
65+	5	1	0

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
<b>Education</b>	%	%	%
Illiterate/No Formal	4	2	2
Elem./Inter.	20	6	8
Secondary	42	43	46
Coll./Univ.	32	50	44
<b>Ethnicity/Nationality</b>			
Persian	50	57	62
Azeri	21	17	13
Kurd	8	9	5
Other	21	17	20

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
<b>Residence</b>	%	%	%
Urban	68	76	70
Rural	32	24	30
<b>Language</b>			
na			

## M E D I A U S E



### Top Ten Media Outlets

1. IRIB Channel 1
2. IRIB Channel 2
3. Iran News Network
4. Google.com
5. Yahoo.com
6. BBC TV
7. Farsi 1
8. VOA PNN TV
9. Jaam-e-Jam International
10. Sahar TV

### Web Analytics

<b>VOA Weekly Visitors</b>	171,800
<b>Weekly Visits</b>	565,000
<b>RFE/RL Weekly Visitors</b>	182,900
<b>Weekly Visits</b>	1,026,200

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- In July, Iran's supreme leader Ayatollah Ali Khamenei established a five-year Committee for Resolving Conflicts and Regulating Relations among Government Branches, apparently in an effort to overcome both his and parliament's long-running conflict with the president, Mahmoud Ahmadinejad.
- A parliamentary election is due in 2012, and the next presidential election is scheduled for 2013. Although experts expect the authorities to ensure a relatively incident-free parliamentary poll, there is potential for the presidential election to become a free-for-all.

### Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 136.00 (175/179)**
- Iran has been blocking news channels broadcast into the country from a French satellite following widespread anti-government protests there. The European Union has put pressure on Iran to stop jamming satellite broadcasts from international broadcasters. There is a possibility the EU will impose trade sanctions to stop the mobile network company Nokia Siemens from trading in Iran. The moves would be separate from any sanctions being considered by the US and their allies over Iran's nuclear ambitions.
- An increase in the availability of Persian language entertainment programming from external providers like Farse 1, Manoto TV, BBC, and others, may be diminishing the time and attention that Iranians are willing to devote to news products on TV. For example, VOA PNN TV's *Parazit*, a satirical news program, is among the most popular of the broadcaster's programs after less than a year on air. Farsi 1 is also among the most popular international TV broadcasters. Moby Media Group, the broadcaster of popular Afghan TV channels Tolo TV and Lemar TV, produces this channel; it is entertainment-focused and competes for Iranian audiences. Additionally, weekly use of radio for news and information has declined, but use of radio overall has increased, suggesting Iranians prefer to listen to the radio for entertainment rather than news.

P R O F I L E



Voice of America



**Language of Broadcast:** Portuguese to Africa

**Content:** 9.5 hrs. of original radio programming per week; Internet

**Distribution:** 7 affiliates (6 FM, 1 MW); 1 IBB FM in Sao Tome, 1 IBB MW and 5 SW frequencies

**Radio:** In addition to its shortwave broadcasts, the Service's programs are broadcast by local FM stations in Mozambique, Cape Verde, Guinea-Bissau and Sao Tome and Principe. The service's Mozambique health project is also aired on the youth channel of Mozambique National radio (Radio Cidade –City Radio).

**New Media:** The Service has a website, an email newsletter, and is available on Facebook and Twitter. Links to the Service's live broadcasts as well as VOA60 Africa and VOA60 Elections videos in Portuguese are available on the website.

**Staff:** 10

**Budget:** \$1,928,000

**Established:** 1976 to present



Portuguese to Africa

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

**Audience Size**

MILLIONS

Luanda survey (February 2010) estimated 0.3 million weekly listeners [6.2% of a covered population of 4,327,796] and 0.1 million weekly website visitors [2.9%], and a national omnibus survey (May 2009) in Mozambique estimated 1.3 million weekly listeners and 0.1 million website visitors.



**Weekly Reach by Media (%)\*\***

	VOA
Radio	na
TV	na
Internet	na
Total	na

**Weekly Reach %**

Current national weekly reach data for Portuguese to Africa not available.



