

P R O F I L E



Language of Broadcast: Russian

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

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

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

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

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

Staff: 20

Budget: \$3,514,000

Established: 1947 to present



Language of Broadcast: Russian

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

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

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

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



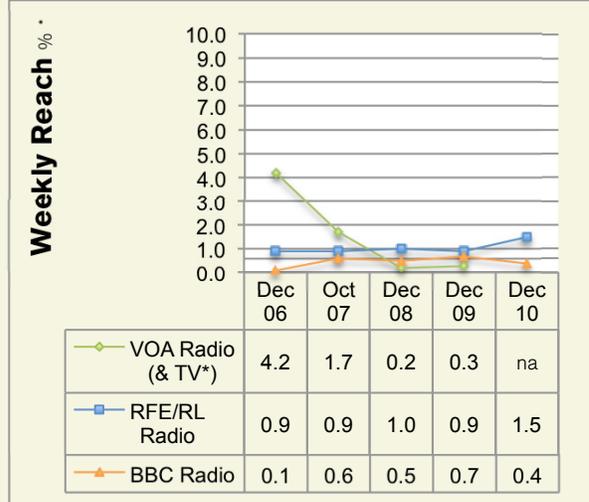
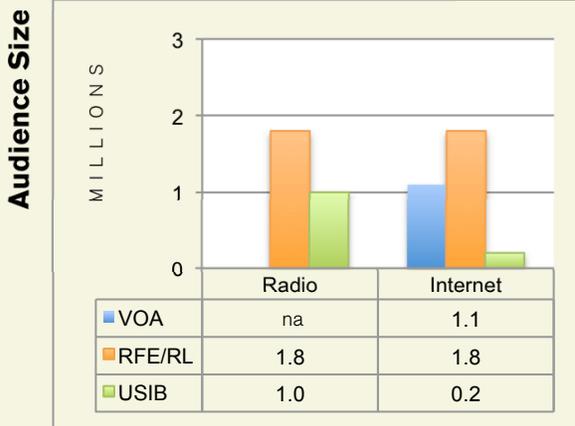
external widget placement which embeds content on local sites. It also has a mobile site and branded YouTube channel.

Staff: 28

Budget: \$7,809,000

Established: 1953 to present

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



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

Awareness (%)	
VOA	RFE/RL
47	64

Russian

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

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

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

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

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

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

Russian Broadcasting

Total Population of Target Country: 142.8 million

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

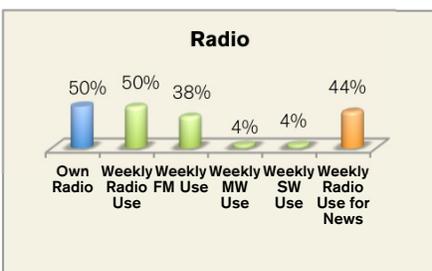
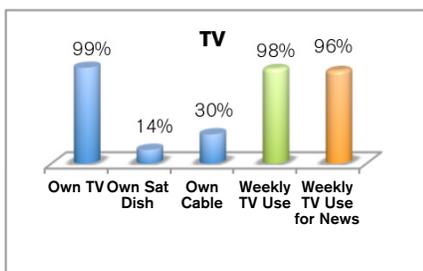
	Sam.	VOA Annual Aud.**	RFE/RL Weekly Aud.**
Sex	%	%	%
Male	46	65	52
Female	54	35	48
Age			
15-24	18	41	16
25-34	19	33	22
35-44	15	16	7
45-54	17	7	27
55-64	14	3	11
65+	15	0	16

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

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

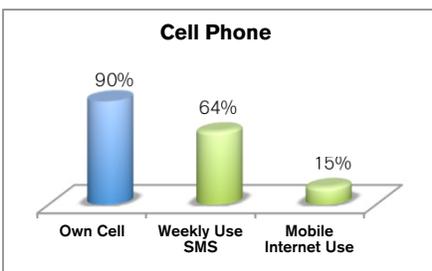
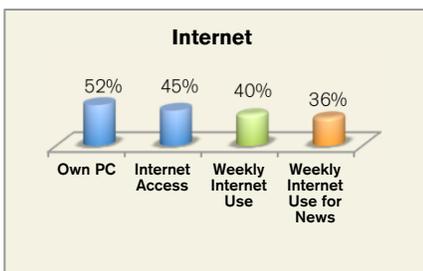
**Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

M E D I A U S E



Top Seven Media Outlets

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



Web Analytics

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Avar, Chechen, Circassian

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

Distribution: 2 IBB SW frequencies

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

Staff: 10

Budget: \$1,203,000

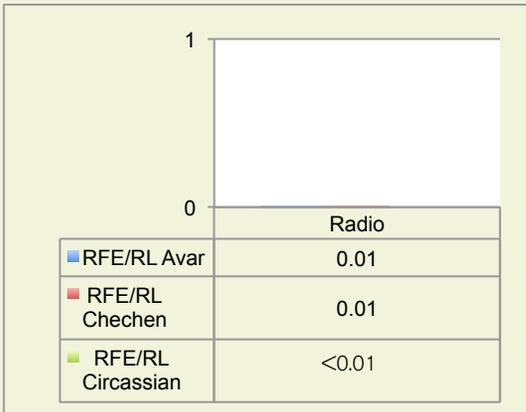
Established: Avar: 1951 to 1970's; 2002 to present; Chechen: 1953 to 1970; 2002 to present; Circassian: 2002 to present



Russian North Caucasus

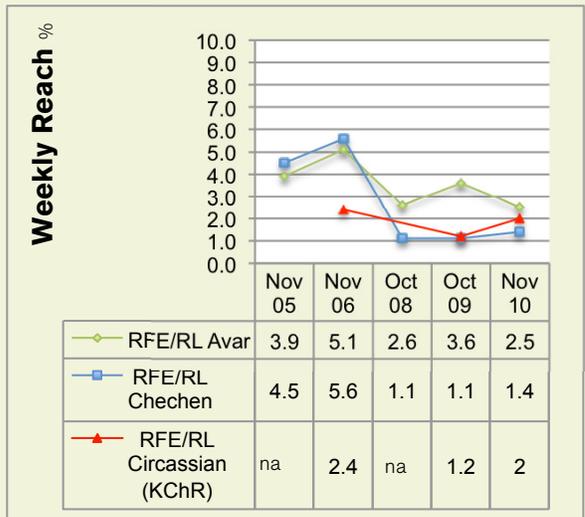
P E R F O R M A N C E D A T A *

Audience Size



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

Weekly Reach %



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

Credibility

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

Quality

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

Understanding

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

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

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

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

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

Russia North Caucasus Broadcasting

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

Total Population of Russia North Caucasus: See note*

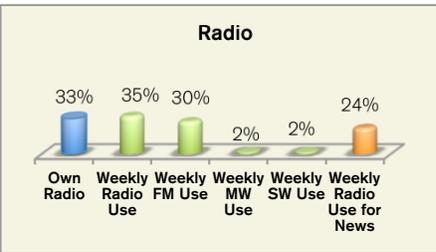
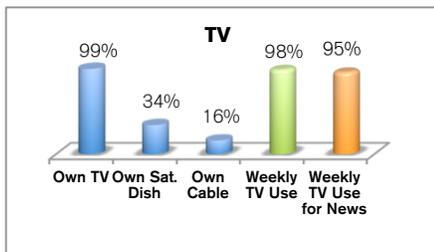
	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
Sex	%	%	%	%
Male	48	na	na	na
Female	52	na	na	na
Age				
15-24	27	na	na	na
25-34	23	na	na	na
35-44	18	na	na	na
45-54	19	na	na	na
55-64	9	na	na	na
65+	4	na	na	na

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

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

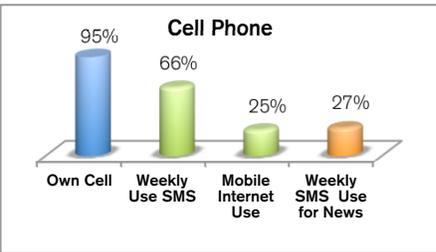
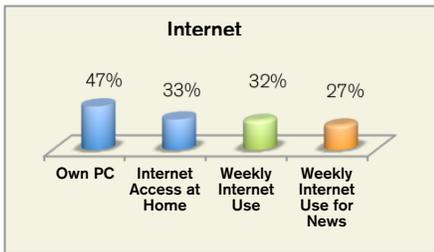
M E D I A U S E

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



Chechnya Top Ten Media Outlets

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



Web Analytics

Weekly Visitors	40
Weekly Visits	90

C O N T E X T



Political Situation

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

Media Environment

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

PROFILE



Voice of America



Language of Broadcast: Serbian

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

Distribution: 52 affiliates

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

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

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

Staff: 10

Budget: \$1,498,000

Established: 1943 to present; TV service established in 1996



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

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

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

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

Staff: 12+



Budget: \$4,525,000+

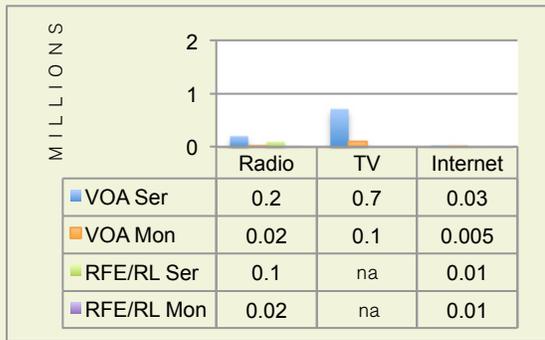
Established: 1994 to present

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

Serbian/Montenegrin

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

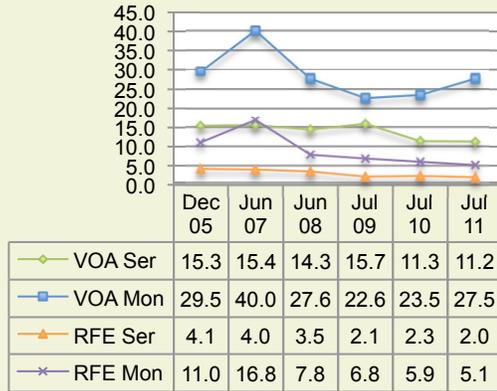
Audience Size



Weekly Reach by Media (%)

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

Weekly Reach %



Awareness (%)

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

Credibility

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

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

Understanding

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

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

Quality

Combined Scores from audience panel

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

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

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

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

Serbian/Montenegrin Broadcasting

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

Total Population of: Serbia 7.3 M and Montenegro 0.6 M

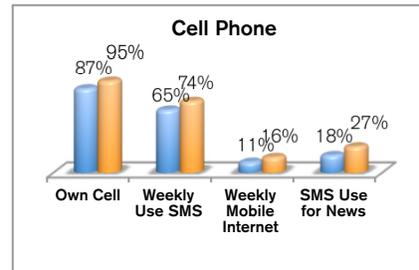
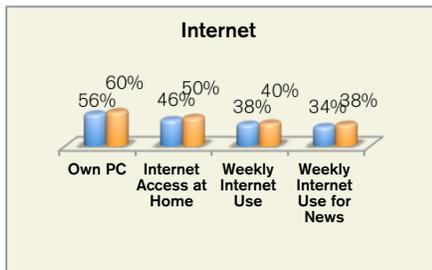
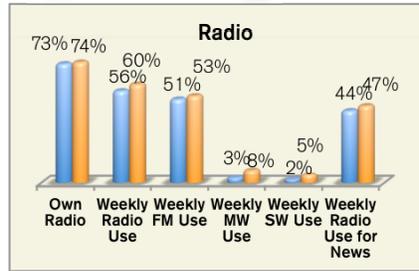
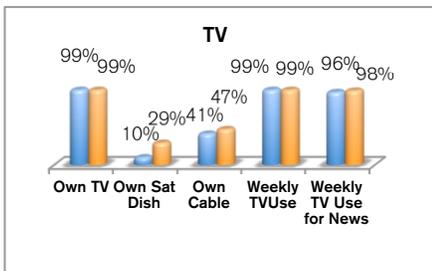
	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Sex	%	%	%
Male	48	56	43
Female	52	44	57
Age			
15-24	14	4	0
25-34	17	14	10
35-44	15	16	22
45-54	17	27	27
55-64	17	22	27
65+	20	17	15

	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Education	%	%	%
Elementary	32	22	24
Secondary	51	53	44
Higher	18	25	32
Ethnicity/Nationality			
Serbian	86	84	85
Montenegrin	1	2	2
Other	13	14	12

	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Residence	%	%	%
Urban	57	71	76
Rural	43	29	24
Language Spoken At Home			
Ser/Mon/Cro/Bos	94	96	93
Other	6	4	7

M E D I A U S E

■ Serbia ■ Montenegro



Serbia Top Ten Sources of News

1. RTS 1,2
2. B92 TV
3. Pink
4. Prva Srpska TV (previously Fox)
5. Blic
6. Google
7. Vecernje Novosti
8. Avala
9. Kurir
10. Radios

Monte. Top Ten Sources of News

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

Web Analytics

VOA Weekly Visitors	7,600
Weekly Visits	11,400
RFE/RL Weekly Visitors	19,200+
Weekly Visits	52,500+

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

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): Serbia-FREE; Montenegro-FREE**
- **Economist Intelligence Unit Instability (2010): Serbia-HIGH RISK; Montenegro-HIGH RISK**
- Violence broke out at police outposts on the Serbia-Kosovo border on July 25th after special units of the Kosovo police force sought to seize control of security posts at the border crossings of Jarinje and Brnjak. The border had previously been patrolled by officers of the 3,000-strong EU rule of law mission (EULEX) in Kosovo and ethnic Serb officers of the Kosovo police.
- Public dissatisfaction with Serbian government austerity policies is expected to grow, given the weak economic recovery, and further cracks may appear in the coalition government (Mladjan Dinkic, a deputy prime minister, resigned in February).
- In May 2012, Nationalist Tomislav Nikolic won a run-off election against incumbent Boris Tadic. Nikolic's commitment to EU orientation remains to be seen.

Media Environment

- **Freedom House Press Freedom Index (2011): Serbia-PARTLY FREE; Montenegro-PARTLY FREE**
- **Reporters Without Borders Index (2011): Serbia- 29.00 (80/179); Montenegro-39.00 (107/179)**
- Television is, by far, the main source of news and information in Serbia. The flagship public network, RTS1, is among a handful of outlets that dominate the market.
- According to Reporters Without Borders (RSF) in 2010, "death threats, physical or verbal assaults, harassment and corruption are unfortunately still the daily lot of the press." Journalists have been the victims of reprisals for investigating the criminal underworld, RSF said.

P R O F I L E



Language of Broadcast: Somali

Content: 17.5 hrs. of original and 7 hrs. of repeat radio programming per week; Internet

Distribution: 7 affiliates (7 FM), IBB: 1 MW, 2 FM and 2-3 IBB SW frequencies

Radio: The Somali Service is distributed: on shortwave; on VOA FMs in Hargeisa and Djibouti, which broadcast all Somali Service shows, originals and repeats, and on 5 private FM affiliates; via Arabsat, the leading satellite services provider in the Arab world.

New Media: The Service's website streams its broadcasts live and is particularly popular with the Somali diaspora community. Somali also has a mobile site, a Facebook page, and a Twitter account. Last year the Service launched a twice per day SMS campaign in Somaliland (North West Somalia) and in Puntland (North East Somalia) reaching an audience of 290,000 twice every day. Also, the Service has a dial-up program that is facilitated by a company called AudioNow through which listeners access VOA Somali Service programs through their telephones.

Staff: 4



Budget: \$1,269,000

Established: 1992 to 1994; 2007 to present

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

Audience Size*

MILLIONS

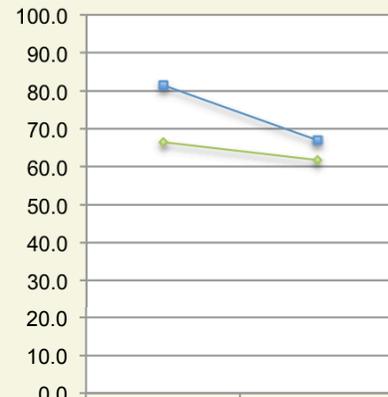
*Due to the lack of reliable population data for Mogadishu it is not possible to project an audience estimate for the VOA Somali service, even in that city. Percentage reach is based on unweighted sample data.

	Radio	Internet
VOA		

Weekly Reach by Media (%)

VOA	
Radio	61.7
TV	na
Internet	10.6
Total	63.6

Weekly Reach %



Awareness (%)

VOA	
	89

Somali

Credibility

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

VOA	
Radio	89
TV	na

Understanding

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

VOA	
Current Events	94
U.S. Culture	58
U.S. Policies	44

Quality

Combined Scores from audience panel

VOA	
Radio	3.4
TV	na

Data are from a March 2010 survey of adults (18+) in Mogadishu only.

