

P R O F I L E



Language of Broadcast: Greek

Content: 2.6 hrs. of original and 0.5 hrs. of repeat radio programming per week; 5 min. of original and 5 min. of repeat TV programming per week; Internet

Distribution: 3 affiliates (2 FM, 1TV)

Radio: VOA Greek produces seven daily five-minute live news satellite programs (M-F) that are simulcast by Greece's top-rated news and information station, affiliate Radio SKAI (Sky) of Athens, and by Radio City International in Thessaloniki, Greece's second largest city. VOA news feeds are also carried by several of Radio SKAI's own affiliates as well as by a network of informal program partners from Canada to Australia through the Internet.

TV: The VOA Greek Service's news program, *Reportaz Apo Washington (Washington Report)*, is broadcast five to ten minutes a week on one affiliate in Greece, TV Halkidiki. Occasionally, the program also airs on informal affiliates SKAI (Sky) TV of Athens and CYBC-1 TV of Nicosia.

Web: The service has a website, a Facebook page, Twitter and YouTube accounts, and sends out an email newsletter.

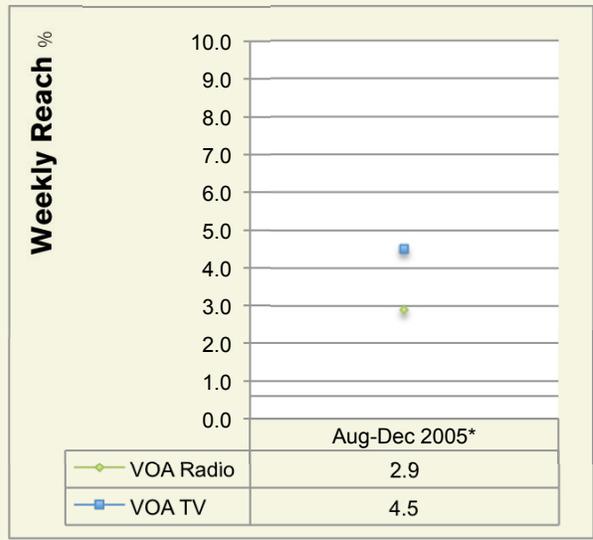
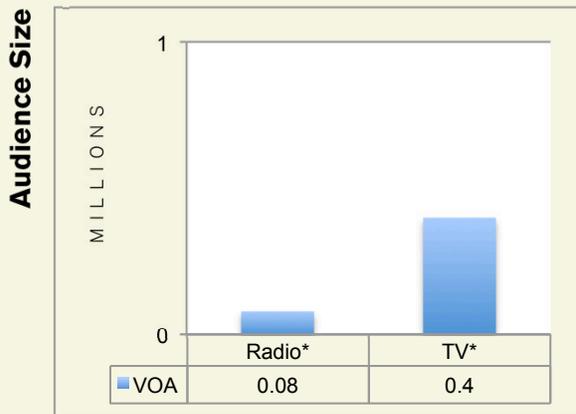
Staff: 4

Budget: \$525,000

Established: 1942 to present; TV service established in 2006



P E R F O R M A N C E D A T A (Using Data from Aug.-Dec., 2005 [radio] & Oct.-Dec. 2005 [TV])



Weekly Reach (%) by Media	
VOA	
Radio	2.9*
TV	4.5*
Internet	na
Total	na*

Awareness (%)	
VOA	
	na

Greek

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

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.7
TV	na

*Radio listenership was recorded using 24-hour "day after" recall and a seven-day diary and reflects audiences in Greater Athens only. TV audience figure is based only on ALPHA TV viewership and does not include estimates for TV Halkidiki in northern Greece or VOA's partner CYBC in Cyprus. Total unduplicated reach figure cannot be derived due to lack of single source data.

Radio reach figures are from a Focus BARI Media Radio Survey in Athens only, August-December 2005. Television figures are from an AGB Nielsen Peoplemeter panel, October-December 2005.

Greek Broadcasting

Total Population of Greece: 11.3 million

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

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

	Sample	VOA Weekly Audience
Education	%	%
None	na	na
Primary	na	na
Secondary	na	na
Coll./Univ.	na	na
Ethnicity/Nationality		
Albanian	na	na
Serbian	na	na
Other	na	na

	Sample	VOA Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
Albanian	na	na
Serbian	na	na
Other	na	na

M E D I A U S E

TV

Media Use Data Unavailable

Radio

Media Use Data Unavailable

Google Analytics

Weekly Visitors 1,600

Weekly Visits 2,000

Internet

Media Use Data Unavailable

Cell Phone

Media Use Data Unavailable

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- In March 2012, Greece agreed to work with European officials in restructuring the country's debt to avoid default. The global financial crisis, coupled with excessive public spending, wide-spread corruption and the lack of accountability left Greece in a near Great-Depression like recession.
- The early parliamentary elections were held in May 2012 to elect all 300 members of the governing body. The election results showed the crushing defeat of the dominant political party which was blamed for the country's economic collapse and subsequent austerity measures.
- The country's unemployment rate in May 2012 was said to be around 22 percent with the standard of living down 20 percent since 2009. The Greek public has responded to aid packages that demanded austerity measures, which many perceive would further reduce the standard of living with rallies and strikes, some of which turned violent.

Media Environment

- **Freedom House Press Freedom Index (2011): FREE**
- **Reporters Without Borders Index (2011): 24.00 (70/179)**
- Television is Greece's dominant medium. Since the late 80s, the market has been expanding quickly, with hundreds of new commercial TV services engaging in fierce competition. Digital TV services are commercially available via IPTV and satellite; broadband penetration is growing. On the other hand, there is a lack of existing cable TV services and satellite TV penetration is low.
- Overall, the number of radio and TV outlets is estimated at close to 1,800. EU standards are not consistently applied and many of these broadcasters are unlicensed. There is also a vibrant press, with a variety of newspapers in print.
- Violence against the media is not unheard of and is rather shocking by European standards. According to Reporters Without Borders, journalists are often physically assaulted by various extreme groups when covering social unrest. In addition, they are often targeted for their investigative reporting on sensitive political issues.

P R O F I L E



Language of Broadcast: Hausa

Content: 13 hrs. of original radio programming per week; Internet

Distribution: 32 affiliates (32 FM), 1 IBB MW and 3 - 5 SW frequencies

Radio: The Hausa Service has four 30-minute air-shows Monday thru Friday and 2 on Saturday and Sunday. The Service also produces a weekly health program. These are broadcast through SW, MW and FM frequencies. The Service has 32 active FM affiliates in Nigeria, Ghana, Niger, Mali, Burkina Faso and Senegal. Several local radio stations in Nigeria also carry packaged VOA Hausa programming.

New Media: The Service offers live and recorded broadcasts as well as written content on its website, and at hausavoa.mobi provides the latest news to mobile phone users. The service is on both Facebook and Twitter.

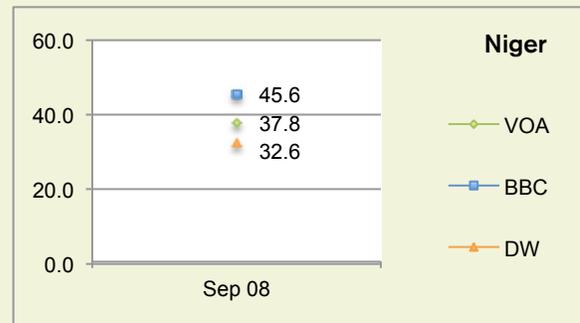
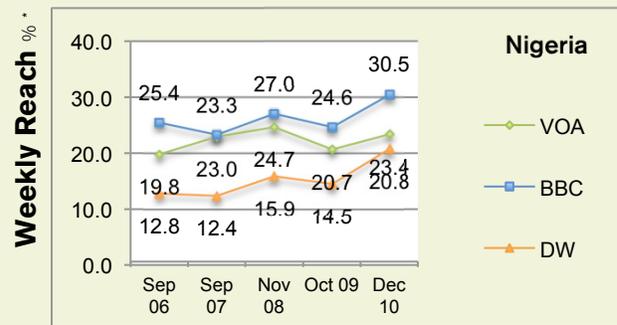
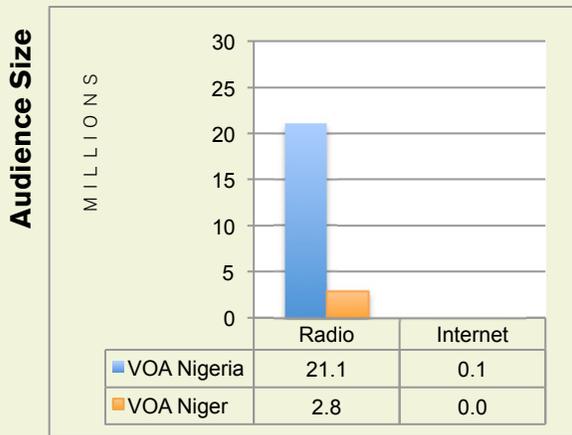
Staff: 10

Budget: \$1,338,000

Established: 1979 to present



P E R F O R M A N C E D A T A (Using Data from Nigeria, Dec. 2010 & Niger, Sept, 2008)



Weekly Reach by Media (%)		Awareness (%)	
	Nigeria	Niger	
Radio	23.4	37.8	57
TV	na	na	64
Internet	0.1	<.1	
Total	23.4	37.8	

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Nigeria	Niger
Radio	95	99
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	Nigeria	Niger
Current Events in Country	91	82
U.S. Culture	81	47
U.S. Policies	75	46

Quality

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	na

Hausa

*Data in relation to national populations, not just Hausa speakers. Reach among Hausa speakers only is significantly higher.

Data are from a December 2010 survey of adults (18+) in Nigeria and a September, 2008 survey of adults (15+) in Niger.