**Awareness (%)**

	VOA
	14.9

**Credibility**

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

	VOA
Radio	na
TV	na

**Understanding**

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

	VOA
Current Events	na
U.S. Culture	na
U.S. Policies	na

**Quality**

Combined Scores from audience panel

	VOA
Radio	3.5
TV	na

\*Previous surveys indicated total media weekly reach rates for VOA Portuguese to Africa of 11.1% in Luanda, Angola (December 2006) and 25.1% in five cities of Mozambique (October 2005). Current sample of VOA weekly audience is too small for meaningful analysis.

# Portuguese to Africa Broadcasting

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

Total Population of Angola 19.6 million and Mozambique 23.1 million

	Sample	VOA Weekly Audience
<b>Sex</b>	%	%
<b>Male</b>	na	na
<b>Female</b>	na	na
<b>Age</b>		
<b>15-24</b>	na	na
<b>25-34</b>	na	na
<b>35-44</b>	na	na
<b>45-54</b>	na	na
<b>55-64</b>	na	na
<b>65+</b>	na	na

	Sample	VOA Weekly Audience
<b>Education</b>	%	%
<b>Primary or less</b>	na	na
<b>Junior School</b>	na	na
<b>High School</b>	na	na
<b>Vocational</b>		
<b>Coll./Univ.</b>	na	na
<b>Ethnicity/Nationality</b>		
<b>na</b>	na	na

	Sample	VOA Weekly Audience
<b>Residence</b>	%	%
<b>Urban</b>	na	na
<b>Rural</b>	na	na
<b>Language</b>		
<b>na</b>	na	na

## M E D I A U S E \*

**TV**

Media use data is not available.

**Radio**

Media use data is not available.

### Web Analytics

**Weekly Visitors** 5,800  
**Weekly Visits** 9,700

**Internet**

Media use data is not available.

**Cell Phone**

Media use data is not available.

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): Angola–NOT FREE; Mozambique–PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): Angola–VERY HIGH RISK (7.6) Mozambique–MODERATE RISK (5.7)**
- As Angola approaches September 2012 elections (only the third election since independence in 1975), the ruling MPLA party overwhelmingly controls the legislature and therefore by terms of the 2010 constitution, the presidency. Jose Eduardo Dos Santos has ruled since 1979.
- 2012 has seen demonstrations by young people in Luanda and Benguela frustrated by their economic and political marginalization by state patronage and corruption. The government has cracked down on opposition and labor union protests with beatings and detentions.
- Mozambique's President Armando Guebuza and the Frelimo Party have been successful at attracting foreign investment (especially in minerals) and aid, and in achieving steady economic growth. Poverty and corruption are widespread, however, and disputes between Frelimo and opposition Renamo parties have been frequent, leading to opposition boycotts of local elections and clashes in Nampula in March 2012.
- The particular legacy of Portuguese colonial administration in Africa means that both Angola and Mozambique populations speak Portuguese to a greater degree than many other Africans speak the colonial languages of their respective countries.

### Media Environment

- **Freedom House Press Freedom Index (2011): Angola–NOT FREE; Mozambique–PARTLY FREE**
- **Reporters Without Borders Index (2011): Angola–58.43 (132/179); Mozambique–21.500 (66/179)**
- In Angola, the state-run media dominate all platforms, with private media limited to smaller, often regional, audiences and subject to harassment and intimidation.
- Internet is unregulated by the government and sites often publish criticisms of MPLA and President Dos Santos. However, reach remains low beyond the capital, and even TV and newspaper coverage is limited in rural areas.
- International broadcasters are prohibited by law from broadcasting via dedicated FM stations, though stories from international broadcasters like VOA are often carried by local affiliates including state media.
- Angola is one of the most challenging places in Africa to conduct research; there is very little local capacity, and few regional firms operate in Luanda. Research of any kind is extremely expensive, and coverage of rural areas usually prohibitively so.
- Mozambique enjoys a less restrictive media environment than Angola, and its cities are largely dominated by TV, with broad access in major cities to programming from Portugal and Brazil. Criminal penalties for defamation and libel are often imposed on journalists for articles critical of the president or other leaders. The political opposition complains that state-run TV and radio does not offer it sufficient coverage, although the constitution guarantees media freedom.