Somali Broadcasting

Total Population of Somalia: 9.9 million

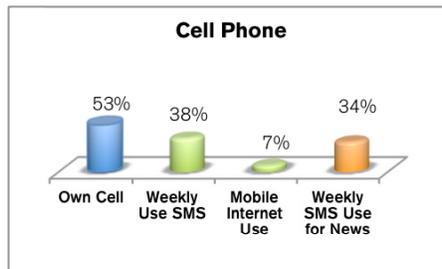
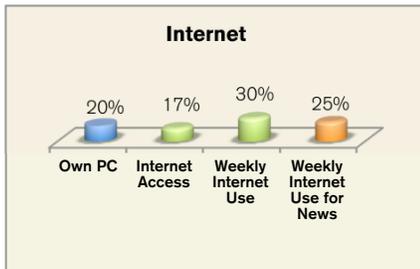
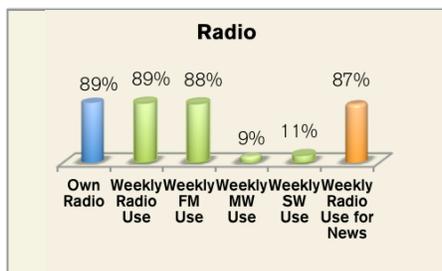
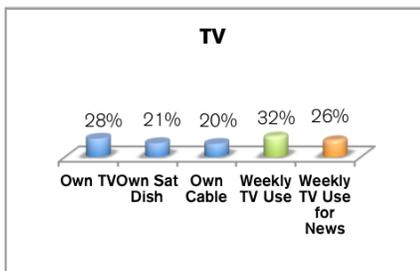
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	64	65
Female	36	35
Age		
15-24	27	27
25-34	37	47
35-44	16	18
45-54	5	6
55-64	2	2
65+	<1	<1

	Sample	VOA Weekly Audience
Education	%	%
None	27	29
Primary	23	22
Secondary	25	29
Higher	12	14
Ethnicity/Nationality		
Somali	98	99
Other	2	1

	Sample	VOA Weekly Audience
Residence	%	%
Urban	100	100
Rural	na	na
Language		
Somali	98	99
Arabic	2	1

M E D I A U S E



Top Ten Media Outlets

1. Horn Afrik
2. Capital Voice
3. BBC Somali
4. VOA Somali
5. Radio Shabelle
6. Radio Mogadishu
7. Simba
8. IQK
9. GBC
10. Furqan

Top Ten Sources of News

1. Horn Afrik
2. Shabelle
3. Universal TV
4. Al Jazeera
5. Capital Voice
6. Shabelle TV
7. VOA
8. CNN
9. IQK
10. BBC

Web Analytics

Weekly Visitors	41,600
Weekly Visits	118,000

C O N T E X T

↓ Stability

↓ Political Freedom

↓ Press Freedom

↔ Ease of Distribution

↓ Competition

Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): NA**
- In 2011, the embattled Transitional Federal Government (TFG) received significant African Union troop support to fight the Islamist insurgent group Al-Shabaab. The coordinated campaign let to success in recapturing all of Mogadishu. Al Shabaab lost much territory, as it had to engage in fighting multiple fronts after Kenyan troops entered Somalia in October 2011 in an attempt to stop kidnappings along the border.
- Elections had been planned for the summer of 2011, but they have been postponed until 2012. The TFG hopes to increase control of a larger area of the country by then.
- The 2011 drought and ensuing famine paired with the continuing instability led to large scale internal migration as well as the flight of tens of thousands of Somalis to Kenyan refugee camps.
- With little rule of law, piracy and terrorism continue to flourish throughout the country.
- Two regions, Somaliland and Puntland, have declared autonomous rule and essentially operate as independent states.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 88.33 (164/179)**
- Not surprisingly, Somalia's media environment has been devastated by the country's political and economic vacuum. There are few formally trained journalists, little and low-quality equipment, and insufficient financial resources. The few private radio and TV stations are often closely linked to political factions and subject to political pressure.
- Journalists face incredible risks, with at least 19 journalists having lost their lives and countless others facing harassment and detainment by the various political factions.
- The administrations of Somaliland and Puntland have imposed very tight media controls and censorship. The Islamist insurgent groups have also begun challenging the media: Hizbul Islam threatened violence against broadcasters who played music on air, and Al-Shabaab imposed a ban of its own, threatening reprisal against any station airing BBC or VOA programming. The degree of media freedom differs considerably throughout Somalia. While journalists enjoy a relative amount of freedom in Somaliland, official pressure on the media has increased in Puntland, and in south/central Somalia journalists remain under extreme threat from Islamic elements.
- In the absence of rule of law or critical infrastructure, research of any kind is extremely challenging. There are no reliable estimates of population distribution on which to base national survey samples, and many areas are inaccessible. Even within Mogadishu, active fighting prevents researchers from moving freely. Local interviewers trained and coordinated through research centers in Nairobi, Kenya are able to collect reasonably representative data and conduct in-depth interviews and other qualitative studies, but research of any kind is risky and expensive.

P R O F I L E



Language of Broadcast: Spanish

Content: 162 hrs. of radio programming per week; Internet

Distribution: AeroMartí, DirectTV, Hispasat DTH and NewSkies 319.51 satellites, MW, and 2-3 IBB SW frequencies

Radio: Radio Martí broadcasts information and news analysis programs six days per week for 24 hours per day, and one day per week for 18 hours per day via AM and shortwave. Surveys conducted among recent arrivals from Cuba show that Radio Martí was by far the most listened to station from abroad (51% said they heard Radio Martí programs their last year in Cuba).

TV: TV Martí broadcasts 24 hours per day, seven days a week on the Hispasat satellite; two and a half hours per day five days a week on AeroMartí, and one hour per day Monday thru Friday, and two hours per day Saturday and Sunday on DirectTV satellite. TV Martí is also carried on a large number of cable stations throughout Latin America, and is available on the Internet (Martínoticias.com). 12% of respondents in surveys of recent arrivals from Cuba said they watched TV Martí during their last year in Cuba.

New Media: Both Radio & TV Martí programming can be accessed through the OCB website, Martínoticias.com. The use of social networking sites YouTube, Twitter and Facebook is being expanded, attracting more visitors to the site.

Staff: 128

Budget: \$28,416,000†

Established: Radio Martí – 1985 to present; TV Martí – 1990 to present

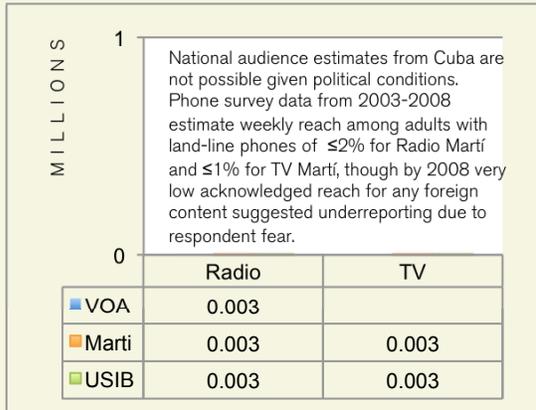
† includes additional indirect costs



VOA distributed on SW only. For language of broadcast, content, staff, budget & establishment date, see Spanish to Latin America on pg. 94.

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

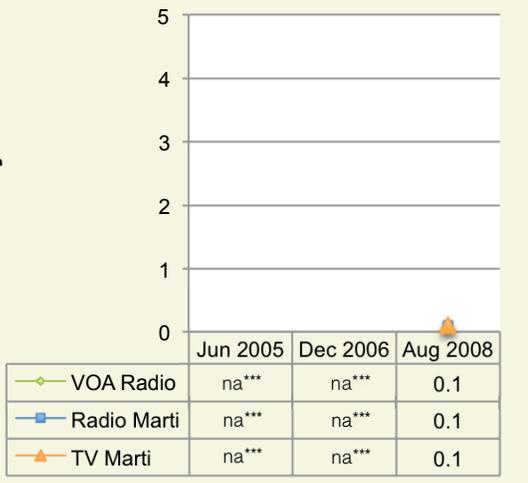
Audience Size**



Weekly Reach by Media (%)

	VOA	Martí	USIB
Radio	0.1	0.1	0.1
TV	na	0.1	0.1
Internet	na	na	na
Total	0.1	0.2	0.3

Weekly Reach%***



Awareness (%)

VOA	Martí
na	na

Credibility

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

	VOA	Martí
Radio	na	na
TV	na	na

Understanding

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

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

Quality

Combined Scores from audience panel

	Martí
Radio	3.0
TV	2.9

*Based on an August, 2008 telephone survey of Cuba. These data are representative of adults in households with published phone numbers, estimated at the time at approximately 20% of all Cuban adults; by 2011, an estimated 29% of Cuban adults lived in landline phone households.
 **In September 2011, 46 of 333 (14%) recent immigrants surveyed in Miami reported listening to Radio Martí at least weekly their last three months in Cuba and 14 (4%) reported seeing TV Martí content weekly, though their responses cannot be assumed to represent behavior of any larger group.
 ***Due to differences in sample coverage between the August 2008 survey and previous surveys of Cuba, it is not possible to display trend information.
 ****Samples of VOA and Martí weekly audience members in the survey are too small for meaningful analysis.

Spanish to Cuba

Spanish to Cuba Broadcasting

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

Total Population of Cuba: 11.2 million

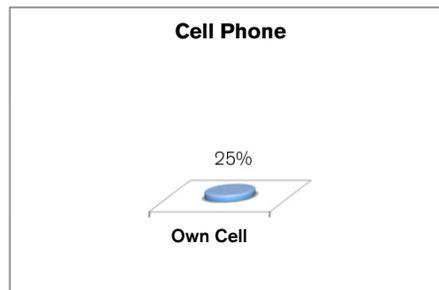
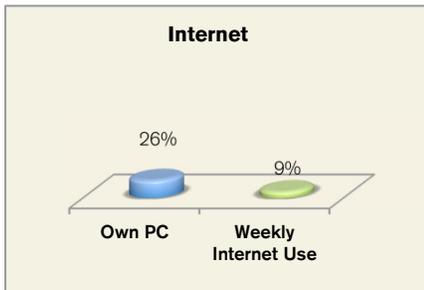
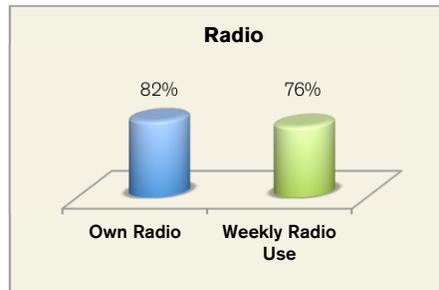
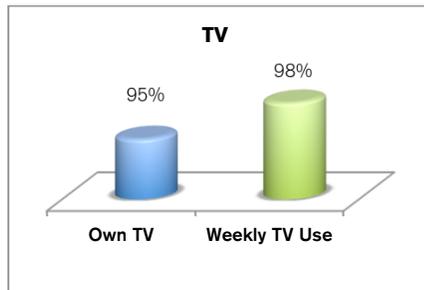
	Sample	VOA Weekly Aud.***	Marti Weekly Aud.***
Sex	%	%	%
Male	47	na	na
Female	53	na	na
Age			
18-24	15	na	na
25-34	16	na	na
35-44	23	na	na
45-54	19	na	na
55-64	16	na	na
65+	12	na	na

	Sample	VOA Weekly Aud.***	Marti Weekly Aud.***
Education	%	%	%
None	<1	na	na
Primary	6	na	na
Secondary	19	na	na
Associates	20	na	na
Trade	31		
University	24	na	na
Ethnicity/Nationality			
na			

	Sample	VOA Weekly Aud.***	Marti Weekly Aud.***
Residence	%	%	%
na			
Language			
na			

***Samples of VOA and Marti weekly audience members in the survey are too small for meaningful analysis.

M E D I A U S E (Phone Owners)



Top Ten Media Outlet

1. Canal 6 Cuba Vision
2. Canal 2 TV Rebelde
3. Radio Progreso
4. Radio Reloj
5. Radio Rebelde
6. TV Provincial
7. Radio Enciclopedia
8. Radio Emisoras Provinciales
9. Radio Taino
10. Telesur

Web Analytics

Weekly Visitors	8,200
Weekly Visits	19,700

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Cuba is unique in the Americas for the degree to which it represses virtually all forms of political dissent. More than five years after transfer of chief executive authority from his brother Fidel, in 2011 Raúl Castro's government still uses detentions and imprisonment, physical violence, public "acts of repudiation," forced exile, and internal and international travel restrictions to restrict contestation of its policies or authority.
- The April 2011 Communist Party Congress saw Raúl take over the office of First Secretary from Fidel Castro, as well as approval of "guidelines" aimed greater legal space for private economic activity and reduced public sector employment. Both have been slow to advance due to Party and bureaucratic resistance.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2009): 94.00 (170/175)**
- The Cuban government tightly controls content on mass media, jams terrestrial signals from US government and exile radio and TV outlets. Independent journalists and bloggers face harassment, assault and detentions or imprisonment. Cuba lags behind all other Latin American countries in both Internet use and mobile phone penetration. Cuban laws prohibit listening to and watching Radio and TV Marti, and likely results in artificially low media use rates in surveys of Cubans on the island.
- Dishes and receivers for DirecTV S. Florida beam are illegal, though one in eight recent immigrants surveyed had either household or shared access to satellite TV. Many more obtain programs recorded off satellite and shared by USB flash drives or DVD.
- State telecommunications services limit online access to on-island servers, though illegal access to the global web through friends or purchase of time on state or foreign-owned computers with full access allows access to a few percent of Cubans. Mobile subscriptions rose to over 1.2 million subscriptions in 2011. Aided by relatives who can add call-time from abroad, almost half of mobile users have made international calls and 40% have sent SMS messages abroad. Foreign text-to-post services allow Facebook and Twitter use.

P R O F I L E



Voice of America



Language of Broadcast: Spanish

Content: 17 hours of original programming per week on radio and television; Internet

Distribution: 225 affiliates (150 radio and 75 TV)

Radio: VOA produces news and informational programming each week on radio and television in addition to daily live interactives with leading affiliates in the region.

Distribution (cont.):

TV: VOA's Spanish programs are regularly featured on such large TV stations as Andina de Television in Peru and El Tiempo in Colombia.

New Media: The Service also has a robust web presence with voanoticias.com, a dedicated mobile web page and is active on social media sites such as Facebook, Twitter and YouTube.

Staff: 15

Budget: \$2,835,000

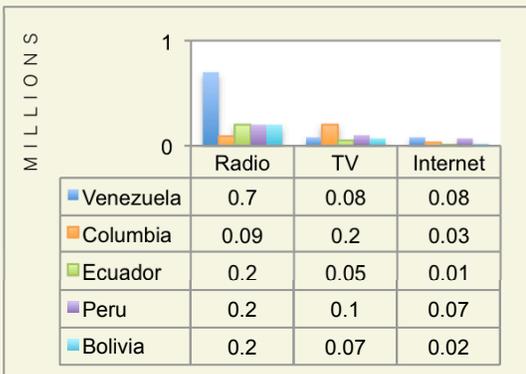
Established: 1941 to 1945; 1946 to 1948; 1953 to 1956 (VOA contracted private radio stations to produce and transmit programs for Latin America); 1960 to present



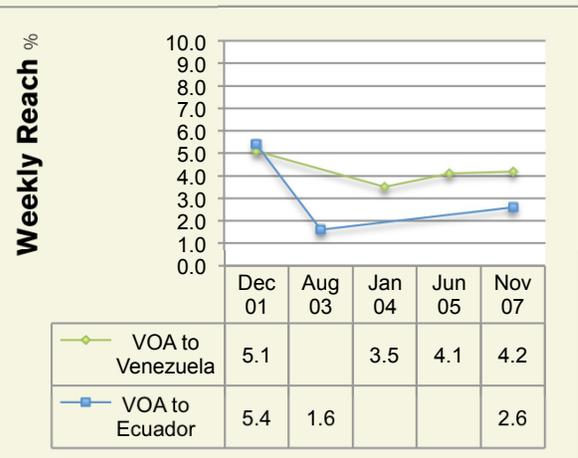
Spanish to Latin America

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

Audience Size



Weekly Reach (%) by Media					
	Ven.	Col.	Ecu.	Peru	Bol.
Radio	3.5	1.1	2.1	1.8	5.6
TV	0.4	2.3	0.5	1.0	1.7
Internet	0.4	0.4	0.1	0.5	.5
Total	4.2	3.2	2.6	2.2	6.8



Awareness (%)					
	Venezuela	Colombia	Ecuador	Peru	Bolivia
	na	na	na	na	na

*Data for Credibility and Understanding ratings are not available for these countries.

