



Broadcasting
Board of
Governors



Annual Language Service Review Briefing Book





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Acknowledgments

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Preface

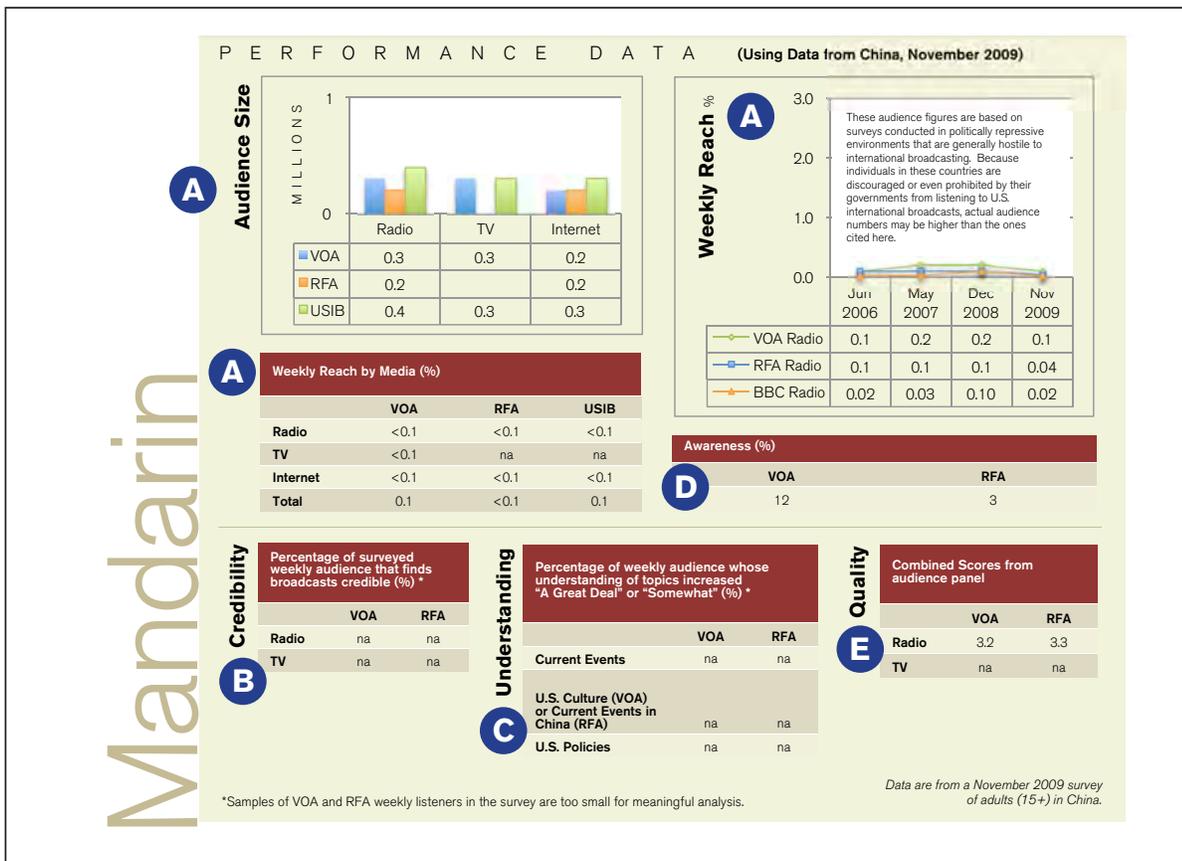
This is the briefing book for 2011 in support of the BBG's congressionally mandated, annual review of all broadcast language services – the process known as Language Service Review.

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

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

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

Performance Data Section



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

Audience Composition Section

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

A

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

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

B Mandarin Broadcasting
Total Population of China: 1,345.9 million

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

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

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

Media Use Section

M E D I A U S E

A

Radio

Internet

Cell Phone

B **Top Ten Media Outlets**

- CCTV1
- CCTV News
- CCTV2
- CCTV4
- Phoenix TV (Chinese)
- Provincial Radio
- Sina.com
- Phoenix TV (Info)
- Local Radio
- Sohu.com

C **Top Ten Sources of News**

- CCTV1
- Provincial TV
- Local TV
- CCTV News
- CCTV2
- Local Press
- CCTV4
- CCTV12
- CCTV5
- Baidu.com

D **Web Analytics**

VOA
Wkly. Visitors: 83,800
Wkly. Visits: 192,000

RFA
Wkly. Visitors: 48,800
Wkly. Visits: 84,200

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

8

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

Context Section

C O N T E X T

A **Stability**

Political Freedom

Press Freedom

Ease of Distribution

Competition

Political Situation

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

Media Environment

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

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



Broadcasting
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Language Service Profiles A-Z

P R O F I L E



Language of Broadcast: Albanian

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

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

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

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

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

Staff: 11

Budget: \$1,863,000

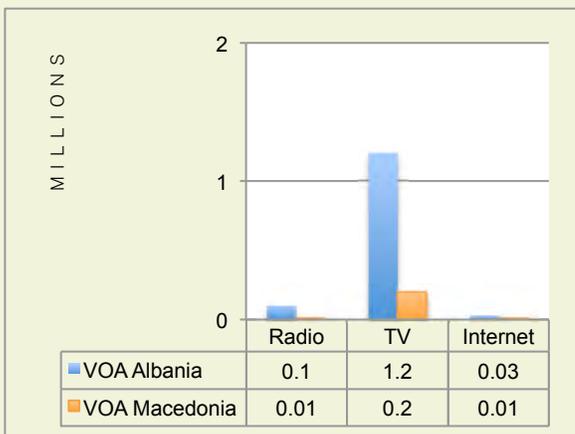
Established: 1943 to 1945; 1951 to present; TV service established in 1999



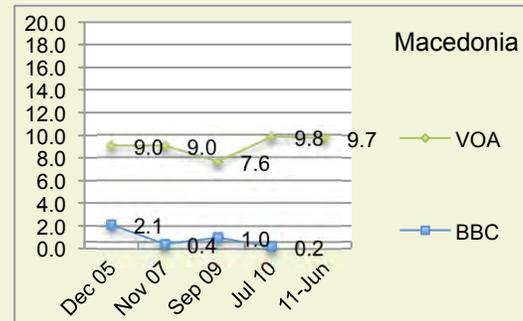
P E R F O R M A N C E D A T A

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

Audience Size



Weekly Reach %



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

Awareness (%)		
	Albania	Macedonia
Radio	70	74

Credibility

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

Understanding

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

Quality

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	3.3

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

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

Albanian

Albanian Broadcasting

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

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

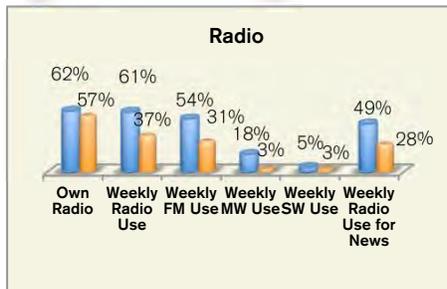
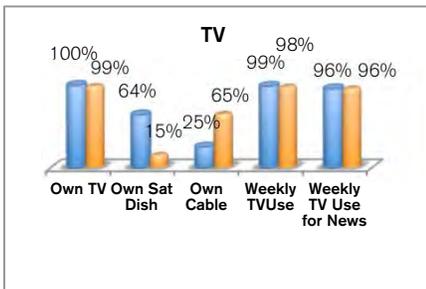
	Alb. Sam.	Alb. Wkly. Aud.	Mac. Sam.	Mac. Wkly. Aud.
Sex	%	%	%	%
Male	50	52	50	59
Female	50	48	50	41
Age				
15-24	25	18	19	23
25-34	18	15	19	22
35-44	17	19	18	24
45-54	17	20	17	14
55-64	12	15	14	10
65+	10	12	14	7

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

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

M E D I A U S E

Albania Macedonia

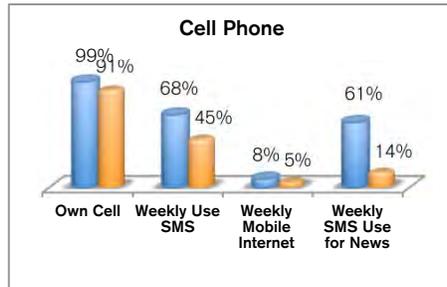
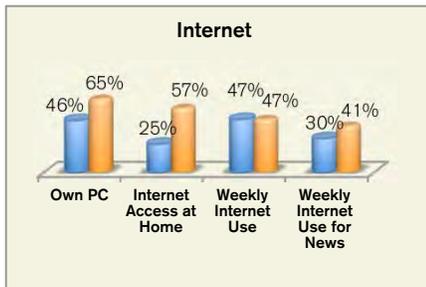


Albania Top Ten Sources of News

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

Macedonia Top Ten Sources of News

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



Web Analytics

Weekly Visitors	14,200
Weekly Visits	32,000

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Voice of America



Language of Broadcast: Albanian

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

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

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

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

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

Staff: 11

Budget: \$1,863,000

Established: 1943 to 1945; 1951 to present;



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

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

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

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



Staff: 12+

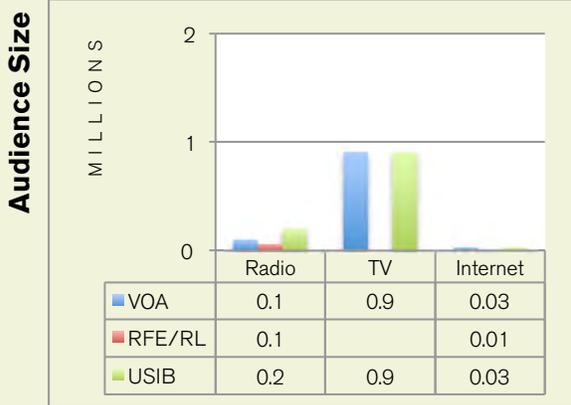
Budget: \$4,525,000+

Established: 1994 to present

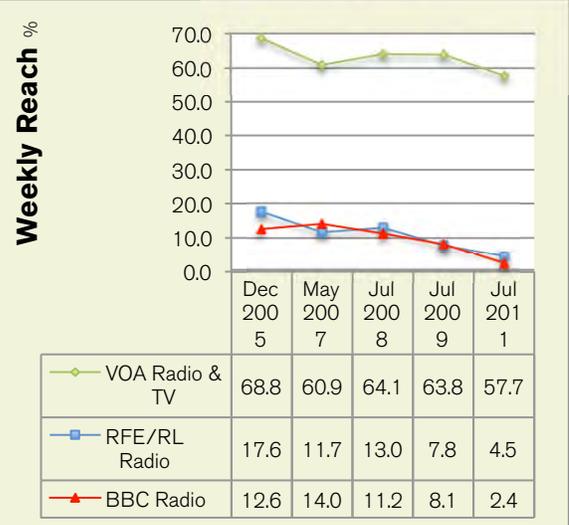
† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Croatian, Macedonian, Montenegrin and Serbian.

Albanian to Kosovo

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



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



Awareness (%)	
VOA	RFE/RL
80	73

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

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

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

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

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

Albanian to Kosovo Broadcasting

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

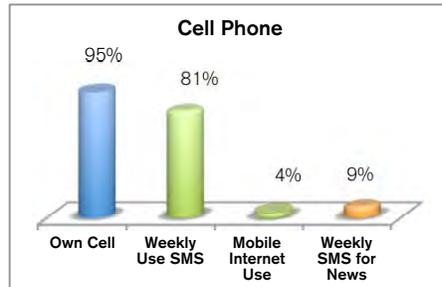
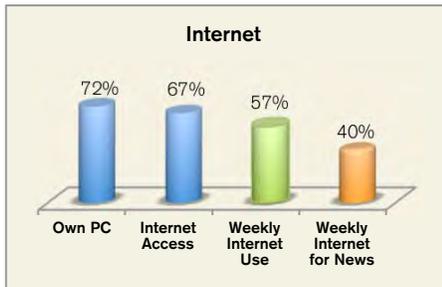
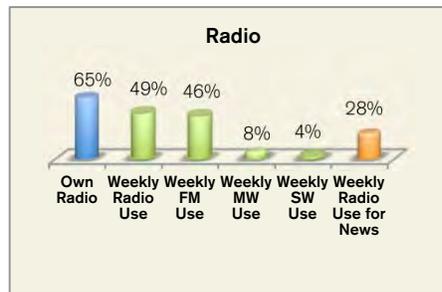
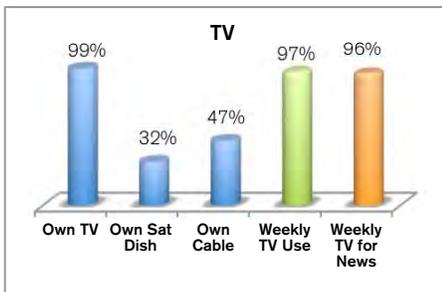
Total Population of Kosovo: 2.3 million

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E

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



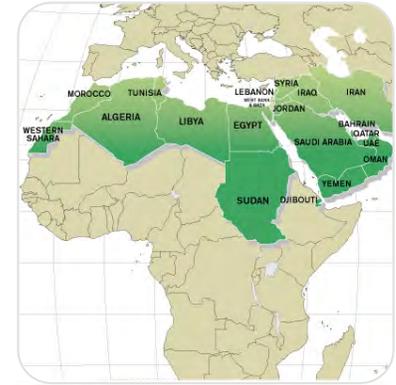
Language of Broadcast: Arabic

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

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

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

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



Staff: 498

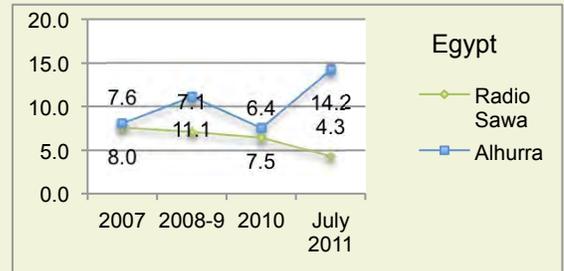
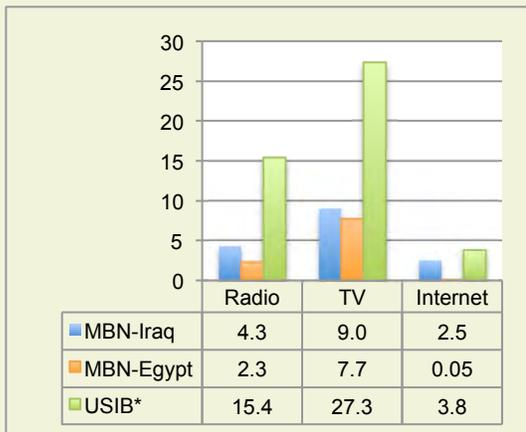
Budget: \$110,332,000†

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

† includes additional indirect costs

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

Audience Size



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

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

Arabic

Credibility

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

Understanding

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

Quality

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

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

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

Arabic Broadcasting

Total Population of Iraq: 32.7 million

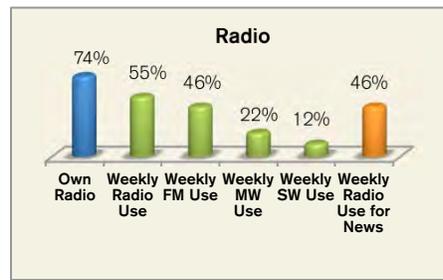
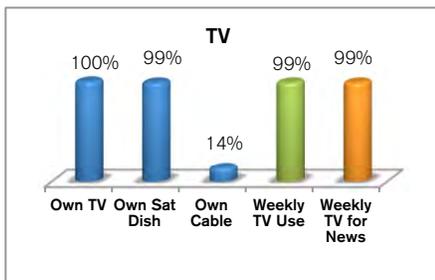
A U D I E N C E C O M P O S I T I O N

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

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

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

M E D I A U S E

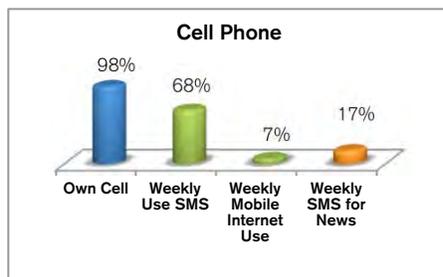
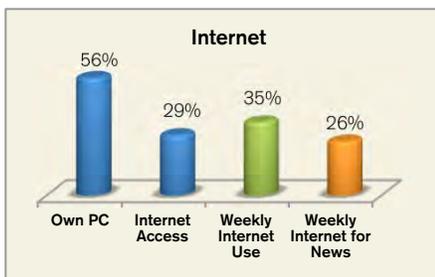


Top Ten Media Outlets

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

Top Ten Sources of News

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



C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Arabic

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

Distribution:

Radio: 13 FM transmitters, One cross-border MW

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

Staff: 11

Budget: \$2,215,000

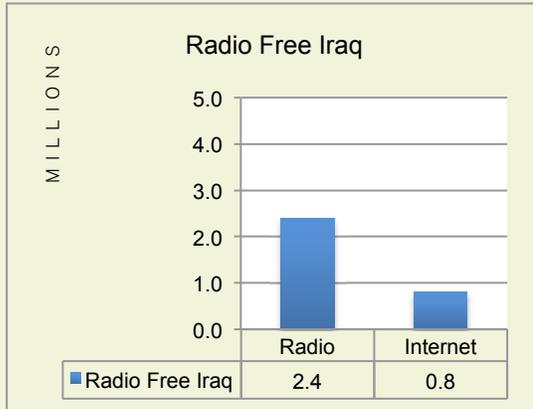
Established: 1998 to present



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

(Using Data from Iraq, March 2011)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)

Radio Free Iraq	
Radio	12.9
TV	na
Internet	4.3
Total	16.1

Awareness (%)

Radio Free Iraq	
Awareness (%)	46%

Credibility

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

Understanding

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

Quality

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

Arabic

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

Arabic Broadcasting

Total Population of Iraq: 32.7 million

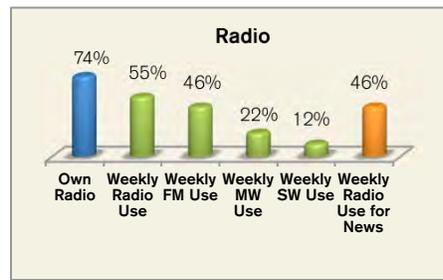
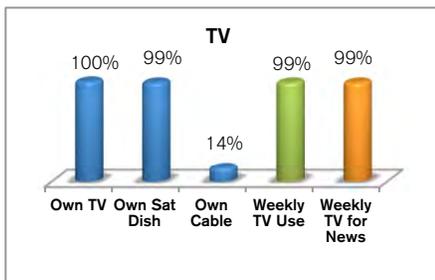
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M E D I A U S E

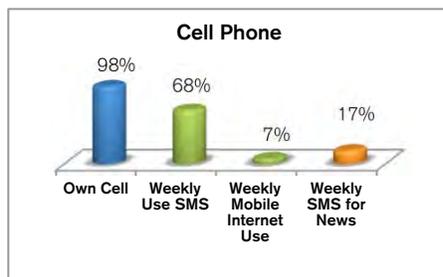
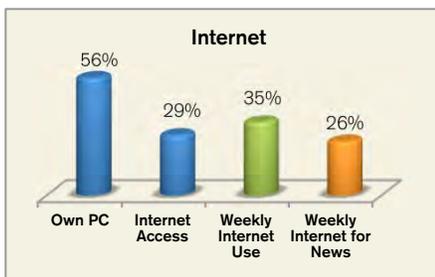


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C O N T E X T



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

Audience Size & Weekly Reach

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

Awareness, Credibility & Understanding

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

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

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

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

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

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

Audience Size & Weekly Reach (cont.)

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

Media Use

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

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

P R O F I L E



Language of Broadcast: Armenian

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

Distribution: 1 affiliate (1 TV)

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

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

Staff: 2

Budget: \$386,200

Established: 1951 to present; TV programming established in 2004



Language of Broadcast: Armenian

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

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

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

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

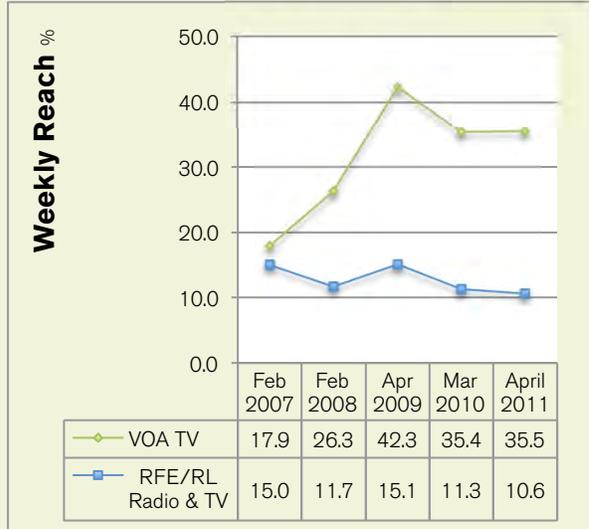
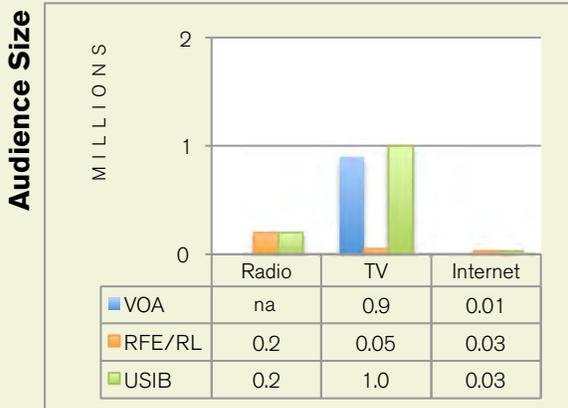


Staff: 6

Budget: \$1,499,000

Established: 1953 to present

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



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

Awareness (%)*	
VOA	RFE/RL
48	64

Armenian

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

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

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

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

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

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

Armenian Broadcasting

Total Population of Armenia: 3.1 million

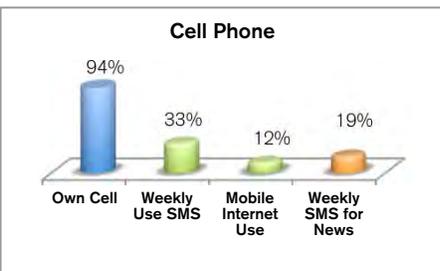
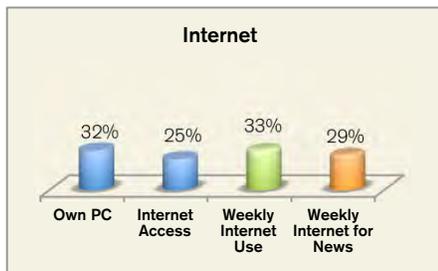
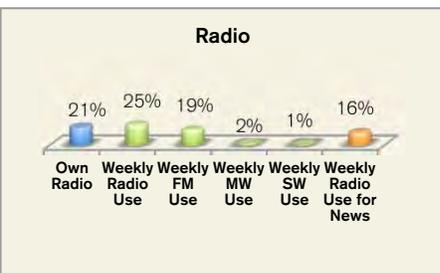
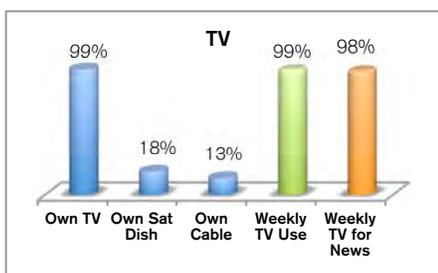
A U D I E N C E C O M P O S I T I O N

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

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

C O N T E X T



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

Media Environment

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

P R O F I L E



Language of Broadcast: Azerbaijani

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

Distribution: Satellite

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

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

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

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

Established: 1951 to 1953; 1982 to present



Language of Broadcast: Azerbaijani

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

Distribution:

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

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

Staff: 6

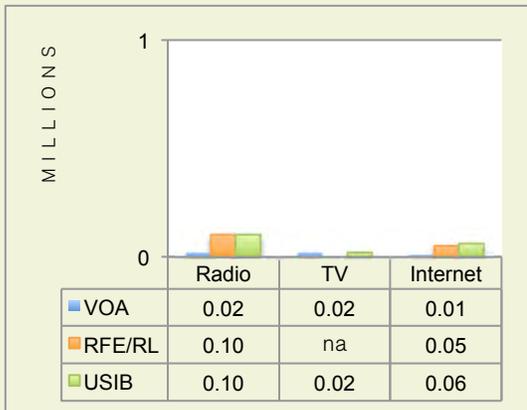
Budget: \$1,654,000

Established: 1953 to present



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

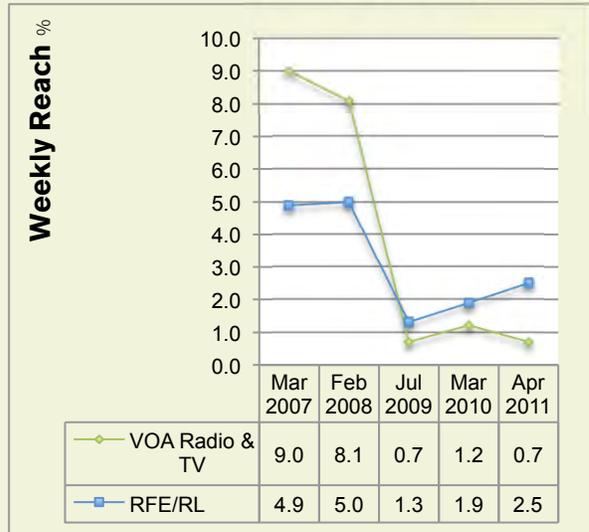
Audience Size



Weekly Reach by Media (%)

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

Weekly Reach %



Awareness (%)

	VOA	RFE/RL
	36	52

Azerbaijani

Credibility

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

	VOA	RFE/RL
Radio	na	na
TV	na	na

Understanding

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

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

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.4	3.3
TV	3.4	na

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

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

Azerbaijani Broadcasting

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

Total Population of Azerbaijan: 9.2 million

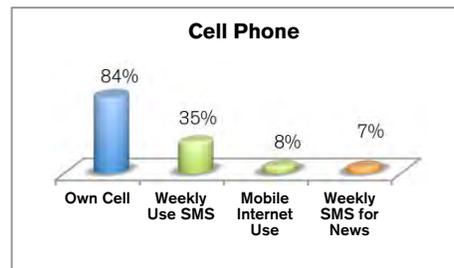
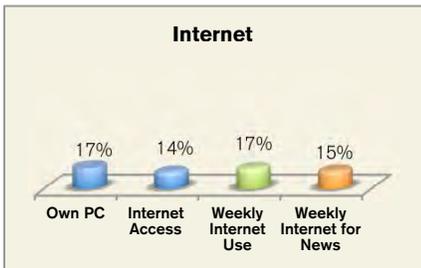
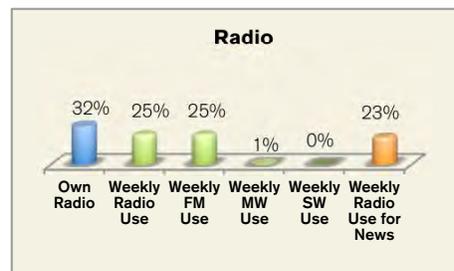
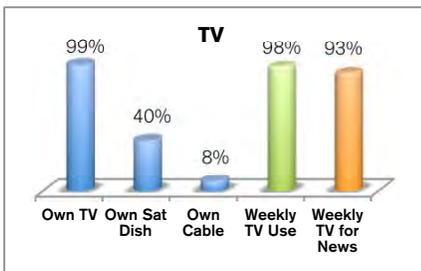
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Sex	%	%	%
Male	48	na	na
Female	52	na	na
Age			
15-24	28	na	na
25-34	15	na	na
35-44	13	na	na
45-54	14	na	na
55-64	15	na	na
65+	16	na	na

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

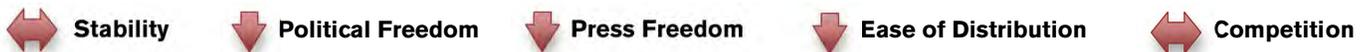
Top Ten Sources of News

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

Web Analytics

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Bangla

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

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

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

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

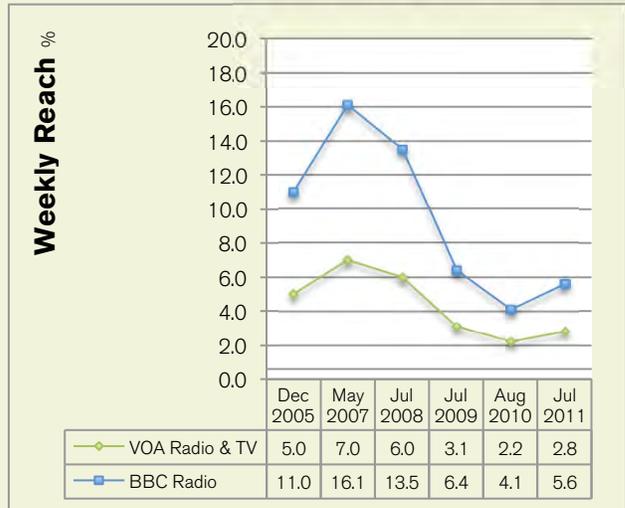
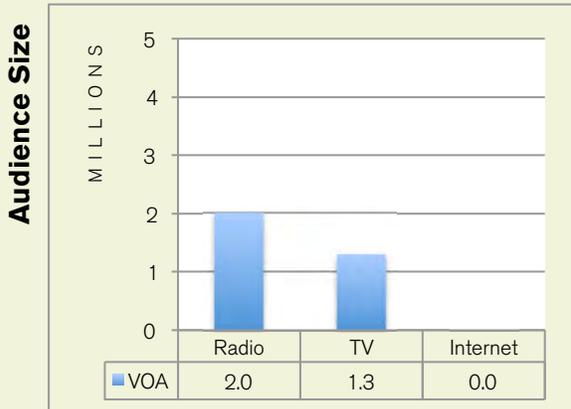
Staff: 7

Budget: \$1,324,000

Established: 1958 to present



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



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

Awareness (%)	
VOA	
	31

Bangla

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

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

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.3
TV	3.3

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

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

Bangla Broadcasting

Total Population of Bangladesh: 150.7 million

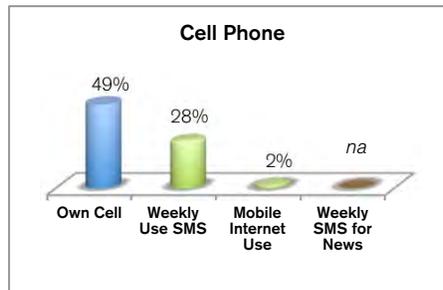
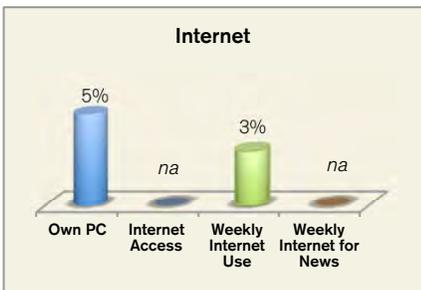
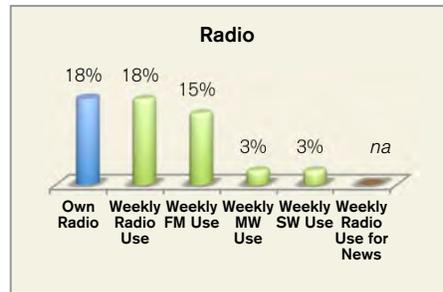
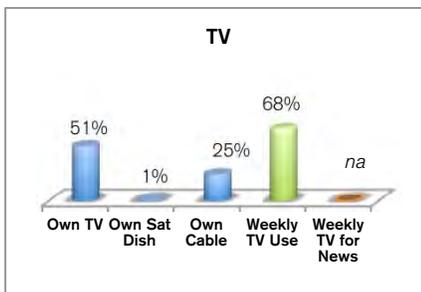
A U D I E N C E C O M P O S I T I O N