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

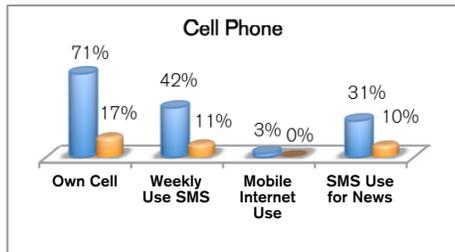
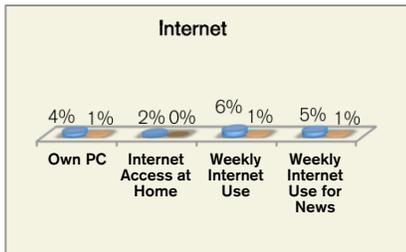
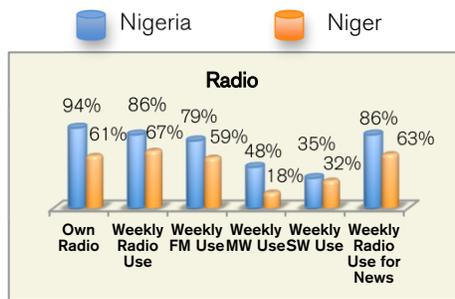
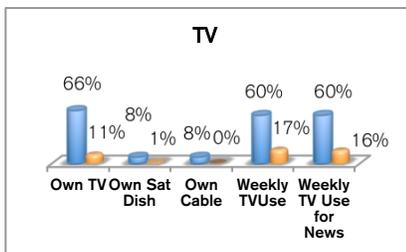
Total Population of Nigeria 162.3 million and Niger 16.1 million

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
Sex	%	%	%	%
Male	49	61	45	66
Fem.	51	39	55	34
Age				
15-24	28	27	28	28
25-34	28	28	24	23
35-44	18	18	16	18
45-54	14	15	15	16
55-64	9	8	10	8
65+	2	4	7	6

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
Educ.	%	%	%	%
None	41	62	82	78
Primary	21	17	10	11
Second.	31	16	5	7
Higher	8	5	3	5
Ethnicity/Nationality				
Hausa	42	74	62	79
Yoruba	21	1	na	na
Igbo	14	2	na	na
Djerma	0	23	20	5
Other	23	74	18	16

	Nigeria Sam.	Nigeria Weekly Aud.	Niger Sam.	Niger Weekly Aud.
Residence	%	%	%	%
Urban	41	44	19	21
Semi-urb.	10	5	na	na
Rural	49	50	81	79
Language Spoken at Home				
Hausa	49	90	66	83
Yoruba	20	1	na	na
Igbo	12	1	na	na
Other	19	8	34	17

M E D I A U S E



Top Ten Sources of News (Nigeria)

1. NTA
2. BBC
3. VOA
4. DW Radio
5. FM Kano
6. Rima FM Radio Sokoto
7. Radio Jigawa
8. AIT Lagos
9. Freedom FM
10. Osun Radio

Top Ten Sources of News (Niger)

1. Tambara FM
2. Radio Fara'a
3. Alternative FM
4. Tele Sahel
5. Africa N.o.1
6. La Voix du Sahel
7. Dalol FM
8. L'Evennement
9. Radio Anfani FM
10. Douinia TV

Web Analytics

Weekly Visitors	17,900
Weekly Visits	33,900

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011):** Nigeria—PARTLY FREE; Niger—PARTLY FREE
- **Economist Intelligence Unit Instability (2010):** Nigeria—HIGH RISK; Niger—VERY HIGH RISK
- Cameroon and Ghana have small populations of Hausa speakers, but it is oil-rich Nigeria—Africa's most populous and economically significant country—where the impact of Hausa broadcasting is greatest. More than half of the country's adult population comprises largely Hausa-speaking Muslims. Around half the population of neighboring Niger speaks or understands Hausa.
- Censorship remains a serious issue for private broadcasters in Nigeria. VOA's affiliates have been no exception (Freedom FM's executive vice-chairman Alhaji Ado Mohamed was arrested in June 2009). The problem is acute in the north as regional and local authorities lash out against content perceived as anti-Islamic.
- Nigeria has had an elected government since 1999, and the government is now challenged with keeping the country from fracturing along ethnic and religious lines. Umaru Yar'Adua of the ruling People's Democratic Party (PDP) won the presidency following the April 2007 elections, but died of illness in May 2010. Vice President Goodluck Ebele Jonathan, also of the PDP, was sworn in as Nigerian president one day after Yar'Adua's death and reelected in April 2011.

Media Environment

- **Freedom House Press Freedom Index (2011):** Nigeria—PARTLY FREE; Niger—NOT FREE
- **Reporters Without Borders Index (2011):** Nigeria—56.40 (126/179); Niger—2.50 (29/179)
- The media landscapes in the north and south of Nigeria differ dramatically. Media in the north continues to revolve around radio; access to and use of shortwave radio has not changed significantly for several years. Even among elites in capital cities in the north, television and Internet use are not prevalent. In the south, on the other hand, evening TV audiences have surpassed evening radio listening.
- Reception issues are a continuing concern as the ban on rebroadcasts of foreign radio programs continues and most listening to VOA takes place on shortwave. Nigeria continues to be a strong shortwave market, though this is almost entirely due to the habits of the Hausa population, as their daily use of shortwave radio is six times higher than that of other Nigerians.
- Hausa audiences are far less likely to watch television or use the Internet than are other Nigerians. While the most common way of going online is at Internet cafes, mobile phones represent the most prevalent means of personal access. Social networking sites such as Facebook are increasingly popular as a source of news and information.

P R O F I L E



Language of Broadcast: Afan Oromo, Amharic, Tigrigna
Content: 14.5 hrs. of original radio programming per week; Internet
Distribution: Afan Oromo: 5 SW; Amharic: 1 Djibouti MW & 5 IBB SW; Tigrigna: 5 IBB SW frequencies

Radio: The Horn of Africa Service broadcasts in Afan Oromo, Amharic and Tigrigna; each language has 5 IBB shortwave frequencies. The service also offers live and repeat audio in each of the 3 languages on Arabasat's BADR-4 satellite. In 2011, the service began broadcasting special 30 minute "Lifeline" drought and development programs on Djibouti AM 1431.

New Media: Each language has its own website and Facebook page. VOA also offers a Web-based newsletter to Ethiopian listeners through a proxy server.

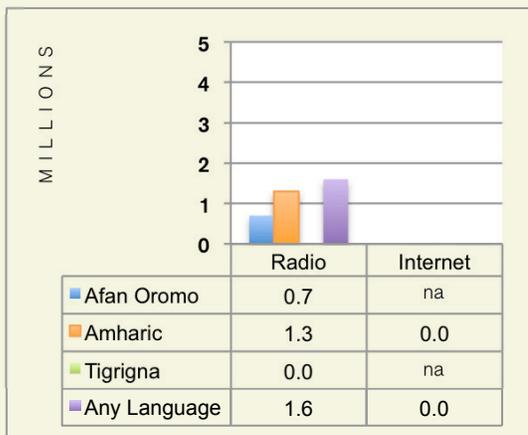
Staff: 16 | **Budget:** \$2,000,000

Established: Afan Oromo: 1996 to present; Amharic: 1982 to present; Tigrigna: 1996 to present



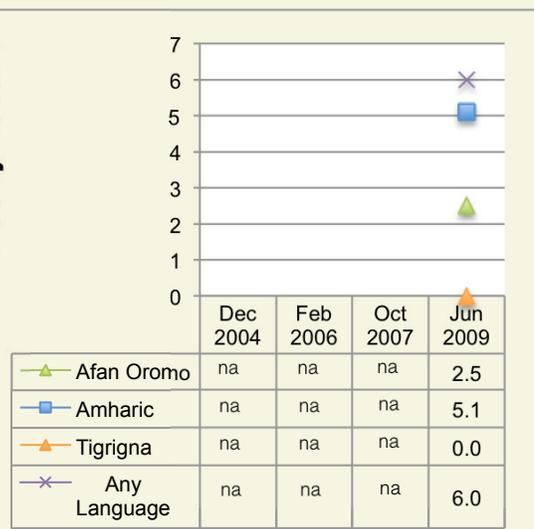
P E R F O R M A N C E D A T A (Using Data from Ethiopia, June 2009)

Audience Size



Weekly Reach by Media (%)				
	Afan Oromo	Amharic	Tigrigna	Any Language
Radio	2.5	5.1	<.1	6.0
TV	na	na	na	na
Internet	na	<.1	na	<.1
Total	2.5	5.1	<.1	6.0

Weekly Reach %



Awareness (%)	
VOA	52

Credibility

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

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA
Current Events	88
U.S. Culture	48
U.S. Policies	57

Quality

Combined Scores from audience panel	
	VOA
Radio	3.5
TV	na

Data are from a June 2009 survey of adults (18+) in Ethiopia. The regions included in the final sample (Oromiya, Addis Ababa, Dire Dawa and S.N.N.P.) account for 59% of adult population in Ethiopia. Research is not possible in Eritrea, where Tigrigna is the primary language.

*Due to differences in sample coverage between the 2009 survey and previous surveys of Ethiopia, it is not possible to display trend data.