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

	Venezuela Wkly. Aud.	Colombia Wkly. Aud.	Ecuador Wkly. Aud.	Peru Wkly. Aud.	Bolivia Wkly. Aud.
Sex	%	%	%	%	%
Male	na	41	78	48	66
Female	na	59	22	52	34
Age	%	%	%	%	%
15-24	na	20	20	23	na
25-34	na	19	26	23	na
35-44	na	19	17	23	na
45-54	na	19	17	14	na
55-64	na	24	17	13	na
65+	na	na	2	4	na
Education	%	%	%	%	%
Illiterate/ No Formal	na	na	0	4	1
Elem./Inter.	na	na	11	29	11
Secondary	na	na	52	62	49
Coll./Univ.	na	na	37	5	39

Total Population of Venezuela 29.3 million
Colombia 46.9million
Ecuador 14.7 million
Peru 29.4 million
and Bolivia 10.1million

Data are from surveys of adults (15+) in urban Bolivia (August, 2008); urban Colombia (May, 2008); Ecuador (August, 2007); urban Peru (May, 2008) and Venezuela (November, 2007).

Spanish to Latin America Broadcasting

MEDIA USE

	Venezuela	Bolivia	Colombia	Ecuador	Peru
TV					
Own TV	96%	97%	99%	99%	97%
Own Satellite Dish	4%	5%	16%	2%	3%
Own Cable Access	29%	23%	71%	28%	40%
Weekly TV Use	97%	95%	99%	99%	95%
Weekly TV For News	93%	87%	89%	98%	88%
Radio					
Own Radio	na	92%	95%	94%	95%
Weekly Radio Use	82%	80%	87%	88%	88%
Weekly FM Use	83%	78%	84%	86%	92%
Weekly MW Use	59%	26%	40%	46%	24%
Weekly SW Use	2%	6%	5%	3%	3%
Weekly Radio For News	70%	55%	60%	79%	65%
Internet					
Own PC	18%	31%	56%	32%	26%
Own Internet Access	8%	10%	43%	10%	15%
Weekly Internet Use	19%	32%	53%	23%	41%
Weekly Internet For News	18%	13%	31%	13%	20%
Mobile Phone					
Own Mobile Phone	51%	76%	85%	73%	68%
Weekly Use SMS	44%	na	21%	na	47%
Ever Use Mobile Internet	na	na	7%	na	9%

Web Analytics

Weekly Visitors	46,800
Weekly Visits	53,400

CONTEXT



Political Situation

- Venezuela, Ecuador, Bolivia, Nicaragua and Honduras remain highly polarized between oppositions and ruling parties pursuing deep changes in political and economic regimes. Use of state power to effect change and punish enemies has undermined the rule of law, led to violence, and reduced space for free debate on vital issues, garnering "Partly Free" ratings from Freedom House.
- Colombia and Mexico, while electoral democracies, see democratic rule and civil order undermined by narcotraffickers who use violence and bribery, as well as by governments' use of extra-legal surveillance and violence against opponents.

Media Environment

- Television dominates media use and use for news, with broadcast channels reaching half or more of adults daily. Radio remains widely used on a weekly basis, but its audience reach at most hours remains far below that of TV, requiring more frequent airing of briefer content to build audience. Internet use is increasing, offering new opportunities for delivering content but requiring traditional media outlets to adapt to the ease of entry, user choice, and interactivity of online media
- Cuba, Venezuela, Mexico and Honduras were rated "Not Free" in Freedom House's 2012 Press Freedom report, and other Spanish-speaking countries except Costa Rica and Uruguay were rated "Partly Free." Media freedom is constrained by violence, use of defamation laws, tax or other regulatory harassment, and smears in state media against journalists.
- VOA has actively pursued new affiliations with higher-reach/profile radio and TV partners, offering customized, shorter-format products as well as selected longer-format programs.
- There is a clear opening to placing well-produced reports, interactives and features in high-reach VOA partner news and informative programs. Better use of the IBB satellite feed (historically carried on many cable systems), targeted online/social media, and development of content and formats more appealing to those under 30 are opportunities for expanding audience.

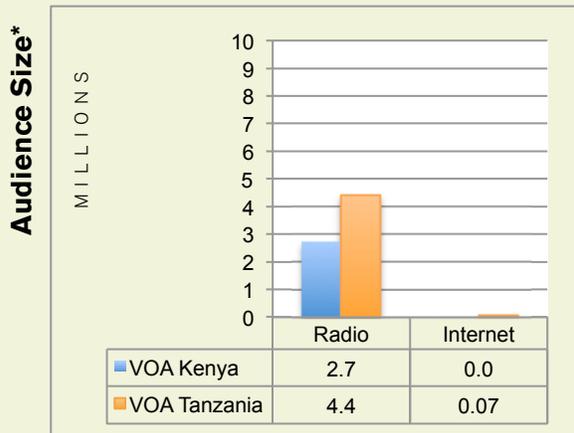
P R O F I L E



Language of Broadcast: Swahili
Content: 9.5 hrs. of original radio programming per week; Internet
Distribution: 26 affiliates (26 FM), 1 IBB FM (Kigali) and 2-3 SW frequencies
Radio: Two top-rated FM stations in VOA Swahili's target region carry its programming live: Citizen FM in Kenya and Radio Free Africa (RFA) in Tanzania.
New Media: The service distributes targeted audio and video programming through mobile devices. Swahili has a website and a mobile site, a Facebook page, SMS distribution, and an email newsletter.
Staff: 7 **Budget:** \$1,024,000 **Established:** 1962 to present

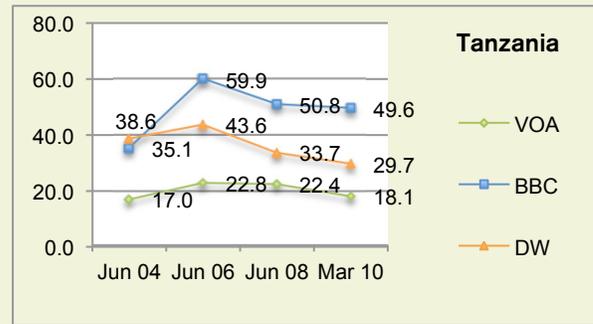
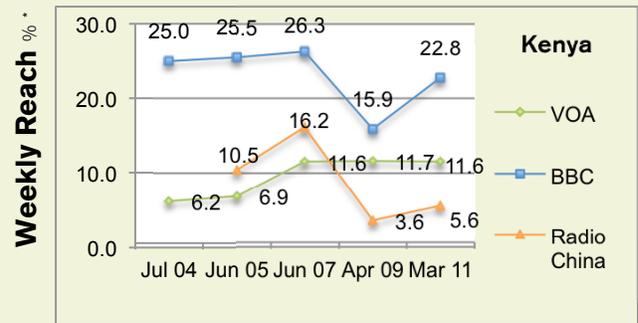


P E R F O R M A N C E D A T A (Using Data from Kenya, March 2011 & Tanzania, March 2010)



Weekly Reach (%) by Media		
	Kenya	Tanzania
Radio	11.6	18.1
TV	na	na
Internet	0	0.3
Total	11.6	18.2

Awareness (%)		
	Kenya	Tanzania
	52	47



Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Kenya	Tanzania
Radio	94	99
TV	na	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	Kenya	Tanzania
Current Events	99	93
U.S. Culture	80	78
U.S. Policies	67	67

Quality

Combined Scores from audience panel	
	VOA
Radio	3.2
TV	na

Swahili

*A March 2011 survey of adults (15+) in urban areas of the Democratic Republic of Congo indicated a weekly reach of 3.1% (an estimated audience of 0.5 million people) for VOA Swahili.

Data are from an March 2011 survey of adults (18+) in Kenya and a March 2010 survey of adults (15+) in Tanzania.

Swahili Broadcasting

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

Total Population: Kenya 41.6 M & Tanzania 46.2 M

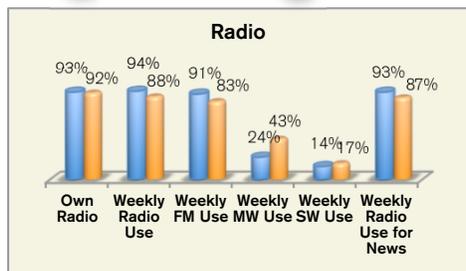
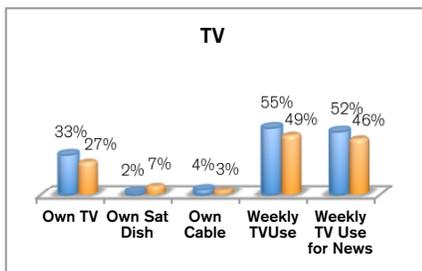
	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Sex	%	%	%	%
Male	47	66	51	67
Female	54	34	49	34
Age				
15-24	28	19	31	28
25-34	34	33	32	32
35-44	19	25	18	16
45-54	11	11	11	15
55-64	5	7	5	7
65+	3	5	3	3

	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Educ.	%	%	%	%
None	8	6	8	3
Primary	54	51	58	51
Sec.	29	34	26	32
Higher	9	9	7	13
Ethnicity/Nationality				
Kikuyu	20	15	na	na
Kuhya	13	13	na	na
Sukuma	na	na	19	12
Waha	na	na	8	13
Other	67	72	71	75

	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Residence	%	%	%	%
Urban	32	26	26	26
Rural	68	74	74	74
Language Spoken at Home				
Swahili	36	47	80	85
Kisukuma	na	na	9	6
English	<1	<1	<1	1
Other	64	53	10	9

M E D I A U S E

Kenya Tanzania

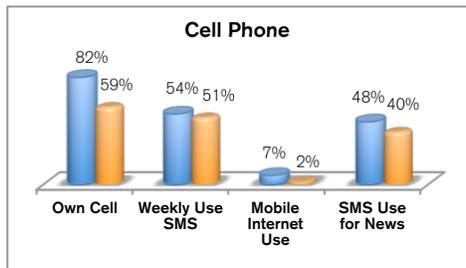
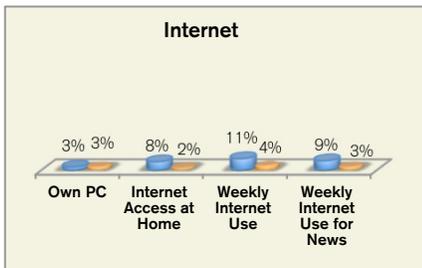


Top Ten Sources of News (Kenya)

1. Citizen FM
2. Citizen
3. KBC Kiswahili
4. KBC
5. KTN
6. NTV
7. Inooro
8. Daily Nation
9. Ramogi
10. Kameme

Top Ten Sources of News (Tanzania)

1. Radio Free Africa
2. TBC 1
3. TBC Taifa
4. ITV
5. Radio One
6. Star TV
7. TBC FM
8. Nipashe
9. Radio Kwizera
10. Mtanzani



Google Analytics

Weekly Visitors 1,300
Weekly Visits 3,200

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): Kenya-PARTLY FREE; Tanzania-PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): Kenya-VERY HIGH RISK; Tanzania-HIGH RISK**
- After the October 2010 general elections (marked by low voter turnout and accusations of vote rigging) that brought about a second 10 year term for President Jakaya Kikwete (of the dominant CCM party), Tanzania's government experienced growing pressure in 2011 to address economic hardships, corruption allegations and constitutional reforms.
- The October 2010 elections in mainly Muslim, semi-autonomous Zanzibar island region saw an opposition candidate become President. The new government has to deal with calls for political and social reforms and solve tensions with the mainland.
- 2011 saw the beginning of the long-demanded constitution review process in Kenya. Political reforms were overshadowed by a number of urgent issues, such as a large increase in famine refugees from Somalia, Kenyan troop's involvement in Somalia since October 2011, and attempts to fight pirates and terrorists who seek to undermine the government.

Media Environment

- **Freedom House Press Freedom Index (2011): Kenya-PARTLY FREE; Tanzania-PARTLY FREE**
- **Reporters Without Borders Index (2011): Kenya-29.5 (84/179); Tanzania-6.00 (34/179)**
- The Kenyan market is driving much of the innovation in mobile phone use across the region; access to mobile phones is almost at saturation, with more than 80 percent of households owning at least one working phone.
- Subscribing to news updates and using mobile web is not uncommon, particularly in urban areas. However, the three major Kenyan private media houses (Nation Media Group, Royal Media Services and the Standard Group) are far outpacing international broadcasters in reaching audiences through these new media tools. Cooperation with mobile service providers has been an important part of their success.

P R O F I L E



Language of Broadcast: Tajik

Content: 32 hrs. of original and 24 hrs. of repeat radio programming per week; Internet

Distribution: 2 IBB SW frequencies and Satellite

RFE/RL's delivery includes multiple SW frequencies, HotBird, AsiaSat, Yamal in addition to Internet with streaming audio and mobile site.

New Media: The Service has active Facebook, VKontakte and Moi Mir sites and has a branded YouTube site.

Staff: 8

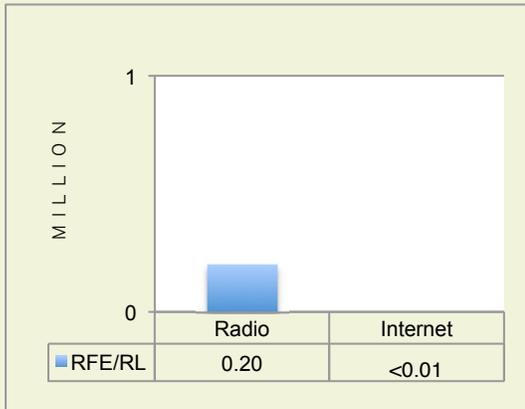
Budget: \$1,578,000

Established: 1953 to present



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

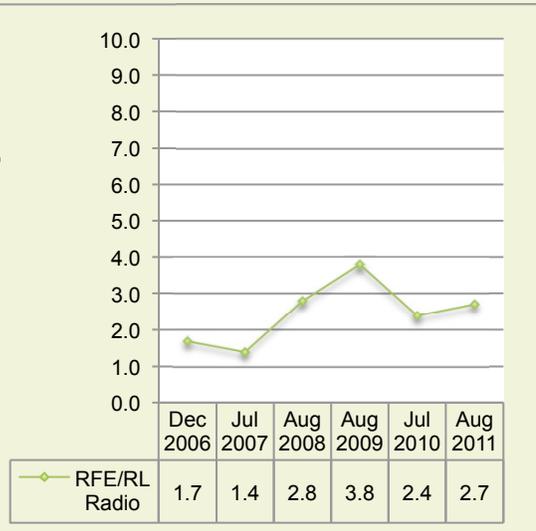
Audience Size



Weekly Reach by Media (%)

RFE/RL	
Radio	2.6
TV	0.1
Internet	0.1
Total	2.7

Weekly Reach %



Awareness (%)

RFE/RL	
Awareness (%)	17

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	93
Current Events in Tajikistan	98

Quality

Combined Scores from audience panel

RFE/RL	
Radio	3.3
TV	na

Tajik

Data are from a August 2011 survey of adults (15+) in Tajikistan.