P R O F I L E



**Language of Broadcast:** Russian

**Content:** 2 hours of original video and Russian features per week; 2.75 hours of audio podcast; Internet.

**Distribution:** Robust multimedia website anchors multi-channel digital distribution strategy:

**Social Media:** Maintains VOA blogs and participation in social networks VKontakte, Facebook, Moi Mir, Twitter, and RuTvit, often using them to crowdsource content.

**Mobile Phones:** Multimedia mobile website targets cell phone users in rapidly growing Russian mobile web market.

**Video:** Branded YouTube channel where Russians can embed VOA videos on other websites and blogs. Service video is also reproduced on a Russian video news site, newstube.ru. Content is also frequently republished on popular Russian websites, including inosmi.ru, lentaru and gazeta.ru (over half a million video views per month.)

**Staff:** 20

**Budget:** \$3,514,000

**Established:** 1947 to present



**Language of Broadcast:** Russian

**Content:** 88 hrs. of original and 80 hrs. of repeat radio prog. per week; Internet

**Distribution:** 4 affiliates (1 FM, 1 MW, 2 cable TV), 2 to 4 SW frequencies, Satellite

RFE/RL's delivery includes affiliates, plus our 24-hour MW in Moscow, full audio streams available on municipal intranets, multiple SW frequencies, HotBird, AsiaSat in addition to Internet with streaming audio.

**New Media:** Svoboda's interactive and multimedia website had almost 30 million visits in 2010. Their content is republished daily on leading news sites, with active blogs carried on their own and other sites. Svoboda is closely followed on popular social networking sites and has recently expanded its offerings with live streaming video to cover breaking events as they unfold and



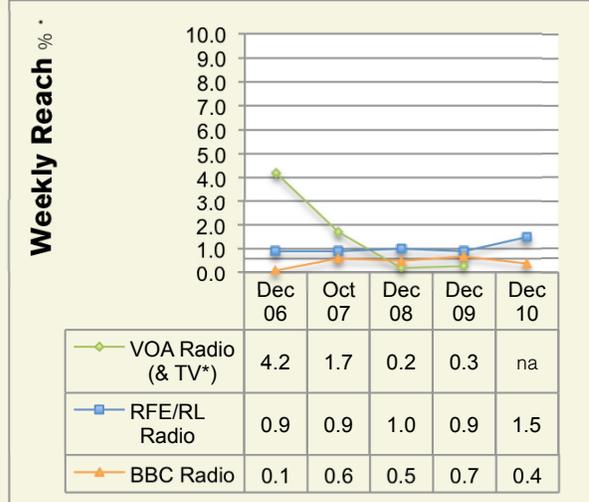
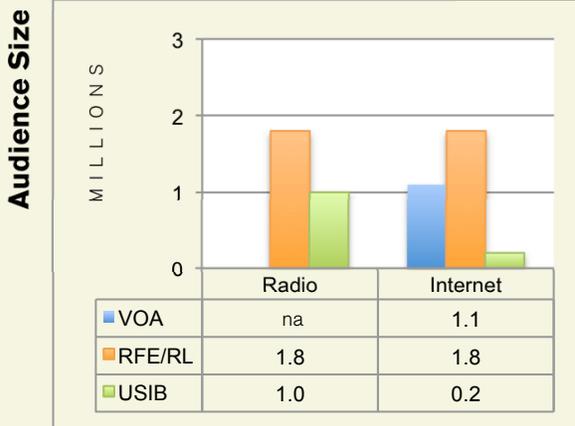
external widget placement which embeds content on local sites. It also has a mobile site and branded YouTube channel.