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

Weekly Visitors 2,000
Weekly Visits 3,200

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Belarusian

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

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

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

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

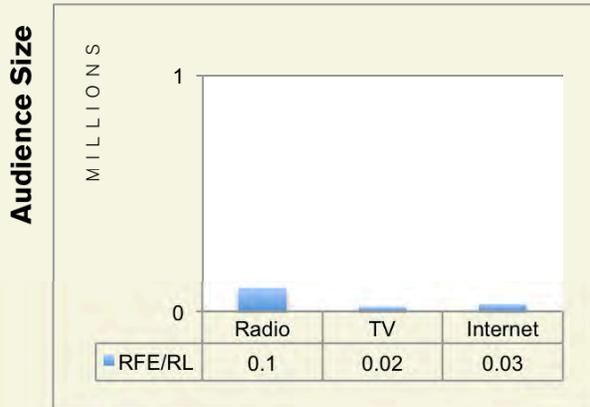
Staff: 12

Budget: \$2,379,000

Established: 1954 to present

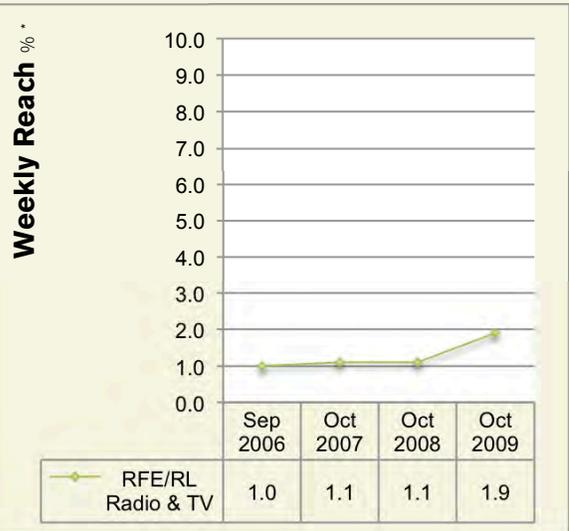


P E R F O R M A N C E D A T A (Using Data from Belarus, October 2009)



Weekly Reach (%) by Media

	RFE/RL
Radio	1.7
TV	0.3
Internet	0.4
Total	1.9



Awareness (%)

	RFE/RL
Awareness	29

Credibility

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

	RFE/RL
Radio	na
TV	na

Understanding

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

	RFE/RL
Current Events	na
Current Events in Belarus	na
U.S. Policies	na

Quality

Combined Scores from audience panel

	RFE/RL
Radio	3.3
TV	na

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

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

Belarusian

Belarusian Broadcasting

Total Population of Belarus: 9.5 million

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

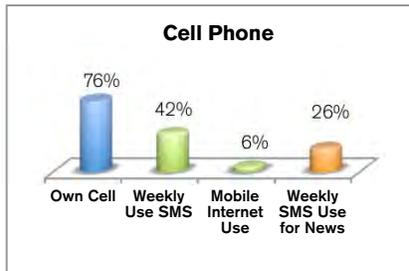
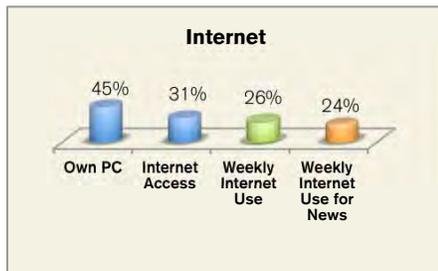
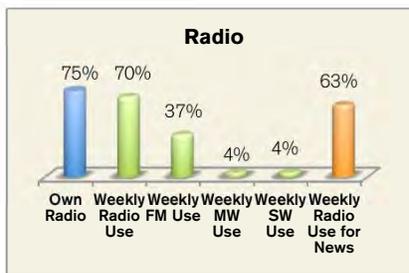
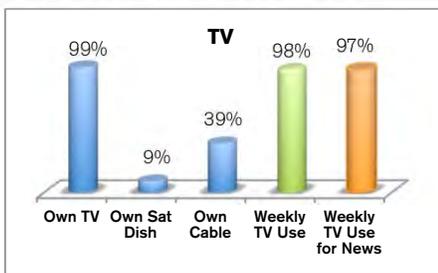
	Sample	RFE/RL Weekly Audience**
Sex	%	%
Male	46	na
Female	54	na
Age		
15-24	18	na
25-34	17	na
35-44	17	na
45-54	19	na
55-64	12	na
65+	17	na

	Sample	RFE/RL Weekly Audience**
Education	%	%
None	3	na
Primary	12	na
Secondary	62	na
Coll./Univ.	23	na
Ethnicity/Nationality		
Belarusian	86	na
Russian	9	na
Other	6	na

	Sample	RFE/RL Weekly Audience**
Residence	%	%
Urban	74	na
Rural	26	na
Language		
Belarusian	4	na
Russian	64	na
Mix of Bel./Russ.	32	na

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

M E D I A U S E



Top Ten Media Outlets

1. ONT
2. BT-1
3. RTR-Belarus
4. NTV-Belarus
5. LAD
6. STV
7. Belarus Radio 1
8. Mir
9. Radius FM
10. Discovery Channel

Top Ten Sources of News

1. ONT
2. BT-1
3. NTV-Belarus
4. RTR-Belarus
5. Belarus Radio 1
6. SB Belarus Segodnya
7. Komolskaya Pravda
8. Euronews
9. www.tut.by
10. www.yandex.ru

Web Analytics

Weekly Visitors 17,700
Weekly Visits 106,100

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): MODERATE RISK**
- Alyaksandr Lukashenka, president since 1994, won re-elections in December 2010 with 79 percent of the vote, according to government officials. Following the election voters peacefully filled a large square in the center of Minsk in protest, claiming the election was a farce. Police violently attempted to break up the crowd and arrested more than 600 people, including seven of the nine opposition leaders.
- Following the election, protests and arrests both the European Union and the United States adopted sanctions against the country in an effort to punish Mr. Lukashenko.
- Belarus is experiencing the worst economic crisis since the collapse of the Soviet Union. With the sanctions in place, it has become isolated and looks to Russia for economic support.
- Since the December 2010 elections, seeing the EU and China have been wooing Belarus, Russia stepped up efforts to keep their neighbor close. The presidents of Russia, Belarus, and Kazakhstan established a Common Economic Space between the three countries, allowing for free flow of goods, capital, services and labor.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 99 (168/179)**
- President Lukashenka introduced a media law in 2008 that curtails press freedom by giving the state monopoly over both distribution and information about social, economic or political affairs. There is limited accessibility to private newspapers and the national television is wholly owned and controlled by the government. In 2009, the government enacted new legislation that makes criticism of the president and government a criminal offense, punishable by prison sentences or high fines.
- Censorship of all Internet activity continues as the government owns Belarus' only internet-service provider. Since June 2010, internet café owners are required to identify users and track their activities.
- Chapter97.org founder, Aleh Byabenin, a site that publishes independent analysis, passed away in September 2011. The circumstances of his death have been disputed but the site continues to operate. In October, Russian television networks were taken off the air and the government banned Russian-produced documentaries.

P R O F I L E



Voice of America



Language of Broadcast: Bosnian†
Content: 2.75 hrs. of original TV programming per week; Internet

Distribution: 15 affiliates (15 TV)

TV: VOA's Bosnian Service's *Studio Washington* is broadcast by satellite and on 15 television stations throughout Bosnia-Herzegovina. VOA Bosnian also produces a weekly live-to-tape TV interactive for the nationally broadcast and top-rated BHT1 network. The interactive is part of the political and foreign affairs show *Global*, which airs Mondays at local prime time.

Web: Multimedia content on web and mobile sites is updated daily. The Service's website features a *U.S. News in One Minute* digital only product, offers videos on YouTube and engages audiences via Facebook and Twitter.

Staff: 4

Budget: \$824,000

Established: 1996 to present; TV service established in 1997



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

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

Distribution: 193 affiliates (150 FM, 43 TV) RFE/RL's delivery includes affiliates in Bosnia and Herzegovina (49 FM, 29 TV), Kosovo (37 FM), Macedonia (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 launched branded YouTube pages in process.



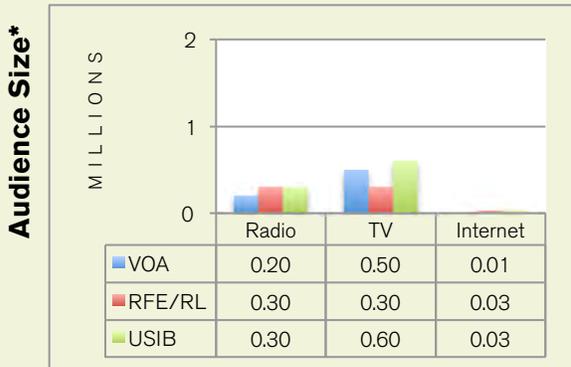
Staff: 12

Budget: \$4,525,000†

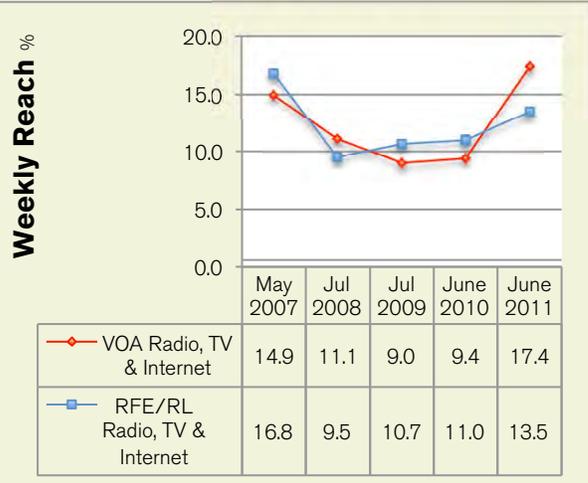
Established: 1994 to present

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

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



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	5.8	8.1	10.0
TV	16.1	8.2	18.2
Internet	0.4	0.9	1.0
Total	17.4	13.5	22.0



Awareness (%)	
VOA	RFE/RL
78	79

Bosnian

Credibility	Percentage of surveyed weekly audience that finds broadcasts credible (%)	
	VOA	RFE/RL**
	Radio	95
TV	96	

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV***	RFE/RL**	
	Current Events	96	90
	U.S. Society (VOA)/Current Events in Bosnia	90	88
U.S. Policies	75	na	

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
	Radio	3.5
TV	3.1	na

*Audience reaches and sizes for VOA and RFE/RL in Bosnia can only be meaningfully compared using figures for VOA content in Bosnian, Serbian, and Croatian. These audiences are .2 million for Internet. VOA total weekly reach is 21.2%, 7.1% for radio, 19.4% for TV and .6% for Internet.

**Credibility and understanding ratings are for RFE/RL on any platform.

***Understanding ratings for VOA Radio are 95% for Current Events, 79% for U.S. Society and 79% for U.S. Policies.

Data are from a June 2011 survey of adults (15+) in Bosnia

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

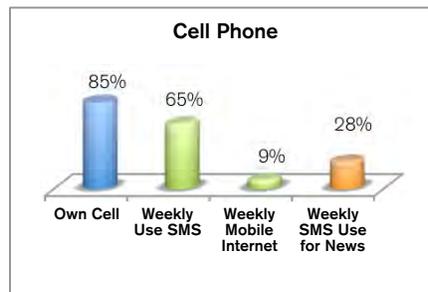
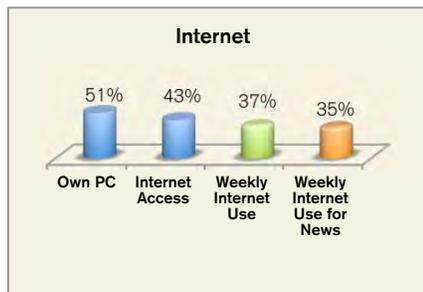
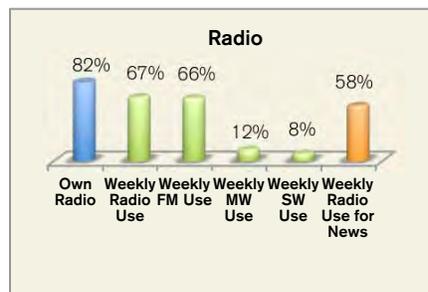
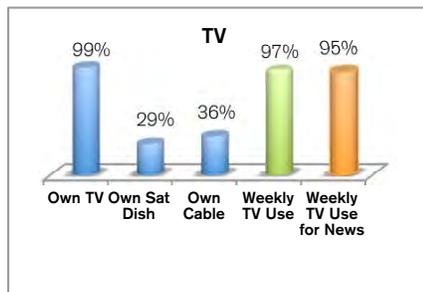
Total Population of Bosnia-Herzegovina: 3.8 million

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Sex	%	%	%
Male	48	53	55
Female	52	47	45
Age			
15-24	19	11	11
25-34	17	14	12
35-44	17	19	19
45-54	16	20	17
55-64	14	18	21
65+	17	18	21

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Education	%	%	%
None	3	2	2
Primary	22	18	20
Secondary	61	63	63
Higher	14	16	16
Ethnicity/Nationality			
Bosniak	49	66	64
Bosnian	2	4	3
Serbian	35	12	15
Croatian	12	17	15
Other	1	1	2

	Sam.	VOA Weekly Aud.	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	45	49	51
Rural	55	51	49
Language			
Bos/Ser/Cro	99	99	99
Other	1	1	1

M E D I A U S E



Top Ten Media Outlets

11. FTV
12. BHT
13. OBN
14. Pink BH
15. RTRS
16. TV BN
17. HRT
18. NTV Hayat
19. TV Nova
20. RTL Hrvatska

Top Ten Sources of News

1. FTV
2. BHT
3. OBM
4. RTRS
5. Nova TV
6. TUBM
7. Dhevni Avaz
8. Pink BH
9. MTV Hayat
10. ATV Banga Luka

Web Analytics

VOA Weekly Visitors 2,000

Weekly Visits 3,500

RFE/RL

Weekly Visitors 19,200+

Weekly Visits 52,500+

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

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- The protracted talks on resolving the nearly year-long government crisis at the state level continued in August with attempts to reach agreement on forming ruling coalitions in three of the ten cantons of larger entity of Bosnia and Herzegovina (BiH), the Bosniak (Bosnian Muslim)-Bosnian Croat Federation. The negotiations have brought together the two dominant forces in the Federation government, the Social Democratic Party of BiH (SDP BiH) and the Party of Democratic Action (SDA), both of which are supported predominantly by Bosniaks—although the SDP BiH is not an ethnically based party—and the two main opposition groups, the Croatian Democratic Union of BiH (HDZ BiH) and the Croatian Democratic Union 1990 (HDZ 1990), representing Bosnian Croats. The dispute over the governments of the three cantons, Hercegovina-Neretva, Herceg-Bosna and Central Bosnia, has become a stumbling block in the attempts to form a ruling coalition at the state level in order to replace the outgoing government, which has been operating in a caretaker capacity since the elections of October 2010.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 19.50 (58/179)**
- The media environment of Bosnia and Herzegovina is divided along ethnic lines and these divisions color news reporting. For example, at the beginning of the fieldwork period much discussion was devoted to the planned (and then canceled on May 13) referendum in Republika Srpska to discontinue recognizing the national-level judiciary. In the middle of the fieldwork period, on May 26, the arrest of the former Bosnian-Serb military commander Ratko Mladic also sparked heated media coverage. For the past several years, qualitative research has shown that domestic media report these types of divisive events through a highly ethnically colored frame, which drives many Bosnians to international broadcasters for more balanced coverage.
- Domestic media outlets continue to suffer severe sustainability problems. With the effects of the economic crisis still having a strong hold on Bosnia, media outlets cannot free themselves from control of business interests or ethnically-aligned political parties. Bosnia's three public broadcasters (the nationwide BHRT and the entity units RTFBiH and RTRS) are under pressure from lost license fee income and the entire system continues to be marred by ethnic rivalry. Survey results show that the population seems to share the pessimistic outlook of media experts cited above: two in five (39 percent) noted incidences of hate speech in the media in the past year.
- Al-Jazeera Balkans was launched in November 2011 and the channel has the potential to become a strong competitor for regional and international news.

P R O F I L E



Language of Broadcast: Burmese

Content: 24.5 hrs. of original and 31.5 hrs. of repeat radio programming per week; 3 hrs. of original and 4 hrs. of repeat TV programming per week; Internet

Distribution: 1 TV affiliate, Satellite TV, 2 affiliate FM stations in Thailand, 1 MW, 5 IBB SW frequencies, Satellite audio and TV on AsiaSat.

Radio: The Service's programming is available on one MW, 5 IBB SW frequencies, 2 affiliate stations on the Thai border, as well as satellite audio.

TV: VOA Burmese programming is available on IBB satellites (AsiaSat 3 and IOR) and a local affiliate in southern Thailand near the border. Affiliate Sangkhalaburi Cable puts the entire package of VOA TV programming, including VOA English and other languages, on 24/7 to local households.

New Media: The Service maintains a website and the VOA Burmese Blog, is available on YouTube, Twitter, Facebook and sends out an e-mail newsletter to more than 5000 subscribers. A mobile site is available for smartphone users.

Staff: 13 **Budget:** \$2,205,000

Established: 1943 to 1945; 1951 to present



Language of Broadcast:

Burmese, Chin, Kachin, Karen, Karenni, Mon, Rakine, Shan

Content: 14 hrs. of original and 14 hrs. of repeat radio programming per week; 2.5 original and 1 hr. repeat television per week; Internet

Distribution: Satellite TV; 1-3 IBB SW frequencies; satellite rebroadcasting; 4 FM guerilla stations operating clandestinely inside Burma; Satellite audio

Radio: The Service broadcasts 2 hours of original news programs daily and 2 hours of repeat.

Video: The Service produces a 30 minute daily television newscast, 5 days per week with repeats on the weekends.



New Media: Includes a multimedia website, a mobile site, Facebook, YouTube, a blog, and an e-newsletter.

Staff: 18

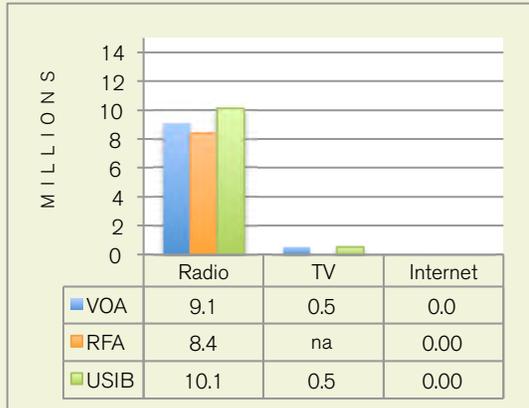
Budget: \$2,208,000

Established: 1997 to present

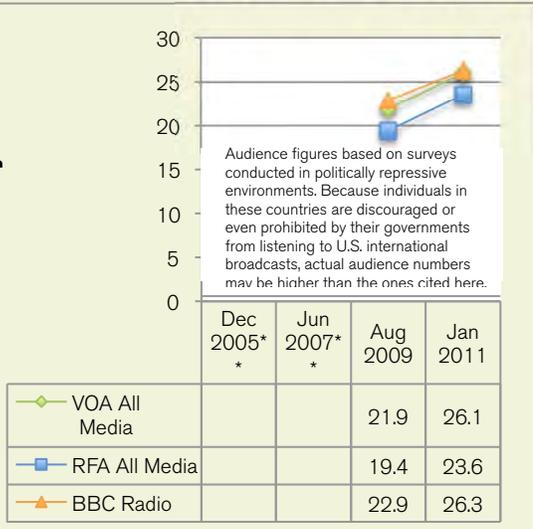
P E R F O R M A N C E D A T A

(Using Data from Burma, January 2011)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)

	VOA	RFA	USIB
Radio	25.7	23.6	28.4
TV	1.5	na	1.5
Internet	0.0	0.0	0.0
Total	26.1	23.6	28.8

Awareness (%)

	VOA	RFA
	84	80

Burmese

Credibility

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

	VOA	RFA
Radio	94	97
TV	94	na

Understanding

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

	VOA	RFA
Current Events	91	91
U.S. Culture (VOA) or Current Events in Burma (RFA)	na	na
U.S. Policies	na	na

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.1	3.1
TV	3.8	na

*Due to differences in the sample areas and in weighting among recent surveys, trend data are not available.

** Dates reflect sub-national surveys; trending not possible with sub-national surveys.

***Understanding question not asked for reasons of political sensitivity.

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

Burmese Broadcasting

Total Population of Burma: 54 million

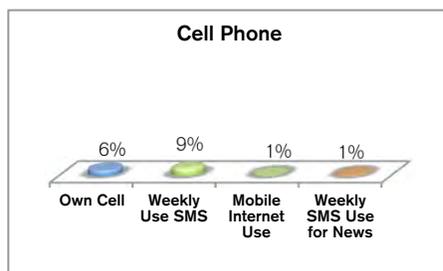
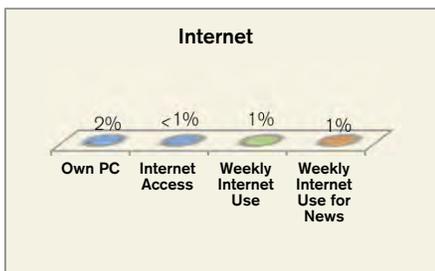
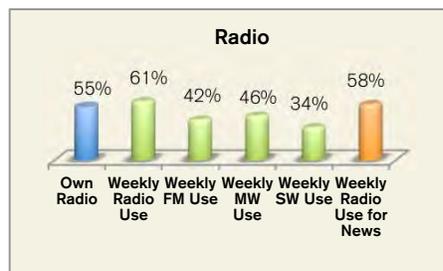
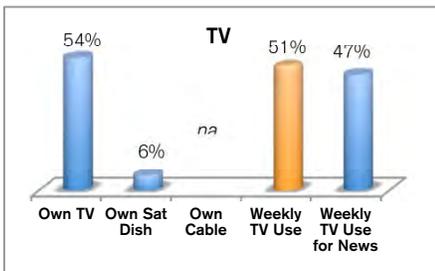
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Sex	%	%	%
Male	48	64	66
Female	52	36	34
Age			
15-24	29	23	23
25-34	24	24	24
35-44	22	23	24
45-54	16	18	17
55-64	10	12	12
65+	na	na	na

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Education	%	%	%
None/Monastic/Primary	43	39	38
Middle	26	26	26
High School	18	21	21
Higher	14	14	15
Ethnicity/Nationality			
Bamar	70	73	73
Shan	6	5	4
Karen	6	8	8
Rakhine	4	4	5
Other	14	10	10

	Sample	VOA Weekly Aud.	RFA Weekly Aud.
Residence	%	%	%
Urban	31	25	26
Semi-urban	69	75	74
Language			
Burmese	77	79	79
Other	24	21	21

M E D I A U S E



Top Ten Media Outlets

1. Myanmar National Radio
2. MRTV
3. Myawaddy TV
4. Myanmar Radio Padauk Myay
5. BBC Radio
6. VOA Radio
7. RFA Radio
8. Mandalay City FM
9. Myanmar Radio FM 98.0 Yangon
10. MRTV 4

Web Analytics

VOA	
Weekly Visitors	41,400
Weekly Visits	137,300
RFA	
Weekly Visitors	39,300
Weekly Visits	89,200

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): HIGH RISK**
- In the last year, Burma has undergone unprecedented changes culminating in the April 1, 2012 parliamentary by elections in which Aung San Suu Kyi and her NLD party won all but three available seats.
- President Thein Sein and other reformists in the government have pledged that the country will not back-slide but continue to progress to a fully democratic state. However, hardliners in the government could impede progress if they feel the country is changing too quickly.
- China, previously Burma's greatest international backer, was dealt a blow when Burmese authorities stopped work on a major hydro-electric dam project funded by the Chinese. The dam was intended to supply China with power, but also presented serious environmental issues and was unpopular with local residents.
- Additionally, the country faces numerous challenges from ethnic fighting and Chinese pressure to extreme poverty and corruption.
- Western governments have welcomed changes, major figures including Hillary Clinton have visited the country and the World Bank has announced it will open an office in Burma.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 100.00 (169/179)**
- Burma's Ministry of Information is drafting a new media law to present to the Parliament this session which is expected to increase the ability to exercise freedom of expression. The draft law includes plans for a "Press Counsel" which could prove a hindrance to free media if it is placed under the control of the government.
- In the meantime, the government's Press Scrutiny and Registration Division continues to censor print news media, and all broadcast media remain under the control of the government or cronies close to the government.
- The Internet is not restricted or censored in any way, but speed and expense limit its effectiveness and penetration. This is an area that could see substantial growth if the government allows the sector to develop as a free market.
- Exile and international media are now being granted access to the country and a number are opening offices.

P R O F I L E



Language of Broadcast: Cantonese
Content: 14hrs. of original radio programming per week; 0.2 hrs. of original and 0.25 hrs. or repeat TV programming per week; Internet
Distribution: 1 affiliate (TV); 1 IBB MW and 2 SW freqs.
TV: VOA Cantonese's program, *American Report*, is carried on ATV Hong Kong and AsiaSat3 for 5 minutes a week. ATV is one of two terrestrial broadcasters in Hong Kong and is available via satellite in parts of southern China.
Radio: VOA Cantonese has two radio affiliates in Hong Kong and two in Australia.
Web: The Service has a website with audio, video and podcasts; a mobile site; and is available on Facebook, Twitter and has a YouTube page.
Staff: 7
Budget: \$986,000
Established: 1941 to 1945; 1949 to 1963; 1987 to present

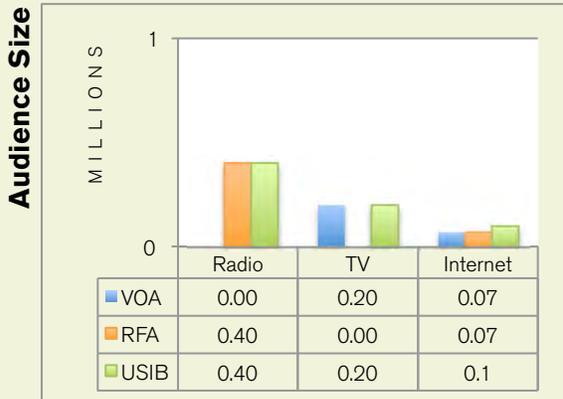


Language of Broadcast: Cantonese
Content: RFA broadcasts 7 hrs. of original and 7 hrs. of repeat radio programming per week; Internet
Distribution: 1-3 IBB SW frequencies; Satellite rebroadcasting
Radio: The Service broadcasts 1 hour of original program and 1 hour of repeat daily.
Video: The Service website features photos and video footage from inside the target area on a daily basis.
New Media: The Service has web and mobile sites. It pioneered the use of Skype for call-in shows. It has Facebook, Twitter and YouTube pages. Newsletters are sent on a daily basis.

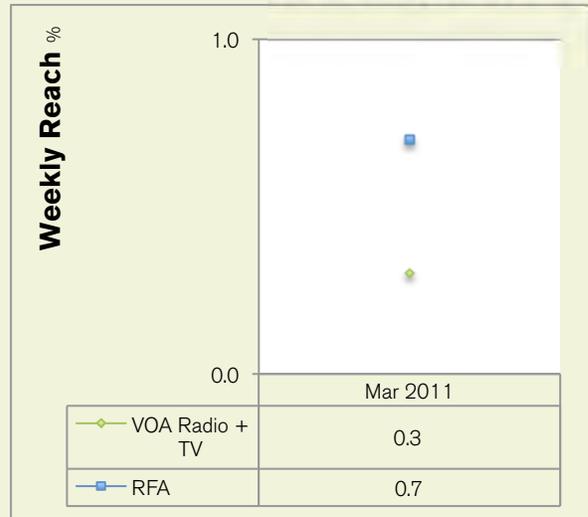


Staff: 6
Budget: \$963,000
Established: 1998 to present

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



Weekly Reach by Media (%)			
	VOA	RFA	USIB
Radio	0.0	0.6	0.6
TV	0.3	na	0.3
Internet	0.1	0.1	0.2
Total	0.3	0.7	1.1



Awareness (%)	
VOA	RFA
7	4

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

Quality	Combined Scores from audience panel	
	VOA	RFA
Radio	3.1	3.4
TV	3.4	na

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

Data are from a March 2011 survey of adults (15+) in Guangdong Province, China.

Cantonese Broadcasting

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

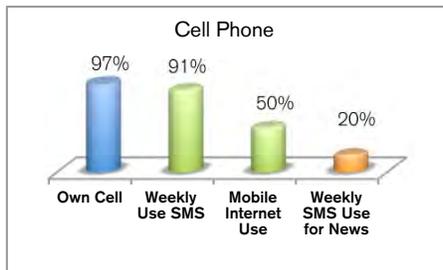
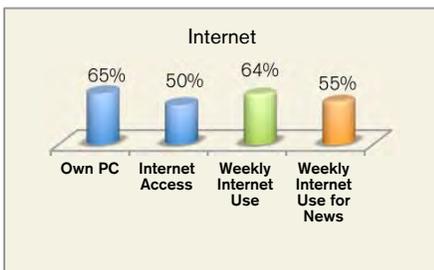
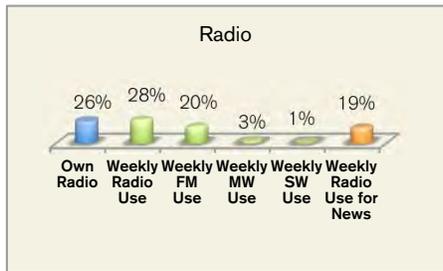
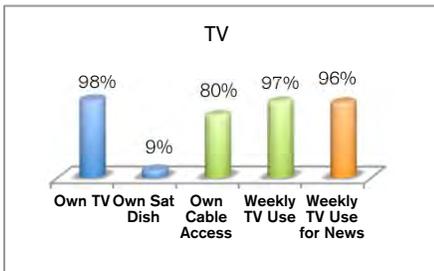
Total Population of Guangdong: 104 million

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
Sex	%	%	%
Male	49	na	na
Female	51	na	na
Age			
15-24		na	na
25-34	24	na	na
35-44	25	na	na
45-54	23	na	na
55-64	20	na	na
65+	6	na	na

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
Education	%	%	%
Primary or less	16	na	na
Jr. School	25	na	na
High School	32	na	na
Vocational	19		
Coll./Univ.	8	na	na
Ethnicity/Nationality			
Han	99	na	na
Other	< 1	na	na

	Sam.*	VOA Weekly Aud.*	RFA Weekly Aud.*
Residence	%	%	%
Urban	54	na	na
Semi-urban	11	na	na
Rural	35	na	na
Language			
Mandarin	40	na	na
Cantonese	11	na	na
Other	48	na	na

M E D I A U S E **



Top Ten Sources of News

1. CCTV1
2. Local TV
3. Provincial TV
4. CCTV News
5. HK/Taiwan/Macau TV
6. TencentQQnews.com
7. Baidu.com
8. Sina.com
9. CCTV5
10. People's Daily

Web Analytics

VOA	
Wkly. Visitors	1,200
Wkly. Visits	1,900
RFA	
Wkly. Visitors	3,500
Wkly. Visits	4,600

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 southern Chinese provinces of Guangdong and Guangxi where most Cantonese speakers reside are relatively affluent provinces where many of China's major manufacturing and trading firms are based. Bordering Hong Kong, Guangdong has a population of 110 million and a GDP of \$689 billion, outstripping Saudia Arabia, Poland, South Africa and Argentina in both.
- With a huge internal migrant population, overcrowding in major cities and massive job creation requirements, internal stability is the Chinese government's primary political concern. China routinely subjugates human rights and legal protections under the banner of social stability.
- Social dislocations resulting first from rapid growth and, more recently, from factory closings and layoffs, have made Cantonese-speaking areas the center of a large number of high-profile civil actions, including the recent land dispute in rebel village Wukan.
- The average standard of living has increased markedly since the late 1970's and studies including the 2011 BBG survey indicate most Cantonese are satisfied with the state and direction on Chinese society. However, environmental pollution and public health are areas where Cantonese express significant dissatisfaction.
- Citizens of Cantonese-speaking Hong Kong enjoy considerably better political rights and civil liberties than do citizens of mainland China. In its report 2010 Freedom House classified Hong Kong as "Partly Free."