Tajik Broadcasting

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

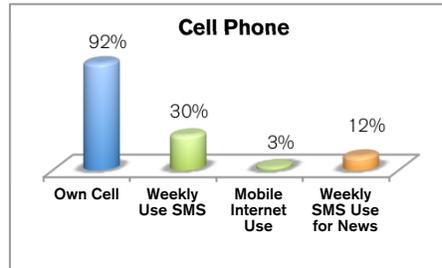
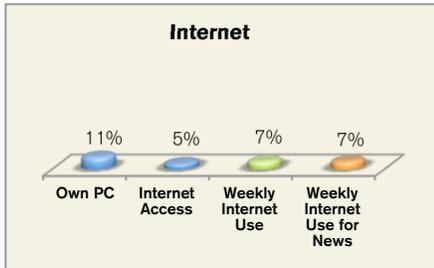
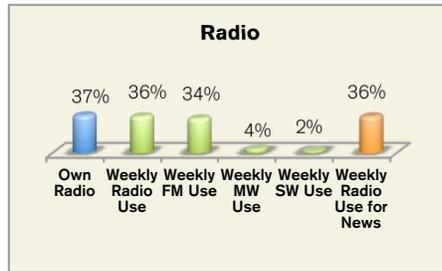
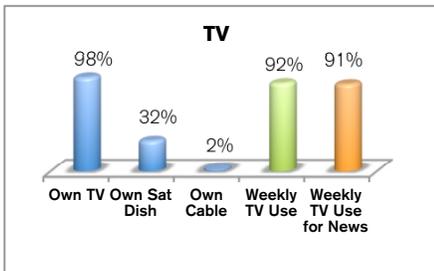
Total Population of Tajikistan: 7.5 million

	Sample	RFE/RL Weekly Audience
Sex	%	%
Male	42	53
Female	58	47
Age		
15-24	36	43
25-34	25	11
35-44	19	15
45-54	11	18
55-64	6	9
65+	4	6

	Sample	RFE/RL Weekly Audience
Education	%	%
Primary	6	6
Incomplete Secondary	19	7
Secondary (Technical & General combined)	65	67
Incomplete Higher/Higher	9	15
Ethnicity/Nationality		
Tajik	82	91
Uzbek	16	7
Russian	1	0
Other	1	2

	Sample	RFE/RL Weekly Audience
Residence	%	%
Urban	28	36
Rural	72	64
Language		
Tajik	80	89
Russian	15	6
Uzbek	2	6
Other	3	0

M E D I A U S E



Top Ten Media Outlets

1. TVT
2. TV Safina
3. Jahonamo
4. Bakhoristan
5. RTR Planeta
6. Sadoi Dushanbe
7. NTV
8. ORT
9. TNT
10. TV Uzbekistan

Top Ten Sources of News

1. TVT
2. Jahonamo
3. TV Safina
4. NTV
5. RTR Planeta
6. Sadoi Dushanbe
7. Yoshlar
8. Planeta
9. TV SM-1
10. Asia ORT1

Web Analytics

Weekly Visitors	12,600
Weekly Visits	66,500

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- Regional Islamist groups are showing an increasing capability of staging attacks within Tajikistan. Poverty and unemployment continue to be sources of popular grievance.
- As part of the 20th anniversary of Tajikistan's independence, parliament approved a prisoner amnesty bill initiated by the presidential administration. According to the prosecutor-general, Sherkhon Salimzoda, as many as 4,000 inmates are expected to receive early release, with another 11,000 detainees, suspects and those awaiting trial either being released, having their charges dropped or having their terms of imprisonment reduced in 2011. Among the categories of prisoners expected to benefit from this bill are all female detainees, male minors and male detainees over the age of 55, detainees diagnosed as suffering from cancer and tuberculosis, veterans of the Afghan war, those involved in the mitigation of the Chernobyl nuclear disaster, and all foreigners. The amnesty law will not affect those already serving life terms and those convicted on terror charges. The authorities have indicated that participants in the mutinies of 1997 and 1998 organised by former Colonel Mahmud Khudoiberdiyev are expected to benefit from the amnesty.
- Given the highly corrupt penitentiary system—which is headed by Lieutenant-General Izatullo Sharipov, a relative of President Emomali Rahmon and a deputy justice minister—the purchase of places on the amnesty list is likely to be rife, whether as payment to prison guards for early release or purchasing a fake medical declaration that the inmate has cancer or tuberculosis.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 56.00 (122/179)**
- Tajikistanis continue to suffer from an "information vacuum," due to low professionalism on the part of Tajik journalists and government censorship and licensing bottlenecks. One form of censorship is a licensing committee which habitually fails to approve applications for the establishment of private TV and radio stations unless they are pro-government. An intriguing exception is Radio Imruz, which has operated in the Tajikistani market for about two years and has developed an independent and even critical tone, despite its owner's family ties to the president.
- The Tajik media environment is technologically stagnant. Internet access is growing slowly; growth of satellite and mobile phone ownership seems to have stalled. The largest change is the sharp decrease in radio set ownership, although radio use has not fallen. Newspapers are an important news source in urban areas despite the lack of a daily press. In general, urban populations enjoy better access to all media platforms.

P R O F I L E



Language of Broadcast: Tatar-Bashkir

Content: 8 hrs. of original and 20 hrs. of repeat radio programming per week; Internet

Distribution: 1 to 2 IBB SW frequencies

RFE/RL's delivery includes multiple SW frequencies, HotBird, AsiaSat plus 1 FM affiliate in Crimea (Ukraine) in addition to interactive multimedia Internet with streaming audio (Cyrillic site with Latin page). Web content is republished in a weekly local newspaper.

New Media: Internet has become Azatliq's main platform and the Service has responded to the shift by dedicating more and better resources to their interactive multimedia site. Active on multiple social networking sites including Facebook, vKontakte and Twitter, the service also has an Android). The service also has a mobile site.

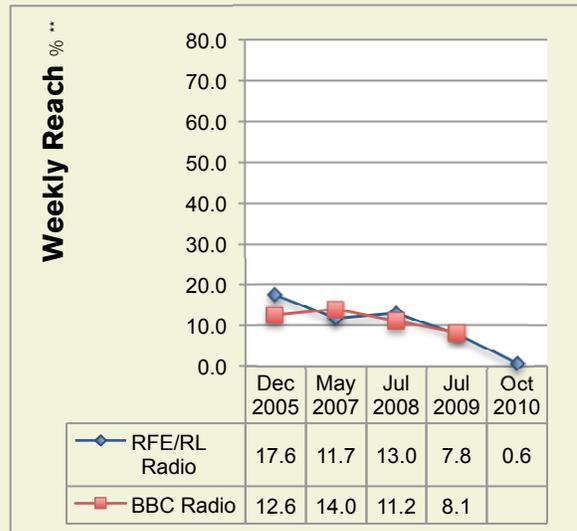
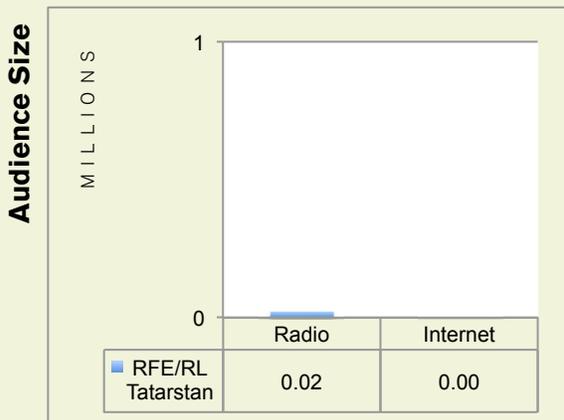
Staff: 6

Budget: \$979,000

Established: 1953 to present



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



Weekly Reach by Media (%)	
Tatarstan	
Radio	0.6
TV	na
Internet	0.0
Total	0.6

Awareness (%)	
RFE/RL	
	30

Credibility	Percentage of surveyed weekly audience that found broadcasts credible (%)*	
	Tatarstan	Bashkortostan
	Radio	na
TV	na	na

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

Quality	Combined Scores from audience panel*	
	RFE/RL	
	Radio	3.2
TV	na	

*Samples of RFE/RL weekly listeners are too small for meaningful analysis.

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

Tatar-Bashkir

Tatar-Bashkir Broadcasting

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

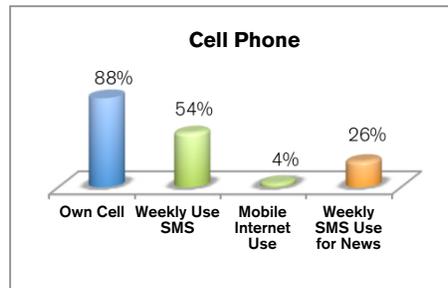
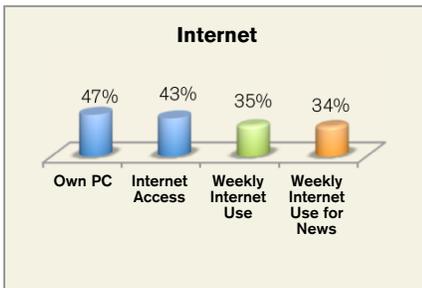
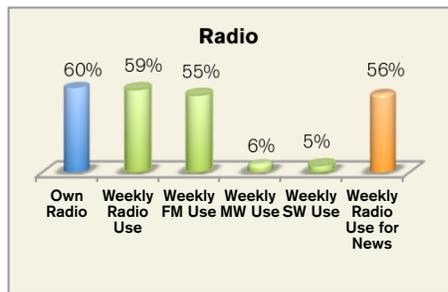
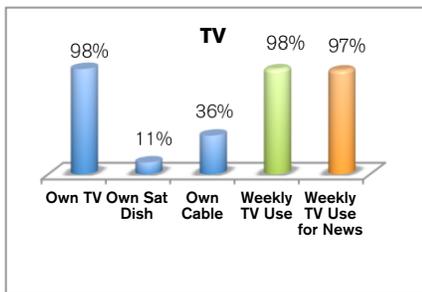
Total Population of Tatarstan: 3.7 M , Bashkortostan 4.1M

	Sample	RFE/RL Weekly Audience*
Sex	%	%
Male	44	na
Female	56	na
Age		
15-24	17	na
25-34	19	na
35-44	15	na
45-54	17	na
55-64	14	na
65+	18	na

	Sample	RFE/RL Weekly Audience*
Education	%	%
None/Primary	7	na
Secondary/Vocational	41	na
Spec. Tech/ Inc. Higher	28	na
Coll./Univ.	24	na
Ethnicity/Nationality		
Tatar	53	na
Russian	39	na
Other	7	na

	Sample	RFE/RL Weekly Audience*
Residence	%	%
Urban	76	na
Rural	24	na
Language		
Tatar	34	na
Russian	64	na
Other	2	na

M E D I A U S E **



Top Ten Media Outlets

1. ORT
2. RTR
3. TNV (Novyi Vek)
4. NTV
5. EFIR
6. STS
7. TNT
8. GTRK Tatarstan
9. Radio Novyi Vek
10. REN-TV

Top Ten Sources of News

1. ORT
2. RTR
3. NTV
4. TNV (Novyi Vek)
5. EFIR
6. www.yandex.ru
7. www.mail.ru
8. GTRK Tatarstan
9. Argumenty i Fakty
10. Russkoe Radio

Web Analytics

Weekly Visitors	2,400
Weekly Visits	8,300

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE (Russia)**
- **Economist Intelligence Unit Instability (2010): HIGH RISK (Russia)**
- As Moscow aspires to gain uncontested control across Russia, Tatarstan's future outlook is worsening. By President Medvedev's decree, Tatarstan has already lost its independent government and the republic's president. More is expected—there is some speculation that after the 2012 presidential elections, Tatarstan might have to merge with neighboring Ulyanovsk and Kirov oblast to form the Kazan Kray. This process of "amalgamation" is likely to increase the republic's financial dependence on the Russian federal budget and to provide the Russian government with greater control over all Tatarstani institutions, including media outlets.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE (175/196) (Russia)**
- **Reporters Without Borders Index (2011): 66.00 (142/179) (Russia)**
- Currently, advertising and price wars in the media market and pervasive self-censorship of journalists and editors make it difficult for independent media sources to succeed. Any movement toward amalgamation is likely to aggravate those hardships and force most independent outlets to leave the market.
- Internet use experienced an impressive increase in 2010, mostly among the general population, although Tatar speakers are also going online for news and information slightly more often than in the previous year. Thirty-five percent of the general population and 29 percent of Tatar speakers report going online weekly to follow current events, a 10 percentage point and 2 percentage point increase compared to 2009, respectively. The list of top informational sources further underscores the growing importance of the internet: Both the general population and Tatar speakers name two websites—yandex.ru and mail.ru—among their three-most important sources of news.

P R O F I L E



Language of Broadcast: Thai

Content: 9 hrs. of original radio programming per week; 20 min. of original TV programming per week; Internet

Distribution: 40 affiliates (36 FM and 4 AM radio stations via satellite, 1 TV affiliate)

Radio: The Service has 3 different radio programs: Hotline News from VOA Washington, Weekend with VOA, and English AmericanStyle, a weekly show which teaches American idioms.

TV: VOA Thai Service's Report from America and Eye on America are broadcast on TNN 24, which is a 24/7 news station, available in both cable and free TV. TNN 24 broadcasts in 110 countries in Asia, Europe and Africa.

New Media: VOA Thai has a website with audio and video, a YouTube site, and a Facebook page.

Staff: 3

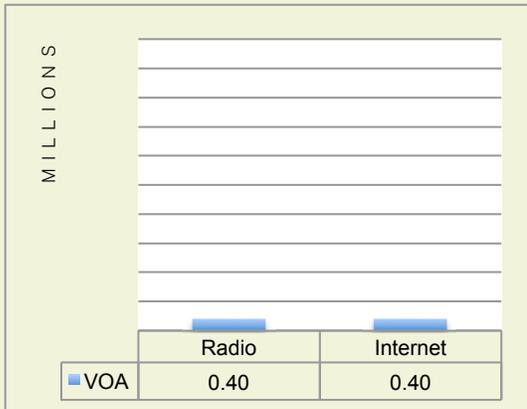
Budget: \$683,000

Established: 1942 to 1958; 1962 to 1988; 1988 to present



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

Audience Size



Weekly Reach by Media (%)	
VOA	
Radio	3.6
TV	3.6
Internet	na
Total	6.2

Weekly Reach



Awareness (%)	
VOA	
	8

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	3.4
TV	na

*The last available survey indicated a total media weekly reach figure of 2.5% for the VOA Thai service in Greater Bangkok.

Data are from a January 2011 survey of adults (15-64) in urban Thailand.

Thai Broadcasting

Total Population of Thailand: 69.5 million

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

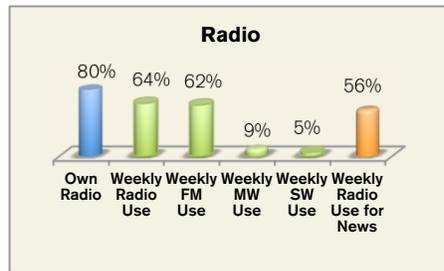
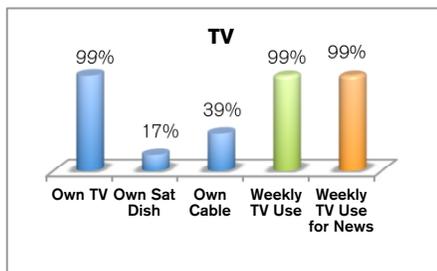
	Sample*	VOA Weekly Audience*
Sex	%	%
Male	53	67
Female	47	33
Age		
15-24	18	10
25-34	23	32
35-44	26	29
45-54	21	18
55-64	12	11

	Sample*	VOA Weekly Audience*
Education	%	%
Primary or less	2	0
Junior School	24	14
High School	36	25
Vocational	13	17
Coll./Univ.	25	44
Ethnicity/Nationality		
na	na	na

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

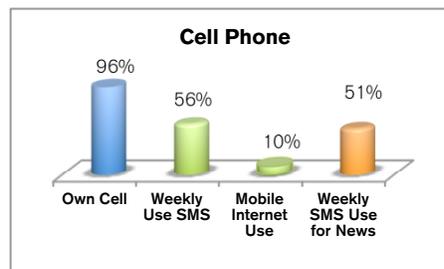
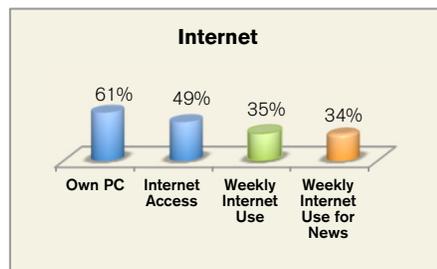
*The last available survey indicated a total media weekly reach figure of 2.5% for the VOA Thai service in Greater Bangkok.

M E D I A U S E



Web Analytics

Weekly Visitors 3,500
Weekly Visits 4,800



C O N T E X T

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

Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- The Puea Thai party, led by Yingluck Shinawatra, won a decisive victory in the general election held on July 3rd, but this will not end the power struggle that has destabilised Thailand for the past five years. Divisions could yet emerge between the new government and the royalist, military-backed establishment, especially if Yingluck seeks amnesty for her brother, Thaksin Shinawatra, who was ousted as prime minister by the military in 2006. The eventual death of King Bhumibol Adulyadej also has the potential to be deeply destabilizing.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 61.50 (137/179)**
- The government and military control nearly all the national terrestrial television networks and operate many of Thailand's radio networks.
- Multichannel TV, via cable and satellite, is widely available. The radio market, particularly in Bangkok, is fiercely competitive. There are more than 60 stations in and around the capital.
- The media are free to criticize government policies, and cover instances of corruption and human rights abuses, but journalists tend to exercise self-censorship regarding the military, the monarchy, the judiciary and other sensitive issues.

P R O F I L E



Voice of America



Language of Broadcast: Tibetan

Content: 42 hrs. of original and 126 hrs. of repeat radio programming per week; 2 hrs. of original TV programming per week; Internet

Distribution:

3-4 IBB SW frequencies; TV via AsiaSat3, 24-7 satellite audio streaming, 8 hours daily satellite audio/text via TelStar 18

Radio: 6 hours of original radio daily on up to 4 SW frequencies, also available via 24/7 satellite.

TV: VOA *Kunleng* is the only Tibetan language TV program in Tibet not controlled by the Chinese Communist Party. Broadcast 2 hours weekly and replayed an additional 14 hours weekly, it is viewed in all 3 major Tibetan regions and in the exile community which has strong contacts with those inside Tibet.

New Media: A multimedia website, Facebook page, Twitter, YouTube, a Tibetan blog that delivers audio and video content, email newsletter. iPhone app waiting for approval from Apple.