**Staff:** 28

**Budget:** \$7,809,000

**Established:** 1953 to present

P E R F O R M A N C E D A T A (Using Data from Russia, December 2010)



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	na	1.5	1.5
Internet	0.9	1.5	1.6
Total	0.9	2.5	2.6

Awareness (%)	
VOA	RFE/RL
47	64

Russian

**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 Russia (RFE/RL)	na	na
U.S. Policies	na	na

**Quality**

Combined Scores from audience panel		
	VOA	RFE/RL
Radio	na	3.2
TV	2.9	na

\*Weekly reach for VOA included TV until December, 2008. December 2009 VOA radio reach may reflect unofficial rebroadcast of podcast.

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

Data are from a December 2010 nationwide survey of adults (15+) in Russia.

# Russian Broadcasting

Total Population of Target Country: 142.8 million

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

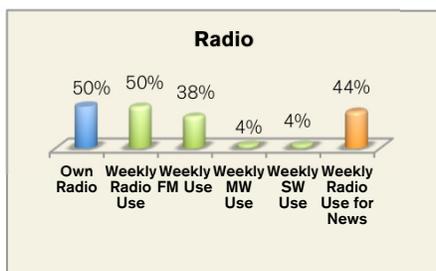
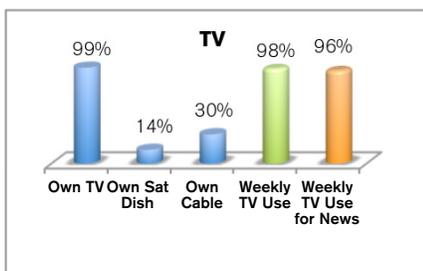
	Sam.	VOA Annual Aud.**	RFE/RL Weekly Aud.**
<b>Sex</b>	%	%	%
Male	46	65	52
Female	54	35	48
<b>Age</b>			
15-24	18	41	16
25-34	19	33	22
35-44	15	16	7
45-54	17	7	27
55-64	14	3	11
65+	15	0	16

	Sam.	VOA Annual Aud.**	RFE/RL Weekly Aud.**
<b>Education</b>	%	%	%
None	0	0	0
Primary	10	8	7
Secondary	63	43	51
Coll./Univ.	25	49	43
<b>Ethnicity/Nationality</b>			
Russian	88	71	92
Other	12	29	8

	Sam.	VOA Annual Aud.**	RFE/RL Weekly Aud.**
<b>Residence</b>	%	%	%
Urban	75	64	76
Rural	25	36	24
<b>Language</b>			
Russian	96	100	100
Other	4	7	5

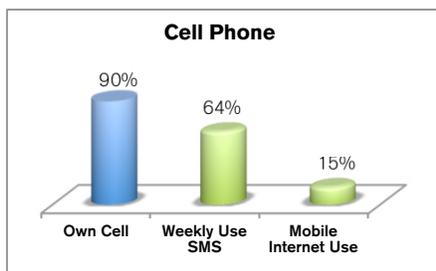
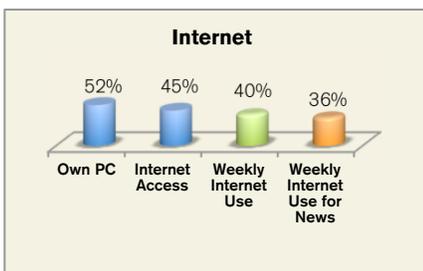
\*\*Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

## M E D I A U S E



### Top Seven Media Outlets

1. Pervyi Kanal
2. Rossiya
3. NTV
4. Ren-TV
5. Radio Rosssii
6. Radio Mayak
7. Euronews TV



### Web Analytics

<b>VOA Weekly Visitors</b>	166,800
<b>Weekly Visits</b>	233,300
<b>RFE/RL Weekly Visitors</b>	311,600
<b>Weekly Visits</b>	805,400