Horn of Africa Broadcasting

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

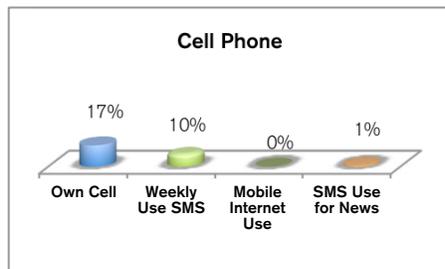
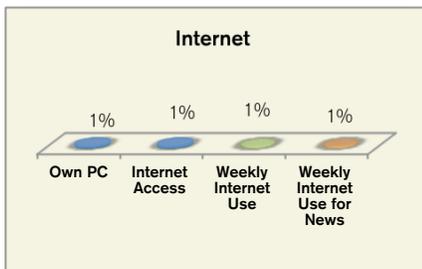
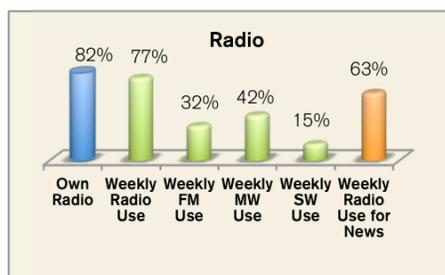
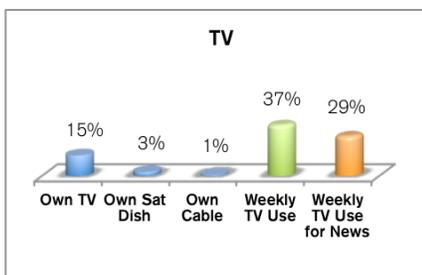
Total Population of Ethiopia: 87.1 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	58	81
Female	42	19
Age		
15-24	32	20
25-34	30	37
35-44	18	21
45-54	11	14
55-64	5	6
65+	4	1

	Sample	VOA Weekly Audience
Education	%	%
None	16	4
Primary	40	31
Secondary	31	40
Vocational/Univ	13	26
Ethnicity/Nationality		
Oromo	35	29
Amhara	32	44
Guragi	9	8
Siadmo	7	4
Other	17	14

	Sample	VOA Weekly Audience
Residence	%	%
Urban	62	70
Rural	38	30
Language Spoken At Home		
Amharic	56	63
Afan Oromo	24	24
Tigrigna	1	1
Other	19	12

M E D I A U S E



Top Ten Media Outlets

1. ETV
2. Ethiopia Radio
3. FM Addis
4. ETV-2 Addis
5. Radio Fana FM
6. Sheger FM
7. FM Addis Admin
8. FM Awassa
9. VOA Horn of Africa
10. DW Amharic

Top Ten Sources of News

1. Ethiopia Radio
2. ETV
3. Radio Fana
4. FM Addis 97.1
5. FM Awassa
6. SABC
7. DW
8. VOA
9. Sheger FM
10. ETV-2 Addis

Web Analytics

Weekly Visitors	36,600
Weekly Visits	107,800

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): Ethiopia-NOT FREE; Eritrea-NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- The Ethiopian People's Revolutionary Democratic Front (EPRDF) continued its strong dominance of the political environment in Ethiopia in 2011. While tensions in the Ethiopia-Eritrea border area continue, Ethiopians troops entered Somalia to fight against Al Shabab.
- Media access and use are politically sensitive issues in Ethiopia, making research difficult. People are often reluctant to discuss any sources of news critical of the government, for fear of reprisal. In addition, permission to conduct research must be granted not only by national government authorities, but also by each regional authority. The November 2011 survey constitutes the first quasi-nationwide BBG audience research project in years.
- Eritrea is a one-party state, holds no free elections and allows no private news media.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 56.60 (127/179)**
- Despite the opening of several private radio stations and newspapers (mostly government oriented), Ethiopia's media scene is still dominated by state-owned radio, TV, and newspapers. Private media houses and journalists have been subject to intimidation and arrest. Domestic media shy away from covering sensitive issues, such as the endemic corruption.
- The Ethiopian government continued to interfere with the signals of international broadcasters. Many Ethiopians use satellite TV to access international stations, including VOA audio programming.
- Eritrea remains at the very bottom of Reporters Without Borders Press Freedom Index. Freedom of opinion does not exist, and dissenting voices from the journalist community are swiftly arrested and detained for long periods.

P R O F I L E



Language of Broadcast: Indonesian

Content: 56 hrs. original radio programming per week; 3.4 hrs. original TV programming per week; Internet; Mobile

Distribution: The Indonesian Service employs an affiliate-based distribution system.

Radio: Over 250 AM/FM affiliate stations in 128 cities relay VOA Indonesian's programs including *Headline News*, *Breakfast and Evening Shows*, *VOA Direct Connection* and 24 additional short inserts ranging from business and economics to the environment to pop culture.

TV: The Service produces two long-form TV shows and 18 short TV segments for 8 of the 11 national TV stations and over 30 regional stations. *Dunia Kita*, a 30-minute human interest TV magazine show, is in its 11th season on Metro TV, Indonesia's version of CNN, a 24-hour news channel. TV produces special events coverage for major stories, e.g. U.S. elections or the death of Osama bin Laden.

New Media: The service has web and mobile sites and a daily headline news e-newsletter. The main Facebook page has over 725,000 fans, Dunia Kita alone has over 110,000 Facebook fans. The Service's YouTube page has over 4,000 videos with more than 2 million views and its Twitter feed has more than 25,000 followers.

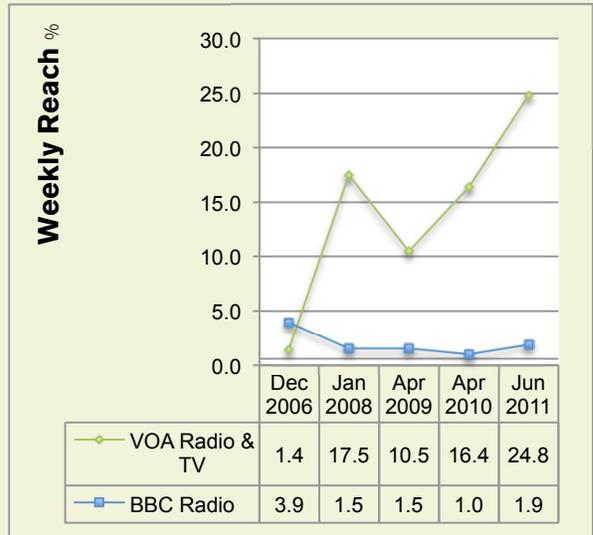
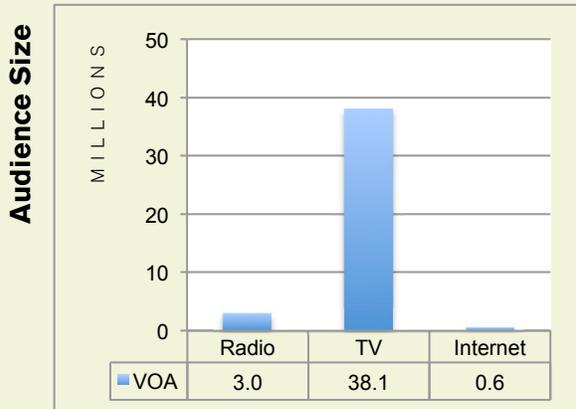
Staff: 43

Budget: \$5,933,000

Established: 1942 to present



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



Weekly Reach by Media (%)	
VOA	
Radio	1.9
TV	24.6
Internet	0.4
Total	24.8

Awareness (%)	
VOA	
	12

Indonesian

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	85
TV	89

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA Radio	VOA TV
Current Events	94	na
U.S. Culture	72	na
U.S. Policies	65	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.2
TV	3.3

Data are from a June 2011 survey of adults (15+) in Indonesia. The survey covered 21 of 32 provinces and is representative of 93% of the adult population.

Indonesian Broadcasting

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

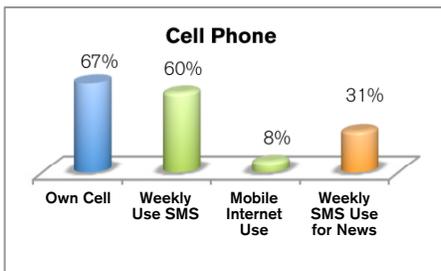
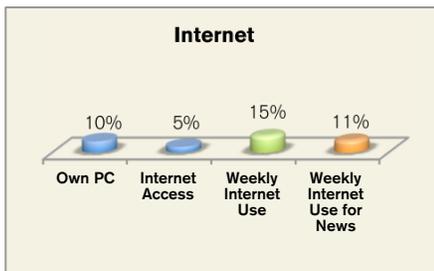
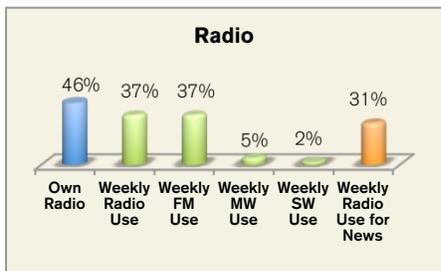
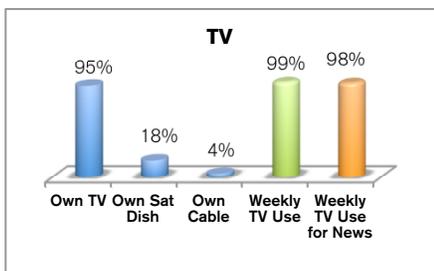
Total Population of Indonesia: 238.2 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	50	48
Female	50	52
Age		
15-24	26	37
25-34	25	27
35-44	22	20
45-54	16	10
55-64	8	4
65+	3	1

	Sample	VOA Weekly Audience
Education	%	%
None	2	2
Primary	31	21
Secondary	29	28
Vocational	33	40
Higher	5	9
Ethnicity/Nationality		
Javanese	46	40
Sundanese	17	28
Other	37	32

	Sample	VOA Weekly Audience
Residence	%	%
Urban	44	52
Rural	56	48
Language		
Javanese	38	33
Bahasa Indonesian	18	25
Sundanese	15	17
Other	27	24