Staff: 22 **Budget:** \$3,320,000

Established: 1991 to present



Language of Broadcast:

Tibetan (in 3 major dialects of Amdo, Kham and Utsang)

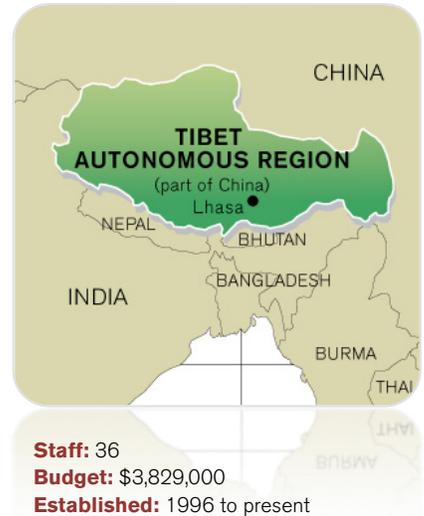
Content: 35 hrs. of original and 35 hrs. of repeat radio programming per week; Satellite rebroadcasting; Internet

Distribution: 3- 5 IBB SW frequencies; Satellite rebroadcasting

Radio: 5 hours of original programs and 5 hours of repeat daily.

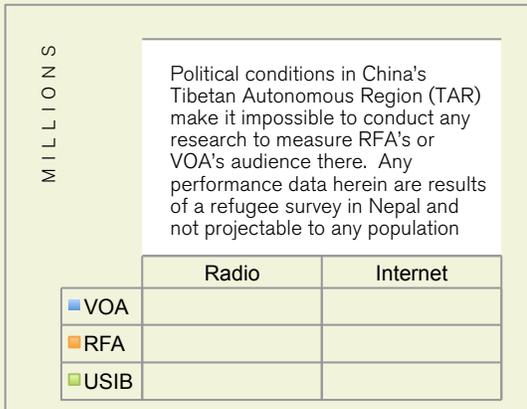
Video: 3 webcasts per week featuring photos and footage from inside the target area.

New Media: The Service currently maintains 5 blogs; newsletters sent on a daily basis; web and mobile sites and Facebook, Twitter, YouTube pages.

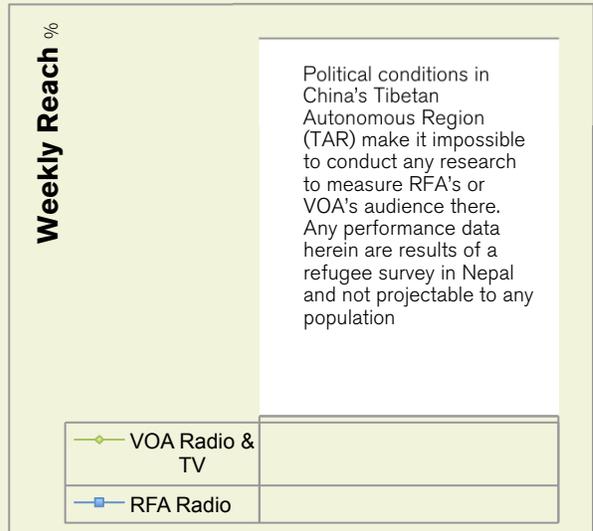


P E R F O R M A N C E D A T A* (Using Data from Tibetan refugees Jan.-Dec. 2010)

Audience Size



Weekly Reach



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	na	na	na
TV	na	na	na
Internet	na	na	na
Total	na	na	na

Awareness (%)

VOA	RFA
na	na

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	3.2	3.2
TV	3.2	na

*Data are from a non-probability sample of Tibetan refugees in Nepal and cannot be used to project audience size or for trend analysis.

Data are from a non-probability sample of newly arrived Tibetan refugees in Nepal, conducted from January-December 2010.

Tibetan Broadcasting

Total Population of Tibet Province: See note**

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	na	na	na
Female	na	na	na
Age			
15-29	na	na	na
30-44	na	na	na
45-59	na	na	na
60+	na	na	na

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Education	%	%	%
None/Informal	na	na	na
Elementary	na	na	na
Secondary	na	na	na
Coll./Univ.	na	na	na
Monastic	na	na	na
Region of Origin			
Amdo	na	na	na
Kham	na	na	na
Utsang	na	na	na

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Residence	%	%	%
Urban	na	na	na
Rural	na	na	na
Nomadic	na	na	na
Language			
na	na	na	na

**Official 2000 census data suggest 2.4 million of the 5.4 million Tibetans in the PRC live in the Tibetan Autonomous Region (TAR), which consists of the provinces of Amdo, Khamke and Utsang.

M E D I A U S E

TV	Radio	Internet	Cell Phone
Media use data is not available.			

Web Analytics

VOA Weekly Visitors	7,000
Weekly Visits	20,800
RFA Weekly Visitors	5,900
Weekly Visits	12,900

Analysis of refugee data -- while not necessarily representative of the home Tibetan population - suggests that access to media -different than in the rest of China. Only 5% of Tibetan refugees, for example, reported weekly Internet access while 49% reported having satellite TV access.

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE (China)**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK (China)**
- Thirty-five Tibetans are confirmed to have self-immolated since February 27, 2009, to protest against Chinese rule. In response, Beijing has stepped up security in Tibetan-populated areas, ramped up "patriotic education" in schools and monasteries, and launched concerted attacks against the Dalai Lama as the mastermind behind the self-immolations.
- Throughout the Tibetan autonomous areas of the PRC and beyond, there are intensified jamming efforts and increased restrictions on access to foreign news websites. In domestic media outlets, the government has increased censorship and manipulation of the press and the internet; new interpretations of criminal laws have been used to limit discussions deemed as passing of intelligence injurious to the state.
- According to the State Department's 2010 Human Rights Report, "The government continued its severe cultural and religious repression of ethnic minorities in Xinjiang Uighur Autonomous Region (XUAR) and Tibetan areas."
- A few months after the 2008 protests the preceded the Beijing Olympics, authorities announced severe penalties for spreading and listening to 'rumors.' Although article 35 of the PRC constitution guarantees freedom of speech, assembly, association and publication, such provisions are subordinated to the "national interest."
- Key Tibetan cultural leaders including writers, artists and educators continued to be arrested and prosecuted in 2010. Notable among these was Tragyal (Shogdung) arrested for inciting "splittism" after the release of his book critical of Chinese Tibetan policies. Kunchok Tsephel was sentenced to 15 years charged with disclosing state secrets related to his literary website Chodme 'butter lamp.'

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE (China)**
- **Reporters Without Borders Index (2011): 136.00 (174/179) (China)**
- Virtually all Chinese media sources are owned by the state. Xinhua, the official news agency, has the status of a government ministry. Recognizing the importance and potency of information, authorities have vigorously pursued a policy of expansion of domestic media offerings to compete with and, in many cases, overwhelm external sources.
- Control of information has intensified and broadened to include electronic/new media sources as well as traditional print and broadcast media outlets. There is increased censorship and manipulation of the press and the Internet.
- Authorities have increased the number of Tibetan language broadcasts on television and radio, as well as the number of Tibetan-language newspapers.
- PRC authorities in Tibet continue to spend significant amounts on radio jamming and hindering access to satellite television. Poor reception and jamming continue to be the biggest obstacles to audience growth in Tibet. The vast majority of regular listeners to VOA and RFA report their broadcasts are "not clear" or are difficult to hear.
- Authorities continue to crack down on the use of large satellite dishes, which most easily receive foreign broadcasts, replacing them with cable access or smaller Ku-band dishes.
- Recent research suggests that portable electronic media -- including DVDs are a key source of information for Tibetans and anecdotal evidence suggests that recordings of VOA Tibetan television and USB radio programs are spread this way.

P R O F I L E



Language of Broadcast: Turkish

Content: 2.5 hours of original radio programming; 2 hours of original TV programming; audio and video products on Internet

Distribution: 1 affiliate (1TV); Internet

TV: Turkey's TGRT News TV network carries daily 4 live, 15 minute VOA Turkish newscasts and a 30 minute magazine program each week. VOA Turkish also presents, Monday through Friday, a daily 5-minute live interactive news roundup via Skype on TGRT News TV.

New Media: The Service has web and mobile sites, a Facebook fan page, Twitter and YouTube accounts, and sends a daily email newsletter to 3,600 subscribers. 1.5 hours of weekly radio programming is presented as podcasts via mobile platform and Internet. The Service also produces 1 web-only video and 3 web-only audio products and maintains 5 blogs.

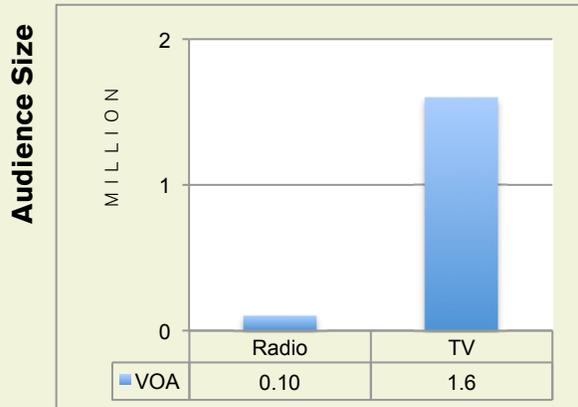
Staff: 7



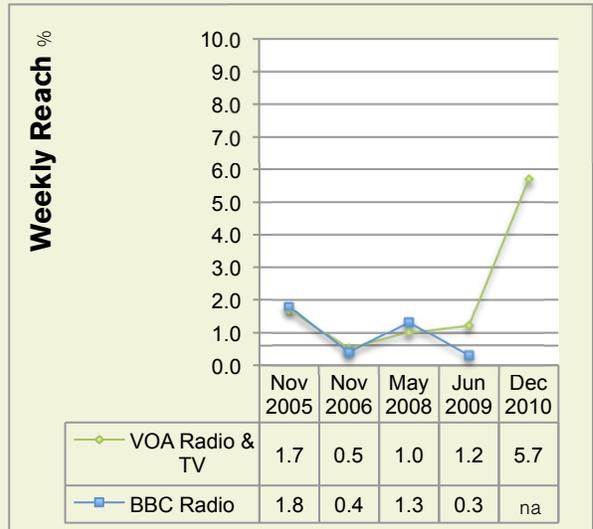
Budget: \$1,219,000

Established: 1942 to 1945; 1948 to present; TV service established in 2005

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



Weekly Reach by Media (%)	
VOA	
Radio	0.4
TV	5.5
Internet	na
Total	5.7



Awareness (%)	
VOA	
	na

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" (%)*		
	Radio	TV
Current Events	na	na
U.S. Culture	na	na
U.S. Policies	na	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.5
TV	3.4

Data are from a December 2010 CATI survey (commissioned by DW and purchased by IBB) of adults (14+) living in areas of Turkey with population of more than 100,000. Includes 51 cities and 136 districts.

* Samples of VOA audience are too small for meaningful analysis.

Turkish Broadcasting

Total Population of Turkey: 74.0 million

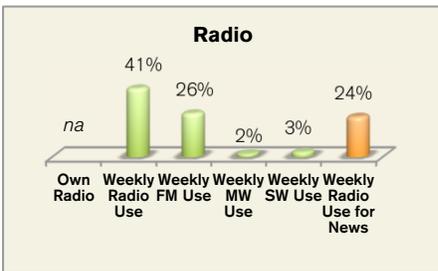
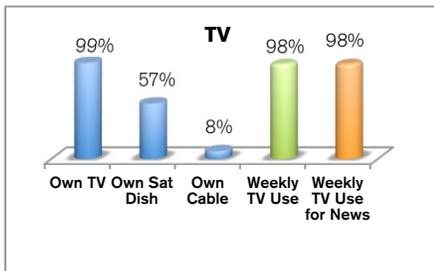
A U D I E N C E C O M P O S I T I O N *

	Sample	VOA TV 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 TV Weekly Audience
Education	%	%
Illiterate/No Formal	na	na
Elem./Inter.	na	na
Secondary	na	na
Coll./Univ.	na	na
Ethnicity/Nationality		
na		

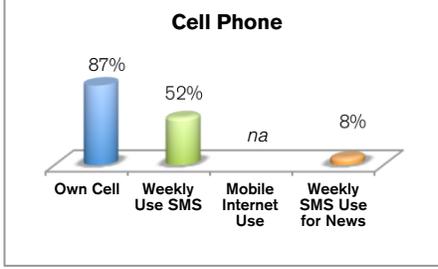
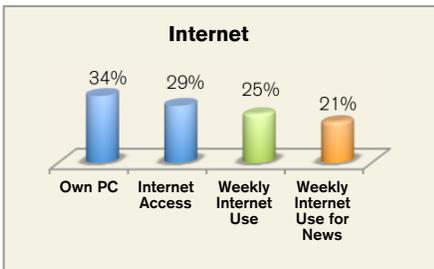
	Sample	VOA TV Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
na		

M E D I A U S E **



Web Analytics

Weekly Visitors	7,700
Weekly Visits	10,800



**Media use data are from a May 2010 nationwide survey of Turkey.

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2011): HIGH RISK**
- Since the general election on June 12th there has been a marked escalation of the campaign of violence by the Kurdish terrorist group, the Kurdistan Workers' Party (PKK). In the month up to mid-August more than 30 Turkish soldiers died in attacks, including 13 in a gun battle with insurgents in the south east of the country on July 14th. Following this attack the Justice and Development Party (AKP) government, led by the prime minister, Recep Tayyip Erdogan, promised that the PKK would feel the full force of his government's response, but not until after the holy month of Ramadan, which began on August 1st. However, several more deadly attacks followed and on August 17th the government ordered the Turkish Armed Forces (TSK) to launch air strikes on PKK camps in northern Iraq.
- One of the most important effects of the continued PKK attacks and the government's military response is that the revival of the democratic initiative to try to resolve the Kurdish problem that the AKP promised before the general election looks less likely than before. The government is likely to take an increasingly hawkish attitude, in terms of how to respond to the PKK threat in particular, and the wider social and economic problems related to the Kurdish issue. It has signalled its intention to give increased powers to local law enforcers in the Kurdish populated regions and government-appointed provincial governors, as well as reinforce special paramilitary forces to combat the PKK.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 70.00 (148/179)**
- A campaign in early 2011 by Turkish authorities has resulted in the arrest of thirteen journalists on charges of conspiring with the so-called Ergenekon plot to overthrow the Justice and Development (AK) Party government. The arrests in turn triggered widespread protests against the growing crackdown on press freedom in the country. In all, some 50 journalists are currently in prison, one of the highest numbers of imprisoned journalists in the world. Turkish police claim the most recent arrests came as a result of information discovered during a search last month of the homes of four journalists associated with the opposition oriented television station, OdaTV. The journalists arrested all who worked for outlets critical of the AK-led government. Turkey's president, Abdullah Gul, publicly admitted the endangerment of civil liberties, claiming the actions are "casting a shadow over the level that Turkey has reached and the image that is lauded by everyone." At the same time, Prime Minister Recep Tayyip Erdogan has defended the arrests.

P R O F I L E



Language of Broadcast: Turkmen

Content: 11 hrs. of original and 45 hrs. of repeat; Internet

Distribution: RFE/RL's delivery includes 1 cross-border MW from Armenia covering the entire country, multiple SW frequencies, Yamal, HotBird, and AsiaSat.

New Media: Internet with proxies and streaming audio, mobile site, Facebook, and Twitter.

Staff: 9

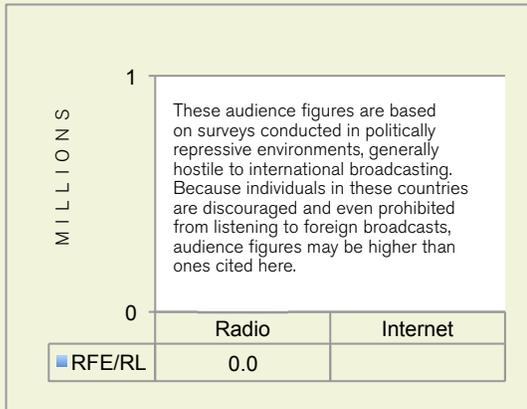
Budget: \$1,150,000

Established: 1953

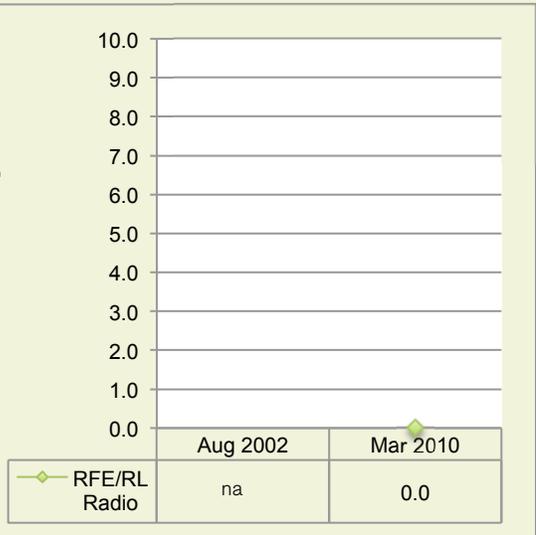


P E R F O R M A N C E D A T A (Using Data from Turkmenistan, March 2010)

Audience Size



Weekly Reach % *



Weekly Reach by Media (%)

	RFE/RL
Radio	na
TV	na
Internet	na
Total	na

Awareness (%)

	RFE/RL
	na

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 Turkmenistan	na
U.S. Policies	na

Quality

Combined Scores from audience panel

	RFE/RL
Radio	3.0
TV	na

*Insufficient data for trend analysis.