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2012): NOT FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- The Russian state remains characterized by lack of political pluralism, widespread corruption, and arbitrary use of the legal and regulatory system for rewarding clients and punishing perceived opponents, in the view of Reporters Without Borders. Freedom of assembly and political association are denied, restricted or manipulated by the authorities.
- The September 2011 announcement of then President Dmitry Medvedev's intention to again "swap" of positions with then Prime Minister Vladimir Putin, followed by systematic manipulation of December elections for the lower house that preserved a small majority for the ruling party, led to a broad-based protest movement against fraud and corruption of the political system unprecedented since Putin's rise to power. Putin's election in March 2012 reinforced dissident forces' resolve and continued erosion of support among many who had been drawn to the once-again President as a force for stability and growth.
- The violence widespread in the North Caucasus continues to take the lives of hundreds of officials, insurgents and civilians in Chechnya, Ingushetia, Dagestan and Kabardino-Balkaria. Its spillover into heartlands of the Russian Federation—as with the January 2011 bomb attack at Moscow's Domodedovo Airport that killed at least 37 people—remains a source of fear for ordinary Russians and a pretext for restrictions of personal freedoms and harsh responses to political challenges in the affected regions.

### Media Environment

- **Freedom House Press Freedom Index (2012): NOT FREE**
- **Reporters Without Borders Index (2011): 66.00 (142/179)**
- As it is by far the most popular medium and source of news for Russians, television remains the prime target of ruling authorities' pressures against alternative information sources. A small number of newspapers (e.g. *Novaya Gazeta*) and radio stations (e.g. Ekho Moskvy) are allowed some space for reporting and opinion outside the central government's controlled narrative.
- Radio continues its decline as an important source of news for Russians, and regular broadcast of foreign content is restricted as it is on television. Use of shortwave radio remains in the low single digits despite, the lack of diversity on domestic media.
- Internet continues to grow in reach and bandwidth, including outside of traditional media-rich centers of Moscow and St. Petersburg, and bears the fewest restrictions on diversity of information and viewpoints.
- Nonetheless, Internet sites and social media are being targeted by authorities, who have sought to develop systems for monitoring "extremist" content, prosecuted or sued bloggers and sites for violating defamation or "anti-extremism" laws. Authorities have sponsored cyber-attacks on independent or dissident pages or sites, for example on LiveJournal and *Novaya Gazeta*. Hackers attacked the website of the election monitoring organization Golos during 2011 elections. In March 2011, Reporters Without Borders added Russia to the list of countries "under surveillance" in its *Enemies of the Internet* report.

P R O F I L E



**Language of Broadcast:** Avar, Chechen, Circassian

**Content:** 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

**Distribution:** 2 IBB SW frequencies

**New Media:** The service has 2 basic web pages (Avar & Circassian) and a full website (Chechen), which provide information on SW frequencies as well as contain audio links.

**Staff:** 10

**Budget:** \$1,203,000

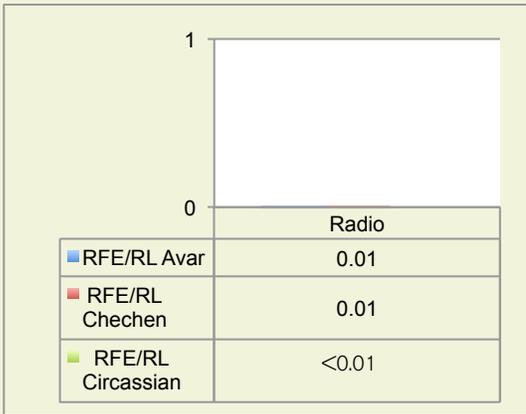
**Established:** Avar: 1951 to 1970's; 2002 to present; Chechen: 1953 to 1970; 2002 to present; Circassian: 2002 to present