M E D I A U S E



Top Ten Media Outlets

1. RCTI
2. SCTV
3. Indosiar
4. Trans TV
5. Trans 7
6. TV One
7. ANTeve
8. Global TV
9. Metro TV
10. TVRI

Top Ten Sources of News

1. RCTI
2. SCTV
3. Metro TV
4. TV One
5. Indosiar
6. Trans TV
7. TVRI
8. ANTeve
9. Global TV
10. Jawa Post

Web Analytics

Weekly Visitors	21,700
Weekly Visits	28,400

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Just over a decade ago Indonesia's economy virtually collapsed during the Asian financial crisis. The value of the rupiah plummeted, property prices dropped, and millions of Indonesians saw their wealth erode overnight. That, and a growing discontent with the former President Suharto's authoritarian regime, led to Indonesia moving to a democracy from the dictatorship it had been for more than 30 years.
- President Susilo Bambang Yudhoyono was first elected on promises to tackle graft - but the latest figures in Transparency International's Corruption Perception Index are not particularly encouraging about the progress he has made. The index shows that Indonesia scored 2.8 out of 10 - the same as in 2009 when he was re-elected. One of the worst affected areas by these twin problems is infrastructure. Indonesia desperately needs more roads, ports and highways to reach its full potential.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 68.00 (146/179)**
- Official censorship of mass media content is rare in Indonesia. However, journalists risk violence and intimidation when they cover corruption or other sensitive topics affecting high-ranking government officials and prominent entrepreneurs.
- Subscription-based cable and satellite television services are growing slowly. Overall, household cable access is at 4 percent (no increase from last year). Satellite television has grown much more rapidly than cable, specifically in rural areas, probably because of its improved TV signal in remote locations. Overall, 18 percent of households in Indonesia have a satellite dish; 25 percent of rural households have a satellite dish compared to 10 percent of urban households.
- Internet access in households is at a fairly low level: overall, 5 percent of households have Internet access, but this figure includes those households that have a mobile phone with Internet access. Less than 3 percent of households have a wired Internet connection at home.

P R O F I L E



Languages of Broadcast: Kazakh, Russian

Content: 8.25 hrs. of original and 6 hrs. of repeat radio programming per hour; Internet

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

RFE/RL's delivery includes 1 UKV affiliate in 3 cites, multiple SW frequencies, Yamal and AsiaSat.

New Media: Complete bi-lingual Kazakh and Russian websites with streaming audio, Facebook, YouTube, Twitter and mobile site.

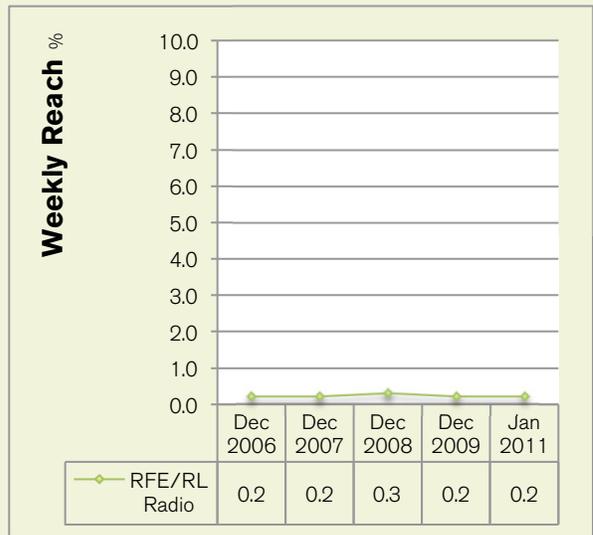
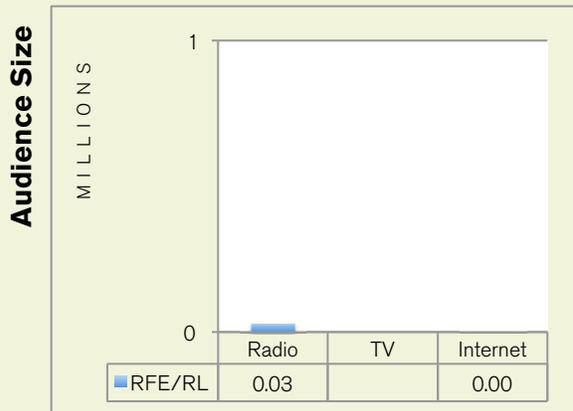
Staff: 9

Budget: \$1,702,000

Established: 1953 to present



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



Weekly Reach (%) by Media	
	RFE/RL
Radio	0.2
TV	na
Internet	0.1
Total	0.2

Awareness (%)	
	RFE/RL
	8

Kazakh

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

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

Quality	
Combined Scores from audience panel	
	RFE/RL
Radio	2.9
Internet	3.5

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

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

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

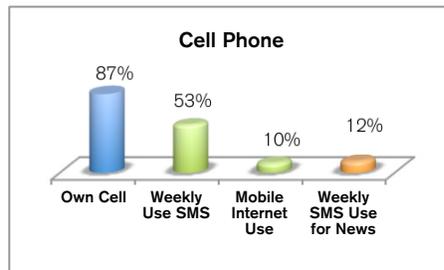
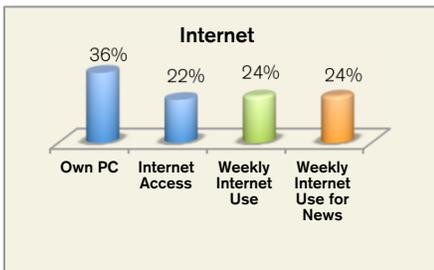
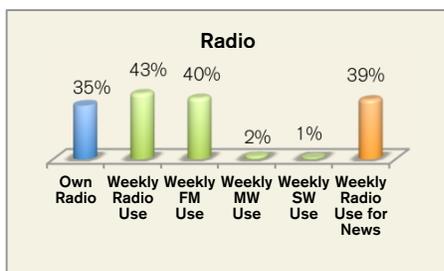
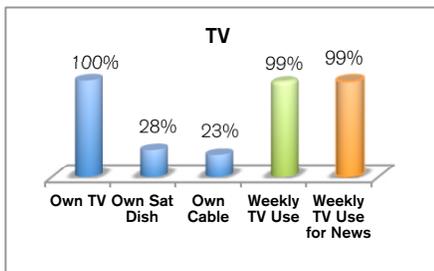
	Sample	RFE/RL Weekly Audience*
Sex	%	%
Male	47	na
Female	53	na
Age		
15-24	23	na
25-34	23	na
35-44	18	na
45-54	17	na
55-64	10	na
65+	9	na

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

	Sample	RFE/RL Weekly Audience*
Residence	%	%
Urban	54	na
Rural	46	na
Language		
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

Weekly Visitors	33,500
Weekly Visits	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

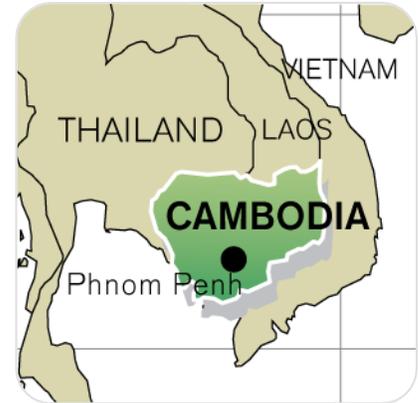
Content: 14 hrs. of original radio programming per week; Internet; video webcasts

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.

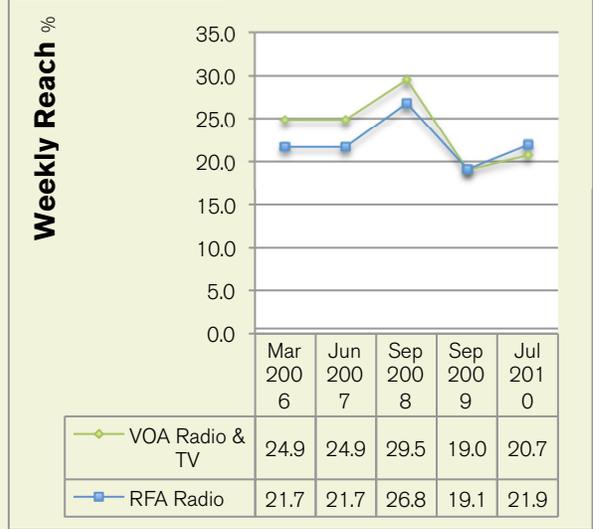
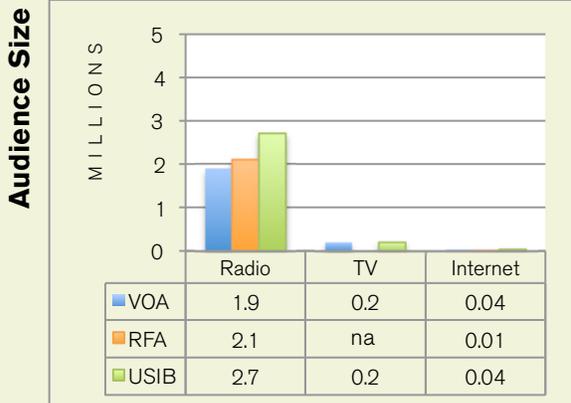