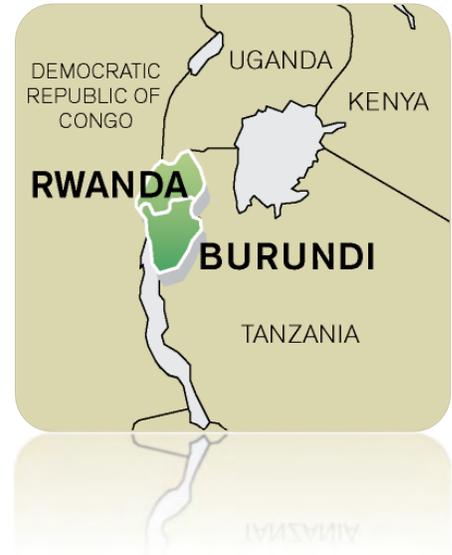
Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE (China)**
- **Reporters Without Borders Index (2011): 136.00 (174/179)**
- Cantonese-speaking areas of China are at the forefront of China's rapidly changing media environment. In the BBG's 2011 survey, 64% of Guangdong's adults used the Web weekly and half of the total population access the internet by mobile phone.
- CCTV continues to be the top news source in Guangdong, but Hong Kong stations also have considerable penetrations and are valued sources of information. Satellite dish ownership in Guangdong is 9 percent and, as elsewhere in China, roughly 90 percent of satellite owners live in rural areas.
- Nearly 24 million Guangdong residents use microblogs regularly. As elsewhere in China, Facebook and Twitter are blocked, but domestic sites such as Sina Weibo and QQ provide forums for discourse on sensitive issues.
- Mobile internet access is not merely an urban phenomenon: 3G mobile networks have allowed the internet to penetrate into rural China even faster than the expansion of internet infrastructure into those areas.

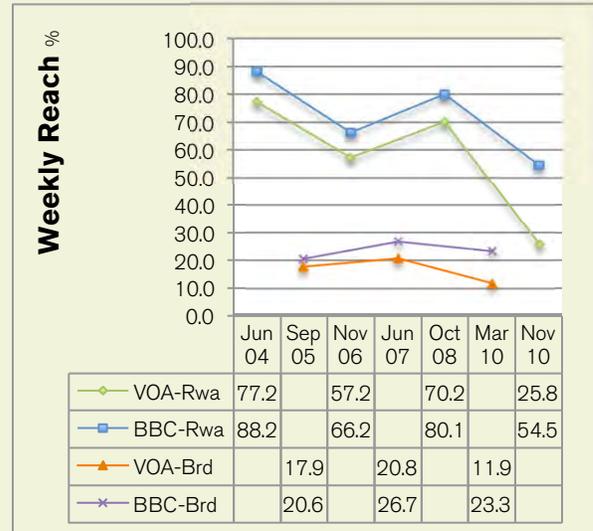
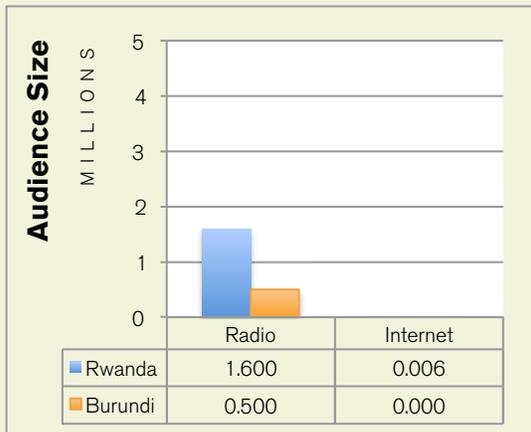
P R O F I L E



Language of Broadcast: Kinyarwanda & Kirundi
Content: 7 hrs. of original radio programming per week; Internet
Distribution: 3 affiliates (3 FM), 3 SW frequencies, 1 IBB FM in Kigali
Radio: In addition to its shortwave broadcasts, VOA's Central Africa Service programs are simulcast on the VOA 24-hour FM frequency in Kigali, Rwanda. All programs, broadcast in Kirundi and Kinyarwanda, are also simulcast on FM by VOA affiliate stations in Burundi and Rwanda, and they are on medium wave on Radio Free Africa located in Mwanza, Tanzania.
New Media: The service has a website, an email newsletter and is on Facebook, YouTube and Twitter.
Staff: 9
Budget: \$1,116,000
Established: 1996 to present



P E R F O R M A N C E D A T A (Using Data from Burundi March, 2010 & Rwanda November, 2010)



Weekly Reach by Media (%)		
	Rwanda	Burundi
Radio	25.8	11.9
TV	na	na
Internet	.1	0
Total	25.8	11.9

Awareness (%)		
	Rwanda	Burundi
	79	40

Credibility		
Percentage of surveyed weekly audience that found broadcasts credible (%)		
	Rwanda	Burundi
Radio	90	80
TV	na	na

Understanding		
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	Rwanda	Burundi
Current Events	85	79
U.S. Culture	64	36
U.S. Policies	67	46

Quality		
Combined Scores from audience panel		
	Rwanda	Burundi
Radio	3.3	3.3
TV	na	na

Data are from a March 2010 nationwide survey of adults (15+) in Burundi and an November, 2010 nationwide survey of adults (15+) in Rwanda.

Kinyarwanda & Kirundi Broadcasting

A U D I E N C E C O M P O S I T I O N Total Population of Burundi 10.2 M and Rwanda 10.9 M

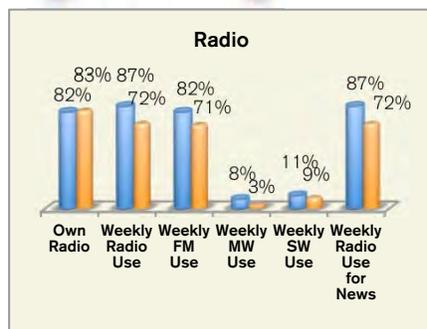
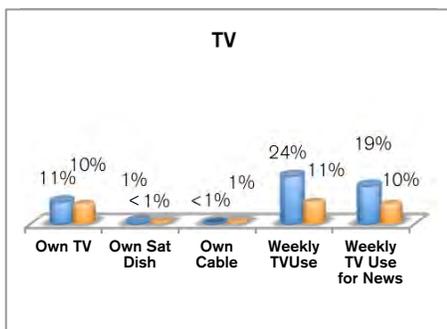
	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
Sex	%	%	%	%
Male	48	67	49	73
Female	52	33	51	27
Age				
15-24	26	26	30	17
25-34	30	34	28	33
35-44	17	18	20	34
45-54	12	11	12	12
55-64	8	7	6	4
65+	7	3	5	1

	Rwd. Sam.	Rwd. Wkly. Aud.	Bur. Sam.	Bur. Wkly. Aud.
Educ	%	%	%	%
None	25	13	16	3
Primary	62	65	39	20
Sec.	11	17	33	47
Higher	2	5	10	27
Ethnicity/Nationality				
Burundian	na	na	98	96
Other	na	na	2	4

	Rwd. Sam.	Rwanda Wkly. Aud.	Bur. Sam.	Burundi Wkly. Aud.
Residence	%	%	%	%
Urban	12	12	12	21
Semi-urb.	na	na	7	13
Rural	88	88	81	66
Language Spoken at Home				
Kinyar.	100	100	<1	0
Kirundi	0	0	97	96
Swahili	0	0	1	2
Other	na	na	2	2

MEDIA USE

■ Rwanda ■ Burundi

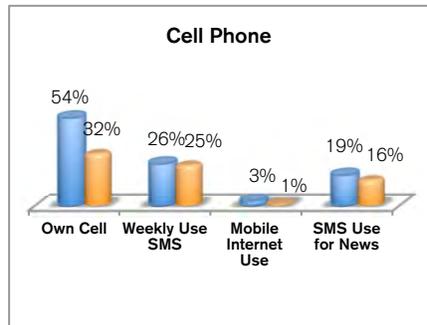
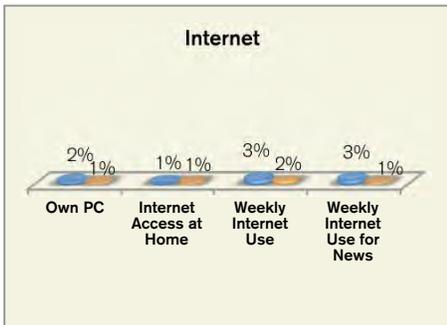


Top Ten Sources of News (Rwanda)

1. Radio Rwanda
2. BBC
3. Radio Salus
4. TV Rwanda
5. Radio Maria
6. VOA
7. Community Radio Butare
8. Radio Izuba
9. Community Radio Gisenyi
10. Imvaho Nshya

Top Ten Sources of News (Burundi)

1. RTN Burundi
2. Bonesha FM
3. Radio Public Africaine
4. Radio Isanganiro
5. BBC
6. RTNB
7. Radio Kwizera
8. Radio Ava Maria
9. VOA
10. Radio BINUB



Web Analytics

Weekly Visitors	2,500
Weekly Visits	7,000

C O N T E X T

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

Political Situation

- **Freedom House Political Freedom Index (2011): Rwanda—NOT FREE; Burundi—PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): Rwanda—MODERATE RISK; Burundi—HIGH RISK**
- In 2011, as in the past number of years, Rwanda failed to make much political progress in terms of democratization and judicial reforms. While several laws were drafted to advance political freedom, arrests of opposition party figures and government critics belied true reforms. Local elections in the spring of 2011 mainly saw the ruling RPF's candidates win seats.
- The political situation in Burundi has not stabilized in 2011. There were multiple fatal clashes between members of the dominant CNDD-FDD and opposition groups—many of whom had fled to neighboring countries following the 2010 elections which they boycotted. In reaction to a particular violent incident in September 2011 the government ordered a month-long media blackout and further restricted civil society activities.

Media Environment

- **Freedom House Press Freedom Index (2011): Rwanda—NOT FREE; Burundi—NOT FREE**
- **Reporters Without Borders Index (2011): Rwanda—81.00 (156/179); Burundi—57.75 (130/179)**
- Rwanda's media environment was ranked the third least free in Africa in October 2010, after pressure on media outlets increased surrounding the August 2010 national elections. This challenging environment makes international broadcasters' work all the more difficult and important.
- Despite improving economic conditions, access to television and Internet remain low—only 11 percent of adults have a TV at home; only 7 percent have ever gone online. Opportunities for international broadcasters to reach audiences via these platforms are very limited.
- Mobile phones have become more viable as a means of reaching Rwandans; slightly more than half of adults have access to a phone at home. However, most transmission of news via mobile phone happens between friends and family, rather than between news organizations and audience members.

P R O F I L E



Language of Broadcast: Creole

Content: 14.5 hrs. of original radio programming per week; Internet

Distribution: 13 affiliates (13 FM)

VOA Creole broadcasts to Haiti via 13 local FM affiliate stations throughout the country. The Service also delivers news and information on its website, on social media platforms Twitter, Facebook, and You Tube, as well as via SMS through a local mobile provider. The Service provides training for Haitian journalists and has a citizen journalist program.

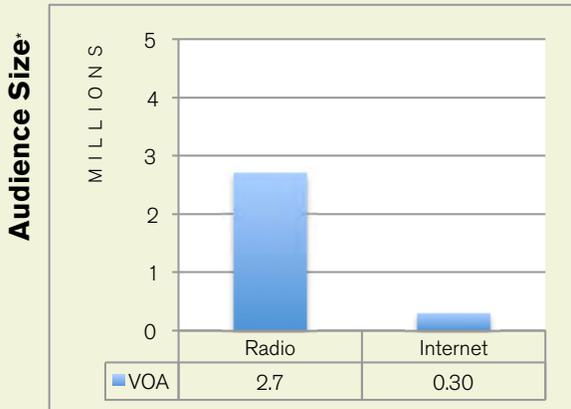
Staff: 8

Budget: \$1,674,000

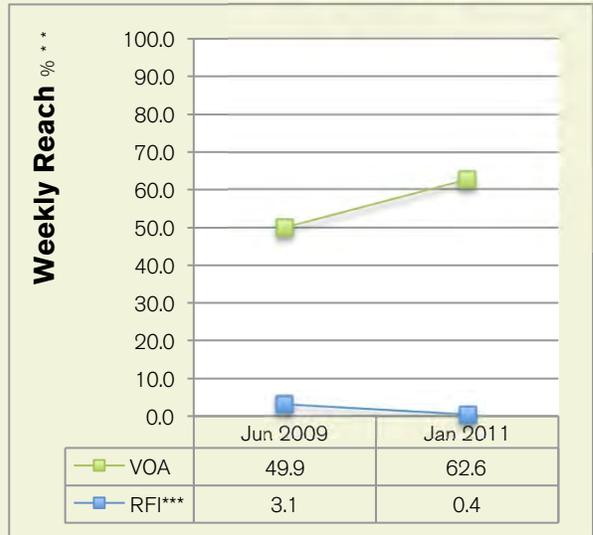
Established: 1987 to present



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



Weekly Reach (%) by Media	
VOA	
Radio	62.1
TV	na
Internet	5.7
Total	62.6



Awareness (%)	
VOA	
Total	93

Creole

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA	
Radio	97
TV	na

Understanding	
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
VOA	
Current Events	91
U.S. Culture	62
U.S. Policies	59
Current Events in Haiti	94

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.7
TV	na

*Audience size estimates are based on 2003 Haitian census 2011 projections put the 18+ population are 29% higher.
 ** Due to differences in sample coverage between the June 2009 nationwide survey and previous urban-only surveys conducted in Haiti, it is not possible to show trend data from earlier surveys.
 *** RFI's Creole content in 2011 was available online only.

Data are from a January 2011 survey of adults (15-64) in Haiti. The national sample is representative of the population 18 years of age and older living in Ouest, Grand Anse, Nippes, Sud Est, Sud, Artibonite, Centre, Nord, Nord Est and Nord Ouest. An additional sample was drawn of the camps located in the metropolitan areas of Haiti.

Creole Broadcasting

Total Population of Haiti: 10.1 million

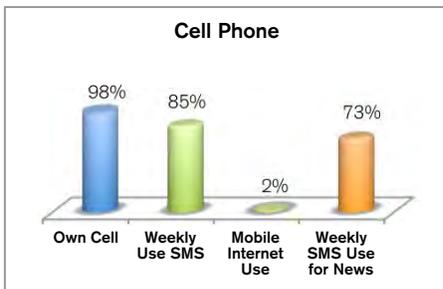
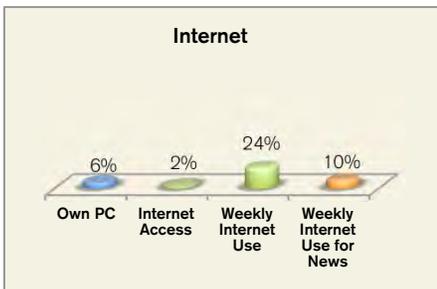
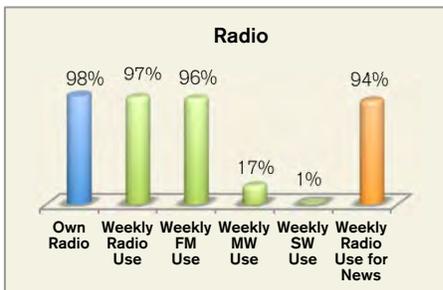
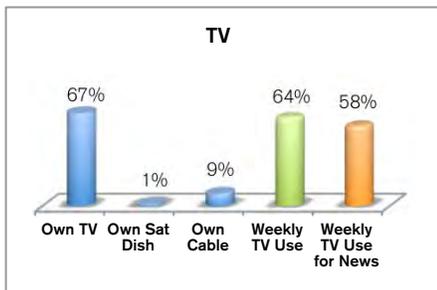
A U D I E N C E C O M P O S I T I O N

	Sample	VOA Weekly Audience
Sex	%	%
Male	47	49
Female	53	51
Age		
15-24	18	15
25-34	36	36
35-44	24	26
45-54	16	17
55-64	5	5
65+	2	2

	Sample	VOA Weekly Audience
Education	%	%
None	6	4
Primary	23	25
Secondary	53	50
Technical	13	17
Higher	4	4
Ethnicity/Nationality		
Haitian	100	100

	Sample	VOA Weekly Audience
Residence	%	%
Urban	46	45
Rural	54	55
Language		
Creole	99	99
French	1	1

M E D I A U S E



Top Ten Media Outlets

11. Radio Tele Ginen
12. Radio Lumiere
13. Radio Vision 2000
14. VOA
15. Radio Nationale d'Haiti
16. Radio Metropole
17. TV Nationale d'Haiti
18. RFI Haiti relais FM
19. TNH
20. Radio Maxima

Top Ten Sources of News

1. Radio Tele Ginen
2. VOA
3. Radio Lumiere
4. Radio Vision 2000
5. Tele Ginen
6. TV National d'Haiti
7. Tele Caraibes
8. Radio Nationale d'Haiti
9. Radio Metropole
10. Le Nouvelliste

Web Analytics

Weekly Visitors	1,200
Weekly Visits	4,100

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 extreme weakness of Haiti's governing institutions has kept the political environment unstable. Violent protest and the difficulty of establishing a new government have been the main threats to progress rebuilding the country. Reconstruction activities—which have been on hold since late 2010 because of election campaigns—have restarted only gradually and will not pick up in earnest until a new prime minister and cabinet are approved by parliament.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 15.67 (52/179)**
- Mobile phones have become an essential communication tool in Haiti. Almost every adult in Haiti has a mobile phone in their household (98 percent) and 97 percent own a personal phone. Before the quake, 90 percent of households had a mobile phone. Mobile ownership has increased; landline ownership has significantly decreased. Less than 1 percent of respondents now have a working landline; 3 percent of respondents had a landline before the earthquake.

P R O F I L E



Voice of America



Language of Broadcast: Dari

Content: 42 hrs. of original radio prog. per week; 3 hrs. of original TV prog. per week; Internet

Distribution: 1 affiliate (1 TV), 1 IBB MW, 8 IBB FM, 2 or 3 IBB SW frequencies

VOA delivers radio programming, seven days per week, on FM, AM, and IBB shortwave. The FM is broadcast to Kabul, Herat, Kandahar, Mazar-e-Sharif, Jalalabad, Khost, Gardaiz, and Kunar. IBB shortwave is heard in Afghanistan, Pakistan, Iran, Tajikistan and Uzbekistan.

VOA's Afghan news program, TV Ashna, is televised live throughout Afghanistan on RTA, Afghanistan's state-owned television network. The first half hour is in Dari; the second in Pashto. On Fridays, RTA also airs "Karwan," a 30 minute program targeted at youth.

Staff: 21

Budget: \$2,953,500

Established: 1980 to present



Language of Broadcast: Dari

Content: 42 hrs. of original radio programming per week; Internet

Distribution: Delivery includes 1 national MW, 8 IBB FM transmitters, multiple SW frequencies, HotBird, AsiaSat, Yamal and Internet with streaming audio (Dari site plus Pashto site).

Staff: 26+

Budget: \$5,030,000+

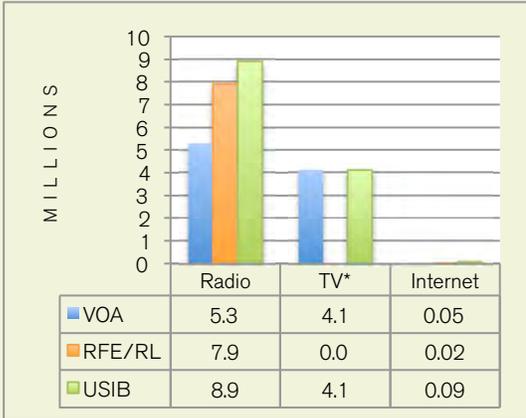
Established: 1985-1993; 2002 to present

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



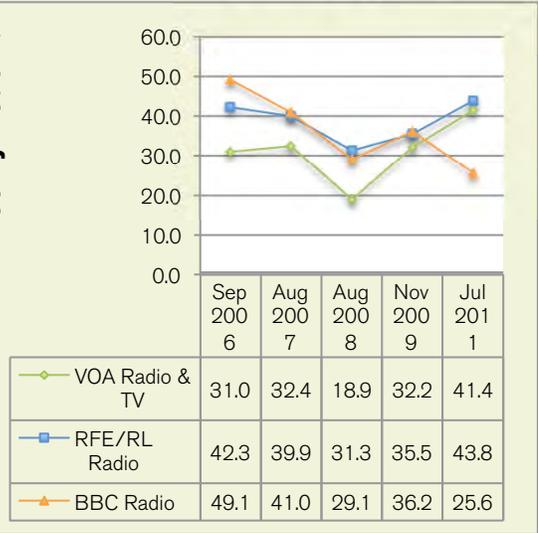
P E R F O R M A N C E D A T A (Using Data from Afghanistan, July 2011)

Audience Size



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	29.4	43.8	49.4
TV	22.7*	na	22.7*
Internet	0.3	0.1	0.5
Total	41.4	43.8	56.4

Weekly Reach %



Awareness (%)	
VOA	RFE/RL
67	81

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)		
	VOA	RFE/RL
Radio	87	85
TV	95	na

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA Radio*	RFE/RL
Current Events	92	90
U.S. Culture (VOA) or Current Events in Afghanistan (RFE/RL)	80	88
U.S. Policies	65	na

Quality

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

Dari

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

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

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

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

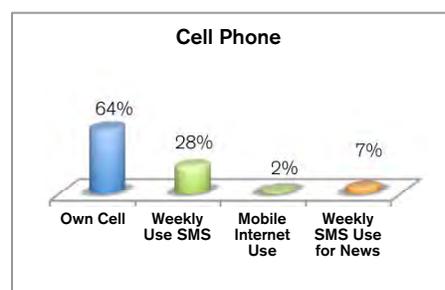
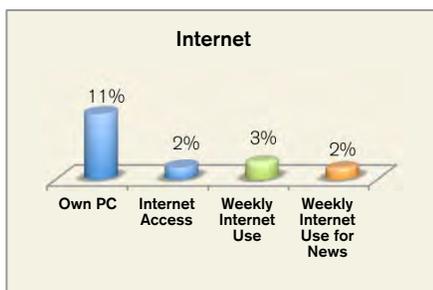
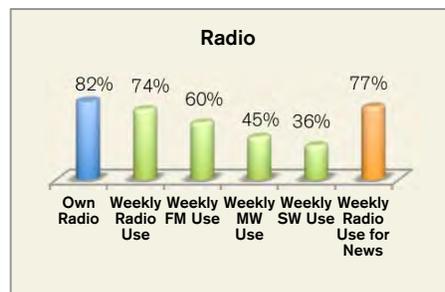
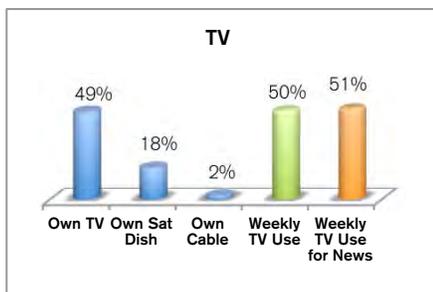
Total Population of Afghanistan: 32.4 million

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Sex	%	%	%
Male	58	56	60
Female	42	44	40
Age			
15-24	31	33	31
25-34	23	21	23
35-44	22	23	21
45-54	15	13	15
55-64	7	8	8
65+	2	2	3

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Education	%	%	%
Illiterate/No Formal	61	53	56
Elem./Inter.	18	21	18
Secondary	17	21	20
Coll./Univ.	3	5	6
Ethnicity/Nationality			
Pashtun	42	30	32
Tajik	36	43	43
Uzbek	9	11	10
Other	14	16	15

	Sample	VOA Weekly Audience	RFE/RL Weekly Audience
Residence	%	%	%
Urban	78	66	76
Rural	22	34	24
Language			
Dari	48	60	59
Pashto	39	26	29
Uzbek	9	12	10
Other	3	2	2

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

VOA Weekly Visitors	5,600
Weekly Visits	14,400
RFE/RL Weekly Visitors	5,900
Weekly Visits	21,100

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**
- In 2011, the legitimacy of the government led by the president, Hamid Karzai, remained compromised as a result of the flawed nature of the electoral process in both the 2009 presidential poll and the 2010 parliamentary elections. The president has been even less effective in his second term than he was in his first. The judicial system is also in a weak state.
- The security outlook is highly unsettled, attacks by elements linked to the Taliban remain frequent. In 2011, a series of high-profile assassinations further weakened the government and have raised doubts that the country could manage itself once the coalition troops transferred security over to the Afghan police and military. The government's credibility is further diminished because of the corruption in the ranks, violence against women and prisoners, and the large number of civilian casualties.

Media Environment

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



English to Asia

Language of Broadcast: English

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

Distribution: 97 affiliates (57 Radio, 40 TV); radio is streamed on the Internet, downloadable on podcast, and broadcast on SW, MW, and relayed via satellite and affiliates.

Radio: Produces regionalized and international news programming targeted to Asia. *Daybreak Asia* (morning) and *Crossroads Asia* (evening) deliver targeted news and information; *International Edition* contains world news. *Reporters' Notebook* provides a platform for discussion of the week's top news by VOA English language correspondents.

TV: Production of video content for web delivery.

New Media: Produces written, audio and video content for the Asia page of the English website. Provides podcasts of radio programming available through the English web page and iTunes. Includes articles, photos, video, audio, and other multimedia forms such as flash. Platforms include voanews.com, Facebook, Twitter, Tumblr, Storify, mobile and limited SMS. Asia is the source of more than one million foreign visitors to the English website each month, more than any other region.

Staff: 96+ | **Budget:** \$14,138,000+

Established: 1942 to present



English to Middle East

Language of Broadcast: English

Content: 10.5 hrs. of original radio programming per week; 0.5 hrs. of original TV programming per week; Internet

Distribution: 20 affiliates (18 Radio, 2 TV) Radio on IBB FMs in Iraq and Kuwait, SW and ArabSat

Radio: The English Division recently began regionalizing programming to the Middle East; *Middle East Monitor* (evening) delivers targeted news and information; *International Edition* contains world news. Also, current affairs programming which includes *Press Conference*, *USA* features interviews about critical issues; *Encounter*, panel discussion, and *Issues in the News*, correspondents' discussion.

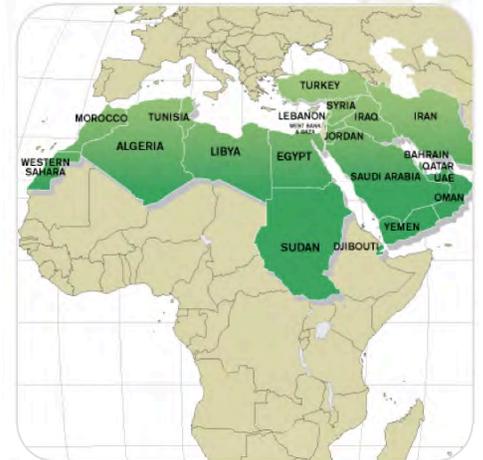
TV: *On the Line* is an interview program dealing with current events.

Digital distribution: Includes articles, photos, video, audio, and other multimedia forms such as flash. Platforms include voanews.com, Facebook, Twitter, mobile and limited SMS. The English website has the largest audience of any of VOA's services.

Staff: Please see English to Asia

Budget: Please see English to Asia

Established: 1942 to present



Learning English

Language of Broadcast: English

Content:

Radio: 10 hours of original programming per week including multiple 10-minute newscasts; feature programming includes health, American life, science/technology and US history; Internet. Audio programs are also posted online with MP3s, podcasts and transcripts for reading and listening comprehension.

TV: Five 4-minute modules per week for English learning; subjects include development, education and agriculture.

New Media: Includes articles, photos, video, audio, and other multimedia forms. Platforms include websites, Facebook, Twitter, YouTube, a weekly newsletter, and a mobile site. "The Classroom" is an interactive e-learning site that includes live ESL teaching on Facebook, using VOA stories as the basis for teaching language and grammar.

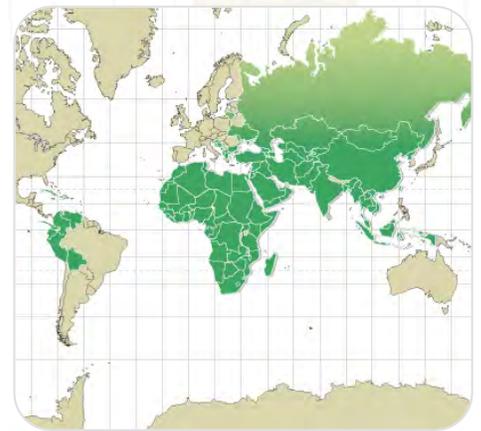
Partners: Companies in many countries use Special English materials to produce and sell as their own English-teaching products.

Distribution: Radio (27 affiliates; SW and MW); TV (on satellite to affiliates)

Staff: Please see English to Asia

Budget: Please see English to Asia

Established: 1942 to present



English Current Affairs

Language of Broadcast: English

Content: 6 hours of original radio programming per week; 0.5 hours of original TV programming per week; Internet

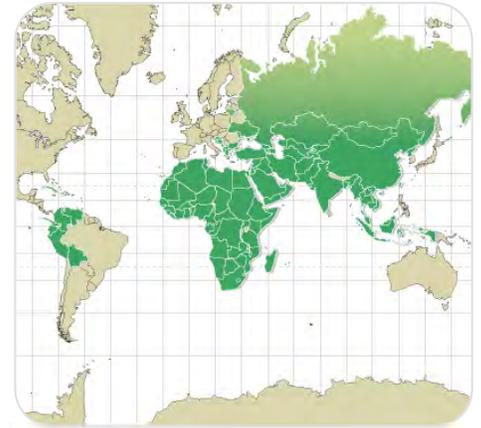
Distribution: Affiliates, satellite, and IBB SW

VOA's English Current Affairs Hub delivers news and analysis of critical international issues to worldwide audiences. Current Affairs helps fulfill the VOA Charter in presenting "responsible discussions and opinion" on the policies of the United States. In addition to news-driven discussion of world events, Current Affairs presents programs on American culture, ideas and institutions.