Russian North Caucasus

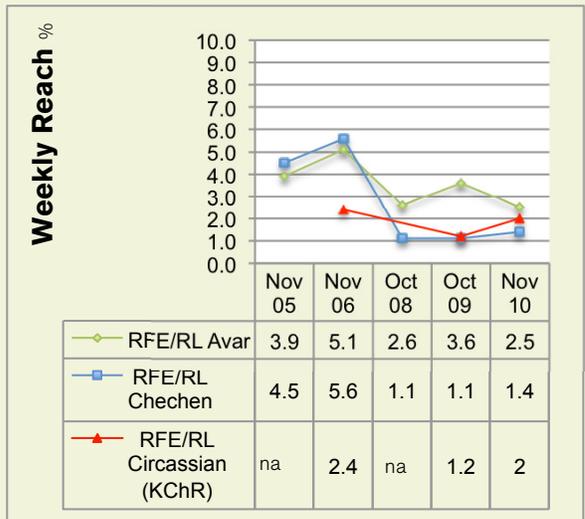
P E R F O R M A N C E D A T A \*

Audience Size



Weekly Reach by Media (%)			
	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Radio	2.5	1.4	2.0
TV	na	na	na
Internet	na	na	na
Total	2.5	1.4	2.0

Weekly Reach %



Awareness (%)		
RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
17	22	24

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)**			
	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Radio	na	na	na
TV	na	na	na

Quality

Combined Scores from audience panel			
	RFE/RL Avar	RFE/RL Chechen	RFE/RL Circassian
Radio	2.6	2.6	2.6
TV	na	na	na

Understanding

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

\*Number reflects quality score for all three languages in the Russian North Caucasus service.

Data are from November 2010 surveys of adults (15+) in Adygea, Chechnya, Dagesta and Karachaevo-Cherkessia. The Chechnya survey is representative of the total adult population. The other surveys are representative of ethnic Adygs, ethnic Avars and ethnic Circassians in their respective republics.

\*The Russia North Caucasus Languages service (NCLS) targets the republics of Chechnya (population: 0.3m), Dagestan (1.8m), Karachaevo-Cherkessia (0.3m), Kabardino-Balkaria (0.7m) and Adygea (0.4m). Audience rates presented here are for Avar in Dagestan, Chechen in Chechnya and Circassian in Karachaevo-Cherkessia/Kabardino-Balkaria. An October 2009 survey indicated a 0.0% total media weekly reach rate for RFE/RL NCLS in Kabardino-Balkaria.

\*\*Samples of weekly Avar, Chechen and Circassian weekly listeners are too small for meaningful analysis.

# Russia North Caucasus Broadcasting

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

Total Population of Russia North Caucasus: See note\*

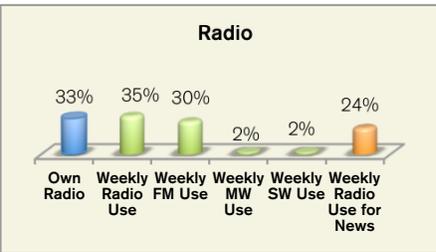
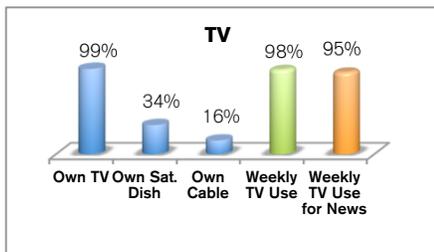
	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
<b>Sex</b>	%	%	%	%
Male	48	na	na	na
Female	52	na	na	na
<b>Age</b>				
15-24	27	na	na	na
25-34	23	na	na	na
35-44	18	na	na	na
45-54	19	na	na	na
55-64	9	na	na	na
65+	4	na	na	na

	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
<b>Education</b>	%	%	%	%
None/Primary	6	na	na	na
Secondary	34	na	na	na
Technical	23	na	na	na
Higher	37	na	na	na
<b>Ethnicity/Nationality</b>				
Avar	39	na	na	na
Chechen	6	na	na	na
Kabardin	53	na	na	na
Adyg	3	na	na	na

	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
<b>Residence</b>	%	%	%	%
Urban	39	na	na	na
Rural	61	na	na	na
<b>Language Spoken At Home</b>				
Avar	32	na	na	na
Chechen	49	na	na	na
Circassian	7	na	na	na
Russian	13	na	na	na