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

Data are from a March 2010 survey of adults (15+) in urban Turkmenistan.

Turkmen

Turkmen Broadcasting

Total Population of Turkmenistan: 5.1 million

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

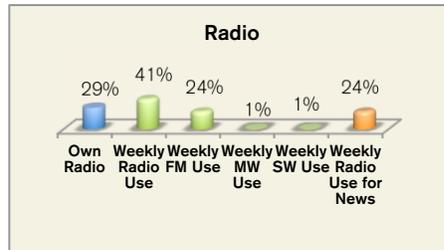
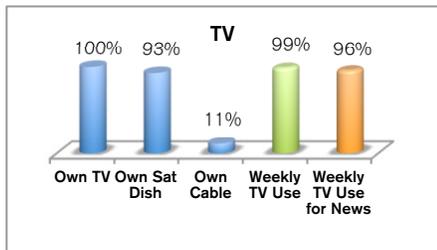
	Sample	RFE/RL Weekly Audience**
Sex	%	%
Male	48	na
Female	52	na
Age		
15-24	27	na
25-34	31	na
35-44	16	na
45-54	18	na
55-64	6	na
65+	2	na

	Sample	RFE/RL Weekly Audience**
Education	%	%
None/Primary	12	na
Secondary	44	na
Vocational	26	na
Coll./Univ.	18	na
Ethnicity/Nationality		
Turkmen	69	na
Russian	16	na
Uzbek	6	na
Other	8	na

	Sample	RFE/RL Weekly Audience**
Residence	%	%
Urban	100	na
Rural	na	na
Language		
Turkmen	63	na
Russian	32	na
Other	5	na

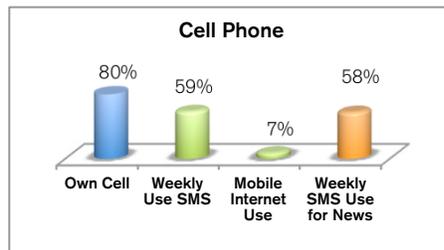
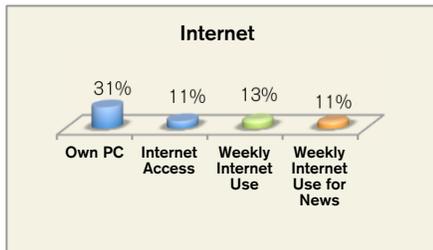
**Sample of RFE/RL weekly listeners in the survey is too small for meaningful analysis.

M E D I A U S E



Top Ten Media Outlets

1. NTV
2. RTR
3. ORT-1 Evraziya
4. TV Turkmen Owazy
5. TV Altyn Asyr Turkmenistan
6. TV Ren
7. TV Yaslyk
8. TV Miras
9. Channel 4 Turkmenistan
10. TNT



Web Analytics

Weekly Visitors	2,100
Weekly Visits	5,200

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): HIGH RISK**
- President Berdimukhammedov, who came into office after Niyazov's death, focuses on ending the country's isolation and promoting the global position of Turkmenistan by using its natural gas reserves as leverage in political negotiations. In December 2009, Turkmenistan opened a pipeline to China, ending Russian monopoly on gas exports there and initiating the negotiations on potential gas exports to Europe.
- As relations between Turkmenistan and Russia have cooled, Turkmenistan has turned to NATO and the USA with an offer to provide logistical support for military activities in Afghanistan.
- Berdimukhammedov's efforts to improve Turkmenistan's internal situation are inconsistent and produce only modest outcomes. Turkmenistan's democratization process has stagnated, even though the new president succeeded in phasing out Niyazov's cult of personality. Elections are not free and fair, and corruption remains widespread.
- Civil liberties in the country are severely restricted: freedom of speech, academic freedom, freedom of religion, and freedom of association are not guaranteed. As the government promotes Turkic identity, all minorities are restricted in their access to education, employment, and public services.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 140.67 (177/179)**
- The government controls all broadcasts and printed media and the judicial system persecutes both independent media and non-government agencies involved in social or political activities.
- TV is the leading media in Turkmenistan with almost universal weekly reach. Radio listening in urban Turkmenistan is relatively high at 41 percent weekly; the majority listen on FM. However, only a quarter of the population relies on radio when following current events; the rest use it as a source of entertainment.

P R O F I L E



Voice of America



Language of Broadcast: Ukrainian

Content: 2 hrs. of original and 0.75 hrs. of repeat TV programming per week; Internet

Distribution: 14 TV affiliates (3 nat. and 11 reg.)

TV: VOA Ukrainian produces the daily *Chas-Time* TV news program and the weekly *Window on America* TV magazine program. *Chas-Time* and *Window on America* are seen nationally on Channel 5 and the latter is seen on Channel 1, the state-run broadcaster, as well. Occasional special reports to some of Ukraine's biggest networks are also provided.

New Media: The service has web and mobile sites, a Facebook fan page, Twitter and YouTube accounts, and sends an email newsletter. Multimedia content on web and mobile sites is updated daily.

Staff: 11

Budget: \$1,611,000

Established: 1949 to present



Language of Broadcast: Ukrainian

Content: 15 hrs. of original and 8 hrs. of repeat radio prog. per week; Internet

Distribution: RFE/RL's Ukrainian Service has 12 FM, 2 UKV and 2 tochka local affiliates, an inter. multimedia Internet site with streaming audio and is also available on HotBird.

New Media: The Ukrainian Service has a growing following on Facebook and VKontakte; a branded YouTube channel; multiple link exchanges including to aggregators which drives new traffic while allowing content to be easily re-published; and a mobile site.

Staff: 12

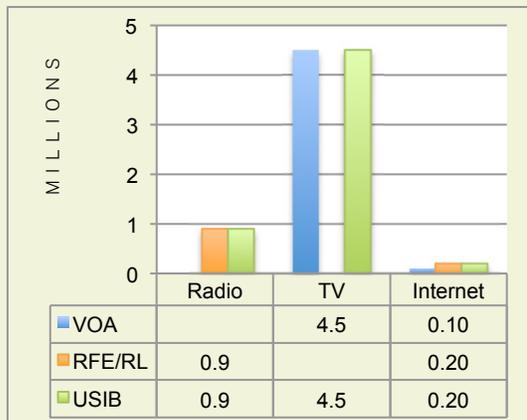
Budget: \$2,441,000

Established: 1954 to present



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

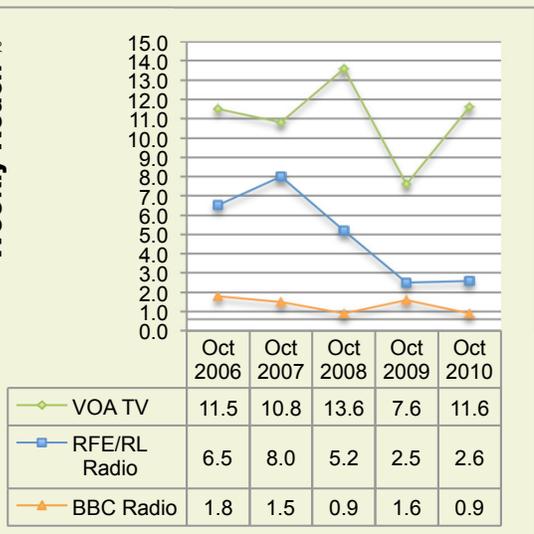
Audience Size



Weekly Reach By Media (%)

	VOA	RFE/RL	USIB
Radio	na	2.3	2.3
TV	11.5	na	11.5
Internet	0.3	0.4	0.5
Total	11.6	2.6	13.1

Weekly Reach %



Awareness (%)

VOA	RFE/RL
70	50

Credibility

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

	VOA	RFE/RL
Radio	na	84
TV	90	na

Understanding

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

	VOA	RFE/RL
Current Events	85	87
U.S. Culture (VOA) or Current Events in Ukraine (RFE/RL)	75	86
U.S. Policies	71	na

Quality

Combined scores from audience panel

	VOA	RFE/RL
Radio	3.7	3.4
TV	3.7	na

*Weekly reach for VOA included radio and TV until October, 2009.

Data are from an October 2010 survey of adults (15+) in Ukraine

Ukrainian

Ukrainian Broadcasting

Total Population of Ukraine: 45.7 million

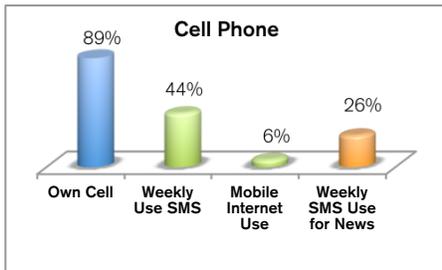
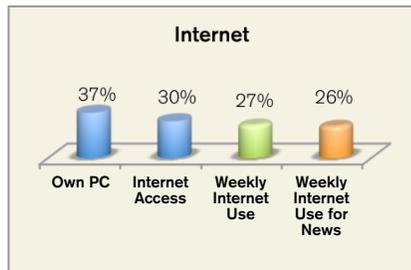
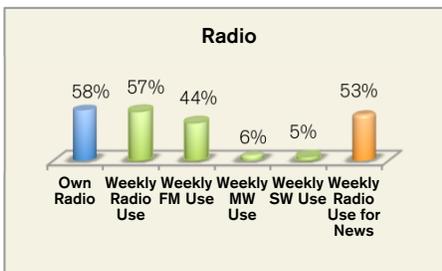
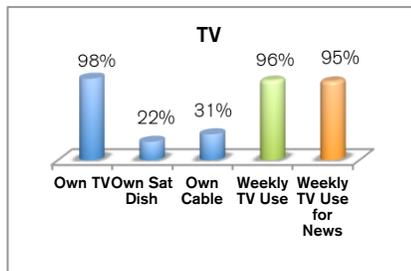
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	45	53	58
Female	55	47	42
Age			
15-24	16	13	13
25-34	20	15	13
35-44	17	17	20
45-54	14	19	22
55-64	15	20	20
65+	19	15	12

	Sample	VOA Weekly Aud.	RFE/RL Weekly Aud.
Education	%	%	%
Primary	5	2	5
Secondary	48	40	28
Technical	27	30	34
Higher	20	28	32
Ethnicity/Nationality			
Ukrainian	84	87	80
Russian	13	10	17
Other	3	3	4

	Sample	VOA Weekly Aud.	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	67	61	63
Rural	33	39	37
Language			
Ukrainian	42	53	50
Russian	41	31	38
Ukrain./Russ.	16	16	12

M E D I A U S E



Top Ten Media Outlets

1. Inter
2. 1+1
3. ICTV
4. STB
5. Novyy Kanal
6. TRC Ukraine
7. UT-1
8. Kanal 5
9. ORT-1
10. RTR Planeta

Top Ten Sources of News

1. 1+1
2. Inter
3. ICTV
4. STB
5. 5 Kanal
6. Channel Ukraine
7. Novyy Kanal
8. ORT
9. UT-1
10. Akgumenty I Fakty

Web Analytics

VOA Weekly Visitors	7,200
Weekly Visits	10,900
RFE/RL Weekly Visitors	44,100
Weekly Visits	107,900

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- The past year witnessed big changes in the Ukrainian political and media landscapes. Newly elected President Viktor Yanukovich began strengthening his presidential power by diminishing the role of other branches of the government and the media. As a result, the relatively free media environment in place before this year changed for the worse. The government relapsed into old habits of controlling the most important information sources, preventing criticism of its performance and marginalizing oppositional voices.
- Criminal cases were opened up against former president Yulia Tymoshenko in May 2010. In October 2011, a Ukrainian court sentenced Mrs. Tymoshenko to seven years in prison after she was found guilty of abuse of office when brokering the 2009 gas deal with Russia. The conviction is seen as "justice being applied selectively under political motivation" by the European Union and other international organizations.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 54.00 (116/179)**
- Attacks and threats on journalists have increased. Recently, several journalists reported their phones were tapped by the Security Services. The first outcries against censorship on TV appeared when Ukrainian journalists started the public action campaign, "Stop Censorship."
- By various methods, the government is trying to control the most important information sources for Ukrainians. The quality of TV news has degraded most noticeably. Inter and UT-1, in particular, show a tendency to present the government in a positive light and at the same time paint the opposition negatively or give no oppositional opinion at all. In addition, the number of independent experts' opinions on current events in different media is decreasing.
- The government also took several steps in changing legislation regarding different media. The Law on Local Elections, enacted in the summer of 2010, has several provisions that affect media and contradict the principle of free and equal elections. For example, article 50 gives preferential treatment to those who own stakes in media outlets; those candidates pay less for their advertising. It is important to note that in smaller cities and settlements, state-owned TV, radio or newspapers are among most popular outlets; thus this provision encourages the representatives of the government media to run for local offices.

P R O F I L E



Language of Broadcast: Urdu & English

Content: 55 hrs. of original radio programming per week, 36 hrs. of repeats per week; 4.5 hrs. of original TV programming per week; Internet

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

Radio: VOA's radio programs (*Urdu VOA*) broadcast through one affiliate, the Pakistan Broadcasting Corporation (PBC). The government-owned radio service airs one live and one pre-recorded 30-minute program on a network of 12 FM stations in 12 cities around Pakistan. VOA's Urdu service also broadcasts programs on 2 IBB MW and 2 SW frequencies.

TV: VOA's TV news-magazine program *Beyond the Headlines (Khabron se Aage)* is carried on one affiliate, Express News, one of Pakistan's premier cable and satellite TV news sources. The broadcast airs Monday-Friday at 6:30 p.m., local time.

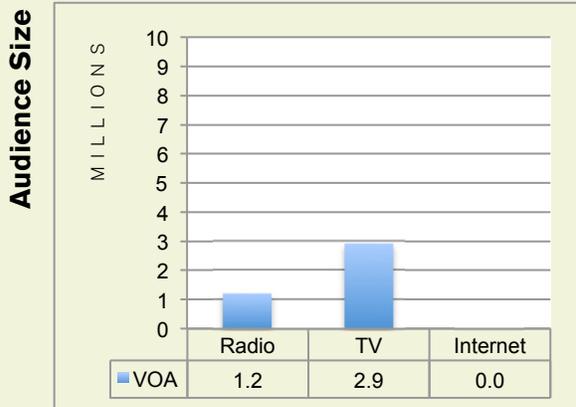
Staff: 24

Budget: \$4,464,000

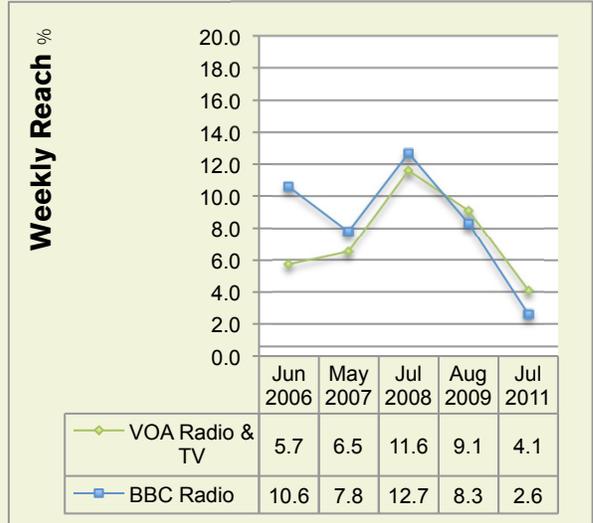
Established: 1951 to 1953; 1954 to present



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



Weekly Reach by Media (%)	
VOA	
Radio	1.2
TV	3.0
Internet	0
Total	4.1



Awareness (%)	
VOA	
	8

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	92
TV	81

Understanding	
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
VOA Radio*	
Current Events in Pakistan	95
U.S. Culture	59
U.S. Policies	40

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.1
TV	3.2

Urdu

* Understanding ratings for VOA TV are 76% for Current Events, 62% for U.S. Culture and 55% for U.S. Policies.

Data are from a July, 2011 nationwide survey of adults (15+) in Pakistan. The survey excluded areas that are inaccessible due to the prevailing security situation or natural disaster: Federal Administrative Tribal Areas (FATA), Provincially Administered Tribal Areas (PATA), Northern Areas, Jammu & Kashmir. The survey is representative of 90% of the total adult population of Pakistan. Subsequent FATA data may be found on the Pashto page.