Radio: VOA's English Current Affairs Hub broadcasts six 30-minute programs each weekend. In addition to the radio simulcast of the TV program *On the Line*, there is the point-counterpoint debate program *Encounter*, the one-on-one newsmaker interview program *Press Conference, USA* and a round-table round-up and discussion of the week's news featuring noted Washington journalists, *Issues in the News*. *Science World* brings together original VOA reporting on science, technology, health and the environment. Topics in American life and culture are the focus of the radio magazine *American Café*.

TV: Current Affairs produces *On the Line*, a weekly 30-minute international affairs panel discussion program providing in-depth analysis and debate.

New Media: In addition to broadcasting, English Current Affairs delivers all of its video and audio programming via the Internet. Some radio programming is also produced in video format for webcasting. *Science World* also features a popular blog that engages the audience.



Audience Size & Weekly Reach

- Most of VOA's Worldwide English programming is consumed in Africa with Nigeria, Ghana, Tanzania, Kenya and Uganda rounding out the top five countries with largest audiences. Outside of Africa, the largest audiences are in Russia (1.2 million), China (1.1 million) and Qatar (0.7 million).

Web Analytics

Weekly Visitors 703,500+

Weekly Visits 999,900+

†Worldwide English totals.

Country	Population	Radio Audience Size	Radio Weekly Reach %	TV Audience Size	TV Weekly Reach %	USIB Internet Audience Size	USIB Internet Weekly Reach %
China	1,345,900,000	1,078,434	0.1	na	na	na	na
Ghana*	25,000,000	834,480	5.7	556,320	3.8	43,920	0.3
Indonesia	238,200,000	310,158	0.2	na	na	155,079	0.1
Nigeria*	162,300,000	3,609,240	4.0	1,443,696	1.6	270,693	0.3
Qatar	1,700,000	44,352	6.4	na	na	na	na
Russia	142,800,000	361,845	0.3	na	na	964,920	0.8

- Research consistently demonstrates that many people who say they know English as a second language actually have difficulty understanding normal radio or television broadcasts in the language, and are therefore good targets for VOA's Learning English programs. These programs are especially valuable for the millions of people around the world who want to learn American English. Large potential audiences are most likely found in South and East Asia, as well as parts of Africa.

P R O F I L E



Language of Broadcast: English

Content: 74.5 hrs. of original radio programming per week; 3.5 hrs. of original TV programming per week; Internet

Distribution: 110 affiliates (88 Radio, 22 TV); 6 IBB FM, 5 MW frequencies, and IBB SW

Radio: Produces 14 radio shows, for a total of 74.5 hours of original news and information programming each week targeted to Africa, including the new "South Sudan In Focus" funded by a State Department grant. "VOA Express" allows affiliates to take short pieces of radio content from the web, and soon "VOA Direct" will accommodate TV, text and picture content as well. It is also responsible in part for VOA's 24/7 Hourly English Newscast, used throughout the organization on radio and the Internet.

TV: Two Africa-targeted shows, totaling 3.5 hours of original programming per week, including *In Focus*, a 30-minute weekday news magazine show, and *Straight Talk Africa*, a weekly call-in program featuring prominent African guests.

New Media: Manages the VOAafrica.com webpage on VOAnews.com, dedicated to news, features and information from and about the continent of Africa. It regularly runs special interactive, multi-media coverage of elections, special health reporting and feature series. Launching four show-related Facebook pages, the service regularly posts video clips on YouTube, opens comment sections on stories that generate lively debate and maintains blogs on youth issues, African music, and sports. Web traffic has increased over 100% in the past year.



Staff: 14

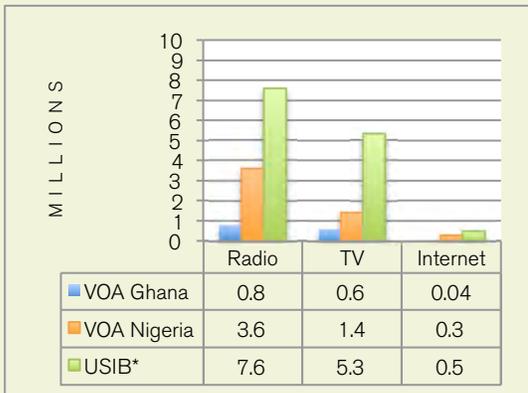
Budget: \$2,527,000

Established: 1942 to present

English to Africa

P E R F O R M A N C E D A T A (Using Data from Ghana, Oct '10 and Nigeria, Dec '10)

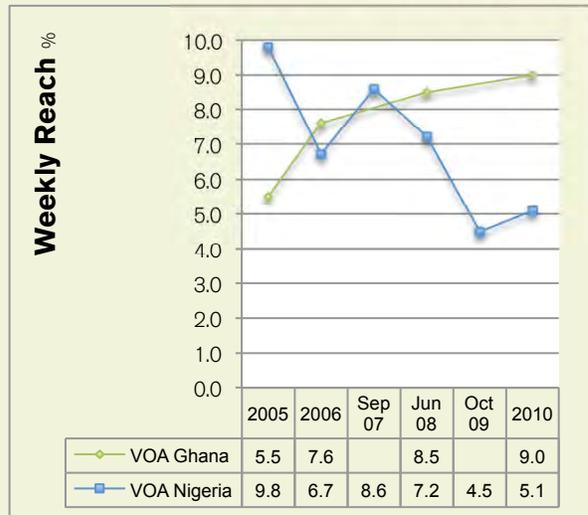
Audience Size



Weekly Reach (%) by Media

	VOA Ghana	VOA Nigeria
Radio	5.7	4.0
TV	3.8	1.6
Internet	0.3	0.3
Total	9.0	5.1

Weekly Reach %



Awareness (%)

	VOA Ghana	VOA Nigeria
	27	57

Credibility

	VOA Ghana	VOA Nigeria
Percentage of surveyed weekly audience that found broadcasts credible (%)		
Radio	99	92
TV	95	94

Understanding

	VOA Ghana Radio**	VOA Nigeria Radio**
Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
Current Events	96	83
U.S. Culture	91	75
U.S. Policies	86	68

Quality

	VOA
Combined Scores from audience panel	
Radio	3.3
TV	3.3

Data are from an October 2010 survey of adults (15+) in Ghana and a December 2010 survey of adults (15+) in Nigeria..

*USIB audience estimate is based on data from Burundi, Ethiopia, Ghana, Guinea, Kenya, Niger, Nigeria, Rwanda, Somalia (Mogadishu only), Tanzania, Uganda and Zambia, Zimbabwe.

**In Ghana, understanding ratings for VOA English to Africa TV are: 89% for Current Events; 85% for U.S. Culture; and 79% for U.S. Policies. In Nigeria, understanding ratings for VOA English to Africa TV are: 94% for Current Events; 86% for U.S. Culture; and 89% for U.S. Policies.

English to Africa Broadcasting

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

Total Population of Ghana 25 million and Nigeria 162.3 million

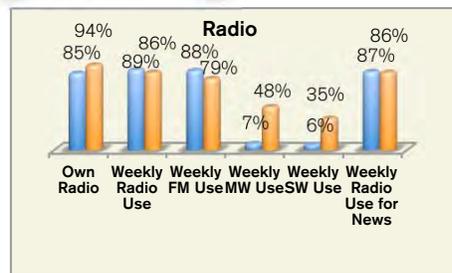
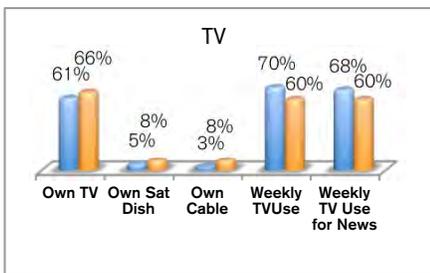
	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
Sex	%	%	%	%
Male	48	56	49	69
Female	52	44	51	31
Age				
15-24	32	30	28	34
25-34	28	27	28	34
35-44	16	14	18	18
45-54	11	16	14	9
55-64	7	8	9	3
65+	6	6	2	2

	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
Education	%	%	%	%
No Formal	14	4	41	13
Primary	20	16	21	13
Sec/Voc.	60	62	31	44
Coll./Univ.	6	17	8	27
Ethnicity/Nationality				
Twí	40	34	na	na
Ewe	14	18	na	na
Hausa	2	4	42	41
Yoruba	na	na	21	9
Other	44	44	37	50

	VOA Ghana Sample	VOA Ghana Wkly. Aud.	VOA Nigeria Sample	VOA Nigeria Wkly. Aud.
Residence	%	%	%	%
Urban	44	62	41	57
Semi-urban	na	na	10	12
Rural	56	38	49	31
Language Spoken At Home				
Twí	44	38	na	na
Ewe	12	14	na	na
Hausa	2	4	49	49
Yoruba	na	na	20	9
English	2	4	6	10
Other	40	40	25	32

M E D I A U S E ***

■ Ghana ■ Nigeria

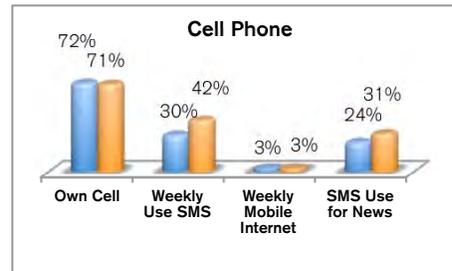
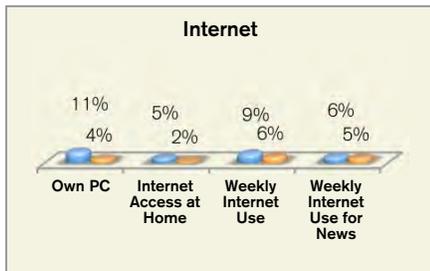


Ghana Top Ten Sources of News

1. Ghana TV
2. TV3
3. Peace FM 104.3
4. Metro TV
5. Radio Savannah
6. Adom FM 106.3
7. TV Africa
8. Fox FM 97.9
9. Viasat 1
10. Daily Graphic

Nigeria Top Ten Sources of News

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



Web Analytics

Weekly Visitors 703,500+

Weekly Visits 999,990+

†Worldwide English totals.

C O N T E X T ***



Political Situation

- **Freedom House Political Freedom Index (2011): Ghana—FREE**
- **Economist Intelligence Unit Instability (2010): Ghana—HIGH RISK**
- Despite tensions between the ruling and opposition parties over corruption investigations, Ghana enjoyed relative political stability in 2011. The country's track record on human rights and good governance are held up as a model amidst its less stable West African neighbors. Political tensions may intensify as the December 2012 elections approach.

Media Environment

- **Freedom House Press Freedom Index (2011): Ghana—FREE; Nigeria—PARTLY FREE**
- **Reporters Without Borders Index (2011): Ghana—11.00 (41/179)**
- Ghana's media environment is considered one of the freest in Africa, with private newspapers, radio and TV stations competing freely with the state-sponsored Ghana Broadcasting Corporation.
- Radio remains the most accessible and widely used media platform, though a majority of Ghanaians also watch TV at least weekly for news and information.

***Refer to the Hausa page for media use and context information for Nigeria.

P R O F I L E



Language of Broadcast: French to Africa

Content: 23 hrs. of original radio programming per week; 1 hr. of original TV programming per week; Internet

Distribution: 59 affiliates (FM and MW); 3-5 IBB SW frequencies; 3 IBB FMs, 1 in Ouagadougou and 1 in Abidjan; two shared IBB FM, 1 in Djibouti and 1 in Kigali; and 12 TV affiliates.

Radio: The bulk of the French to Africa audience is in DR Congo, where VOA's partner, RAGA-FM, is heard in almost all the major cities of the country. In addition, VOA has affiliates in Dakar and Kaolack, Senegal; Yaounde and Douala, Cameroon; Bamako, Mali; Libreville, Gabon; Lome and Sokode, Togo; and Conakry, Guinea.

TV: French to Africa has a co-production arrangement with Raga-TV in DR Congo, sending packages to affiliates in Gabon, Benin, Guinea, Niger, Cameroon/Douala, and the DRC. Similar arrangements are being made with affiliates in Burkina Faso, Cameroon and Togo. These affiliates can also download French to Africa's own packages, besides the service's weekly TV show *Washington Forum*.

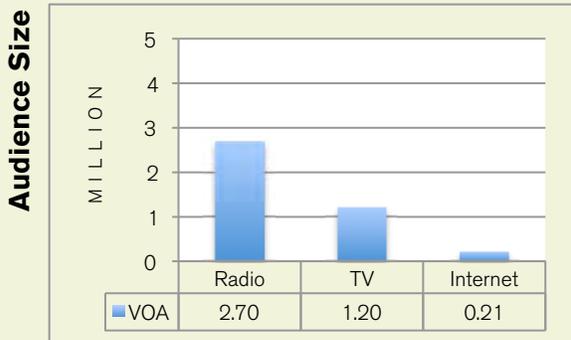
New Media: The Service has a website as well as active Facebook and Twitter accounts.



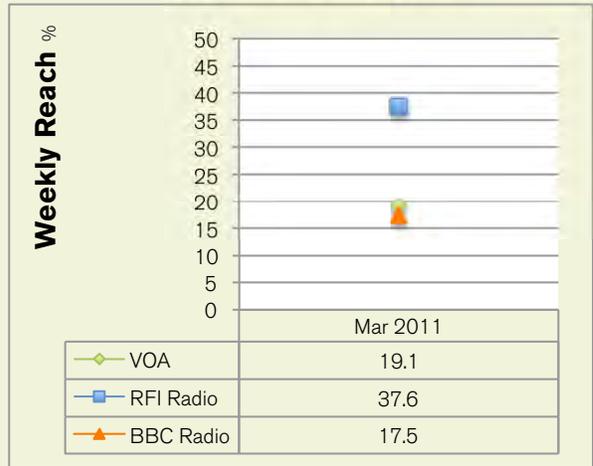
Staff: 18
Budget: \$2,190,000
Established: 1960 to present

French to Africa

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



Weekly Reach (%) by Media	
VOA in DRC	
Radio	15.5
TV	6.8
Internet	1.1
Total	19.1



Awareness (%)	
VOA in DRC	
Total	64

Credibility	
Percentage of surveyed weekly audience that finds broadcasts credible (%)	
VOA in DRC	
Radio	97
TV	100

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	Radio	TV
Current Events	95	na
U.S. Culture	60	na
U.S. Policies	67	na

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.4
TV	3.4

Data are from a March 2011 survey of adults (15+) in urban areas of the Democratic Republic of Congo.

French to Africa Broadcasting

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

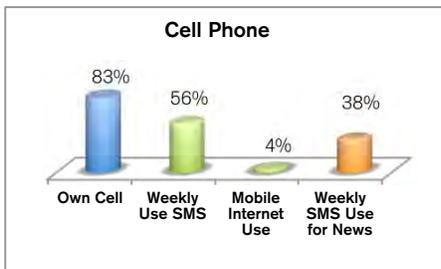
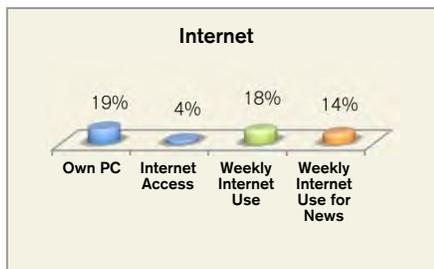
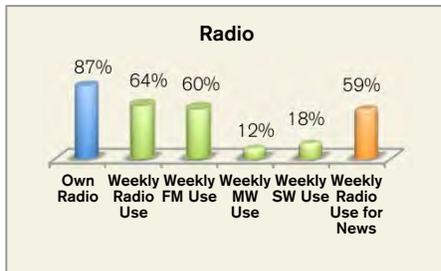
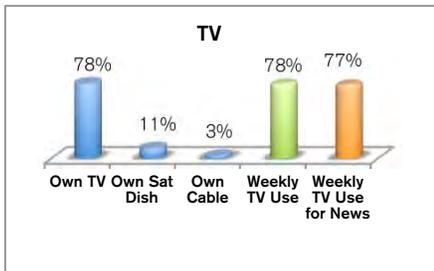
Total Pop. of Democratic Republic of Congo (DRC): 67.8 M

	Sample	VOA Weekly Audience
	100%	4.5%
Sex	%	%
Male	49	66
Female	51	34
Age		
15-24	34	27
25-34	34	34
35-44	18	25
45-54	8	9
55-64	3	4
65+	2	1

	Sample	VOA Weekly Audience
Education	%	%
None/Primary	7	<1
Secondary/Vocational	17	11
High School	29	22
Inc Higher	21	24
Higher	24	41
Ethnicity/Nationality		
Baluba	23	23
Bakingo	19	21
Other	58	56

	Sample	VOA Weekly Audience
Residence	%	%
Urban	100	100
Rural	na	na
Language		
French	20	26
Swahili	33	28
Lingala	33	33
Other	14	13

M E D I A U S E (Using Data from DRC March 2011)



Top Ten Media Outlets

1. Digital Congo
2. TV RTNC1
3. TV5
4. RFI
5. Radio Okapi
6. BBC
7. Mirador TV
8. Antenne A
9. Radio RTNC
10. CCTV

Top Ten Sources of News

1. TV RTNC1
2. Radio Okapi
3. TV 5
4. France 24
5. Digital Congo
6. RFI
7. Radio RTNC
8. Mirador TV
9. Antenne A
10. Canal France international

Google Analytics

Weekly Visitors	3,200
Weekly Visits	5,300

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**
- Presidential and legislative elections in the Democratic Republic of Congo (DRC) are scheduled for November 28th. In late June the president, Joseph Kabila, signed into law a bill that limits the presidential election to one round—the 2005 constitution required two rounds if no candidate secured more than 50% in the first round. This will greatly increase Mr. Kabila's chances of re-election as he no longer needs over 50% of the vote to be returned to office. The new law also limits future presidents to one term of office only. The National Assembly passed the bill in mid-June, although opposition parties boycotted the vote in protest. In January a joint sitting of the National Assembly and Senate had approved constitutional amendments that made the new law possible.
- The North and South Kivu provinces are distinct from the rest of DRC. These are areas where fighting between different military groups remains high, there is a higher concentration of refugees from neighboring countries and infrastructure is generally less developed than in the rest of the country.

Media Environment

- **Freedom House Press Freedom Index (2011): NOT FREE**
- **Reporters Without Borders Index (2011): 67.67 (145/179)**
- The media market in Kinshasa is more competitive than in other parts of DRC. In Kinshasa's radio market, for example, there are 10 domestic radio stations with more than 10 percent reach, compared to only four domestic stations outside of Kinshasa. In addition, there are 15 domestic and international TV broadcasters with more than 10 percent reach in Kinshasa compared to four in other urban areas of the country. Weekly use of TV—including international TV—as well as weekly use of SMS, internet and newspapers for news in Kinshasa is higher than elsewhere, creating even more competition for international broadcasters.
- The Kivu region's media market is different from that of DRC in general. Although levels of radio ownership in Kivu (90 percent) are similar to those in the country as a whole (87 percent), the use of radio for news and information is considerably higher in Kivu (79 percent) compared to the country in general (59 percent). However, the use of international radio in Kivu is similar to its use across DRC, probably because of language barriers—international broadcasters predominantly broadcast in French. Ownership of television is significantly lower, as is the use of TV—including international TV—for news and information.

P R O F I L E



Language of Broadcast: Georgian

Content: 7 hrs. of orig. and 7 hrs. of repeat radio prog. per week; 15 min. television per week; Internet

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

Radio: VOA's Georgian Service is heard on one affiliate, the Georgia Public Broadcasting, the country's third most powerful FM distribution facility.

TV: The Service produces a 15-minute weekly television show titled *Washington Today*. It is aired in Georgia on Network 1 of Georgia Public Broadcaster.

Web: The Service has a multimedia website, a mobile site, a Facebook fan page, Twitter and YouTube accounts, and sends an email newsletter.

Staff: 6

Budget: \$764,000

Established: 1951 to present



Language of Broadcast: Georgian and Russian to Georgia

Content: 27 hrs. of original and 2 hrs. of repeat radio programming per week; 1.5 hours of original TV programming per week; Internet

Distribution:

Radio: RFE/RL delivery for Georgian includes 2 national FM networks & 6 regional FM affiliates, HotBird and AsiaSat. Alt. delivery includes fortnightly publication and distribution of newspapers.

New Media: The Service has a website, mobile site, Facebook & YouTube page and very active blog.

TV: RFE/RL has 1 national TV affiliate carrying a weekly 60-minute program and 1 satellite channel broadcasting a weekly half-hour Russian-language program focused on the Caucasus.

Delivery for Ekho Kavkaza in Russian includes 2 national network & 2 regional FM affiliates, IBB



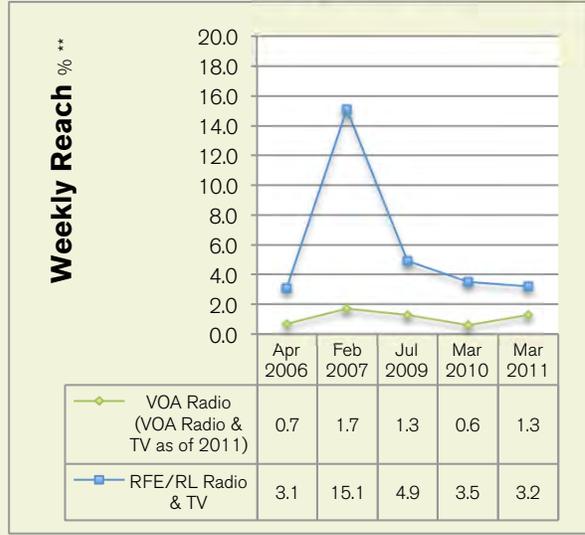
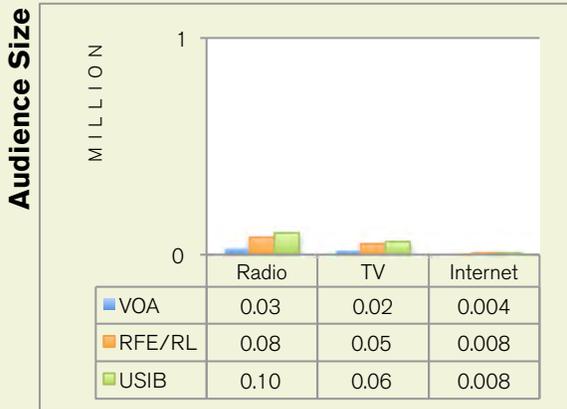
provided SW, Internet with live audio streaming, mobile site and fortnightly publication and distribution of newspapers in refugee enclaves.

Staff: 10

Budget: \$2,042,000

Established: 1953 to present

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



Weekly Reach (%)			
	VOA	RFE/RL	USIB
Radio	.9	2.1	2.5
TV	0.5	1.4	1.8
Internet	0.1	0.2	0.2
Total	1.3	3.2	4.7

Awareness (%)	
VOA	RFE/RL
35	56

Georgian

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

Understanding	Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)	
	VOA Radio	RFE/RL Radio
Current Events	75	68
U.S. Society (VOA) or Current Events In Georgia (RFE/RL)	79	68
U.S. Policies	64	na

Quality	Combined Scores from audience panel	
	VOA	RFE/RL
Radio	3.4	3.6
TV	na	na

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

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

Georgian Broadcasting

Total Population of Georgia: 4.3 million

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

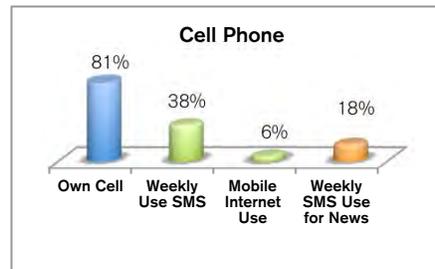
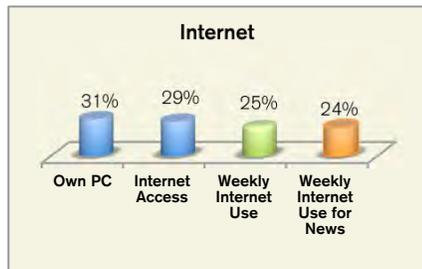
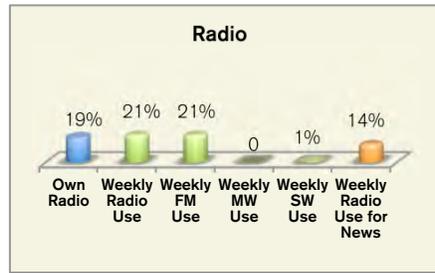
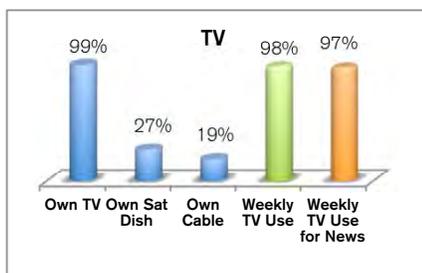
	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
Sex	%	%	%
Male	46	55	53
Female	54	45	47
Age			
15-24	20	12	8
25-34	18	23	17
35-44	19	20	21
45-54	14	16	14
55-64	13	17	25
65+	17	12	15

	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
Education	%	%	%
Inc. Sec.	23	3	4
Secondary	29	16	21
Technical	22	16	12
Higher	26	64	64
Ethnicity/Nationality			
Georgian	86	99	97
Azerbaijani	7	0	2
Armenian	4	0	0
Russian	1	1	0

	Sample	VOA Annual Aud.*	RFE/RL Weekly Aud.
Residence	%	%	%
Urban	53	66	59
Rural	47	31	41
Language			
Georgian	88	98	95
Russian	2	2	4
Other	10	0	1

*Samples of VOA weekly audiences in the survey are too small for meaningful analysis, hence use of annual audience above.

M E D I A U S E



Top Ten Media Outlets

1. Imedi TV
2. Rustavi 2 TV
3. Georgian Public TV 1
4. Ajara State TV
5. Sakartvelo
6. Mze
7. NTV
8. Georgian Public TV 2
9. Radio Ar daidardo
10. Radio Imedi

Top Ten Sources of News

1. Rustavi TV 2
2. Imedi TV
3. Georgian Public TV 1
4. Dilis gazeti
5. Adjara State TV
6. Tavisupleva.org
7. DW
8. Google
9. ORT-1
10. Radio Ar daidardo

Web Analytics

VOA	
Weekly Visitors	2,600
Weekly Visits	4,300
RFE/RL	
Weekly Visitors	7,200
Weekly Visits	25,200

C O N T E X T



Political Environment

- **Freedom House Political Freedom Index: PARTLY FREE in 2010**
- **Economist Intelligence Unit Instability: HIGH RISK (6.3) in 2010**
- Georgia remains a very politicized society. There are hundreds of different registered and unregistered political parties. The political system, however does not represent society well. In a recent poll, over 30 percent of the population supports the incumbent president, Mikhail Saakashvili, with 50 percent of the population undecided.
- The parliament of Georgia is considering a new draft of the Constitution that would turn Georgia from presidential republic to a parliamentary one. Some see it an attempt by Saakashvili to safeguard a position of prime minister after his second presidential terms expires in 2013.
- Georgian relations with Russia remain tense. Taken together, these factors indicate that the Georgian political situation remains less than stable.

Media Environment

- **Freedom House Press Freedom Index (2011): PARTLY FREE**
- **Reporters Without Borders Index (2011): 38.00 (104/179)**
- Although enjoying relative freedom compared to other countries in the FSU region, Georgian media outlets continue to be polarized and fragmented between opposition and the government, the quality of journalism in the country is low and media ownership rules are non-transparent.
- In Abkhazia and South Ossetia RFE/RL's Ekho Kavkaza's programming in Russian show an increase in listenership. In Abkhazia, weekly use of Ekho Kavkaza was 7.7 percent with 6.8 percent of adults listening to the radio programming each week and 1.4% visiting the website. In South Ossetia the website and radio program are both popular with 1.1 percent of adults visiting the website and .5 percent listening to the radio programming. Overall use in South Ossetia is 1.5 percent weekly.
- The use of Internet for news has overtaken use of conventional radio. Internet is now the third-most important weekly source of news and information for Georgian adults, following TV and friends and family; radio use has declined to sixth position.