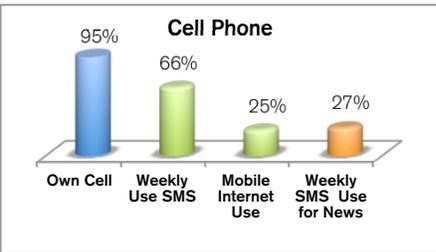
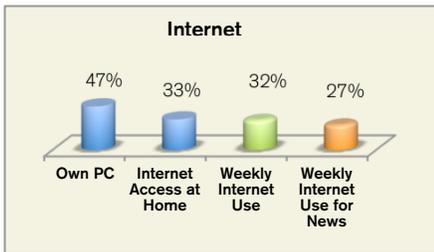
## M E D I A U S E

(Using combined sample from Chechnya, Dagestan and Kabardino-Balkaria/Karachaevo-Cherkessia, Oct '09)



### Chechnya Top Ten Media Outlets

1. ORT-1
2. RTR-Rossiya
3. NTV
4. GTRK Grozny
5. ChGTRK Vainakh
6. REN-TV
7. STS
8. Put'
9. Kultura
10. Radio Grozny



### Web Analytics

<b>Weekly Visitors</b>	40
<b>Weekly Visits</b>	90

## C O N T E X T



### Political Situation

- **Freedom House Political Freedom Index (2011): Russia–NOT FREE (Russia)**
- **Economist Intelligence Unit Instability (2010): Russia–HIGH RISK (Russia)**
- Currently, the North Caucasus is Russia's most difficult region in terms of political stability, human rights, and civil freedoms. Although the political context differs for each of the republics, the entire region is characterized by the ongoing fighting between Russian state troops and the insurgents, as well as among different insurgent leaders and groups.
- The fighting is accompanied by mass murders masked as counter-terrorism activities; hundreds of people, especially younger males, have disappeared since the second Caucasus war. Widespread corruption and arbitrary appointments of officials by Kadyrov and other NC leaders introduce the extreme level of lawlessness.

### Media Environment

- **Freedom House Press Freedom Index (2011): Russia–NOT FREE (Russia)**
- **Reporters Without Borders Index: 66.00 (142/179) (Russia)**
- The media environment in the North Caucasus is highly repressive even compared to the rest of Russia, and many respondents find local reporting insufficient, while recognizing that it is dangerous to engage in honest journalism. As the insurgency accelerates, there may be increased demand for an alternative voice among Avars, Chechens, and Circassians in the North Caucasus.
- Ramzan Kadyrov, president of Chechnya, is unusually repressive even by the standards of the Russian Federation. He was independently named by Reporters without Borders, along with Vladimir Putin, as one of the world's worst "predators of the press." The murders of two prominent critics of the Chechen regime, Anna Politkovskaya in 2006 and Natalya Estemirova, remain unsolved, and Estemirova's murder provoked the closure of the Chechen office of the human rights group Memorial. Kadyrov has fostered a personality cult, posting his photo everywhere and starting petting newspapers using subsidies from the Russian government. According to Reporters without Borders, Chechen media "toe the line," leaving few independent sources within the republic.
- New technology is transforming the media environment in the North Caucasus; the Internet, satellite TV, and mobile phones enabled to serve as media platforms (until recently quite rare) have increased several-fold in the past few years and now compete with or eclipse traditional media platforms like radio and newspapers.

PROFILE



Voice of America



**Language of Broadcast:** Serbian

**Content:** 3.85 hrs. of original TV programming per week; 1.25 hours of audio podcast programming per week; Internet

**Distribution:** 52 affiliates

**TV:** The Service broadcasts 30-minute TV shows *Open Studio* (Mon-Fri) and *Weekend Studio* (Sat-Sun). The shows are rebroadcast by over 50 TV affiliates in Serbia (30), Montenegro (9), Kosovo (8), Republic Srpska (Bosnia-Herzegovina) (6), and Macedonia (1). There is also a weekly interactive program with public service TV Montenegro and two weekly TV interactive programs with major Serbian independent TV station, B92.