Urdu Broadcasting

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

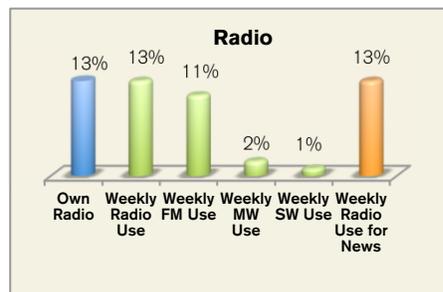
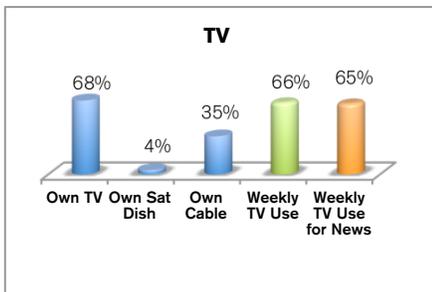
Total Population of Pakistan: 177 million

	Sample	VOA Weekly Audience
Sex	%	%
Male	52	78
Female	48	22
Age		
15-24	28	31
25-34	26	24
35-44	22	20
45-54	13	12
55-64	7	10
65+	4	3

	Sample	VOA Weekly Audience
Education	%	%
Illiterate/No Formal	39	9
Elem./Inter.	6	2
Secondary	48	63
Coll./Univ.	8	25
Ethnicity/Nationality		
Urdu	10	30
Punjabi	45	34
Sindi	12	13
Pashtun	12	8
Other	11	15

	Sample	VOA Weekly Audience
Residence	%	%
Urban	35	61
Rural	65	39
Language		
Punjabi	41	29
Sariki	14	8
Urdu	14	37
Pashto	11	7
Sindi	11	10
Other	7	7

M E D I A U S E

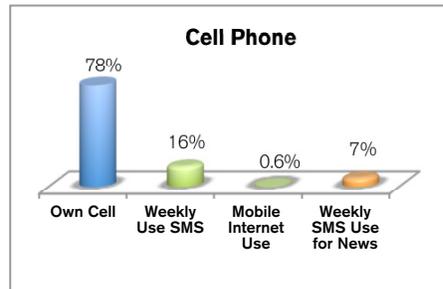
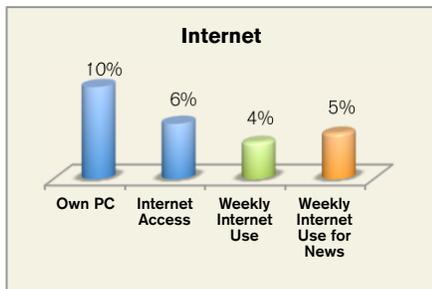


Top Ten Media Outlets

1. GEO News
2. PTV1
3. Express News
4. GEO TV
5. PTV World/11
6. Samaa
7. ARY Digital
8. ATV
9. HumTV
10. Dunya News

Top Ten Sources of News

1. GEO News
2. PTV1
3. Express News
4. ATV
5. KTN
6. GEO TV
7. PTV World
8. Aaj TV
9. Jang
10. PTV National



Web Analytics

Weekly Visitors 14,200
Weekly Visits 29,500

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- The political and security environments in Pakistan remain challenging. The country is currently waging a war against Taliban forces in the western region of the country bordering Afghanistan. This conflict has led to frequent terrorist attacks on both government and civilian targets across the country.
- Pakistan has had a functioning democracy since the elections in 2008 with the current government headed by Pakistan People's Party leaders, President Asif Ali Zardari and Prime Minister Yousuf Raza Gilani. Upcoming elections are tentatively scheduled for October, 2012 or early 2013.
- Pakistan's relations with India are volatile due to unresolved conflict over Kashmir and inflamed by terrorist attacks on India originating from Pakistan.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 75.00 (151/179)**
- Despite its Freedom House rating, Pakistan has a strong domestic media; it has seen considerable growth in independent TV and radio channels over the past 5 years. However private TV channels have been subject to government interference.
- State run TV is now outperformed by private news channels, a switch driven by greater access to cable & satellite TV, although this access is limited in rural areas.
- While private FM radio channels have mushroomed, they are not allowed to carry substantial news content.
- Internet is still limited to the urban elite. The press is diverse and free but readership is mainly confined urban areas.

P R O F I L E



Language of Broadcast: Uyghur

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

Distribution: 4-5 IBB SW frequencies; Satellite rebroadcasting

Radio: The Service broadcasts 1 hour of original program and 1 hour of repeat daily.

Video: The service produces a weekly video webcast featuring photos and videos from Uyghur communities across the globe.

New Media: The service has web and mobile sites. It has Facebook, Twitter and YouTube pages. Newsletters are sent on a daily basis.

Staff: 12

Budget: \$1,180,000

Established: 1998 to present



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

Audience Size

M I L L I O N S

Political conditions in China's Xinjiang Uyghur Autonomous Region (XUAR) make it impossible to conduct quantitative research to measure RFA's Uyghur audience.

	Radio	Internet
RFA		

Weekly Reach by Media (%)

RFA	
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach

%

Political conditions in China's Xinjiang Uyghur Autonomous Region (XUAR) make it impossible to conduct quantitative research to measure RFA's Uyghur audience.

RFA Radio

Awareness (%)

RFA	
	na

Credibility

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

RFA	
Radio	na
TV	na

Understanding

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

RFA	
Current Events	na
Current Events in Region	na
U.S. Policies	na

Quality

Combined Scores from audience panel

RFA	
Radio	3.0
TV	na

Uyghur

*China's Xinjiang Uyghur Autonomous Region (XUAR) has a total population of 20.1 million—7.9 million are Chinese; the rest belong to ethnic minority groups, of which 9 million are Uyghurs. (Source: Xinhua News, April 2006. Non-PRC sources suggest the Uyghur population may be much higher.)

In-country quantitative research in the Xinjiang Uyghur Autonomous Region (XUAR) is impossible.

Uyghur Broadcasting

Total Population of Xinjiang: 20.1 million*

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

	Sample	RFA Weekly Aud.
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	RFA Weekly Aud.
Education	%	%
Primary or less	na	na
Junior School	na	na
High School	na	na
Vocational	na	na
Coll./Univ.	na	na
Ethnicity/Nationality		
Han	na	na
Other	na	na

	Sample	RFA Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
Mandarin	na	na
Cantonese	na	na
Other	na	na

M E D I A U S E

TV	Radio	Internet	Cell Phone
Media use data is not available.			

Web Analytics

Weekly Visitors	7,300
Weekly Visits	14,000

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE (China)**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK (China)**
- The Xinjiang Uyghur Autonomous Region of China is far more restricted than the rest of China. Tensions between Uyghurs and the ruling Han majority are at an historic high after violent clashes broke out between Uyghurs and Han Chinese in Xinjiang in July 2009. Chinese authorities responded with a harsh crackdown on Uyghurs in the XUAR.
- Government surveillance of a wide range of activities in the XUAR is systematic and intense. Even the limited freedom of action enjoyed by residents in other areas of China is restricted in Xinjiang. Going beyond simple surveillance, the government literally shut down text messaging and internet in Xinjiang following the ethnic clashes in July 2009.
- As part of its Western development strategy, the Chinese government has put in place policies to encourage Han migration to the XUAR in an attempt to Sinofy the region and further secure Beijing's control of Uyghur areas.
- The research environment in Xinjiang is extremely sensitive and although limited research is possible in Xinjiang, most Uyghur research is conducted outside of the XUAR in Turkey or Central Asia.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE (China)**
- **Reporters Without Borders Index (2011): 136.00 (174/179) (China)**
- Chinese authorities tightly restrict any content they deem to be sensitive and this is doubly true of Xinjiang. Media consumers in Xinjiang are limited largely to official Chinese media sources.
- Even under normal circumstances, US International broadcasters are among the most tightly censored media outlets in Xinjiang. RFA radio broadcasts are intensively jammed and international broadcasters' websites are blocked. Such restrictions present serious obstacles to those in China attempting to access US international broadcaster content.
- After the July 2009 ethnic clashes in the XUAR Chinese media restrictions in the Xinjiang reached a new high. The Internet service was suspended to the whole of the XUAR from July 2009 until May 2010 and even in 2012 Internet restrictions remain severe. Text messaging services were suspended from July 2009 until January 2010 and text message content continues to be monitored.
- Prior to July 2009 many relatively sophisticated young Uyghurs had begun to rely on the Internet and other forms of new media for Uyghur-language sources of news and information. Many Internet-savvy Uyghurs interviewed during qualitative research reported having used proxy servers or anticensorship software to access sensitive or blocked content. As in the rest of China, blogs, podcasts, social networking sites and micro-blogs had become a normal part of many Uyghur Internet users' online routines. Recent research suggest that portable digital media, especially DVDs, have become a source of news for Uyghurs.
- However, for many Uyghurs in rural XUAR, radio remains an important source for Uyghur language news. Radio broadcasts are also looked upon favorably because listeners are less susceptible to government monitoring than those accessing sensitive content online.

P R O F I L E



Language of Broadcast: Uzbek

Content: 3.5 hrs. of original radio programming per week; 0.5 hrs. of original TV programming per week; Internet

Distribution: 3 affiliates (2 FM, 1 TV); 4 IBB SW frequencies; Satellite (Yamal, Hotbird, Asiasat)

TV: VOA's 30-minute weekly TV show *Exploring America* is carried by Keremet TV in Osh, Kyrgyzstan twice a week. The program is repeated on AsiaSat every day of the week.

Radio: The daily 30-minute radio show is carried by Radio Almaz FM in Bishkek, Kyrgyzstan and broadcasted via 4 IBB SW frequencies and Shaharwand FM in Samangan, Afghanistan as well as satellites Yamal and Hotbird.

New Media: The Service is active on web and mobile pages, podcast, RSS feeds, a Facebook fan page, Twitter, YouTube, and Russia based **Мой Мир** and **ВКонтакте** social media pages, and sends out a daily e-mail newsletter.

Staff: 4 | **Budget:** \$585,000

Established: 1958; 1972 to present; TV service established in 2004



Language of Broadcast: Uzbek

Content: 20.3 hrs. of original and 32 hrs. of repeat radio programming per week; Internet

Distribution: 1 IBB MW and 3 SW frequencies, Satellite

RFE/RL's delivery includes multiple SW frequencies, 1 cross-border MW from Armenia, Yamal, HotBird, and AsiaSat.

New Media: Internet with proxies and streaming audio, Uzbek youth-oriented page in Latin script, mobile site, Facebook, Twitter and branded YouTube page.

Staff: 10

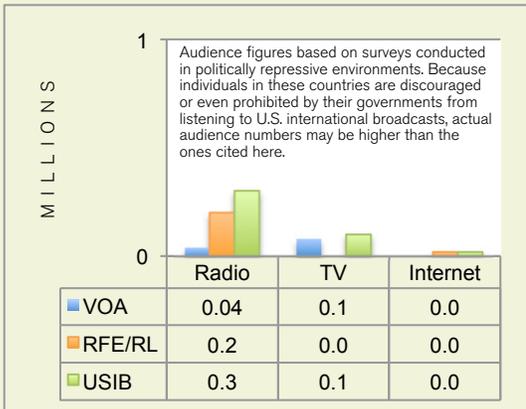
Budget: \$1,431,000

Established: 1953 to present



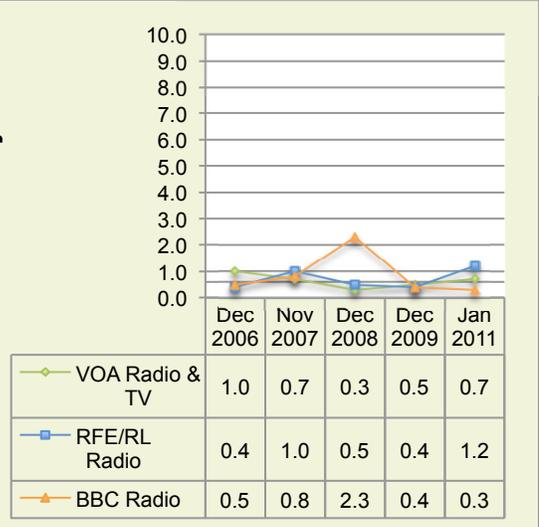
P E R F O R M A N C E D A T A (Using Data from Uzbekistan, January 2011)

Audience Size



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	0.2	1.2	1.3
TV	0.4	na	0.4
Internet	0	.1	.1
Total	0.7	1.2	1.7

Weekly Reach



Awareness (%)	
VOA	RFE/RL
19	31

Credibility

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

Understanding

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

Quality

Combined Scores from audience panel		
	VOA	RFE/RL
Radio	3.6	3.1
TV	3.6	na

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

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

Uzbek Broadcasting

Total Population of Uzbekistan: 28.5 million

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

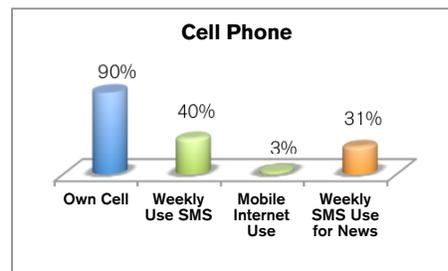
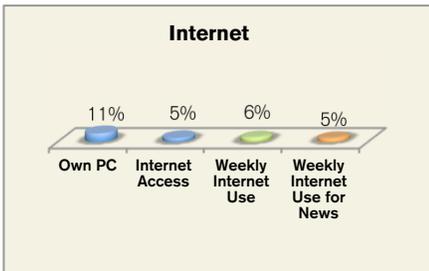
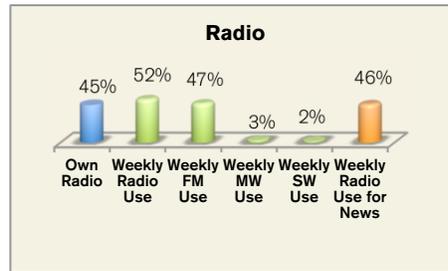
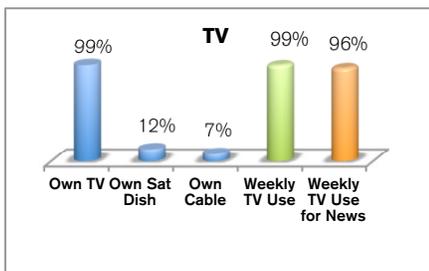
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	29	na	na
25-34	26	na	na
35-44	18	na	na
45-54	14	na	na
55-64	8	na	na
65+	5	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Education	%	%	%
None/Primary	1	na	na
Secondary	58	na	na
Technical	28	na	na
Higher	13	na	na
Ethnicity/Nationality			
Uzbek	86	na	na
Tajik	3	na	na
Russian	2	na	na
Other	10	na	na

	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Residence	%	%	%
Urban	53	na	na
Rural	47	na	na
Language			
Uzbek	86	na	na
Tajik	4	na	na
Russian	4	na	na
Other	6	na	na

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

M E D I A U S E



Top Ten Media Outlets

1. TV Yoshlar
2. UZ TV 1
3. TV Sport (Tashkent)
4. Markaz TV (Tashkent)
5. Vodiy Sadosy/ Echo Doliny
6. Uz Radio-4 Yoshlar
7. ORT-1
8. Uz Radio-2 Mashal
9. NTV
10. Namangan TV

Top Ten Sources of News

1. TV Yoshlar
2. Uz TV 1
3. TV Sport (Tashkent)
4. Darakchi
5. ORT-1
6. NTV
7. Vodiy Sadosy/ Echo Doliny
8. Uz Radio-4 Yoshlar
9. RTR
10. Uz Radio-2 Mashal

Web Analytics

VOA Weekly Visitors	3,000
Weekly Visits	6,300
RFE/RL Weekly Visitors	18,500
Weekly Visits	102,600

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- The political situation in Uzbekistan is dismal but stable. The country remains one of the most repressive in the region. Stability is maintained by draconian measures restricting citizens from voicing any opposition to authorities.
- Uzbekistan's president Islam Karimov started an unconstitutional third term in office in 2008. He and his clan continue to use their power to repress political opposition, freedom of speech, religion, and assembly. The country is also one of the most corrupt in the world -- ranked 177 out of 182 countries surveyed in Transparency International's 2011 Corruption Perceptions Index.
- As in the Soviet era, the government maintains a system of surveillance of its citizens. It has a widespread network of 'whistleblowers' in the mahallas (neighborhood communities) who report to authorities suspicious activities of citizens. The system is also used to carry out surveillance at mosques.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 83.00 (157/179)**
- The government of Uzbekistan shows no signs of decreasing pressure on media outlets or civil society despite a somewhat improved relationship with the EU and the United States in the last year. Complete control of mass media outlets, including the Internet, as well as harassment of independent journalists, continued in 2011. There are no independent media sources in Uzbekistan. Self-sustaining private media businesses are practically nonexistent. TV, in particular, is heavily censored and used by the government mainly as a propaganda tool.
- The government has also taken new steps to control the Internet. According to IREX, the government applies sophisticated filtering technology to control the flow of information via the Internet. IREX information is supported by accounts from inside the country. According to Expert-Fikri, the government has recently purchased state-of-the-art filtering software that blocks articles based on keywords and monitors social networks and blogs. The government has blocked the websites of international broadcasters for several years—not only Western ones, but also a number of Russia-originated sites that report on Uzbekistan, such as fergananeews.com, centrasia.ru and uzmetronom.com.
- The spread of recent revolutionary movements across the Middle East will probably lead to further tightening of the Internet in Uzbekistan. As the reaction to the Osh events of 2010 demonstrated, the Uzbekistani government is wary of the effects outside demonstrations could have on their internal situation. The Uzbekistani government used pictures of violence in Osh on domestic TV to relay a message to Uzbekistanis that revolutions bring violence and suffering.