P R O F I L E



Language of Broadcast: Greek

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

Distribution: 3 affiliates (2 FM, 1TV)

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

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

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

Staff: 4

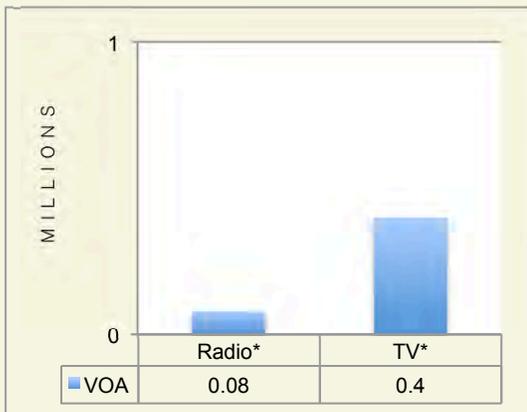
Budget: \$525,000

Established: 1942 to present; TV service established in 2006



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

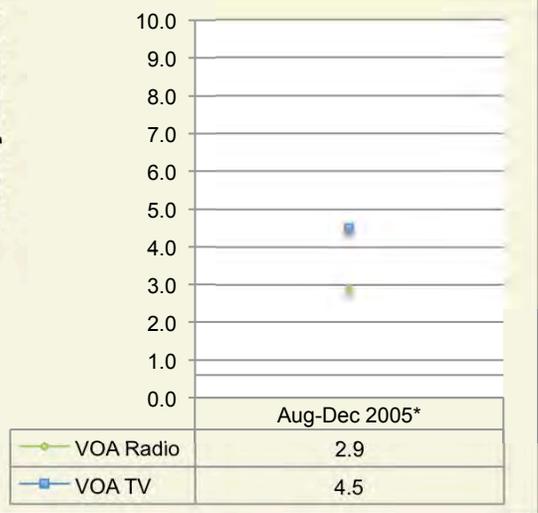
Audience Size



Weekly Reach (%) by Media

VOA	
Radio	2.9*
TV	4.5*
Internet	na
Total	na*

Weekly Reach %



Awareness (%)

VOA	
	na

Greek

Credibility

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

Understanding

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

Quality

Combined Scores from audience panel	
VOA	
Radio	3.7
TV	na

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

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

Greek Broadcasting

Total Population of Greece: 11.3 million

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

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

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

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

M E D I A U S E

TV

Media Use Data Unavailable

Radio

Media Use Data Unavailable

Google Analytics
Weekly Visitors 1,600
Weekly Visits 2,000

Internet

Media Use Data Unavailable

Cell Phone

Media Use Data Unavailable

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Hausa

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

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

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

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

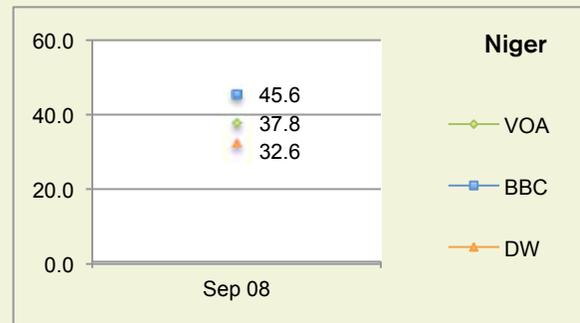
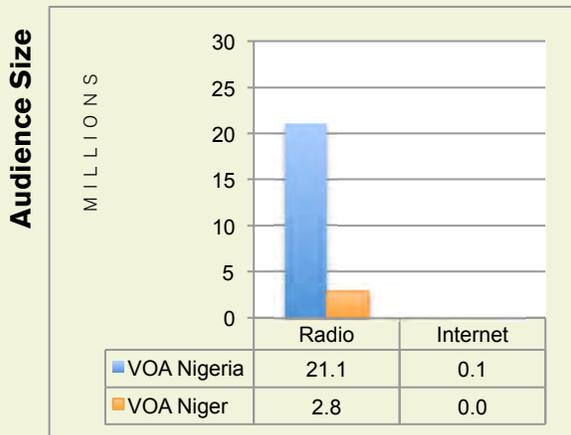
Staff: 10

Budget: \$1,338,000

Established: 1979 to present



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



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

Credibility

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

Understanding

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

Quality

Combined Scores from audience panel	
	VOA
Radio	3.6
TV	na

Hausa

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

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

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

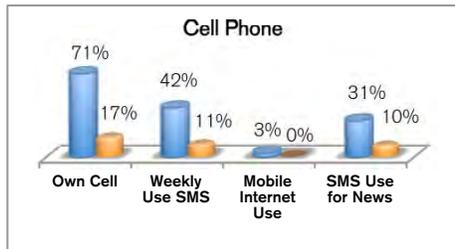
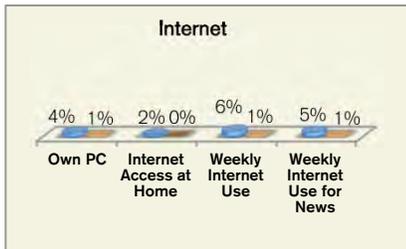
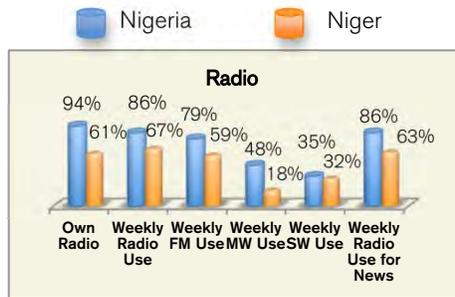
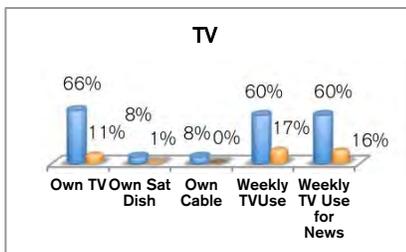
Total Population of Nigeria 162.3 million and Niger 16.1 million

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

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

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

M E D I A U S E



Top Ten Sources of News (Nigeria)

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

Top Ten Sources of News (Niger)

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

Web Analytics

Weekly Visitors	17,900
Weekly Visits	33,900

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



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

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

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

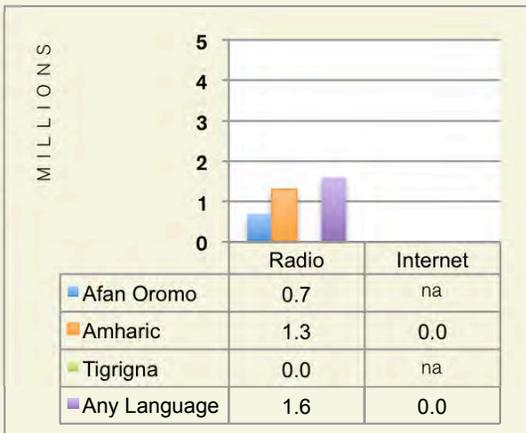
Staff: 16 | **Budget:** \$2,000,000

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

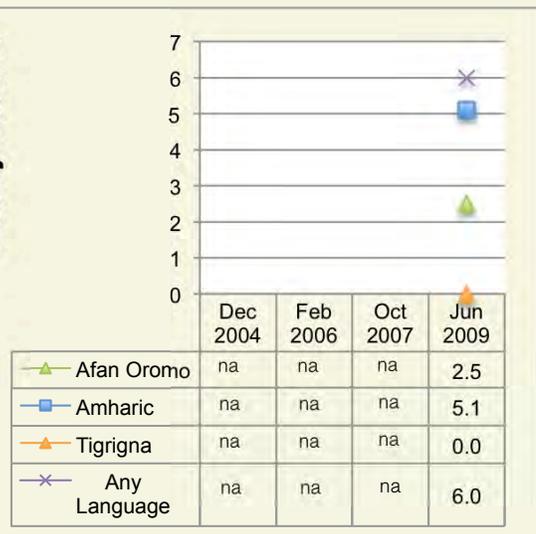


P E R F O R M A N C E D A T A (Using Data from Ethiopia, June 2009)

Audience Size



Weekly Reach



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

Awareness (%)	
VOA	
	52

Credibility

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

Understanding

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

Quality

Combined Scores from audience panel	
	VOA
Radio	3.5
TV	na

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

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

Horn of Africa Broadcasting

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

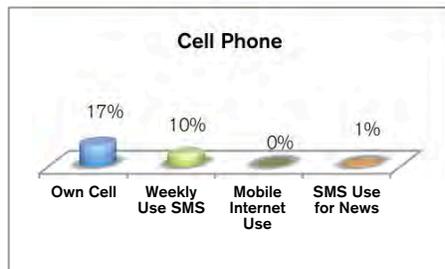
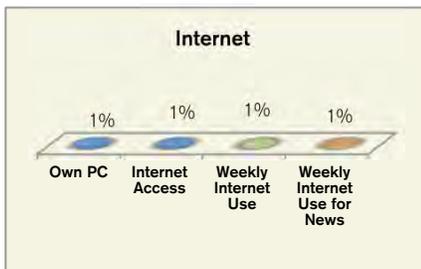
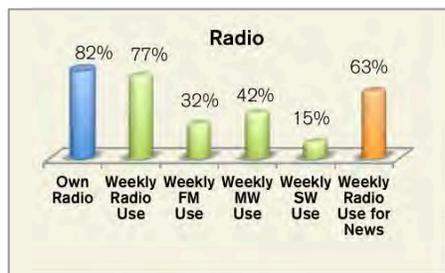
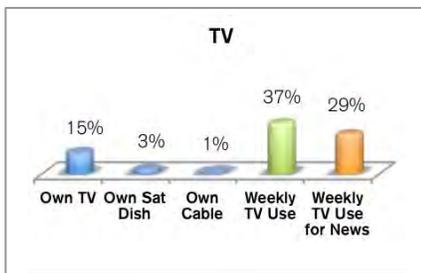
Total Population of Ethiopia: 87.1 million

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

Weekly Visitors	36,600
Weekly Visits	107,800

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Indonesian

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

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

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

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

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

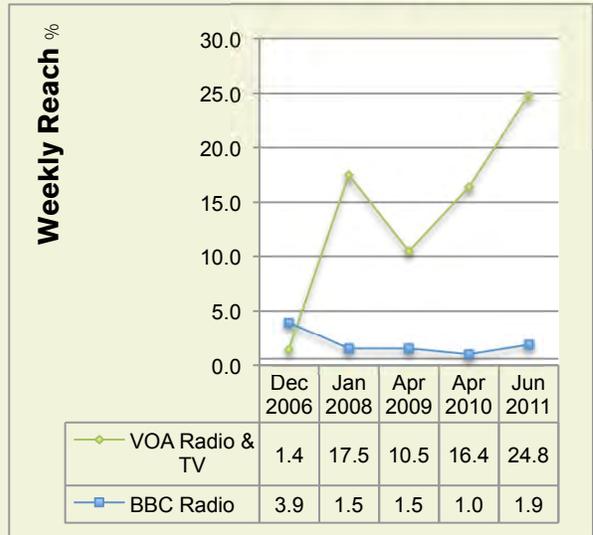
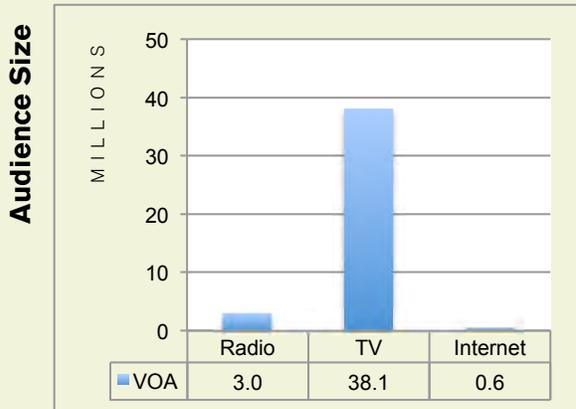
Staff: 43

Budget: \$5,933,000

Established: 1942 to present



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



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

Awareness (%)	
VOA	
	12

Indonesian

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

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

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.2
TV	3.3

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

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

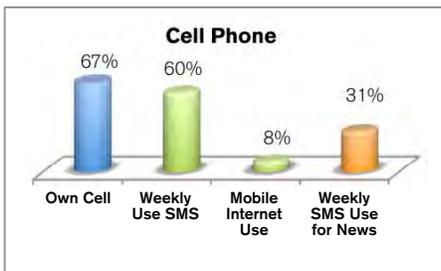
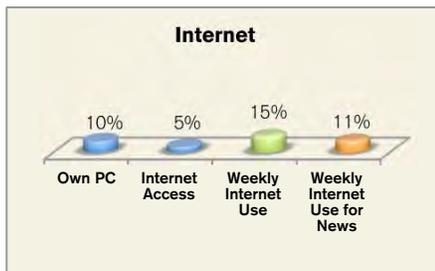
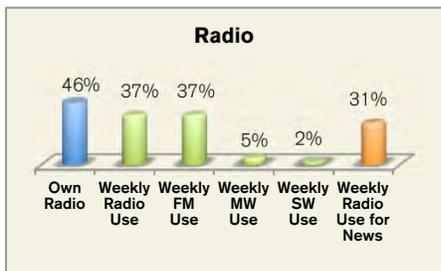
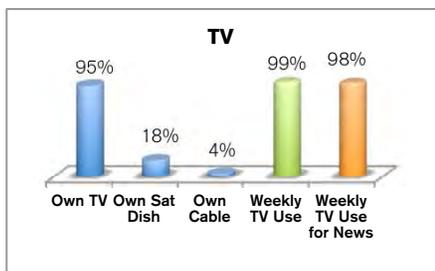
Total Population of Indonesia: 238.2 million

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

Weekly Visitors	21,700
Weekly Visits	28,400

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Languages of Broadcast: Kazakh, Russian

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

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

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

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

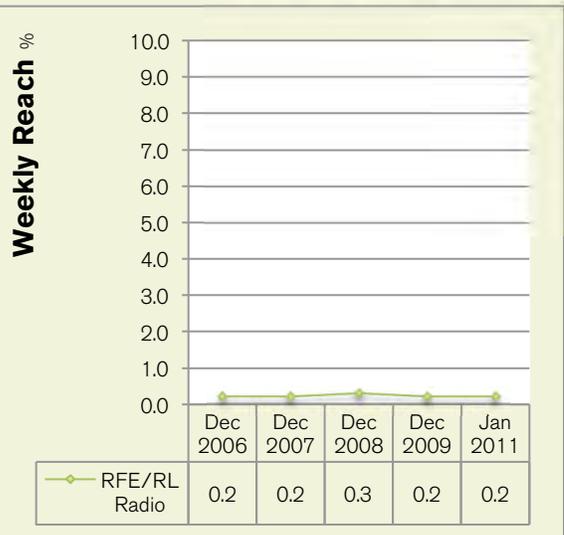
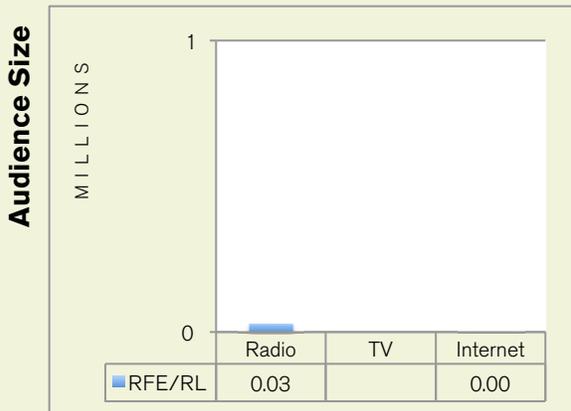
Staff: 9

Budget: \$1,702,000

Established: 1953 to present



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



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

Awareness (%)	
	RFE/RL
	8

Kazakh

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

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

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

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

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

Kazakh Broadcasting

Total Population of Kazakhstan: 16.6 million

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

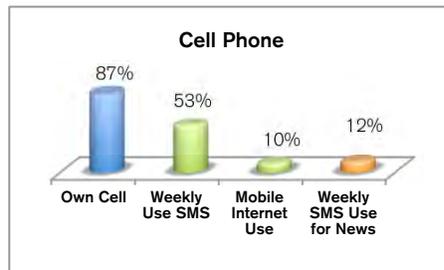
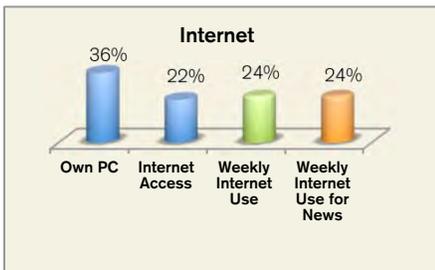
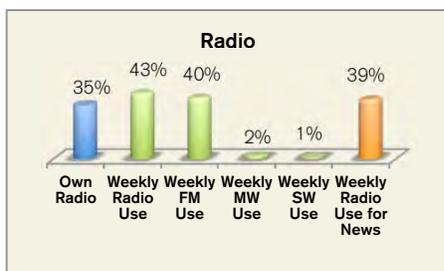
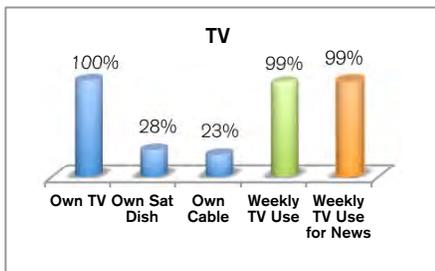
	Sample	RFE/RL Weekly Audience*
Sex	%	%
Male	47	na
Female	53	na
Age		
15-24	23	na
25-34	23	na
35-44	18	na
45-54	17	na
55-64	10	na
65+	9	na

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

Weekly Visitors	33,500
Weekly Visits	95,400

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Khmer

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

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

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

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

Staff: 11

Budget: \$1,774,000

Established: 1955 to 1957; 1962 to present



Language of Broadcast: Khmer

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

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

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

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

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



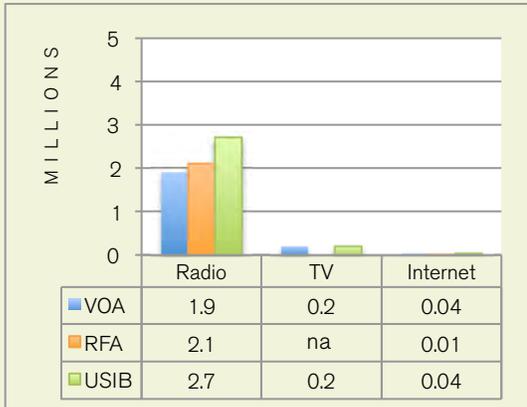
Staff: 12

Budget: \$1,413,000

Established: 1997 to present

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

Audience Size



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

Weekly Reach %



Awareness (%)	
VOA	RFA
66	73

Khmer

Credibility

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

Understanding

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

Quality

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

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

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

Khmer Broadcasting

Total Population of Cambodia: 14.7 million

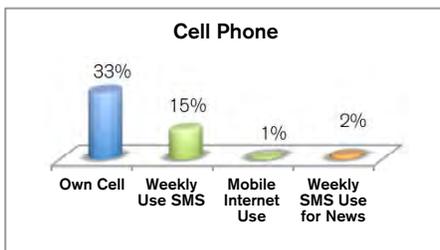
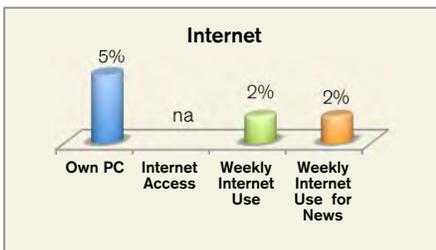
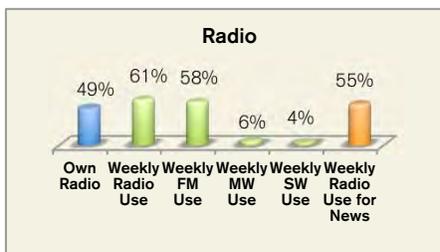
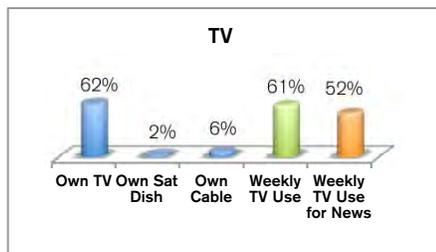
A U D I E N C E C O M P O S I T I O N

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

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

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

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- Cambodia's Prime Minister Hun Sen and his Cambodian Peoples' Party (CPP) maintain a tight grip on political power in Cambodia. National elections are scheduled for 2013, but the main opposition leader, Sam Rainsy, has lived in exile for the past couple of years and faces imprisonment should he go to Cambodia. Thus, there is no effective opposition.
- There is little separation of powers in the government. Public confidence in the court system and the police remain low. The Cambodian government continues to silence critics through the targeted use of laws and detention. Freedom House described the rule of law in Cambodia as "marred by a inefficiency, corruption and a lack of independence."
- The legitimacy of the high profile Khmer Rouge trials is in doubt now that two international judges have resigned due to interference from the Cambodian government.
- BBG surveys found less than half of Cambodian adults (45 percent) believe "people like them" are free to discuss political opinions openly and 69 percent believe that official corruption is the biggest problem in Cambodia today.
- Chinese influence is growing economically and politically. In early 2010, China gave \$850 million in aid to the Cambodia after the Phnom Penh government repatriated to China 20 Uyghurs who had been seeking political asylum.

Media Environment

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

P R O F I L E



Language of Broadcast: Korean
Content: 29 hrs. of original and 6.5 hrs. of repeat radio programming per week; Internet
Distribution: 2 MW, 7 IBB SW frequencies
Radio: VOA Korean broadcasts on 2 MW (AM) transmitters, one in South Korea and one in far eastern Russia, near the northern North Korean border. In addition, VOA Korean broadcasts from shortwave transmitters in the Philippines, Thailand, and Russia.
New Media: The Service has an Internet site and a multimedia mobile website and sends an email newsletter. The Service has recently launched Facebook, Twitter and YouTube pages.
Staff: 21 **Budget:** \$30,10,000
Established: 1942 to present

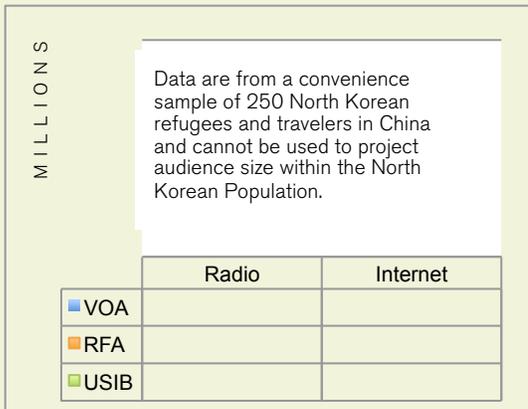


Language of Broadcast: Korean
Content: 24.5 hrs. of original and 10.5 hrs. of repeat radio programming per week; Internet
Distribution: 3 SW frequencies; Satellite rebroadcasting
Radio: The Service broadcasts three-and-a-half hours of original program and one-and-a-half hours of repeat daily.
Video: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

Staff: 22
Budget: \$2,332,000
Established: 1997 to present

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

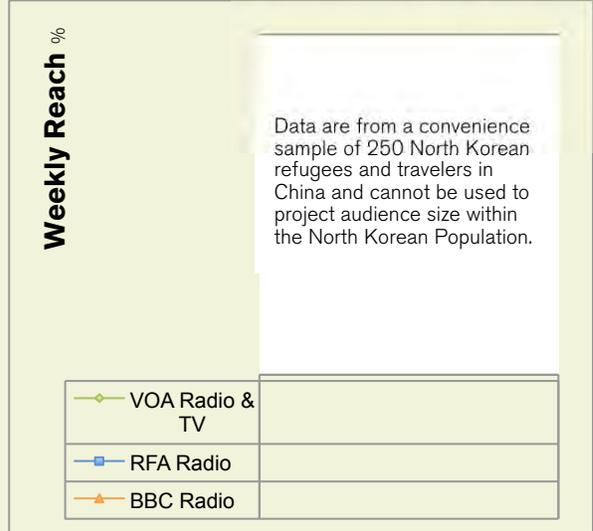
Audience Size



Weekly Reach by Media (%) **

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

Weekly Reach %



Awareness (%)

VOA	RFA
28	24

Credibility

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

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

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

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

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.4	3.0
TV	na	na

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

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

Korean Broadcasting

Total Population of North Korea: 24.5 million

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

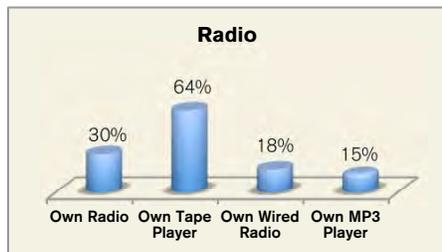
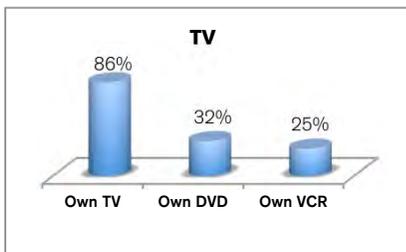
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	40	53	51
Female	60	47	49
Age			
15-24	2	2	4
25-34	22	25	24
35-44	50	41	42
45-54	20	25	24
55-64	6	8	7

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

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

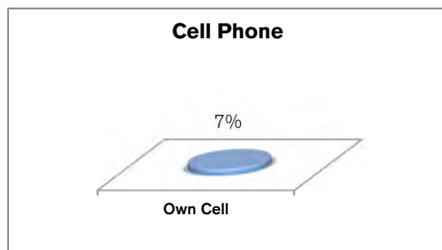
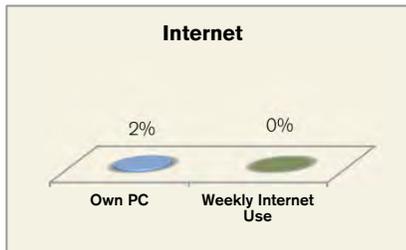
**Weekly reach figures are for listening while in North Korea; 15.2% reported listening to RFA and 12.4% to VOA while in transition. Media use data reflect while respondents were in North Korea.

M E D I A U S E **



Most Important Sources of Information

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



Web Analytics

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

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

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): NOT FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- North Korea remains one of the most closed and repressive societies in the world. The impoverished country continues to struggle to feed people, and is largely dependent on Chinese economic assistance. Under the rule of Kim Jong-un and the Korean Workers Party, serious and large-scale human rights abuses are common.
- The death of Kim Jong-il in December 2011 further complicated the security environment on the Korean Peninsula, as his 28-year-old son and successor Kim Jong-un has demonstrated the same reclusive tendencies as his father.
- An increasingly porous border with China has provided North Koreans with a greater window to the outside world than in the past, along with smuggled goods. Refugees describe a domestic environment of increasing disillusionment and despair, though this has not produced open protest.
- Relations between North and South Korea remain very tense after an official investigation into the sinking of the South Korean naval ship "Cheonan" concluded that the vessel was sunk by a North Korean torpedo. In response, South Korea has suspended trade with the North, resumed psychological operations and is appealing to the UN and the international community to condemn North Korea's actions.
- North Korea launched its first nuclear weapon in 2006, and multi-lateral talks with China, the U.S. Japan, Russia and South Korea have failed to curb the country's nuclear program. It tested another nuclear weapon in May 2009. In April 2012, North Korea launched a long-range rocket that disintegrated shortly after blast-off.

Media Environment

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

P R O F I L E



Language of Broadcast: Kurdish (dialects Sorani and Kurmanji)

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

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

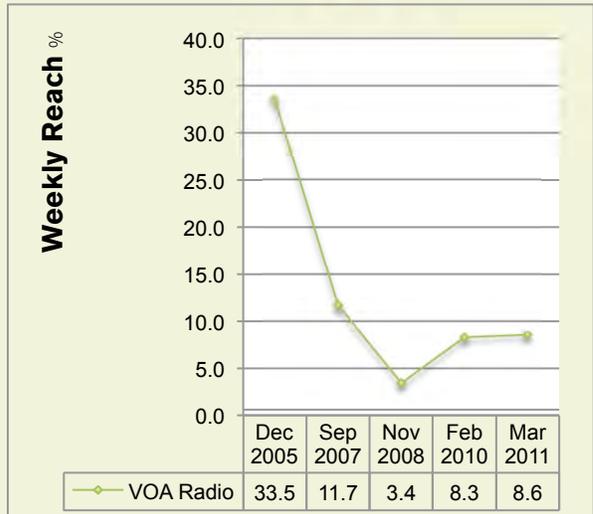
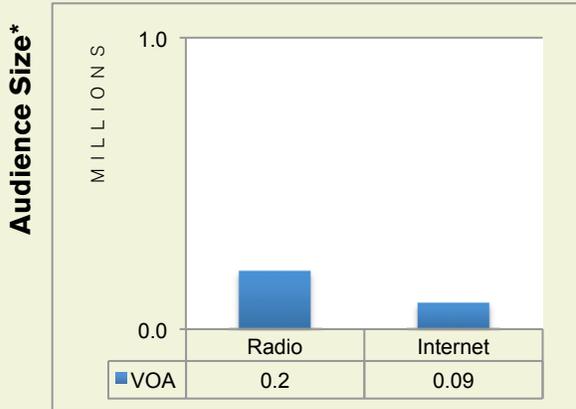
Radio: VOA's Kurdish Service broadcasts three hours of radio programming seven days a week. IBB FM transmitters in the Kurdish-populated cities of Sulaimaniya, Kirkuk, Mosul and Erbil carry all three hours daily. One hour per day is carried on IBB FM transmitters in Baghdad and Basra. One hour per day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

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

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



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



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

Awareness (%)	
VOA	
	na

Kurdish

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

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

Quality	
Combined Scores from audience panel	
VOA	
Radio	3.4
TV	na

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

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

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

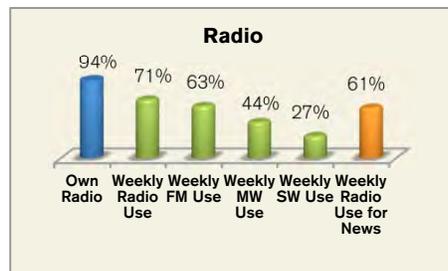
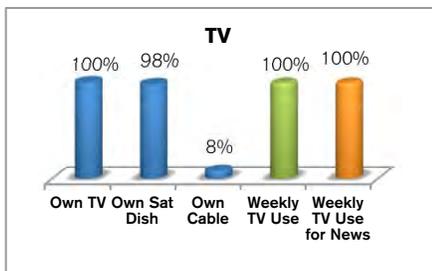
Total Population of Ethnic Kurdish population in Iraq: 3 million

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

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

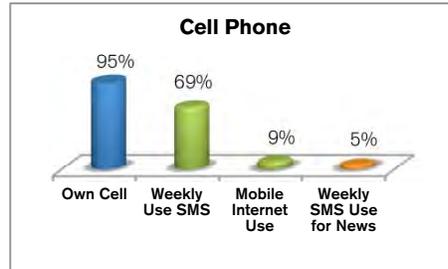
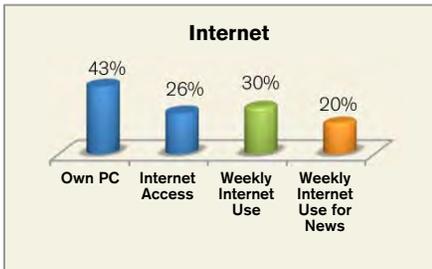
	Sample	VOA Weekly Audience
Residence	%	%
Urban	65	70
Rural	35	30
Language		
Kurdish	100	100

M E D I A U S E



Top Ten Media Outlets

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



Web Analytics

Weekly Visitors 20,600
Weekly Visits 46,500

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Kyrgyz

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

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

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

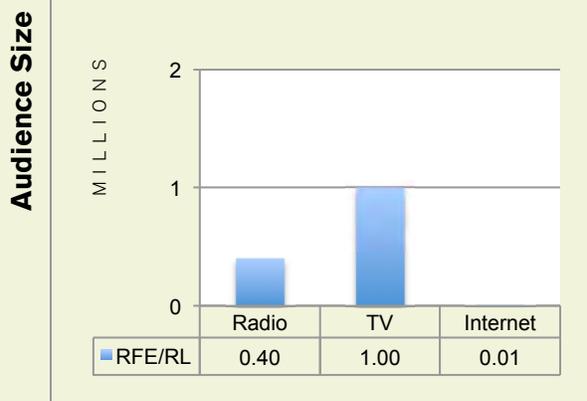
Staff: 7

Budget: \$1,685,000

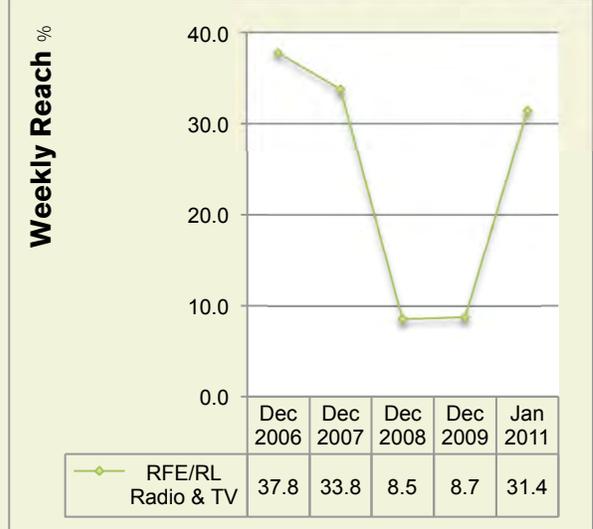
Established: 1953 to present



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



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



Awareness (%)	
RFE/RL	
	59

Kyrgyz

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

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

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

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

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

Kyrgyz Broadcasting

Total Population of Kyrgyzstan: 5.6 million

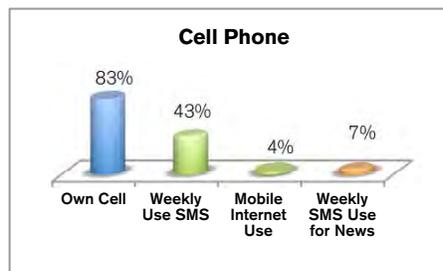
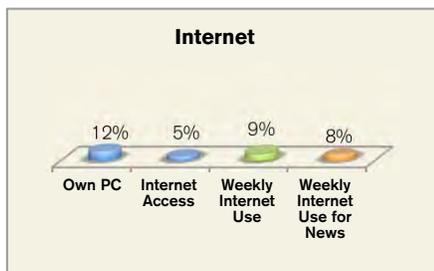
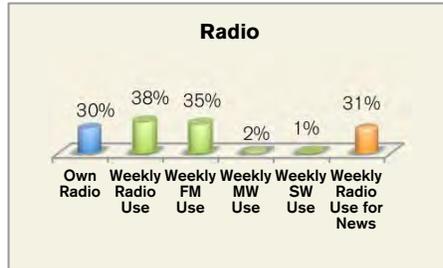
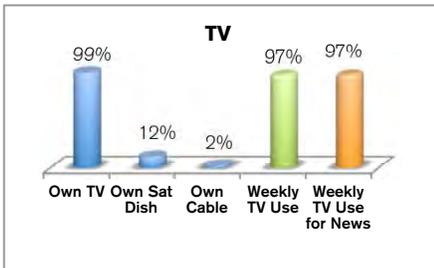
A U D I E N C E C O M P O S I T I O N

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

Weekly Visitors	13,400
Weekly Visits	53,200

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Lao

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

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

Radio: All Lao Service broadcasting is done from outside Laos. In addition to broadcasts on IBB facilities, the Service's 7 radio affiliates are based in Thailand near the border with Laos. They broadcast the Service's programming into Laos.