Staff: 12

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
Total	20.7	21.9	28.3

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

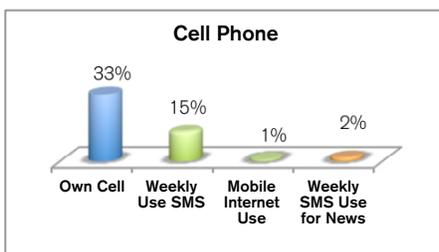
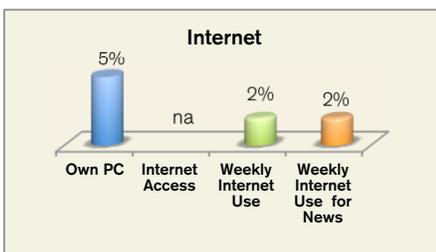
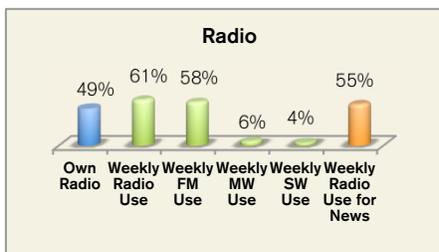
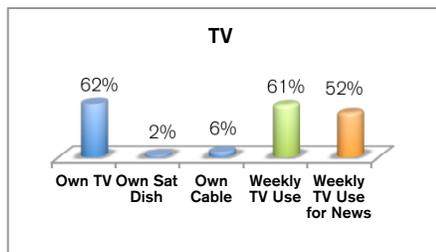
A U D I E N C E C O M P O S I T I O N

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

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

	Sample	VOA Wkly. Aud.	RFA Wkly. Aud.
Residence	%	%	%
Urban	18	20	19
Rural	82	80	81
Language			
Khmer	96	95	96
Other	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:** \$30,10,000
Established: 1942 to present

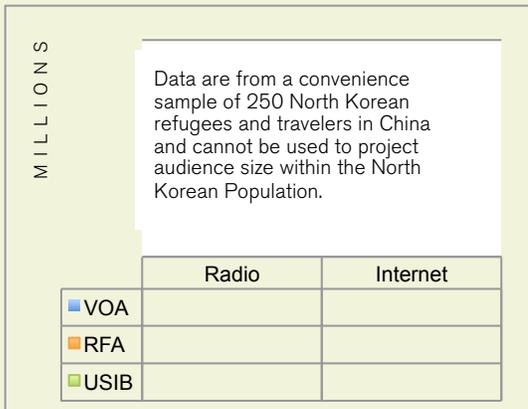


Language of Broadcast: Korean
Content: 24.5 hrs. of original and 10.5 hrs. of repeat radio programming per week; Internet
Distribution: 3 SW frequencies; Satellite rebroadcasting
Radio: The Service broadcasts three-and-a-half hours of original program and one-and-a-half hours of repeat daily.
Video: 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)*

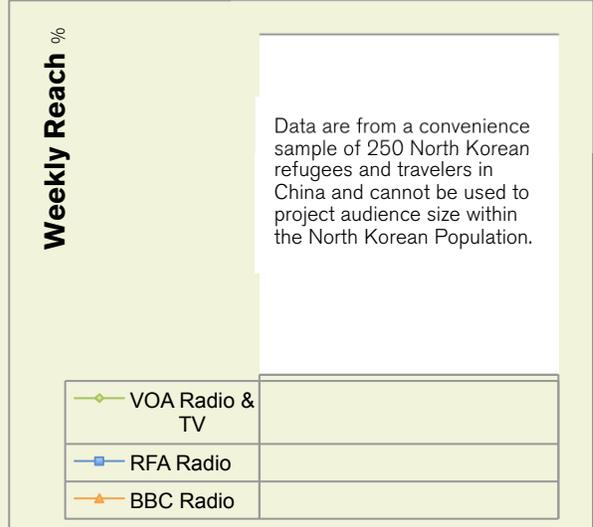
Audience Size



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

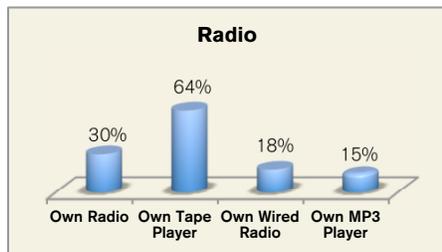
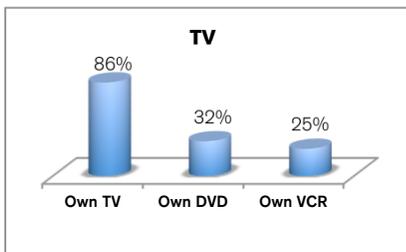
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	40	53	51
Female	60	47	49
Age			
15-24	2	2	4
25-34	22	25	24
35-44	50	41	42
45-54	20	25	24
55-64	6	8	7

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

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

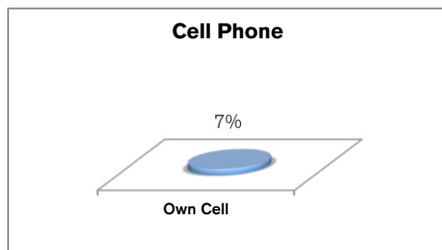
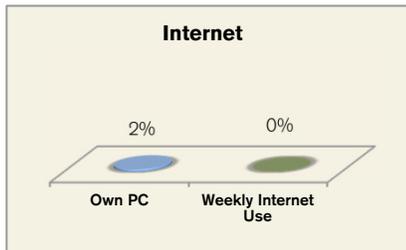
**Weekly reach figures are for listening while in North Korea; 15.2% reported listening to RFA and 12.4% to VOA while in transition. Media use data reflect while respondents were in North Korea.

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.

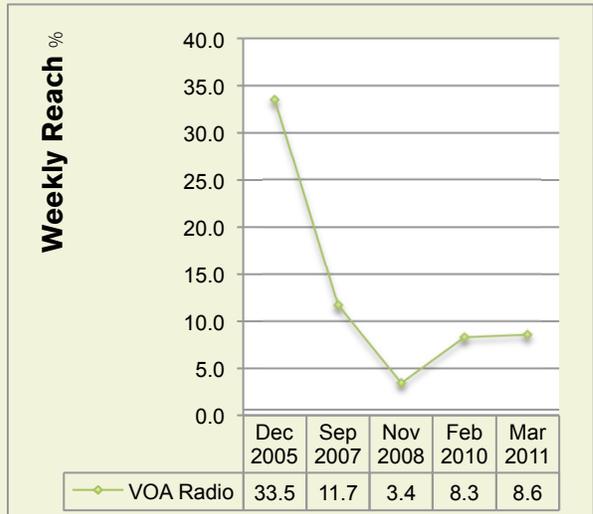
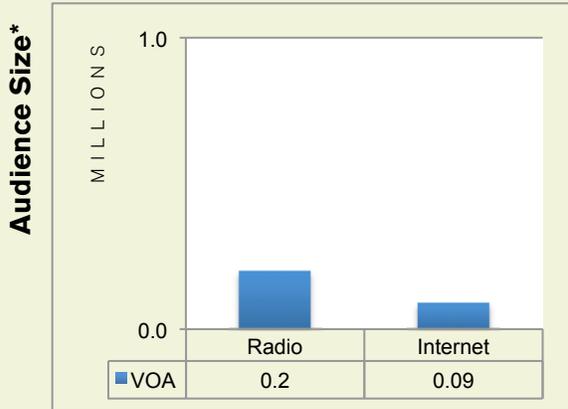
TV/Video: VOA Kurdish has been engaged in a continuing effort to upgrade TV and video production skills. Already, both original and "versioned" features are a significant component of its web offerings. The Service is also launching a weekly, fast-paced, 10-minute TV show (*Kurd Connection*) for web 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
Total	8.6

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

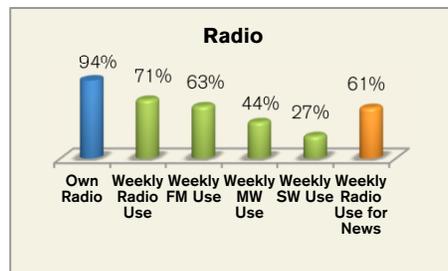
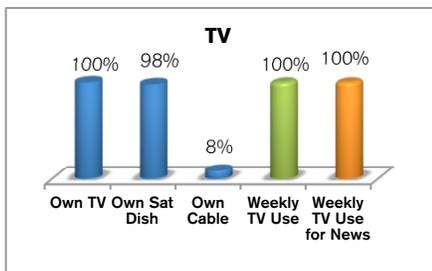
Total Population of Ethnic Kurdish population in Iraq: 3 million

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

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

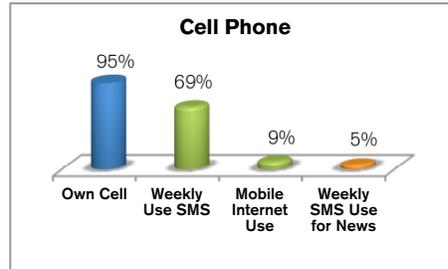
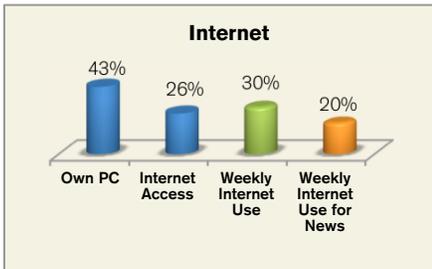
	Sample	VOA Weekly Audience
Residence	%	%
Urban	65	70
Rural	35	30
Language		
Kurdish	100	100

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

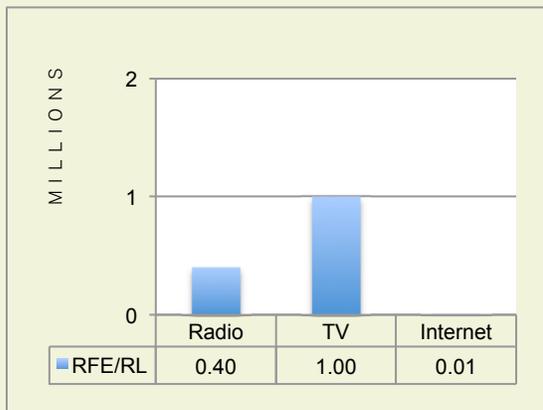
Budget: \$1,685,000

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)