P R O F I L E



Language of Broadcast: Vietnamese

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

Distribution: 2 IBB MW

Radio: VOA Vietnamese broadcasts 2 daily radio programs for a total of 1.5 hours each day.

New Media: The Service also has a multimedia website with audio, video, photos and blogs, as well as a mobile website and daily email news headlines. The Service maintains 6 social media sites: Facebook, Twitter, Yahoo 360, GooglePlus and two YouTube video pages on which it posts its 4 web video products.

Staff: 14 **Budget:** \$1,671,000

Established: 1943 to 1946; 1951 to present



Language of Broadcast: Vietnamese

Content: 17.5 hrs. of original radio programming per week; 4 hours of original video webcast per week; Satellite rebroadcasting; Internet

Distribution: 1 MW affiliates in another country, 1-5 IBB SW frequencies, satellite rebroadcasting

Radio: The Service broadcasts 2 ½ hours of original programs daily.

Video: The Service is producing 2 video news webcasts five days a week, two weekly review programs, and 3 features weekly.



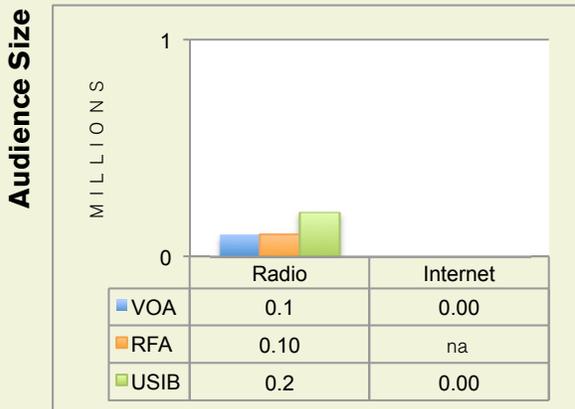
New Media: Includes a multimedia website; a mobile site; 9 Facebook pages; 2 Twitter accounts; YouTube channel; 3 blogs (rfavietnam.com, WordPress, Yahoo 360 Plus) with 9 bloggers (3 inside the country); and an e-newsletter five days a week with 60,000 subscribers.

Staff: 18 **Budget:** \$1,709,000

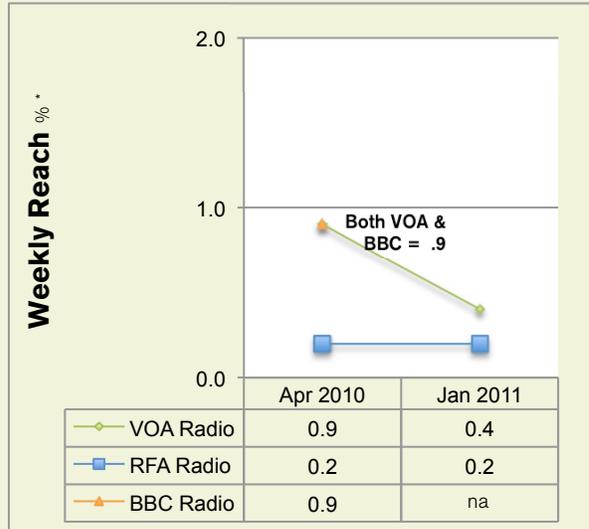
Established: 1997 to present

Audience figures are based on surveys conducted in politically repressive environments that are generally hostile to international broadcasting. Because individuals are discouraged or even prohibited by their government from listening to U.S. international broadcasts, actual audience numbers may be higher than the ones cited here.

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



Weekly Reach by Media (%)			
	VOA	RFA	USIB
Radio	0.4	0.2	0.6
TV	na	na	na
Internet	na	0.0	0.0
Total	0.4	0.2	0.6



Awareness (%)	
VOA	RFA
na	na

Vietnamese

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 Events in Vietnam (RFA)	na	na
U.S. Policies	na	na

Quality	Combined Scores from audience panel	
	VOA	RFA
Radio	3.2	3.0
TV	na	na

Jan 2011 survey of adults (15-64) in 63 cities and provinces of Vietnam. Sample includes coverage of rural areas in these regions.

*Due to differences in the sample areas and in weighting among recent surveys, trend data are not available.
**Samples of VOA and RFA weekly listeners in the survey are too small for meaningful analysis.

Vietnamese Broadcasting

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

Total Population of Vietnam: 87.9 million

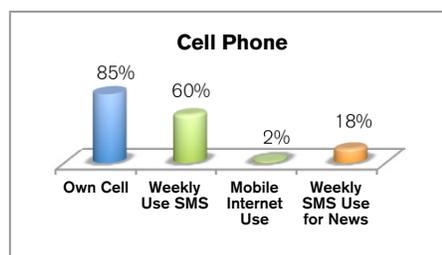
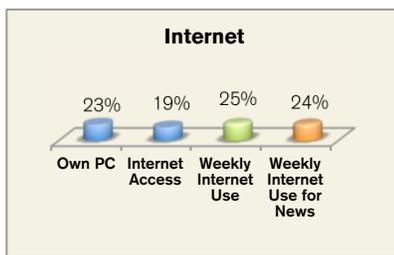
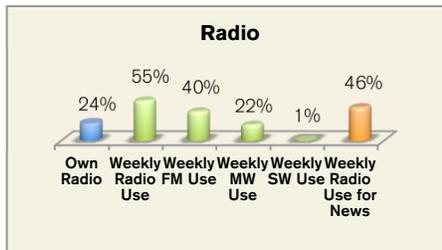
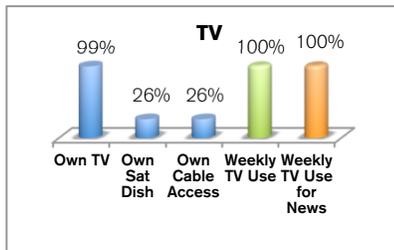
	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	26	na	na
25-34	28	na	na
35-44	22	na	na
45-54	16	na	na

	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Education	%	%	%
No formal	9	na	na
Primary	34	na	na
Secondary	41	na	na
Vocational	5	na	na
Coll./Univ.	11	na	na
Ethnicity/Nationality			
na		na	na

	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Residence	%	%	%
Urban	31	na	na
Rural	69	na	na
Language			
Vietnamese	na	na	na
Chinese	na	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. VTV
2. Local provincial TV
3. Other provincial TV
4. Regional radio stations
5. Voice of Vietnam
6. VCTV
7. HCMC Cable TV
8. SCTVC
9. MTV
10. Hanoi Cable TV

Web Analytics

VOA Weekly Visitors	159,500
Weekly Visits	396,400
RFA Weekly Visitors	165,600
Weekly Visits	361,300

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Vietnam has a one-party, authoritarian government, which strictly limits the freedoms of its citizens. The State Department's most recent human rights report noted a crackdown on dissent. "Individuals were arbitrarily detained for political activities and denied the right to fair and expeditious trials." The report also noted "political influence, endemic corruption, and inefficiency" which it said "strongly distorted the judicial system."
- Vietnamese living standards have risen rapidly since the mid-1980s when the government launched its Doi Moi reforms. The rapid growth in manufacturing of consumer goods for international markets expanded employment and entrepreneurial opportunities for Vietnamese, but the global recession has slowed foreign investment and demand for goods dramatically.
- Vietnam has held joint military exercises with the United States Navy in the South China Sea, where its claims to the oil and mineral-rich Spratly Islands have conflicted with China. China's naval activities in the disputed waterway prompted hundreds of anti-China protesters to take to the streets in Hanoi last summer. While Vietnamese initially tolerated these activities, the government eventually arrested dozens.
- Vietnam has had numerous disputes with members of the Catholic Church over land claims and other issues. Currently, 17 young Vietnamese – mostly Catholic activists arrested since last July -- await trial in Hanoi on charges of "carrying out activities aimed at overthrowing the people's administration" or for establishing or joining organizations with the "intent" to do so.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 114.00 (172/179)**
- There are no independent, privately run media outlets in Vietnam. Virtually all media outlets are under direct government control, including the managing and supervising of all publication and broadcasting activities. Reporters Without Borders ranked Vietnam 172 out of 179 countries in its 2011-2012 World Press Freedom Index. Freedom House's Press Freedom Index categorizes Vietnam as "not free."
- Last summer, under pressure from China, Hanoi also arrested two journalists for reporting on China's abuse of Falun Gong practitioners.
- The government is hostile toward RFA, VOA and other international broadcasters who continue to face numerous obstacles in their efforts to disseminate news content (whether via radio or internet).
- The government has been cracking down on Internet bloggers in particular, with the second largest number of imprisoned bloggers in a country outside China.
- Although the Vietnamese government has restricted private access to satellite dishes, satellite penetration is now 26%, with most using small Ku band dishes.
- Mobile phone ownership is very high in Vietnam—85 percent of households have at least one mobile phone; 70 percent of adults have their own personal mobile phone. There is relatively little difference between urban (93 percent of households) and rural areas (82 percent) in mobile penetration.

P R O F I L E



Language of Broadcast: English, Ndebele & Shona

Content: 12 hrs. of original radio programming ("Studio 7") per week; Internet

Distribution: 1 MW and 2 or 3 IBB SW frequencies

Radio: Though the government of Zimbabwe started jamming the Zimbabwe Service's 909 AM signal in mid-2006, such interference has tapered off to a level best described as intermittent. The service's 3 SW frequencies cover the entire country of Zimbabwe, including the 20 percent of the national territory not reached by the Zimbabwe Broadcasting Corporation.

New Media: The service also has a website (with sections for each language and streaming of programs) and periodically uses SMS as another distribution channel and a method for seeking information from its audience. The service maintains a Facebook page and a Twitter account and sends email newsletters in all three languages.

Staff: 2

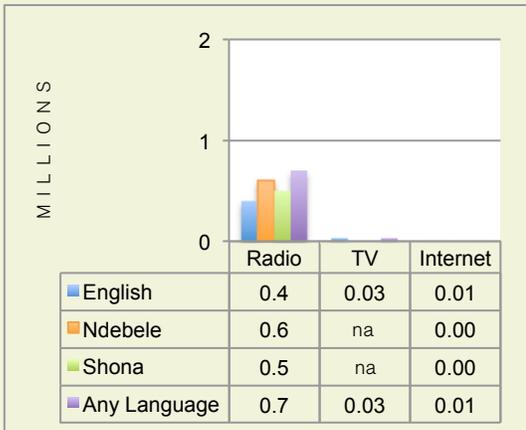
Budget: \$1,340,000

Established: 2003 to present



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

Audience Size



Weekly Reach %



Weekly Reach by Media (%)				
	English	Ndebele	Shona	Any Language
Radio	5.4	8.8	7.9	10.3
TV	0.4	na	na	0.4
Internet	0.1	0.0	0.0	0.1
Total	5.8	8.8	7.9	10.7

Awareness (%)	
	VOA
	47

Zimbabwe

Credibility

Percentage of surveyed weekly audience that found broadcasts credible (%)*	
	VOA
Radio	90
TV	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)*	
	VOA Radio
Current Events	94
U.S. Culture	63
U.S. Policies	52

Quality

Combined Scores from audience panel	
	VOA
Radio	3.8
TV	3.4

*Credibility/understanding ratings and demographic profile information are for the VOA Zimbabwe Project in any language.

Data are from an August 2011 survey of adults (15+) in Zimbabwe.

English, Ndebele & Shona Broadcasting

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

Total Population of Zimbabwe: 12.1 million

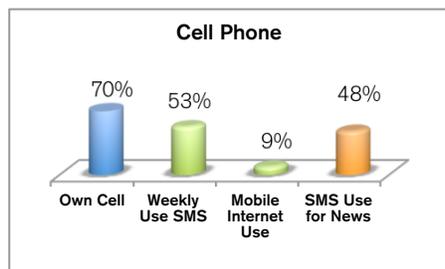
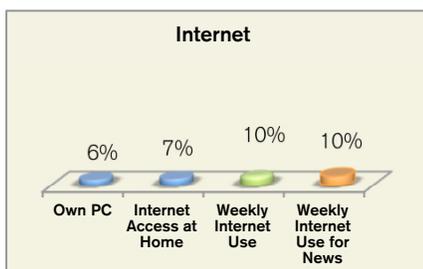
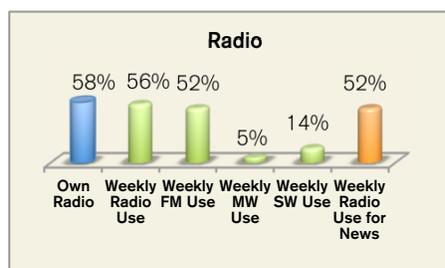
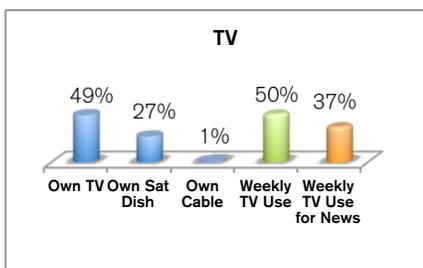
	Sample	VOA Weekly Audience*
Sex	%	%
Male	48	61
Female	52	39
Age		
15-24	37	34
25-34	27	33
35-44	13	14
45-54	9	8
55-64	8	6
65+	6	3

	Sample	VOA Weekly Audience*
Education	%	%
None	6	2
Primary	26	24
Inc Secondary	25	24
Secondary	39	43
Higher	4	7
Ethnicity/Nationality		
Shona	78	74
Ndebele	12	14
Other	10	12

	Sample	VOA Weekly Audience*
Residence	%	%
Urban	39	31
Rural	61	69
Language Spoken At Home		
Shona	82	77
Ndebele	12	17
English	1	1
Other	5	5

*Credibility/understanding ratings and demographic profile information are for the VOA Zimbabwe Project in any language.

M E D I A U S E



Top Ten Media Outlets

1. Radio Zimbabwe
2. ZTV1
3. Power FM
4. SABC
5. Botswana TV
6. National FM
7. Spot FM
8. ZTV2
9. France 24
10. VOA/Studio 7

Top Ten Sources of News

1. Radio Zimbabwe
2. ZTV1
3. SABC
4. VOA/Studio 7
5. Power FM
6. Herald
7. Botswana TV
8. National FM
9. France 24
10. ZTV2

Web Analytics

Weekly Visitors 324,700
Weekly Visits 629,800

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- The dispute over the country's electoral timetable has not been resolved: President Robert Mugabe had insisted that the latest possible date for polls will be March 2012—a stance rejected by both the mainstream and the minority wings of the Movement for Democratic Change (MDC), with Morgan Tsvangirai, the MDC leader and prime minister, promising that elections will be held only after a new constitution has been drafted and approved at a national referendum, and new electoral laws are in place. Welshman Ncube, who leads the breakaway MDC-N movement, has been even more dismissive, saying that the drafting of a new constitution has not even started and that elections cannot be held before 2013.
- Work on drafting a new constitution is already more than a year behind schedule, suggesting that a referendum on a new measure will not be held until early next year. Thereafter the MDC will demand the compilation of a new electoral register, a process that will take several months at least. It is feasible that Mr. Mugabe's Zimbabwe African National Union-Patriotic Front (ZANU-PF) will simply skip this part of the process, but any such elections would be unlikely to be recognised by the international community—and possibly not by African states either.
- Continued disputes over the election schedule underscore the fact that many of the steps agreed by the signatories of the Global Political Agreement (GPA) that created Zimbabwe's Government of National Unity (GNU) have still not been implemented, three years after the GPA was signed in September 2008. Promised media and electoral reforms are not in place, while repressive legislation such as the Public Order and Security Act and the Access to Information and Protection of Privacy Act has yet to be repealed.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 55.00 (117/179)**
- Strict government control of the media continues, but there are some signs of liberalization. A new private newspaper was granted a license to print in May 2010—the first in seven years—and the newly formed Zimbabwe Media Commission theoretically has a mandate for reforming the media sector.
- With wide availability of cheap reception hardware, free-to-air satellite programming from South Africa via SABC, and constrictions on the local media scene, ownership of satellite dishes and viewing of foreign TV programming has risen substantially. Greater usage of external satellite TV appears to be one of the factors leading to a decline in the VOA audience, though this phenomenon may be reversed due to plans to encrypt the South African channels.
- Local journalists are subject to intimidation and imprisonment, and foreign journalists are regularly denied credentials or harassed in other ways. Strict media laws have been used to restrict the activities of private media outlets and journalists.
- Despite the controls on domestic media, a number of international stations broadcast into the country via shortwave radio, including not only VOA, BBC, and Deutsche Welle but also two stations run by expatriate Zimbabweans, Voice of the People and SW Radio Africa. The government has periodically jammed these shortwave broadcasts.
- Media access and use are very sensitive issues in Zimbabwe, and interviewees must secure permission to conduct interviews from the local authorities in each area they visit. Any study mentioning international broadcasters is met with suspicion by authorities loyal to the ruling Zanu-PF party, and at times local authorities will deny permission to researchers.