New Media: The Service has a website, a Facebook page, and sends an email newsletter.

Staff: 5 **Budget:** \$679,000

Established: 1962 to present



Language of Broadcast: Lao

Content: 12 hrs. of original radio programming per week; Internet

Distribution: 4 FM affiliates in Thailand, 2 IBB SW frequencies, satellite audio; mobile phone

Radio: The Service broadcasts two hours of original programs daily.

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

Staff: 13 **Budget:** \$1,399,000



Established: 1997 to present

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

(Using Data from Laos, May 2011)

Audience Size

MILLIONS

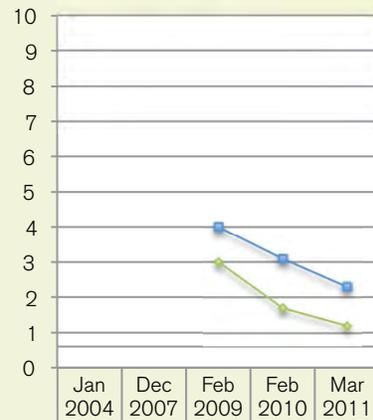
Audience figures are based on surveys conducted in politically repressive environments that are generally hostile to international broadcasting, particularly of domestic news coverage. Discouraged, and even prohibited by governments from listening to USIB programming, actual audience figures may be higher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

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

Weekly Reach by Media (%)

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

Weekly Reach %



Awareness (%)

VOA	RFA
10	26

Credibility

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

	VOA	RFA
Radio	na	na
TV	na	na

Understanding

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

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

Quality

Combined Scores from audience panel

	VOA	RFA
Radio	3.3	3.0
TV	na	na

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

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

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

Lao Broadcasting

Total Population of Laos: 6.3 million

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

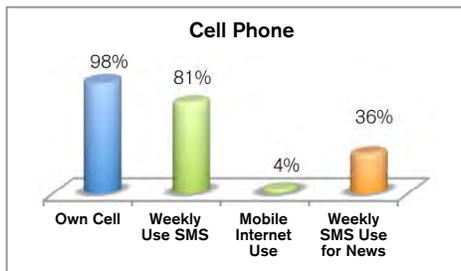
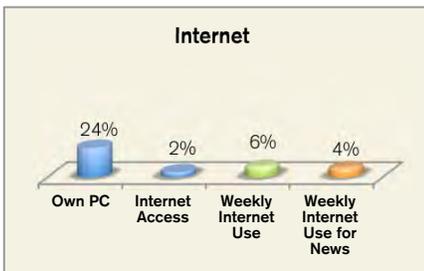
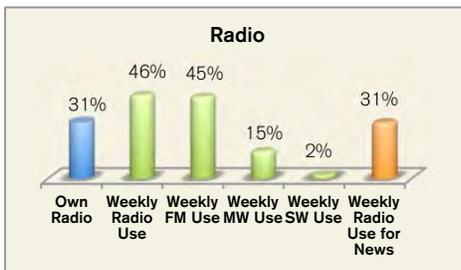
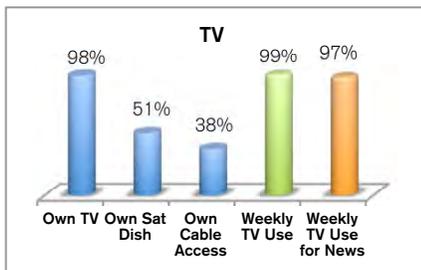
	Sample	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	37	na	na
25-34	23	na	na
35-44	17	na	na
45-54	11	na	na
55-64	12	na	na
65+	0	na	na

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Web Analytics

VOA Weekly Visitors	3,400
Weekly Visits	9,300
RFA Weekly Visitors	5,000
Weekly Visits	9,900

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



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

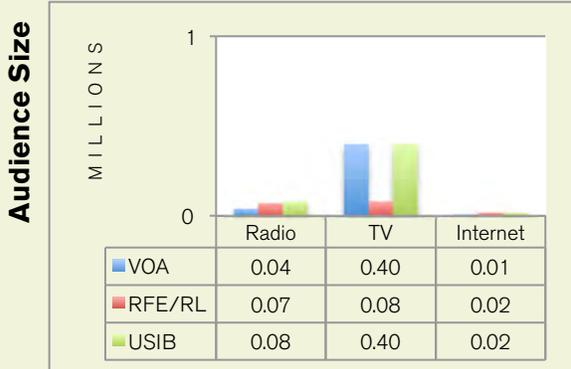


Language of Broadcast: Albanian to Kosovo, Bosnian, Macedonian, Montenegrin, and Serbian
Content: Albanian to Kosovo: 10.5 hours original radio; 5 hours TV; Macedonian: 7 hours original radio; 10 minutes TV; Serbian: 7 hours original radio; Montenegrin: 3.5 hours original radio; Balkans Regional program: 12 hours original radio
Distribution: 193 affiliates (150 FM, 43 TV) RFE/RL's delivery includes affiliates in Bosnia and Herzegovina (49 FM, 29 TV), Kosovo (37 FM), Macedonia (6 FM, 13 TV), Montenegro (12 FM), and Serbia (47 FM, 1 TV), in addition to HotBird and Internet with streaming audio.
Web: All of the Balkan Services are active on Facebook and Twitter, have mobile sites, and have branded YouTube pages in process.
Staff: 12†
Budget: \$4,525,000+
Established: 1994 to present

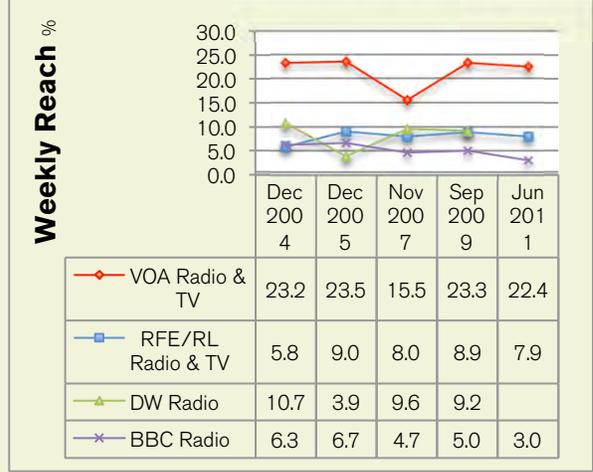


† Numbers reflect RFE/RL Balkans service totals which include Albanian, Bosnian, Macedonian, Montenegrin and Serbian.

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



Weekly Reach by Media (%)			
	VOA	RFE/RL	USIB
Radio	2.3	4.1	4.7
TV	21.3	4.6	22.4
Internet	0.7	0.9	1.3
Total	22.2	7.9	23.7



Awareness (%)	
VOA	RFE/RL
74	57

Credibility

Percentage of surveyed weekly audience that finds broadcasts credible (%)		
	VOA	RFE/RL
Radio	97	96*
TV	95	96*

Understanding

Percentage of weekly audience whose understanding of topics increased "A Great Deal" or "Somewhat" (%)		
	VOA TV*	RFE/RL
Current Events	74	94
U.S. Culture (VOA)/Current Events in Macedonia	95	92
U.S. Policies	75	na

Quality

Combined Scores from audience panel		
	VOA	RFE/RL
Radio	3.4	3.3
TV	3.5	na

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

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

Macedonian Broadcasting

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

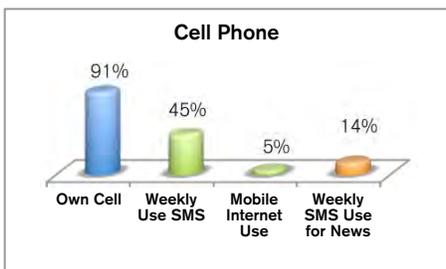
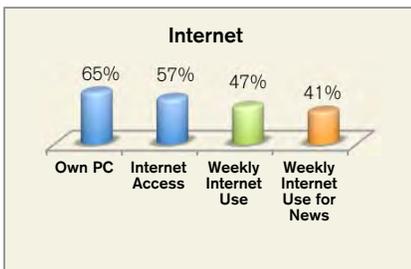
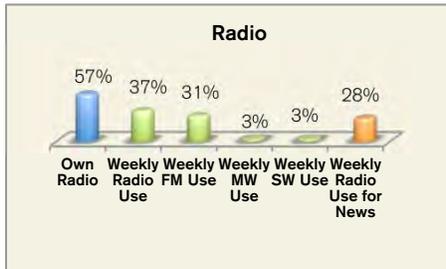
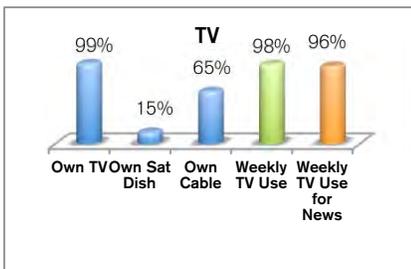
Total Population of Macedonia: 2.1 million

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Mandarin

Content: 63.3 hrs. of original radio programming per week, 273 hours of repeat radio per week on two satellite channels; 7.25 hrs. of original and 1.25 hrs. of repeat TV programming per week; Internet
Distribution: 12 affiliates (4 TV, 9 radio), TV via AsiaSat3, 6-8 IBB SW frequencies.

TV: Branded TV programming on CTV and BCC, Asia Travel TV in Taiwan, and Hong Kong based SunTV. 11 stations inside China take unbranded VOA Mandarin Service's programs for rebroadcast.

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

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

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

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

Established: 1941 to present



Language of Broadcast: Mandarin

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

Distribution: 6-11 IBB SW frequencies; Satellite rebroadcasting

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

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

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

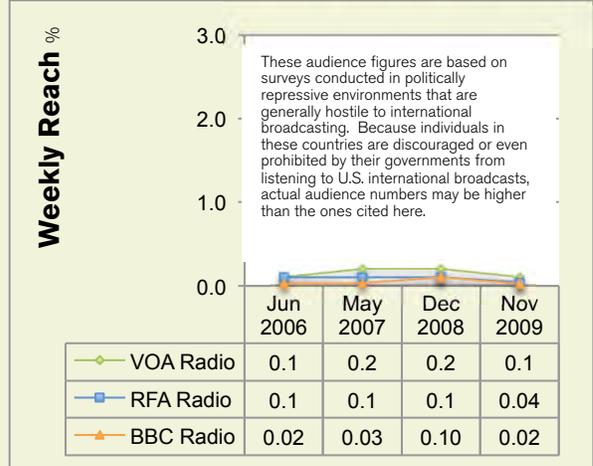
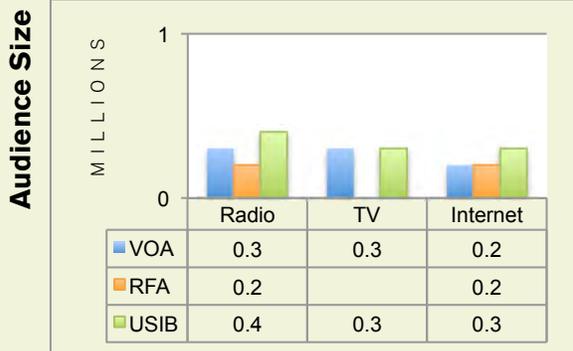
Staff: 37

Budget: \$4,881,000

Established: 1996 to present



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



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

Awareness (%)	
VOA	RFA
12	3

Mandarin

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

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

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

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

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

Mandarin Broadcasting

Total Population of China: 1,345.9 million

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

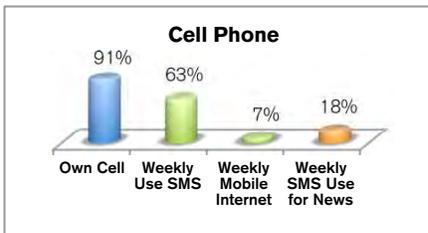
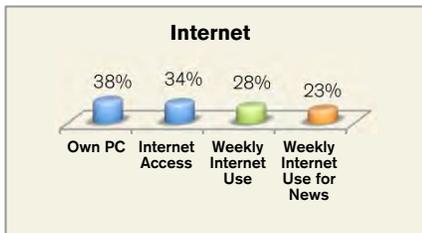
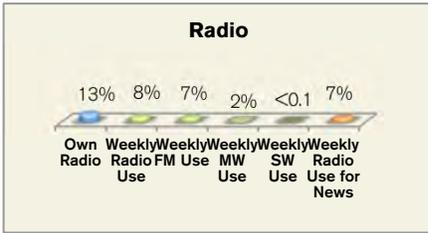
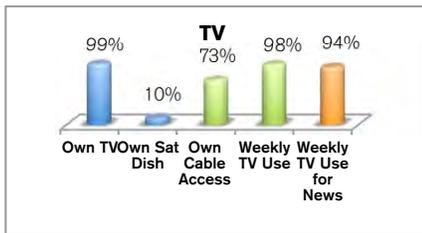
	Sam.	VOA Weekly Aud.*	RFA Weekly Aud.*
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	17	na	na
25-34	21	na	na
35-44	25	na	na
45-54	22	na	na
55-64	12	na	na
65+	16	na	na

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Romanian, Russian

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

Distribution: 4 affiliates (FM, MW & UKW)

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

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

Staff: 4

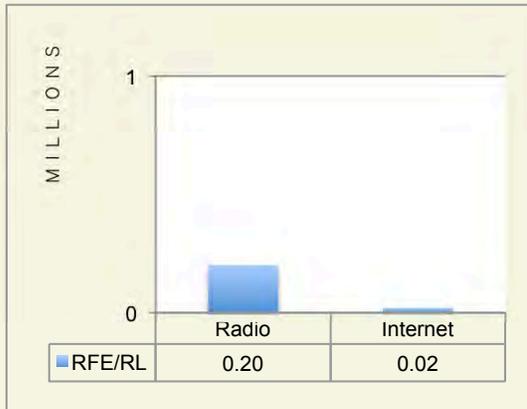
Budget: \$1,029,000

Established: 1950 to present

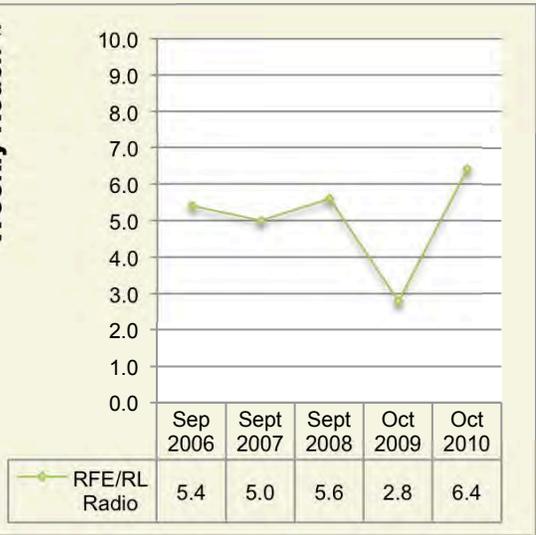


P E R F O R M A N C E D A T A (Using Data from Moldova, October 2010)

Audience Size



Weekly Reach %



Weekly Reach by Media (%)

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

Awareness (%)

Media	RFE/RL (%)
Total	52

Moldovan

Credibility

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

Media	RFE/RL (%)
Radio	88
TV	na

Understanding

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

Topic	RFE/RL (%)
Current Events	99
Current Events in Moldova	99

Quality

Combined Scores from audience panel

Media	RFE/RL Score
Radio	3.5
TV	na

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

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

Romanian & Russian to Moldova Broadcasting

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

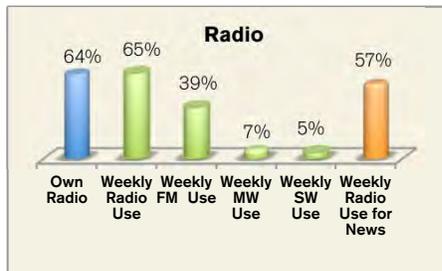
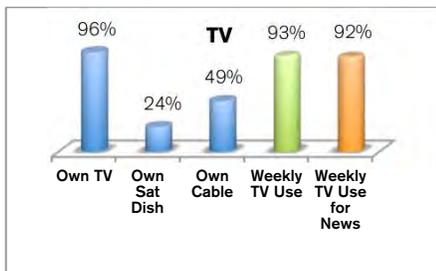
Total Population of Moldova: 4.1 million

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

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

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

M E D I A U S E

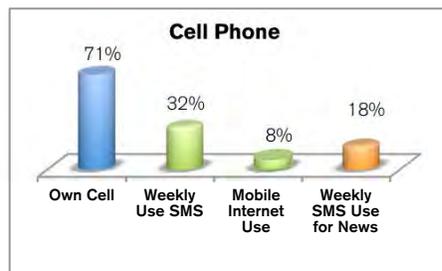
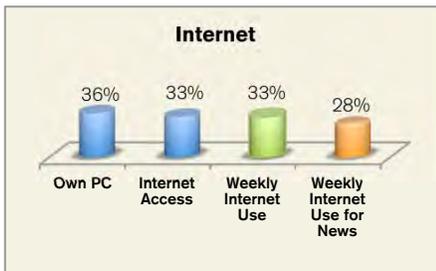


Top Ten Media Outlets

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

Top Ten Sources of News

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



Web Analytics

Weekly Visitors	5,500
Weekly Visits	12,200

C O N T E X T



Political Situation

- **Freedom House Political Freedom Index (2011): PARTLY FREE**
- **Economist Intelligence Unit Instability (2010): VERY HIGH RISK**
- Moldova's politics continue to be dominated by the ramifications of the breakaway region of Transnistria, which has impeded Moldova's economic growth and political goal of closer integration with the European Union. The Transnistria issue also colors Moldova's foreign relations, given Moldova's continued economic dependence on Russia, and Russia's continued support for the Russian-speaking separatist regime.

Media Environment

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

P R O F I L E



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

Content: Albanian to Kosovo: 10.5 hours original radio; 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+

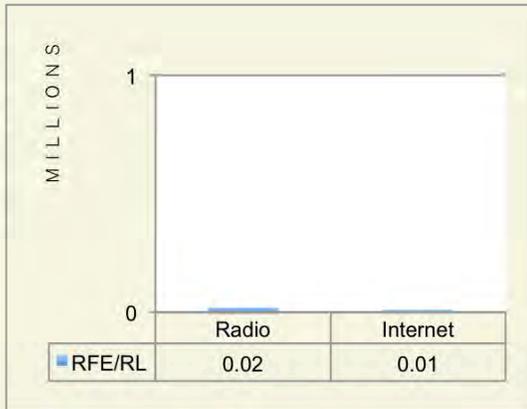
Established: 1994 to present

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



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

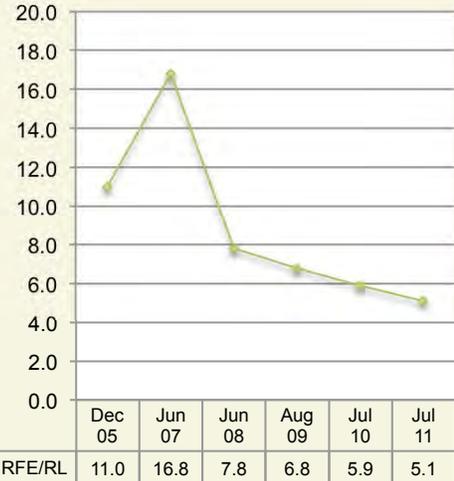
Audience Size*



Weekly Reach by Media (%)*

	RFE/RL
Radio	3.8
TV	na
Internet	1.5
Total	5.1

Weekly Reach %



Awareness (%)

	RFE/RL
Awareness (%)	65

Credibility

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

	RFE/RL
Radio	93
TV	na

Understanding

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

	RFE/RL
Current Events	96
Current Events in Montenegro	92

Quality

Combined Scores from audience panel

	RFE/RL
Radio	3.4
TV	na

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

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

Montenegrin

Montenegrin Broadcasting

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

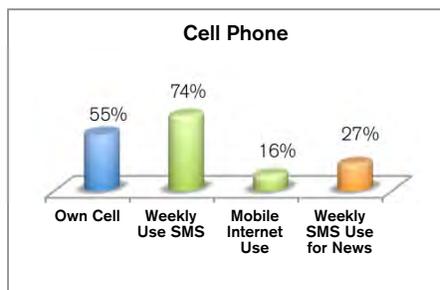
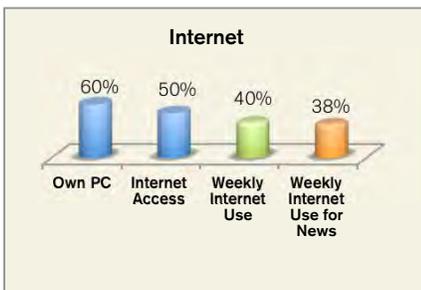
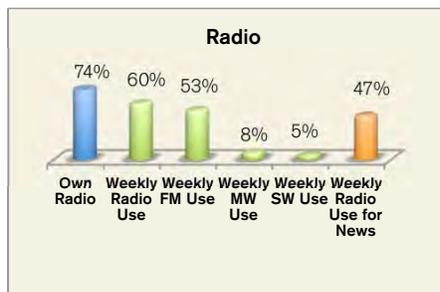
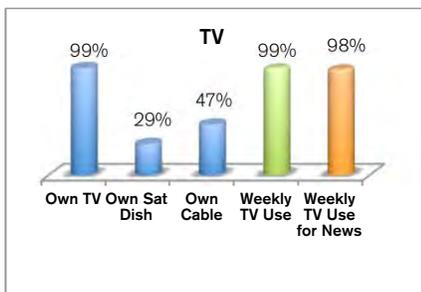
Total Population of Montenegro: 0.6 million

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

Weekly Visitors 19,200+

Weekly Visits 52,500+

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Voice of America



Language of Broadcast: Pashto

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

Distribution:

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

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

Radio Deewa: 1 IBB MW and 4 IBB SW frequencies

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

Staff: TV Ashna: 21; Radio Deewa: 7

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

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



Language of Broadcast: Pashto

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

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

Radio Mashaal: 1 IBB MW, 3 IBB SW frequencies

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

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

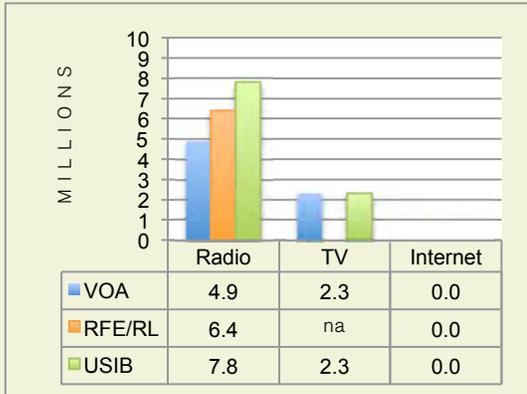
Established: 1985 to 1993; 2002 to present



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

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

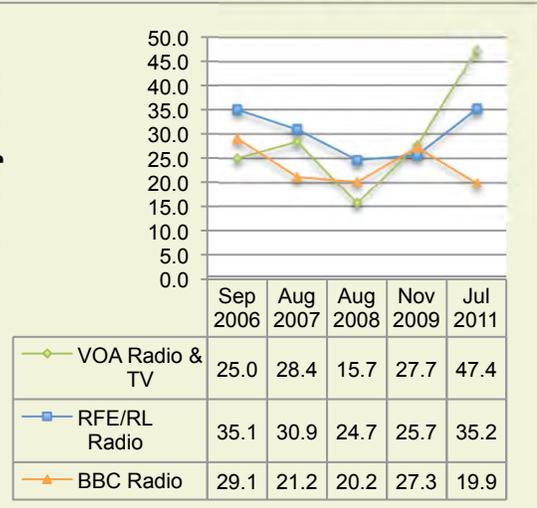
Audience Size



Weekly Reach by Media (%)

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

Weekly Reach %



Awareness (%)

VOA	RFE/RL
58	81

Pashto

Credibility

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

	VOA	RFE/RL
Radio	86	86
TV	95	na

Understanding

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

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

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.3	2.8
TV	na	na

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

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

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

Pashto Broadcasting

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

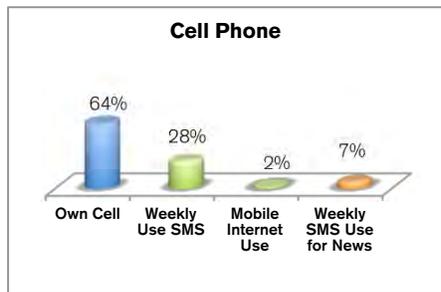
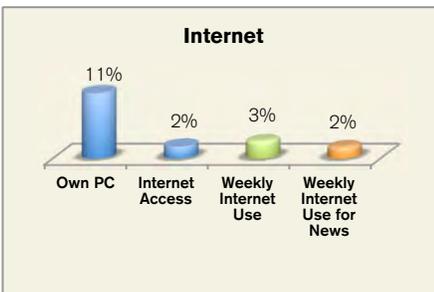
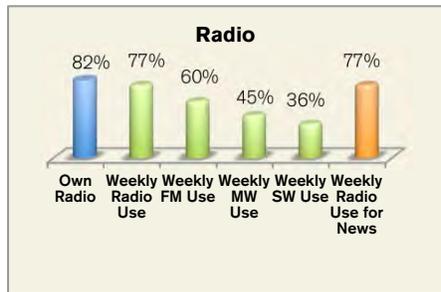
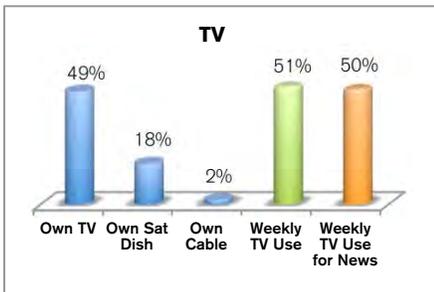
Total Population of Afghanistan: 32.4 million

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Top Ten Sources of News

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

Web Analytics

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

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

C O N T E X T



Political Situation

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

Media Environment

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

P R O F I L E



Language of Broadcast: Persian

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

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

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

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



Language of Broadcast: Persian

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

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

Staff: 57

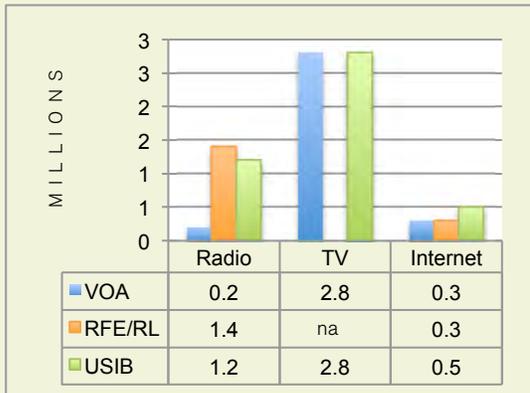
Budget: \$6,982,000

Established: 2002 to present



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

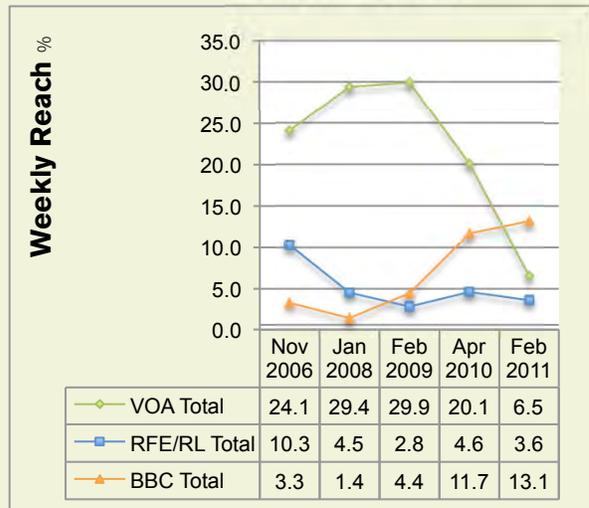
Audience Size



Weekly Reach by Media (%)

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

Weekly Reach %



Awareness (%)

	VOA	RFE/RL
	28	39

Credibility

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

	VOA	RFE/RL
Radio	na*	83
TV	75	na

Understanding

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

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

Quality

Combined Scores from audience panel

	VOA	RFE/RL
Radio	3.2	3.1
TV	2.9	na

Persian

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

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

Persian Broadcasting

Total Population of Iran: 77.9 million

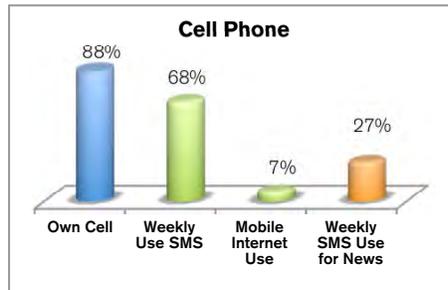
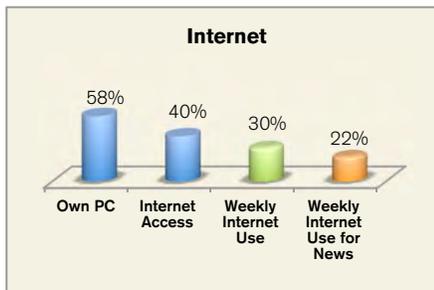
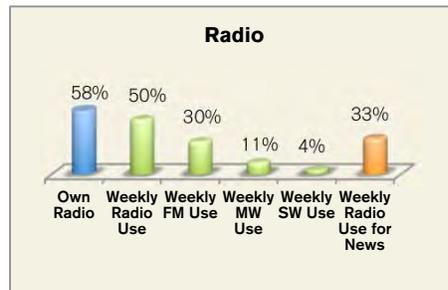
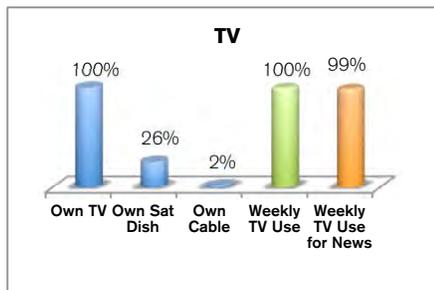
A U D I E N C E C O M P O S I T I O N

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

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

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

M E D I A U S E



Top Ten Media Outlets

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

Web Analytics

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

C O N T E X T



Political Situation

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

Media Environment

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

PROFILE



Language of Broadcast: Portuguese to Africa

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

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

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

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

Staff: 10

Budget: \$1,928,000

Established: 1976 to present



Portuguese to Africa

PERFORMANCE DATA *

Audience Size

MILLIONS

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

VOA

Weekly Reach by Media (%)**

	VOA
Radio	na
TV	na
Internet	na
Total	na

Weekly Reach %

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

VOA

Awareness (%)

VOA
14.9

Credibility

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

	VOA
Radio	na
TV	na

Understanding

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

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

Quality

Combined Scores from audience panel

	VOA
Radio	3.5
TV	na

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

Portuguese to Africa Broadcasting

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

Total Population of Angola 19.6 million and Mozambique 23.1 million

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

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

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

M E D I A U S E *

TV
Media use data is not available.