**Podcast:** 1.25 hours of audio podcast programming per week. Around 20 radio stations in Serbia and Kosovo simulcast the TV shows or use audio podcast.

**Web:** Multimedia content on web and mobile sites is updated daily. The Service website focuses on service-originated content and interactivity. The website features and *American Minute* digital-only product (M-F). The Service offers videos on YouTube and engages audience via Facebook and Twitter.

**Staff:** 10

**Budget:** \$1,498,000

**Established:** 1943 to present; TV service established in 1996



**Language of Broadcast:** Albanian, 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; Montenegrin: 3.5 hours original radio; South Slavic 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+

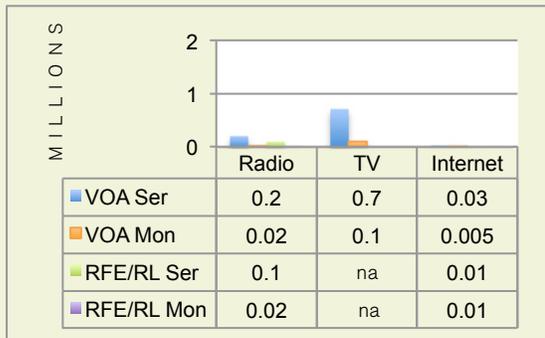
**Established:** 1994 to present

† Numbers reflect RFE/RL Balkan Service totals. Please see separate Montenegrin page for further information on that market.

Serbian/Montenegrin

PERFORMANCE DATA (Using data from Serbia & Montenegro, July 2010 & 2011)

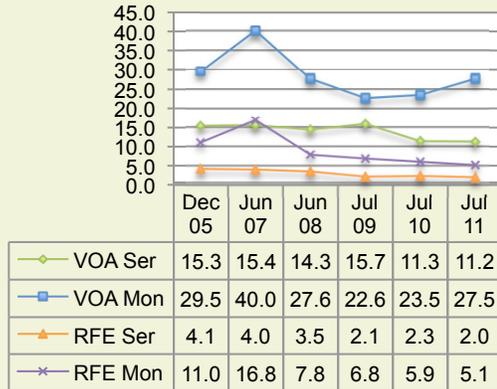
Audience Size



Weekly Reach by Media (%)

	VOA Serbia	VOA Montenegro	RFE/RL Serbia	RFE/RL Montenegro
Radio	2.5	4.7	2.0	3.8
TV	10.4	26.6	na	na
Internet	0.4	1.0	0.2	1.5
Total	11.2	27.5	2.0	5.1

Weekly Reach %



Awareness (%)

	VOA Serbia	VOA Montenegro	RFE/RL Serbia	RFE/RL Montenegro
	68	66	65	65

Credibility

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

	VOA		RFE/RL	
	Ser	Mon	Ser	Mon
Radio	81	98	95*	96*
TV	92	96	na	na

Understanding

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

	VOA TV*		RFE/RL	
	Ser	Mon	Ser	Mon
Cur. Events	80	95	92	96
U.S. Society (VOA)	57	75	na	na
Current Events in Ser/Mon (RFE/RL)	76	87	89	92
U.S. Pol.	58	74	na	na

Quality

Combined Scores from audience panel

	VOA Serbia	RFE/RL Serbia
Radio	3.7	3.4
TV	3.5	na

\*Credibility and understanding ratings are for RFE/RL on radio or Internet.

\*\*In Serbia, understanding ratings for VOA Radio are: 92% for Current Events; 60% for U.S. Culture; and 60% for U.S. Policies. In Montenegro, understanding ratings for VOA TV are: 98% for Current Events; 77% for U.S. Society; 92% for Current Events in Montenegro; and 71% for U.S. Policies.

Data are from July 2010 & 2011 surveys of adults (15+) in Serbia and Montenegro.