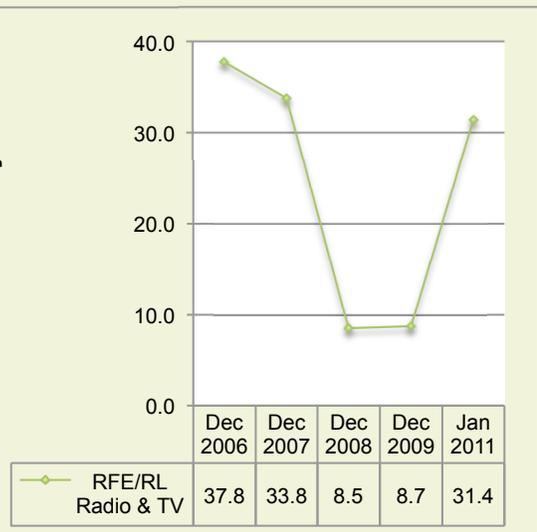
Audience Size



Weekly Reach by Media (%)

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

Weekly Reach %



Awareness (%)

RFE/RL	59
---------------	----

Credibility

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

Media	Credibility (%)
RFE/RL	
Radio	97
TV	95

Understanding

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

Topic	Understanding (%)
RFE/RL Radio*	
Current Events	93
Current Events in Kyrgyzstan	93
U.S. Policies	na

Quality

Combined Scores from audience panel

Media	Quality Score
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

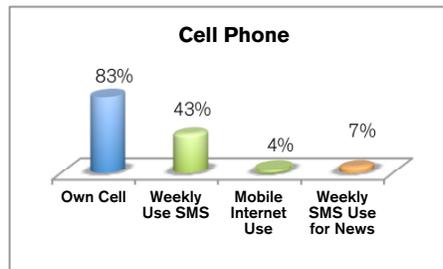
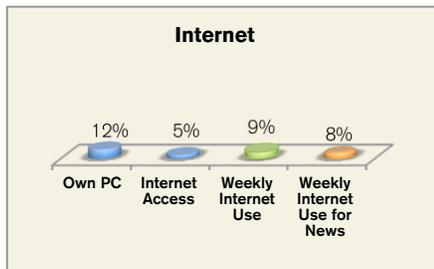
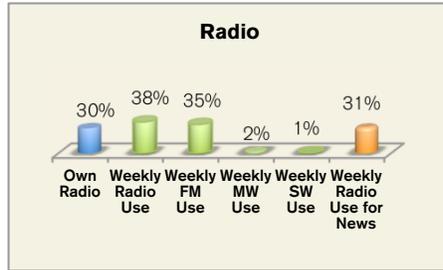
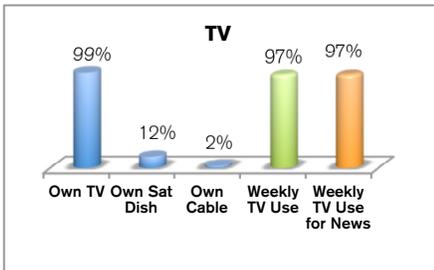
A U D I E N C E C O M P O S I T I O N

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	48	54
Female	52	46
Age		
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
Education	%	%
None/Primary	2	<1
Secondary	70	71
Technical	17	17
Coll./Univ.	11	12
Ethnicity/Nationality		
Kyrgyz	68	92
Russian	7	<1
Uzbek	16	7
Other	9	1

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	31	22
Rural	69	78
Language		
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

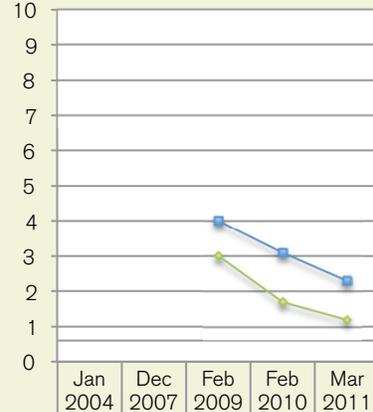
MILLIONS

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

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 Laos (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel		
	VOA	RFA
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.**
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
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

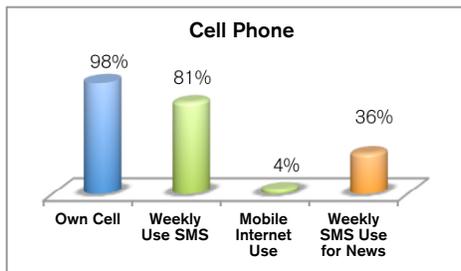
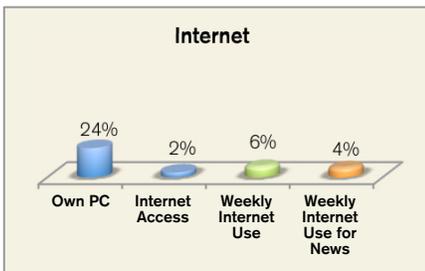
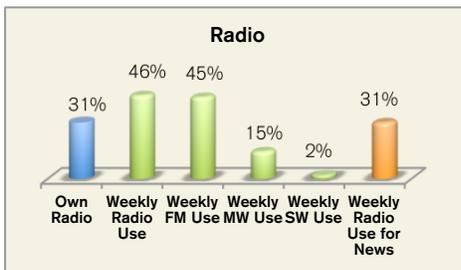
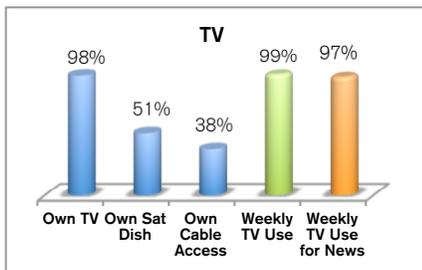
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Education	%	%	%
No formal	1	na	na
Primary	23	na	na
Lower Sec.	29	na	na
Upper Sec.	23	na	na
Technical	14	na	na
Higher	11	na	na
Ethnicity/Nationality			
Lao	90	na	na
Hmong	3	na	na
Other	7	na	na

Total Population of Laos: 6.3 million

	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Residence	%	%	%
Urban	69	na	na
Rural	31	na	na
Language			
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

VOA Weekly Visitors	3,400
Weekly Visits	9,300
RFA Weekly Visitors	5,000
Weekly Visits	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



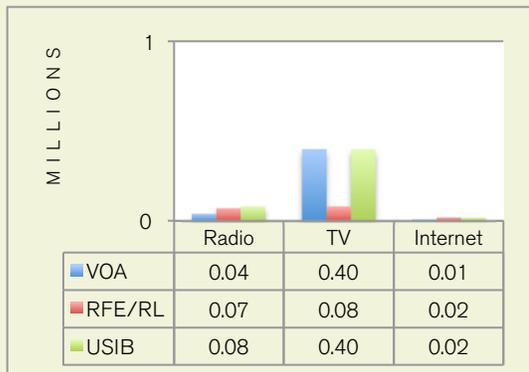
Language of Broadcast: Albanian to Kosovo, Bosnian, Macedonian, Montenegrin, and Serbian
Content: Albanian to Kosovo: 10.5 hours original radio; 5 hours TV; Macedonian: 7 hours original radio; 10 minutes TV; Serbian: 7 hours original radio; Montenegrin: 3.5 hours original radio; Balkans Regional program: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

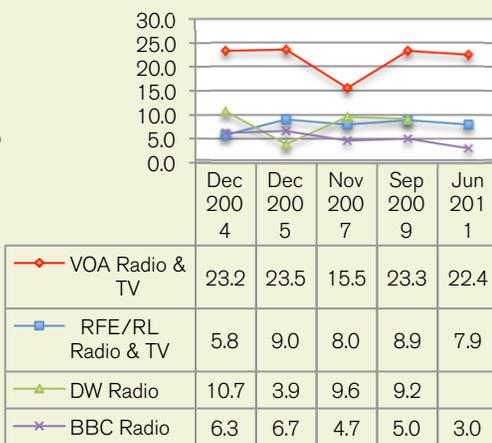
Audience Size



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
Total	22.2	7.9	23.7

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

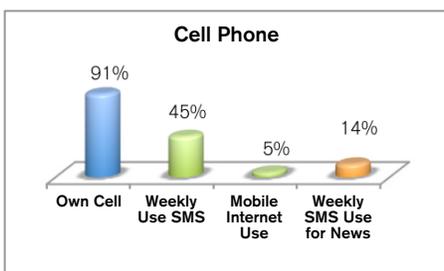
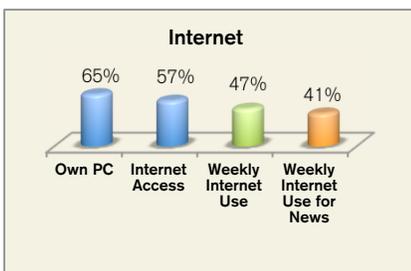
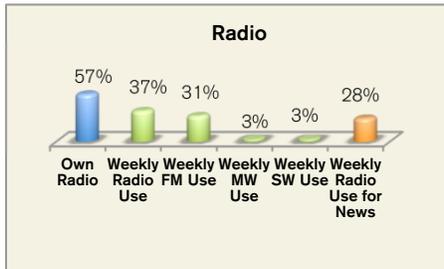
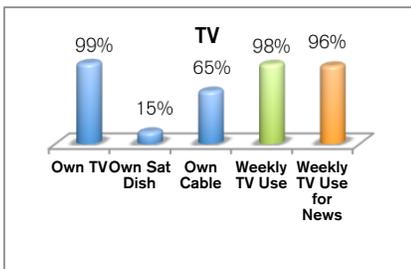
Total Population of Macedonia: 2.1 million

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

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

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

VOA Weekly Visitors	1,200
Weekly Visits	1,600
RFE/RL Weekly Visitors	5,100
Weekly Visits	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.