Radio
Media use data is not available.

Web Analytics

Weekly Visitors	5,800
Weekly Visits	9,700

Internet
Media use data is not available.

Cell Phone
Media use data is not available.

C O N T E X T



Political Situation

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

Media Environment

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

PROFILE



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



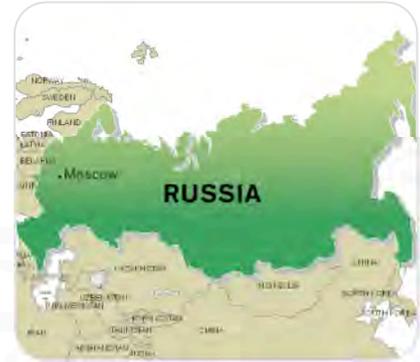
Language of Broadcast: Russian

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.

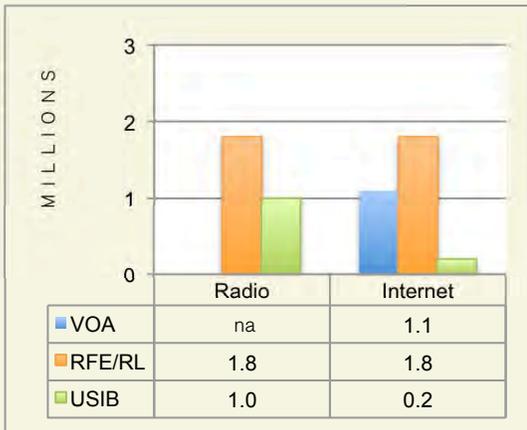
Staff: 28

Budget: \$7,809,000

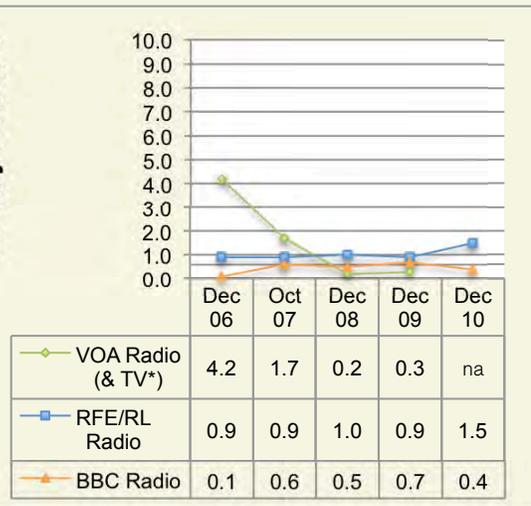
Established: 1953 to present

PERFORMANCE DATA (Using Data from Russia, December 2010)

Audience Size



Weekly Reach *



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

	VOA	RFE/RL
Radio	na	na
TV	na	na

Understanding

	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

	VOA	RFE/RL
Radio	na	3.2
TV	2.9	na

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

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

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

Russian Broadcasting

Total Population of Target Country: 142.8 million

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

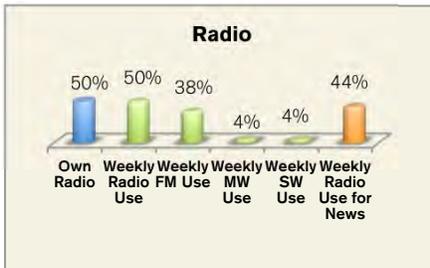
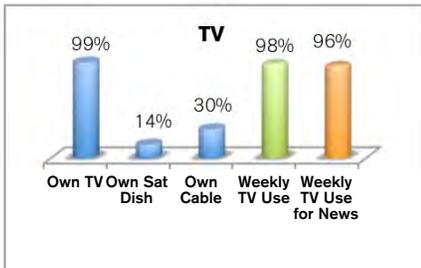
	Sam.	VOA Annual Aud.**	RFE/RL Weekly Aud.**
Sex	%	%	%
Male	46	65	52
Female	54	35	48
Age			
15-24	18	41	16
25-34	19	33	22
35-44	15	16	7
45-54	17	7	27
55-64	14	3	11
65+	15	0	16

	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

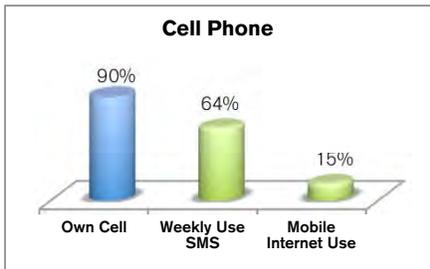
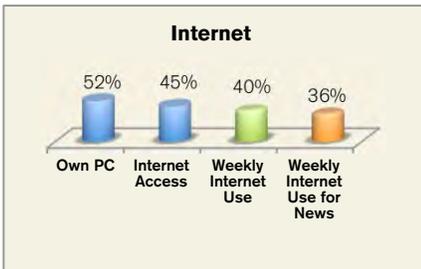
**Samples of VOA and RFE/RL weekly listeners in the survey are too small for meaningful analysis.

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

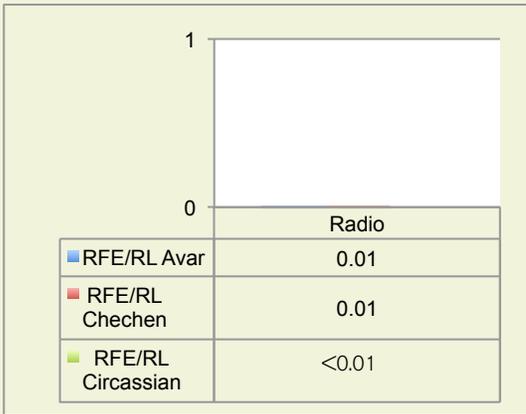
Established: Avar: 1951 to 1970's; 2002 to present; Chechen: 1953 to 1970; 2002 to present; Circassian: 2002 to present



Russian North Caucasus

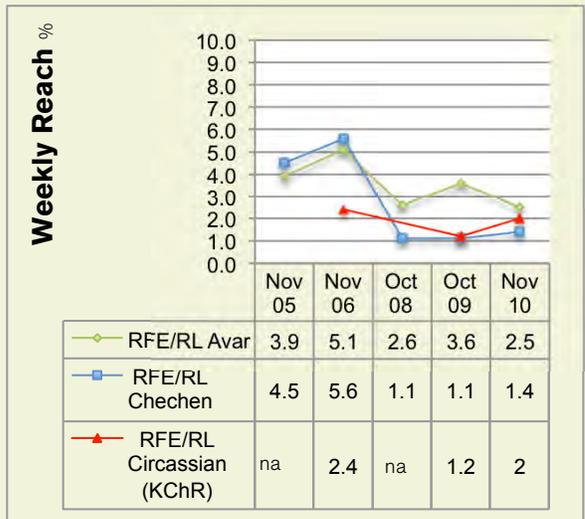
P E R F O R M A N C E D A T A *

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*

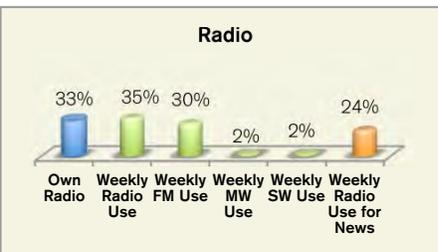
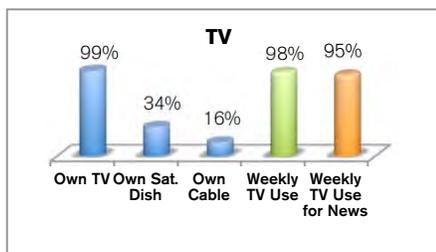
	Comb. Sam.	Avar Wk. Rch.	Chech. Wk. Rch.	Circ. Wk. Rch.
Sex	%	%	%	%
Male	48	na	na	na
Female	52	na	na	na
Age				
15-24	27	na	na	na
25-34	23	na	na	na
35-44	18	na	na	na
45-54	19	na	na	na
55-64	9	na	na	na
65+	4	na	na	na

	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

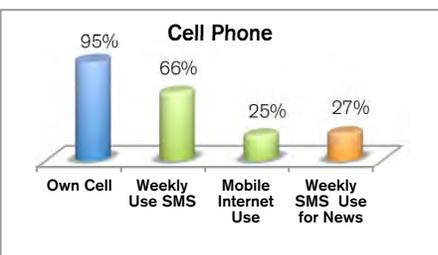
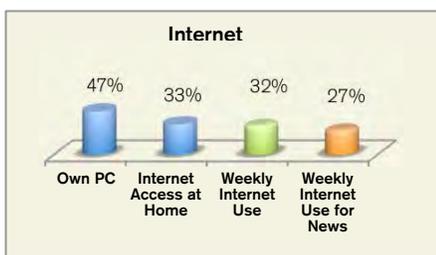
M E D I A U S E

(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



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+



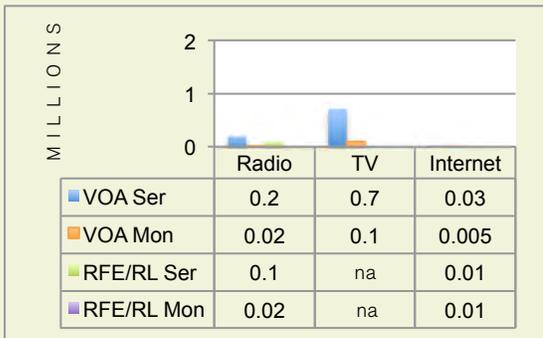
Budget: \$4,525,000+
Established: 1994 to present

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

Serbian/Montenegrin

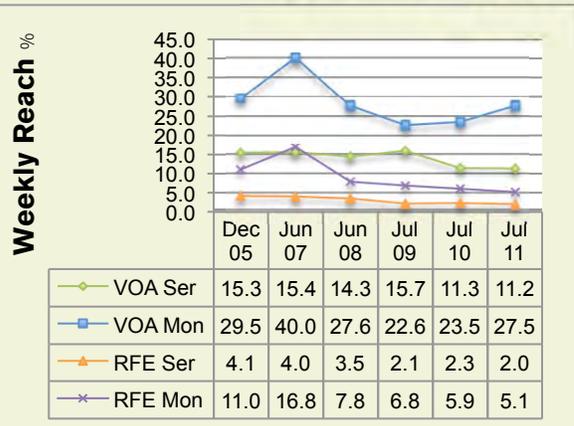
PERFORMANCE DATA (Using data from Serbia & Montenegro, July 2010 & 2011)

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



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

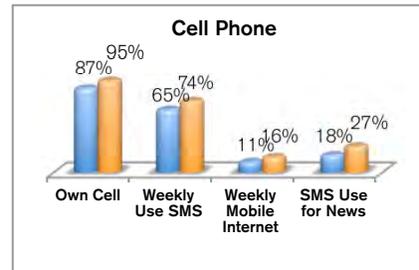
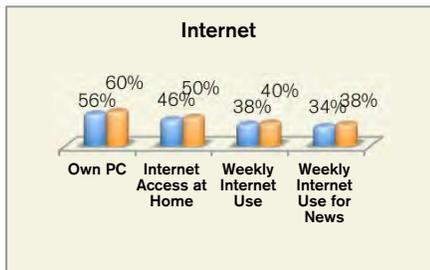
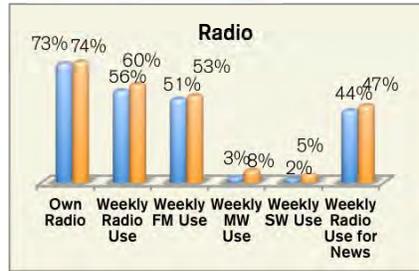
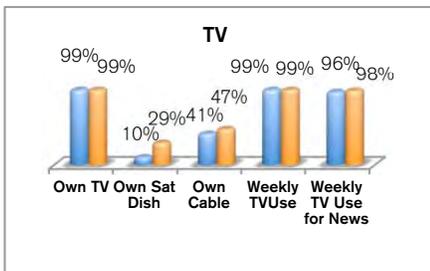
	Serbia Sam.	VOA Serbian Wkly. Aud.	RFE/RL Serbian Wkly. Aud.
Sex	%	%	%
Male	48	56	43
Female	52	44	57
Age			
15-24	14	4	0
25-34	17	14	10
35-44	15	16	22
45-54	17	27	27
55-64	17	22	27
65+	20	17	15

	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

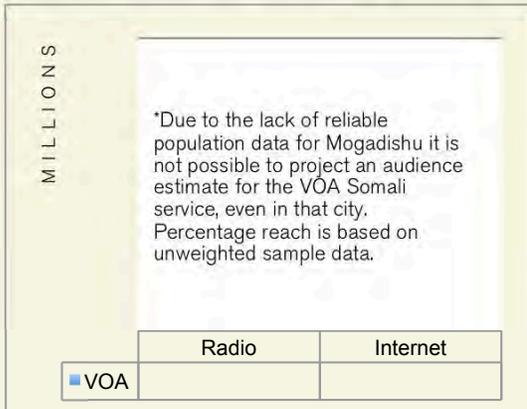


Budget: \$1,269,000

Established: 1992 to 1994; 2007 to present

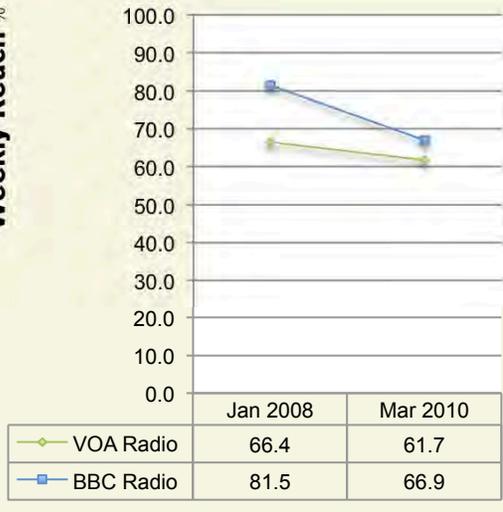
P E R F O R M A N C E D A T A (Using Data from Mogadishu, March 2010)

Audience Size*



Weekly Reach by Media (%)	
	VOA
Radio	61.7
TV	na
Internet	10.6
Total	63.6

Weekly Reach %



Awareness (%)	
	VOA
	89

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

Somali

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

Somali Broadcasting

Total Population of Somalia: 9.9 million

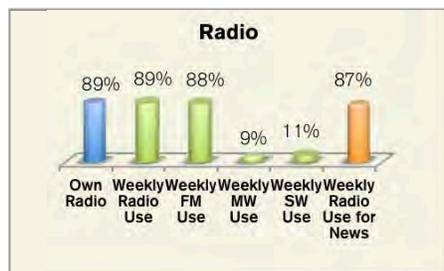
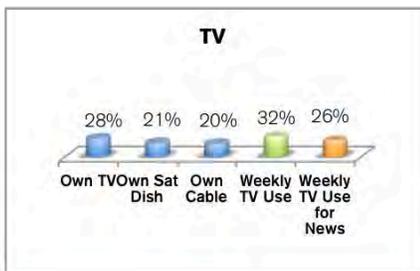
A U D I E N C E C O M P O S I T I O N

	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

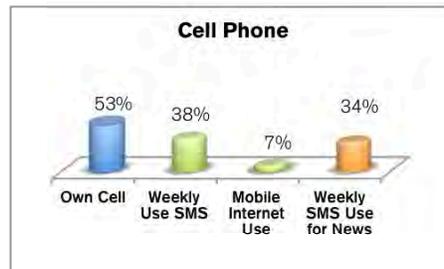
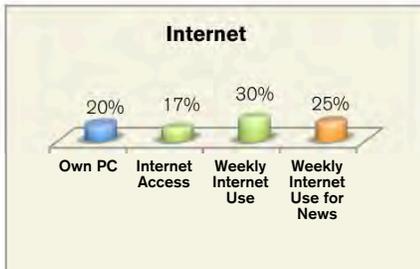


Top Ten Media Outlets

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



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 led 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

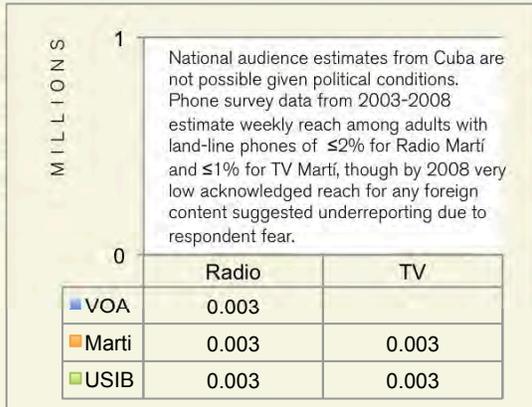
† includes additional indirect costs



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 *

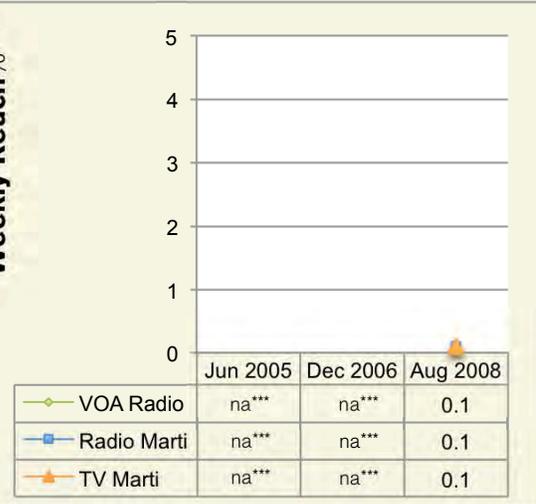
Audience Size**



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

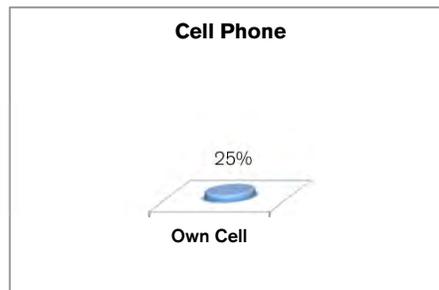
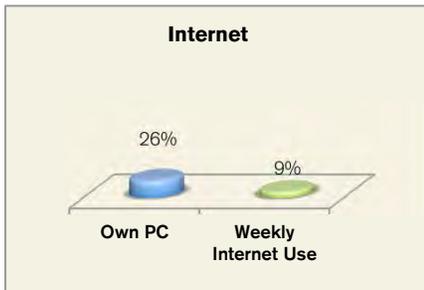
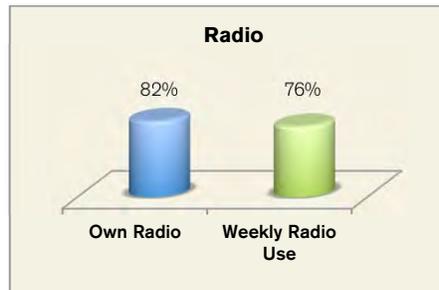
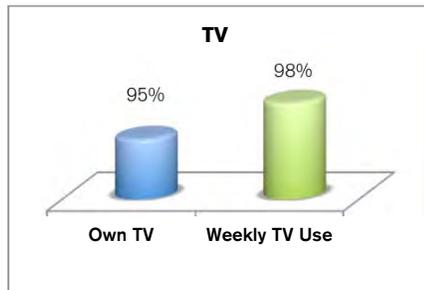
	Sample	VOA Weekly Aud.***	Marti Weekly Aud.***
Sex	%	%	%
Male	47	na	na
Female	53	na	na
Age			
18-24	15	na	na
25-34	16	na	na
35-44	23	na	na
45-54	19	na	na
55-64	16	na	na
65+	12	na	na

	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



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

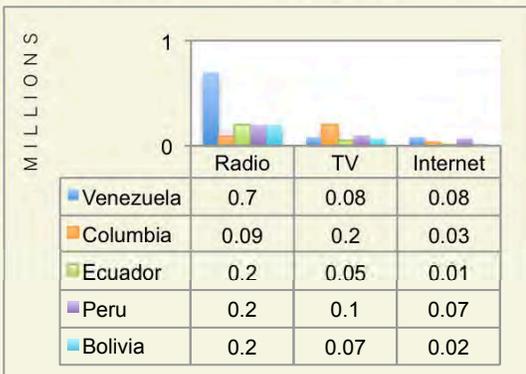
Established: 1941 to 1945; 1946 to 1948; 1953 to 1956 (VOA contracted private radio stations to produce and transmit programs for Latin America); 1960 to present



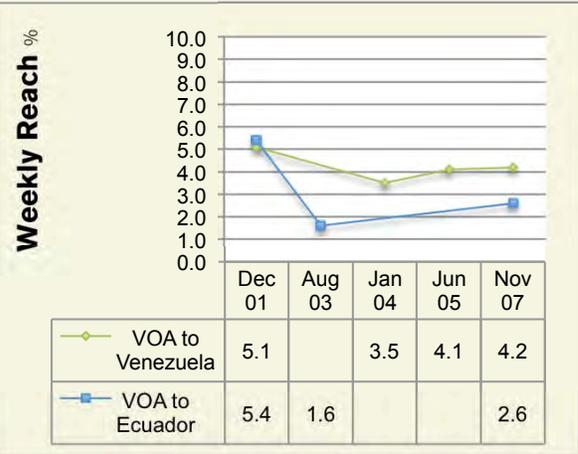
Spanish to Latin America

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.

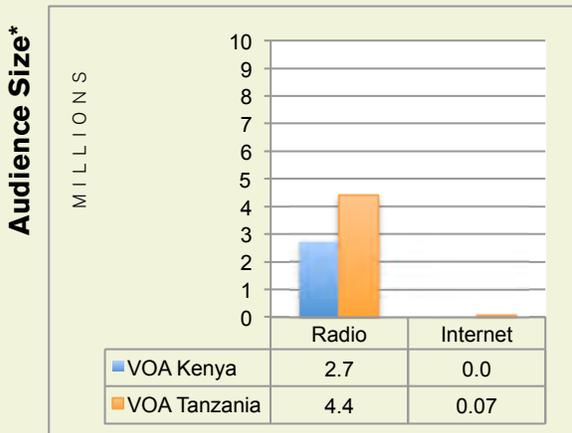
P R O F I L E



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

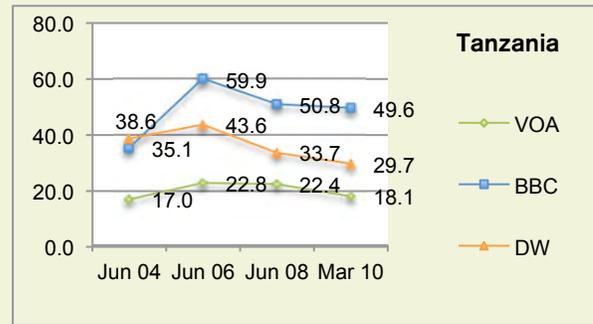
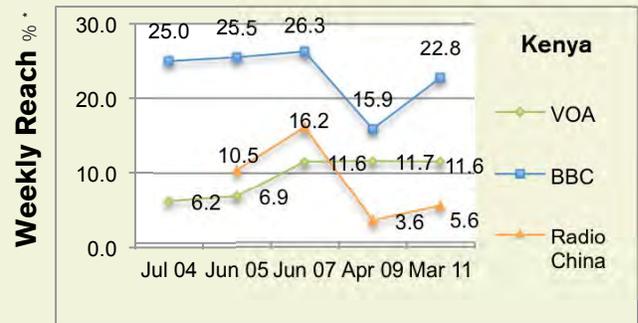


P E R F O R M A N C E D A T A (Using Data from Kenya, March 2011 & Tanzania, March 2010)



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

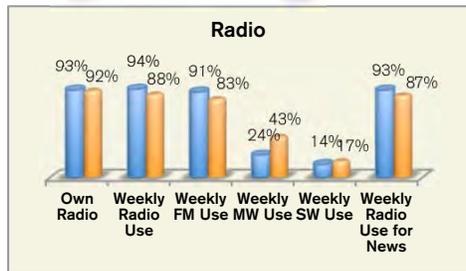
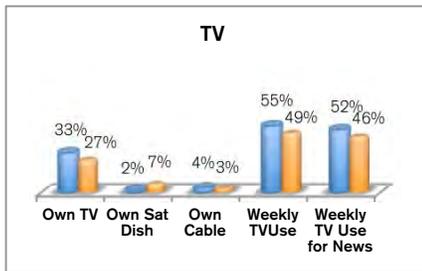
	Kenya Sam.	Kenya Wkly. Aud.	Tanz. Sam.	Tanz. Wkly. Aud.
Sex	%	%	%	%
Male	47	66	51	67
Female	54	34	49	34
Age				
15-24	28	19	31	28
25-34	34	33	32	32
35-44	19	25	18	16
45-54	11	11	11	15
55-64	5	7	5	7
65+	3	5	3	3

	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

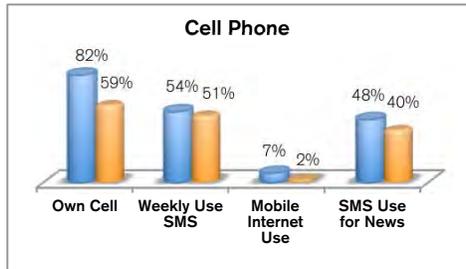
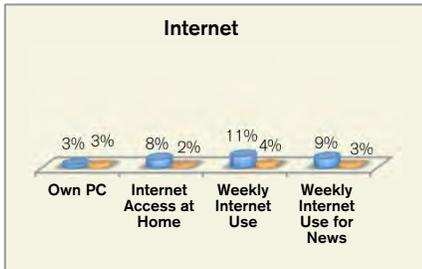


Top Ten Sources of News (Kenya)

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.

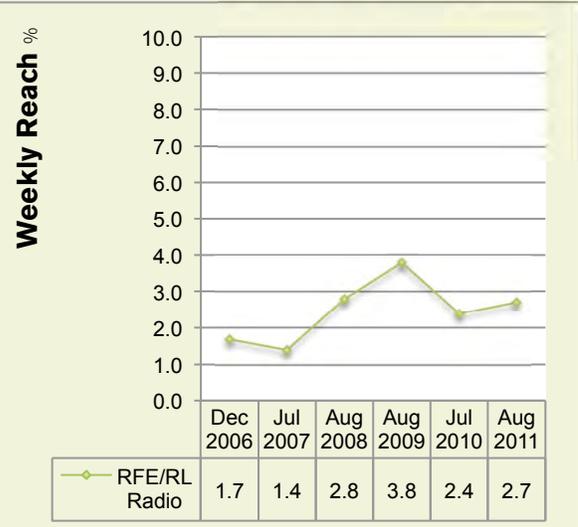
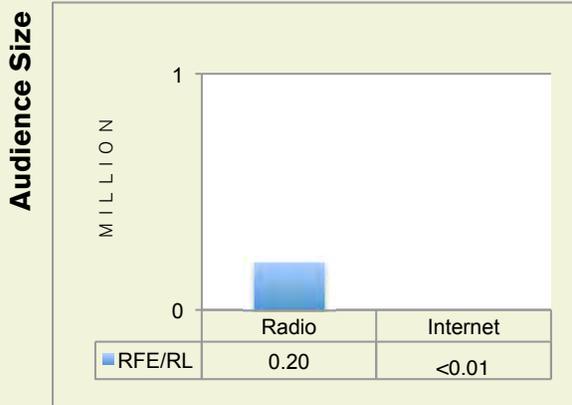
Staff: 8

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)



Weekly Reach by Media (%)	
	RFE/RL
Radio	2.6
TV	0.1
Internet	0.1
Total	2.7

Awareness (%)	
	RFE/RL
	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

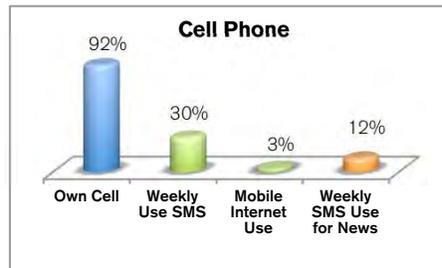
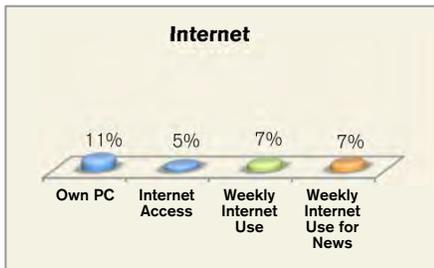
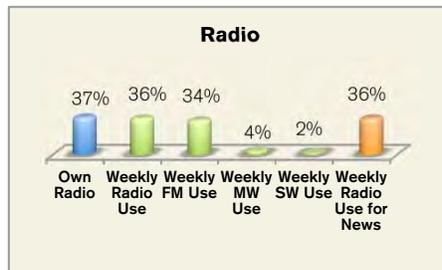
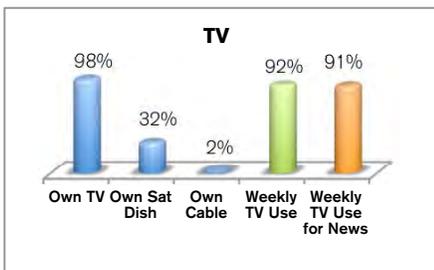
Total Population of Tajikistan: 7.5 million

	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.