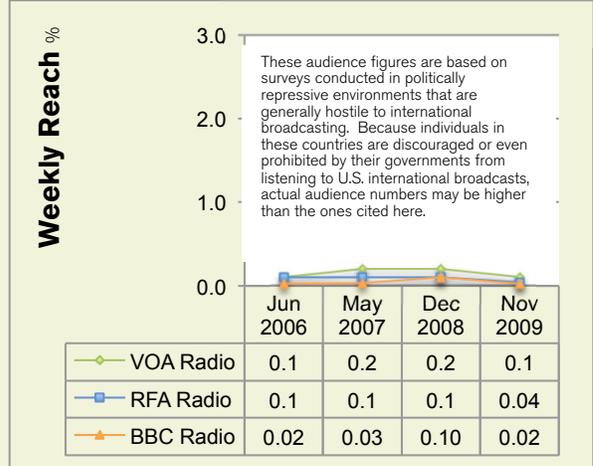
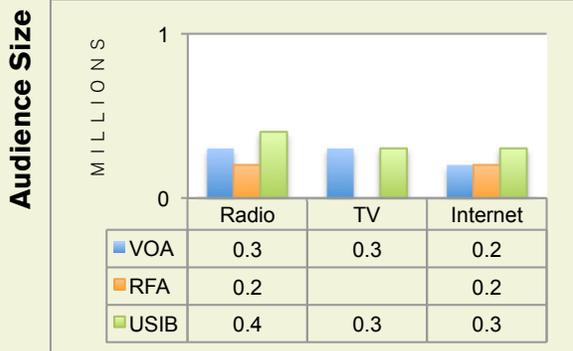
Staff: 37

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

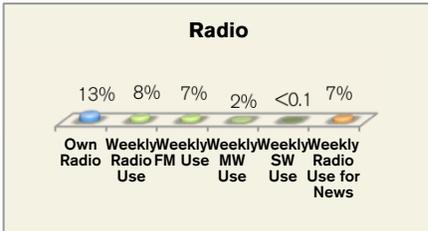
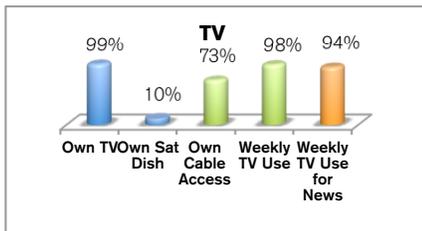
	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	17	na	na
25-34	21	na	na
35-44	25	na	na
45-54	22	na	na
55-64	12	na	na
65+	16	na	na

	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Education	%	%	%
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
Ethnicity/Nationality			
Han	99	na	na
Other	1	na	na

	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Residence	%	%	%
Urban	45	na	na
Rural	55	na	na
Language			
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

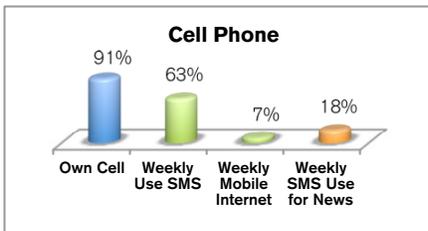
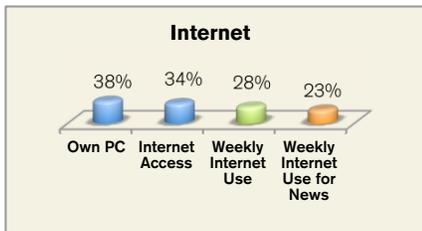


Top Ten Media Outlets

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

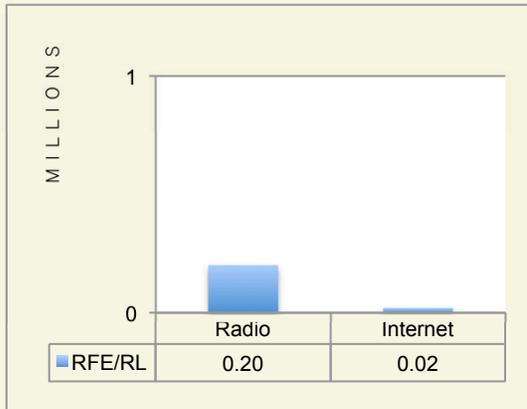
Budget: \$1,029,000

Established: 1950 to present

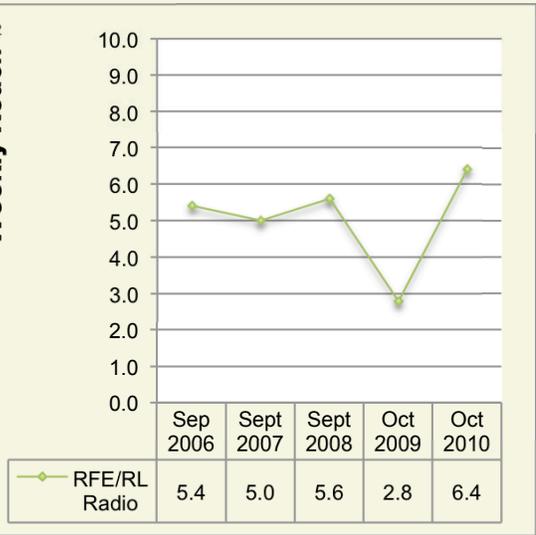


P E R F O R M A N C E D A T A (Using Data from Moldova, October 2010)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)	
	RFE/RL
Radio	6.2
TV	na
Internet	0.6
Total	6.4

Awareness (%)	
	RFE/RL
	52

Moldovan

Credibility

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

Understanding

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

Quality

Combined Scores from audience panel	
	RFE/RL
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

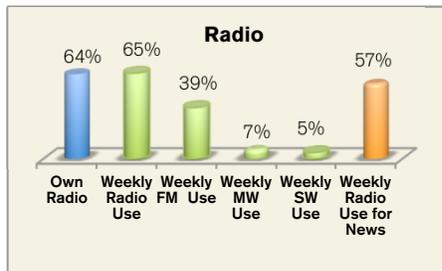
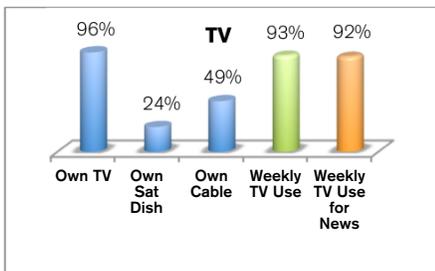
Total Population of Moldova: 4.1 million

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	45	62
Female	55	38
Age		
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
Education	%	%
None/Primary	21	16
Secondary	23	14
Vocational	22	18
Higher	34	52
Ethnicity/Nationality		
Moldovan	80	87
Russian	6	4
Ukrainian	6	2

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

M E D I A U S E

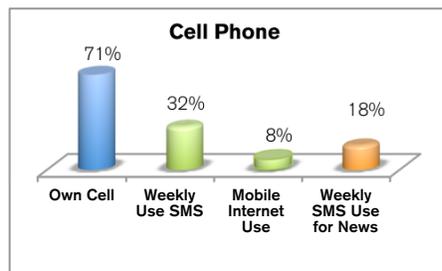
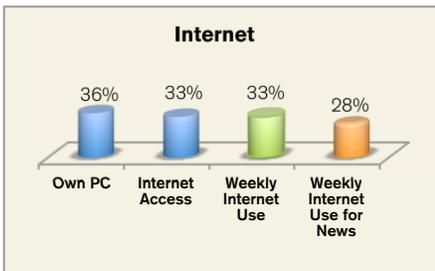


Top Ten Media Outlets

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

Weekly Visitors	5,500
Weekly Visits	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+

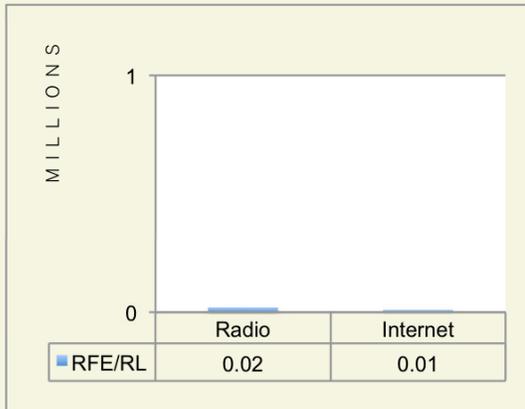
Established: 1994 to present

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

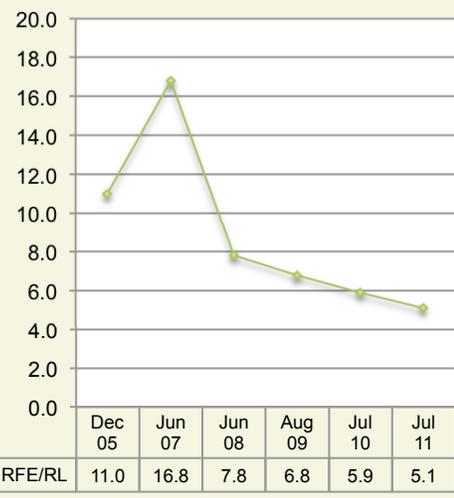


P E R F O R M A N C E D A T A (Using Data from Montenegro, July 2011)

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

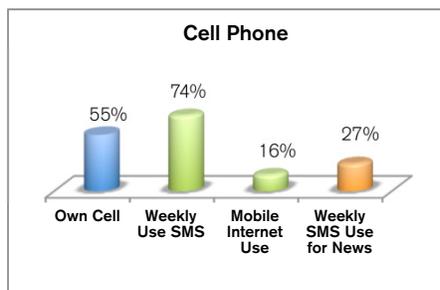
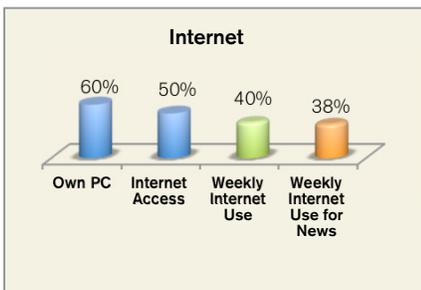
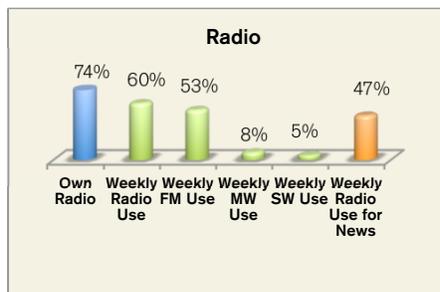
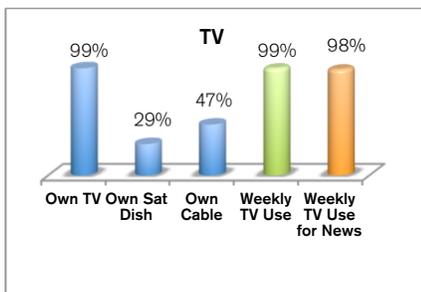
Total Population of Montenegro: 0.6 million

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	49	64
Female	51	36
Age		
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
Education	%	%
Elementary	25	10
Secondary	53	60
Higher	22	30
Ethnicity/Nationality		
Montenegrin	55	45
Serbian	27	35
Other	13	8

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	62	72
Rural	38	28
Language		
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

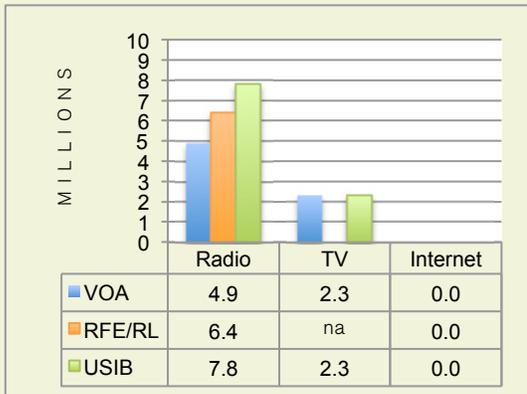
Established: 1985 to 1993; 2002 to present



† 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)

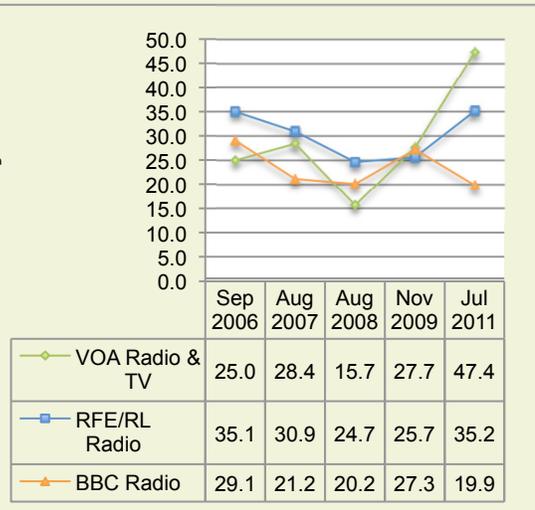
Audience Size



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

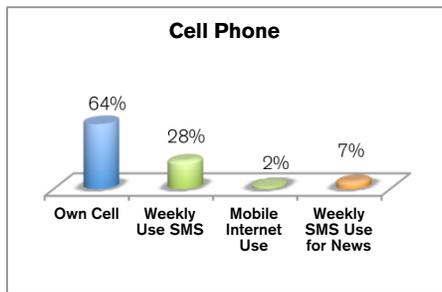
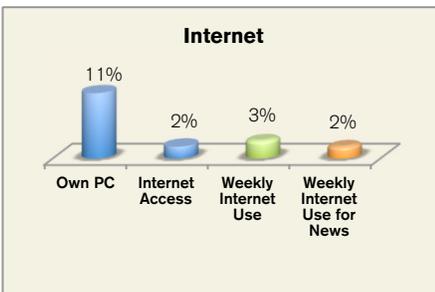
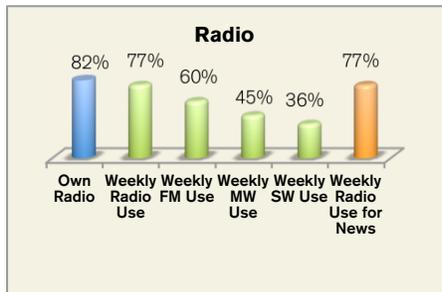
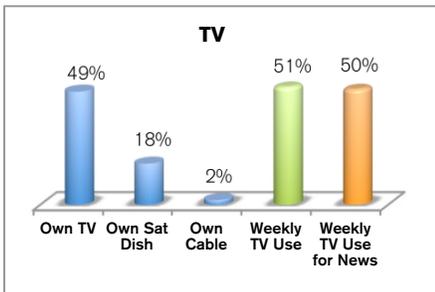
Total Population of Afghanistan: 32.4 million

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

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

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

VOA Weekly Visitors	6,900
Weekly Visits	18,100
RFE/RL Weekly Visitors	9,500++
Weekly Visits	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

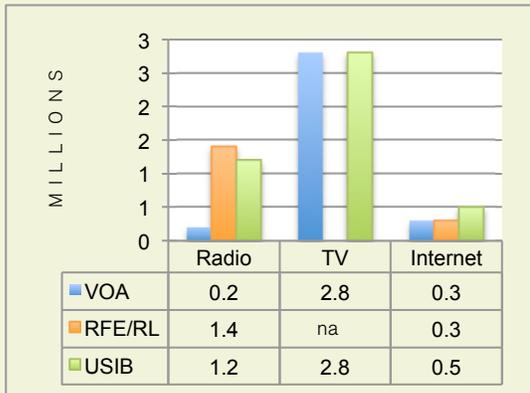
Established: 2002 to present



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

(Using Data from Iran, February 2011)

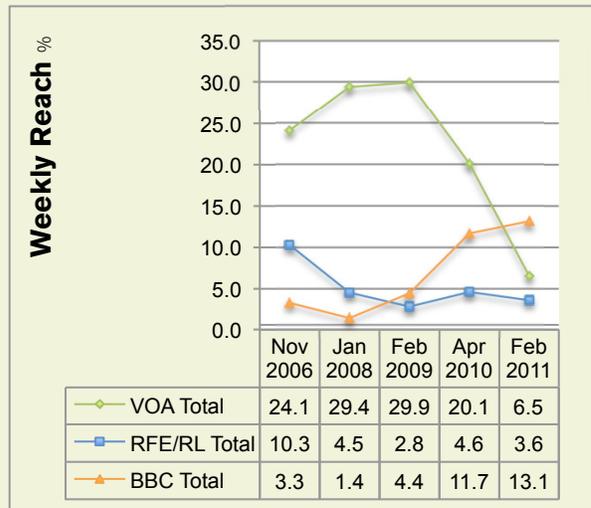
Audience Size



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
Total	6.5	3.6	8.5

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

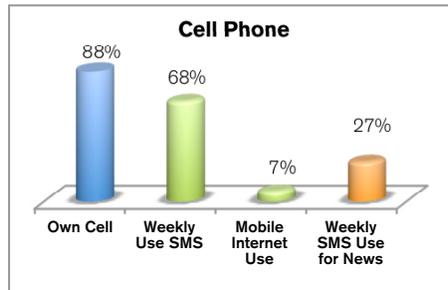
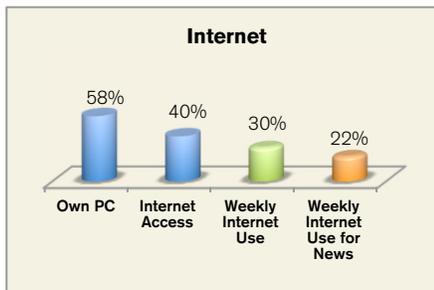
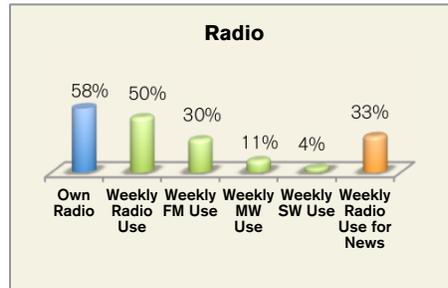
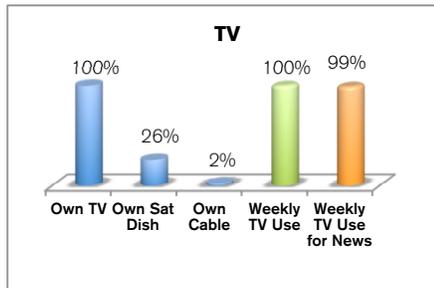
A U D I E N C E C O M P O S I T I O N

	Sample	VOA TV Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	50	65	66
Female	50	35	34
Age			
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.
Education	%	%	%
Illiterate/No Formal	4	2	2
Elem./Inter.	20	6	8
Secondary	42	43	46
Coll./Univ.	32	50	44
Ethnicity/Nationality			
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.
Residence	%	%	%
Urban	68	76	70
Rural	32	24	30
Language			
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

VOA Weekly Visitors	171,800
Weekly Visits	565,000
RFE/RL Weekly Visitors	182,900
Weekly Visits	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
Sex	%	%
Male	na	na
Female	na	na
Age		
15-24	na	na
25-34	na	na
35-44	na	na
45-54	na	na
55-64	na	na
65+	na	na

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

	Sample	VOA Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
na	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.