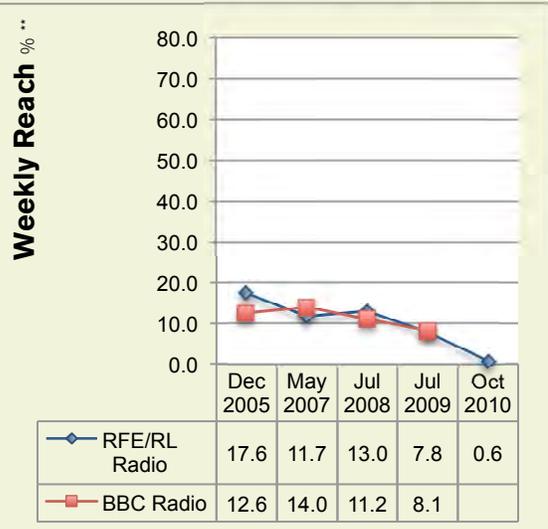
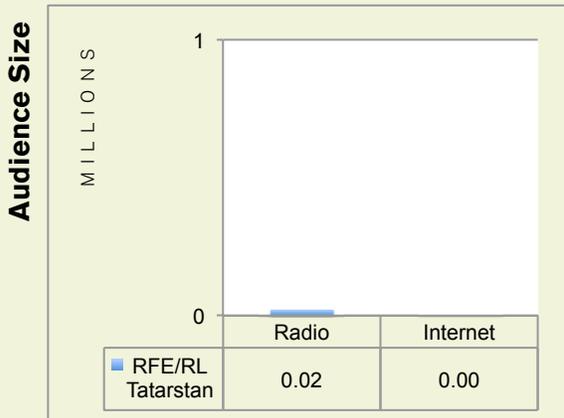
Staff: 6

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

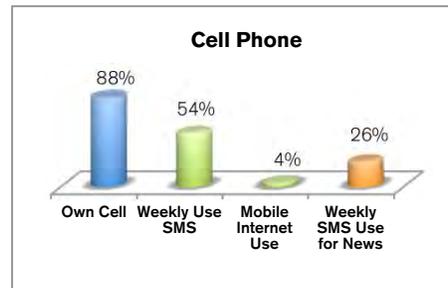
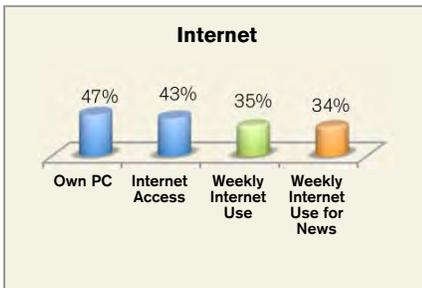
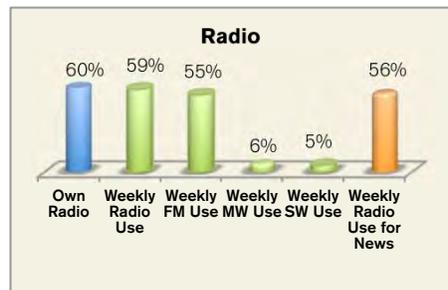
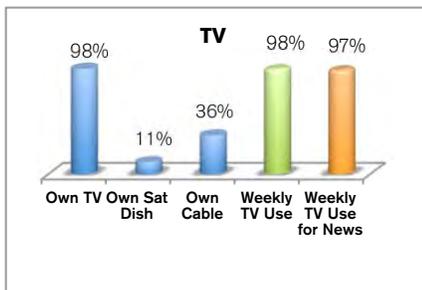
Total Population of Tatarstan: 3.7 M , Bashkortostan 4.1M

	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

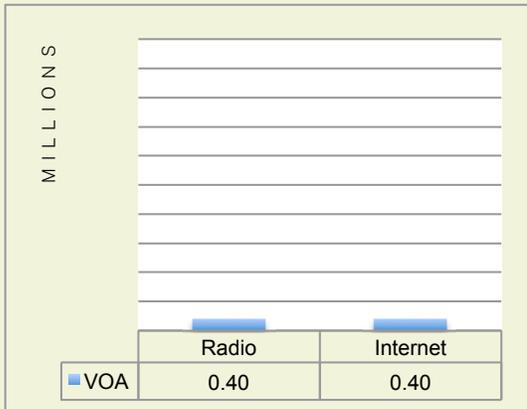
Budget: \$683,000

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

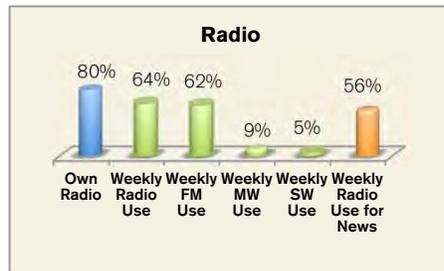
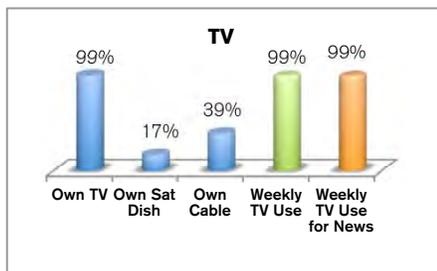
	Sample*	VOA Weekly Audience*
Sex	%	%
Male	53	67
Female	47	33
Age		
15-24	18	10
25-34	23	32
35-44	26	29
45-54	21	18
55-64	12	11

	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

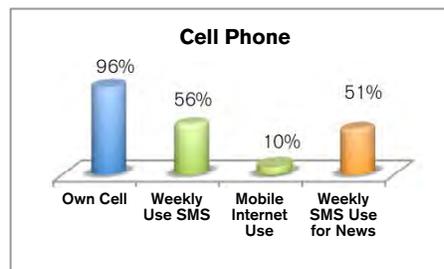
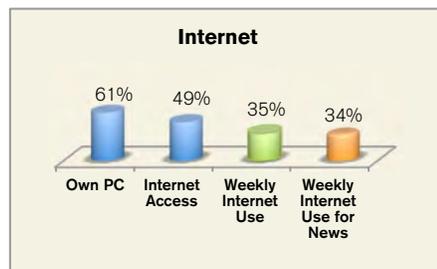
*The last available survey indicated a total media weekly reach figure of 2.5% for the VOA Thai service in Greater Bangkok.

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



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



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.



Staff: 36

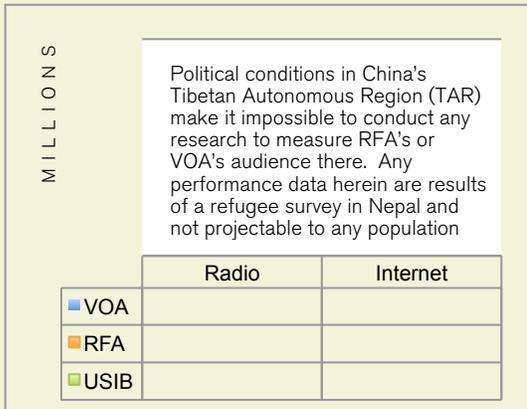
Budget: \$3,829,000

Established: 1996 to present

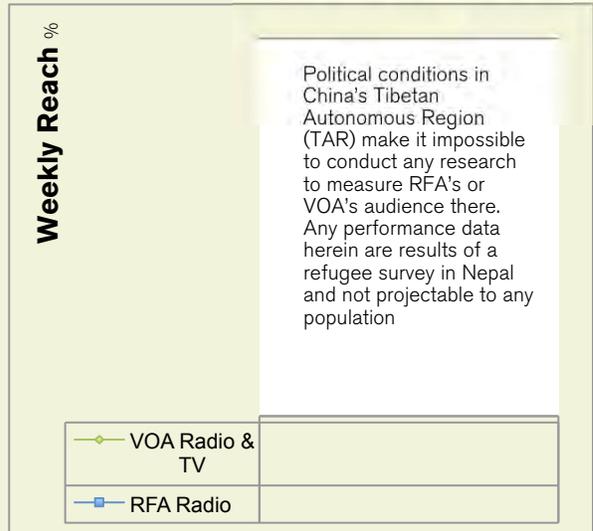
P E R F O R M A N C E D A T A*

(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 USIB 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.

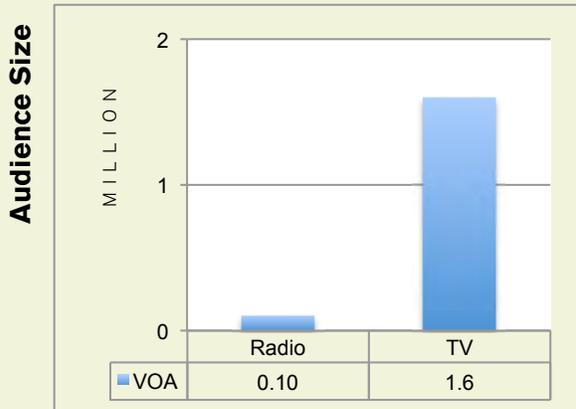
Staff: 7



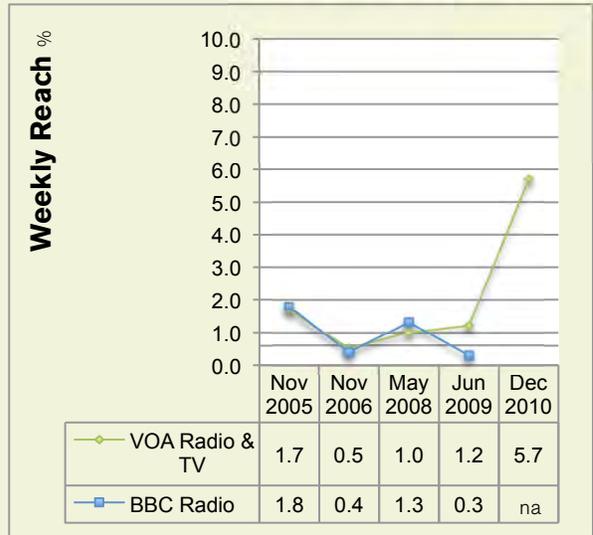
Budget: \$1,219,000

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" (%)*		
VOA		
	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

Turkish Broadcasting

Total Population of Turkey: 74.0 million

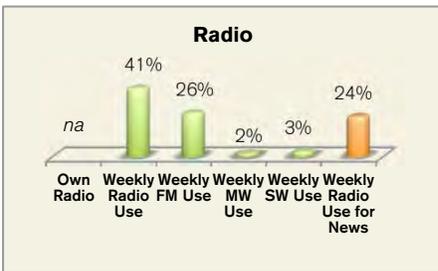
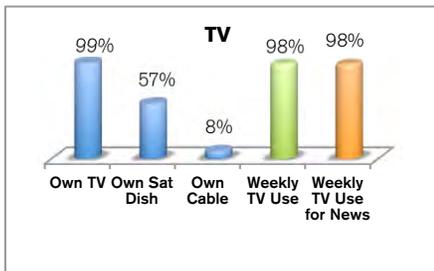
A U D I E N C E C O M P O S I T I O N *

	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		

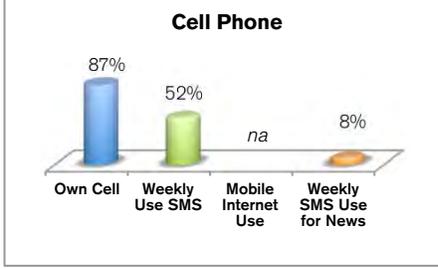
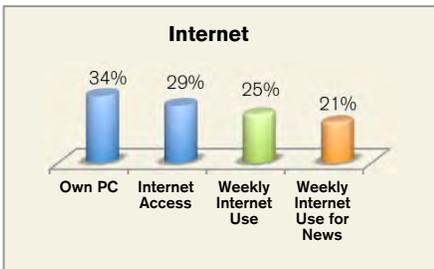
	Sample	VOA TV Weekly Audience
Residence	%	%
Urban	na	na
Rural	na	na
Language		
na		

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

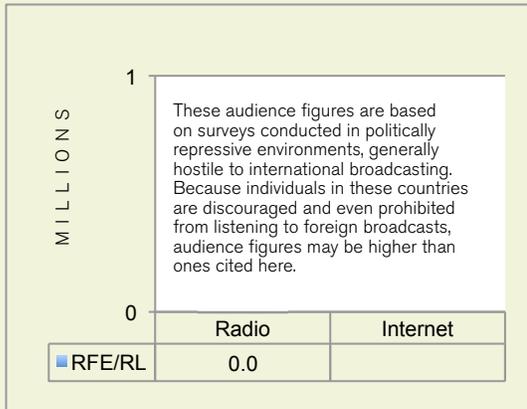
Budget: \$1,150,000

Established: 1953

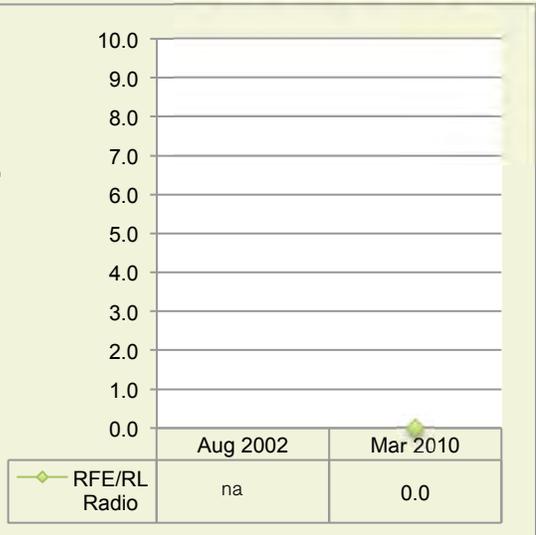


P E R F O R M A N C E D A T A (Using Data from Turkmenistan, March 2010)

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

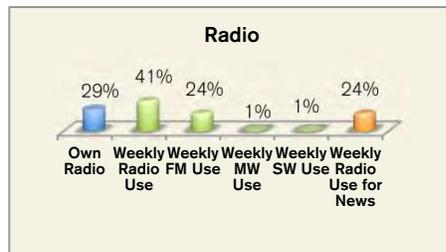
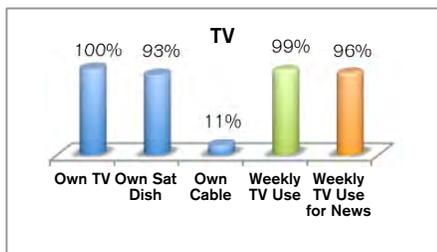
	Sample	RFE/RL Weekly Audience**
Sex	%	%
Male	48	na
Female	52	na
Age		
15-24	27	na
25-34	31	na
35-44	16	na
45-54	18	na
55-64	6	na
65+	2	na

	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

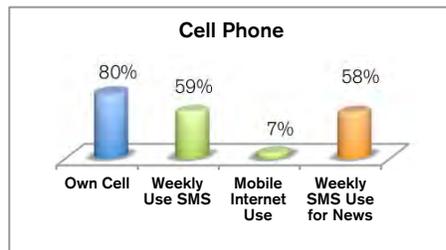
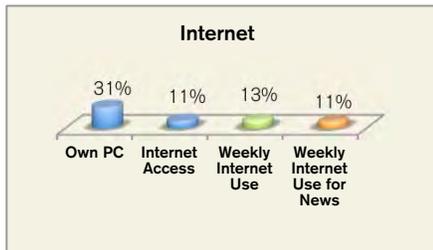
**Sample of RFE/RL weekly listeners in the survey is too small for meaningful analysis.

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



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



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

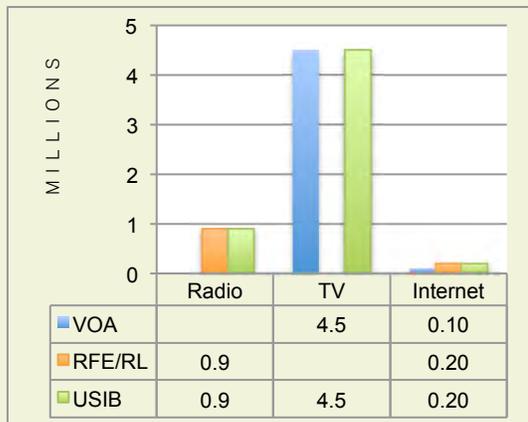
Budget: \$2,441,000

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)

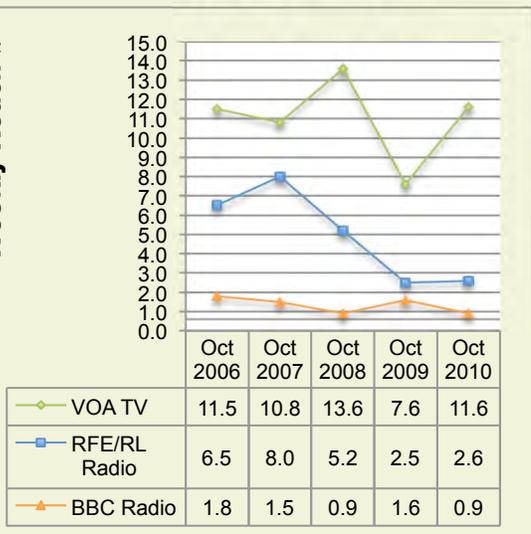
Audience Size



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

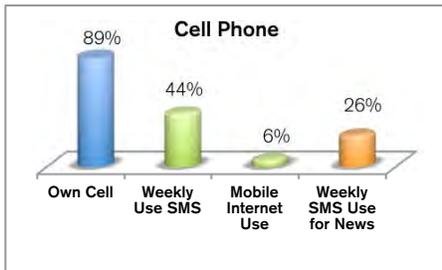
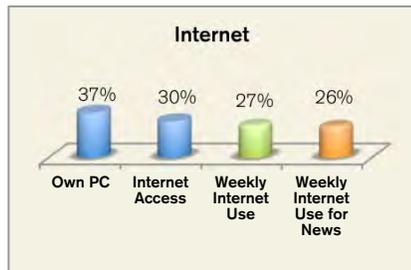
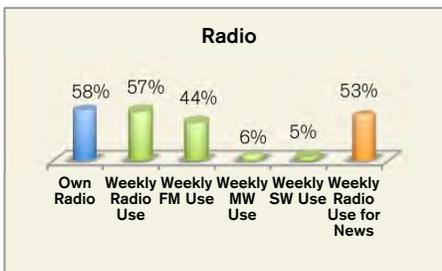
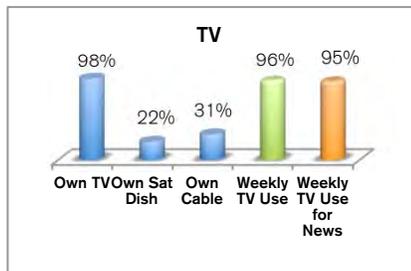
A U D I E N C E C O M P O S I T I O N

	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.

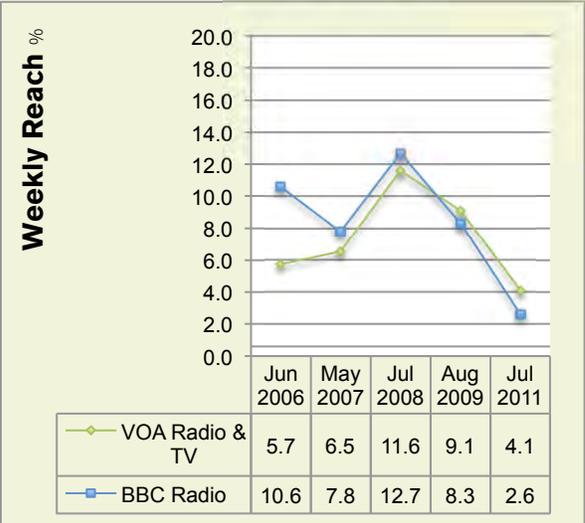
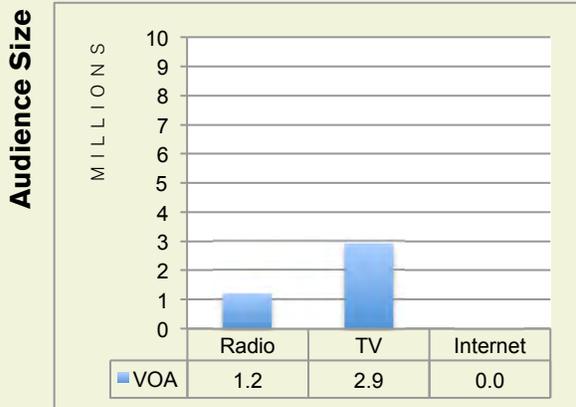
Staff: 24

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

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.

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

Urdu Broadcasting

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

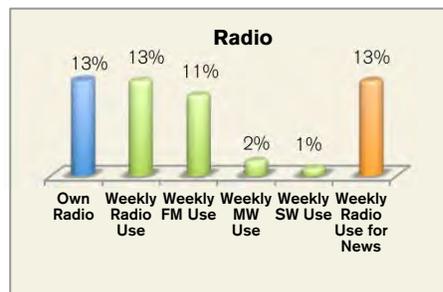
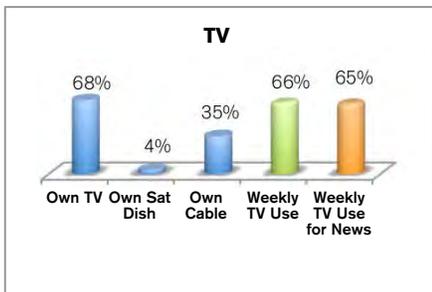
Total Population of Pakistan: 177 million

	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

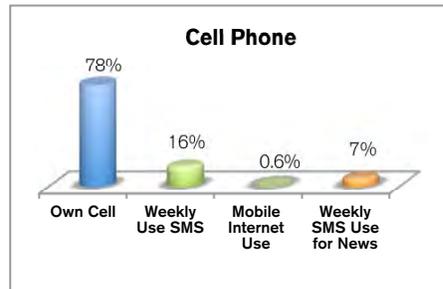
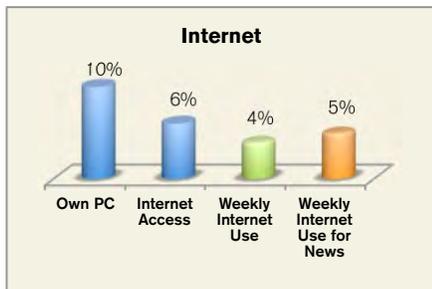


Top Ten Media Outlets

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 Pakistan faces some serious security challenges; it 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

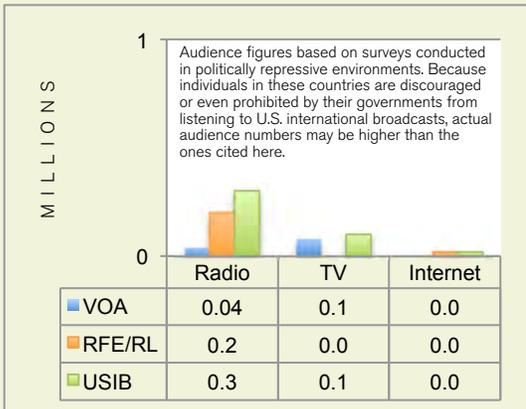
Budget: \$1,431,000

Established: 1953 to present



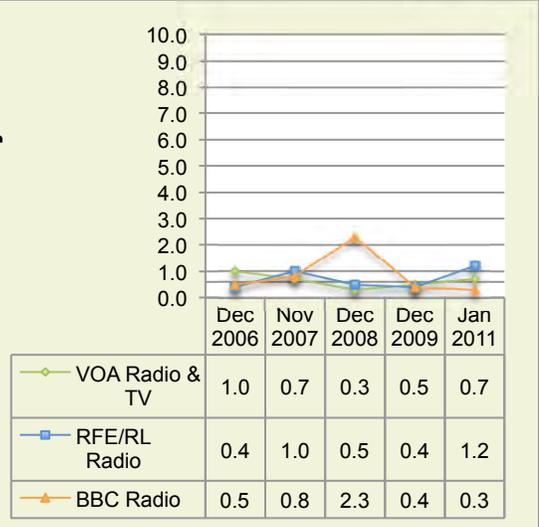
P E R F O R M A N C E D A T A (Using Data from Uzbekistan, January 2011)

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

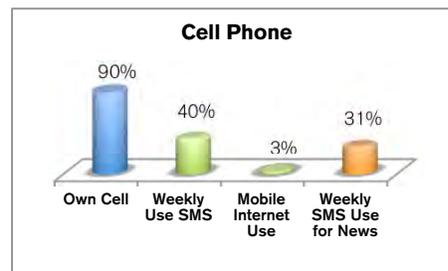
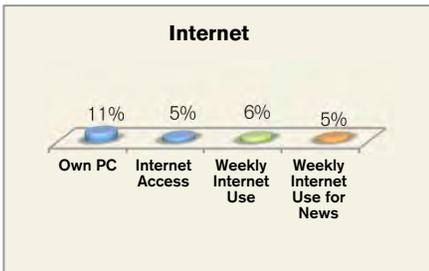
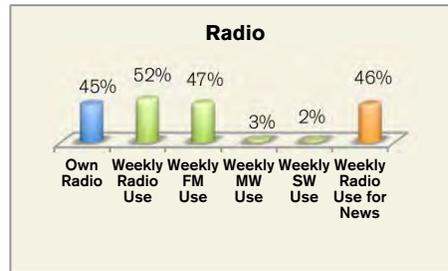
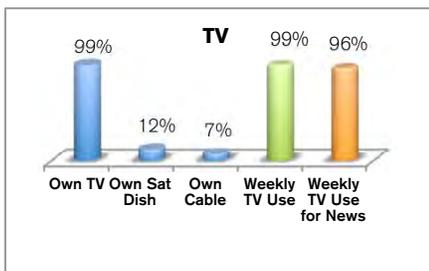
	Sample	VOA Weekly Aud.*	RFE/RL Weekly Aud.*
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	29	na	na
25-34	26	na	na
35-44	18	na	na
45-54	14	na	na
55-64	8	na	na
65+	5	na	na

	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.



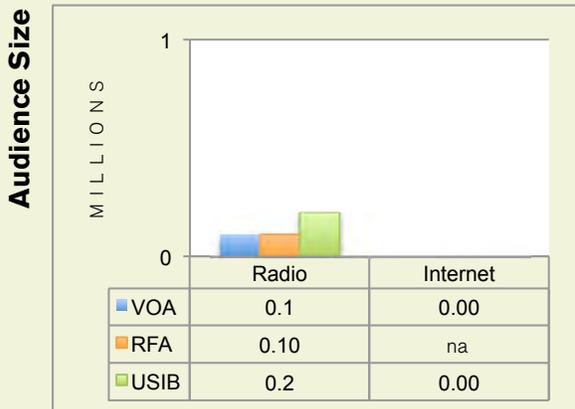
New Media: Includes a multimedia website; a mobile site; 9 Facebook pages; 2 Twitter accounts; YouTube channel; 3 blogs (rfavietnam.com, WordPress, Yahoo 360 Plus) with 9 bloggers (3 inside the country); and an e-newsletter five days a week with 60,000 subscribers.

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

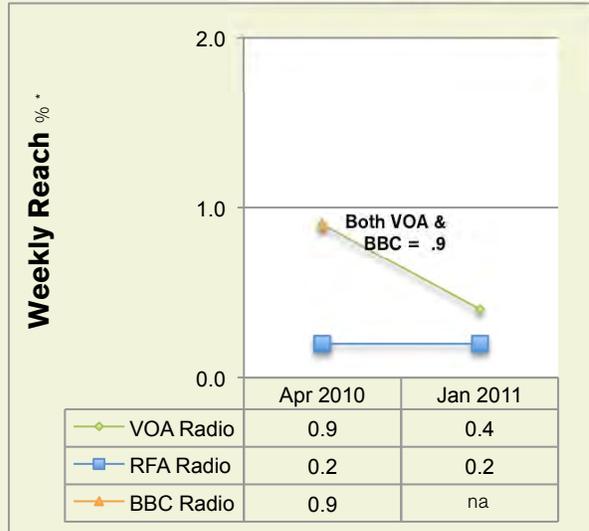
Established: 1997 to present

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

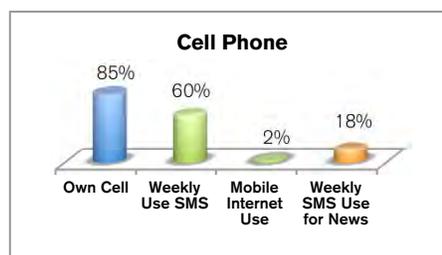
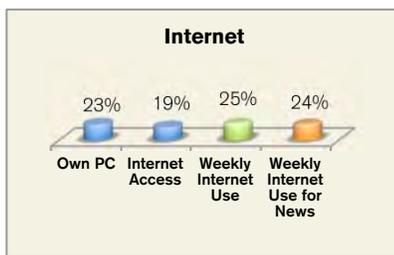
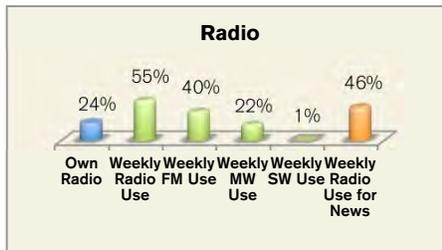
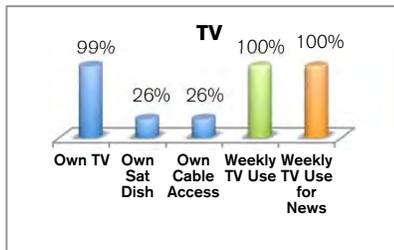
	Sam.	VOA Weekly Aud.**	RFA Weekly Aud.**
Sex	%	%	%
Male	50	na	na
Female	50	na	na
Age			
15-24	26	na	na
25-34	28	na	na
35-44	22	na	na
45-54	16	na	na

	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

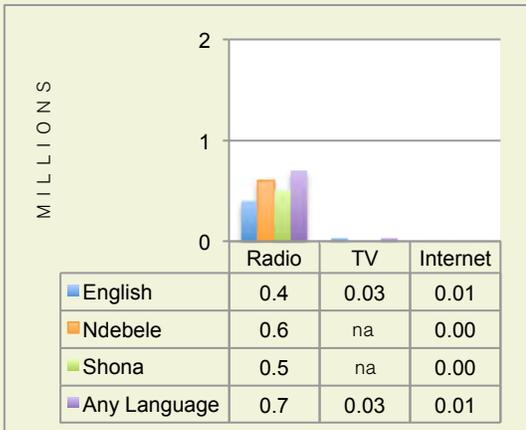
Budget: \$1,340,000

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

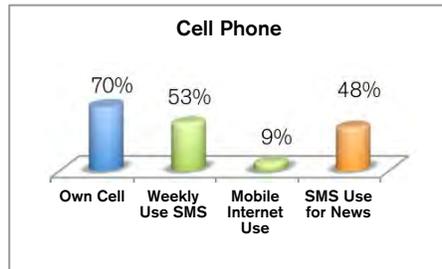
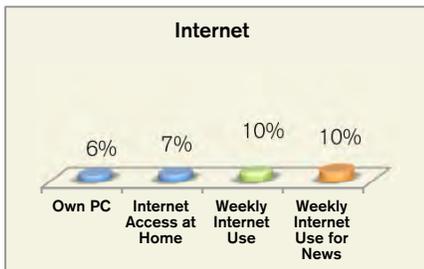
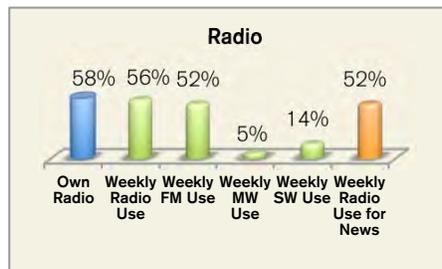
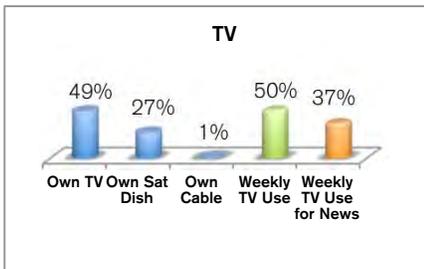
	Sample	VOA Weekly Audience*
Sex	%	%
Male	48	61
Female	52	39
Age		
15-24	37	34
25-34	27	33
35-44	13	14
45-54	9	8
55-64	8	6
65+	6	3

	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 interviewers 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.