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WORKING PAPER

Good News from a Far Country? Changes in international broadcast news supply in Africa and South Asia

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PREFACE AND EXECUTIVE SUMMARY

David Levy
Director, Reuters Institute for the Study of Journalism

This report is the first stage of a three-phase project on 'International News: Provision, Consumption and Trust in a Rapidly Changing Broadcasting Environment'. The project examines eight countries and aims to explore the increasingly competitive provision of news by international providers, changing patterns of consumption and use of these providers, and the ways in which trust may be changing in a world of news plenty as opposed to news scarcity.

The eight countries that the project examines include six in three different language zones in Africa, Senegal and Cameroon, Kenya and Nigeria and Algeria and Egypt, together with two countries in South Asia, India and Pakistan.

This phase 1 working paper focuses on the provision of international news to the target countries and examines the stated aims of the main international broadcast providers, the nature of the media environment in the eight countries, and aims through some news agenda analysis to compare the nature of the provision that is available from international providers as opposed to some key local suppliers. Subsequent phases of the research project will examine detailed figures on consumption of the key suppliers and then deepen this understanding through field research in five of the countries aimed at uncovering the ways in which notions of trust may be changing in relation to providers of international news.

This is a very ambitious project in terms of its scope – covering a multiplicity of international broadcasters across eight contrasting countries in two continents, and with the research and writing all conducted within the calendar year 2010. But it is also a unique project in its determination to examine both the supply and the demand side regarding international news broadcasters across so many countries, and to place this within the local market contexts. Inevitably this has required us to make some trade-offs between breadth and depth; the breadth of the project means that in this phase of the research we have not been able to study any provider or any single broadcast market in as much detail as we would have liked and have had to focus more on broadcast than internet and mobile provision. Similarly, in this phase we have had to limit ourselves to examining news agendas on a few sample days, rather than engaging in detailed content analysis of individual broadcasts over several months. However, we feel that, while the broader scope has meant some compromises on detail, we have nevertheless produced a rare snapshot of the activities of a range of international broadcasters and, by placing that against the pattern of local broadcast news provision on the same days, we have produced a unique picture of how international news broadcasts fit within the local media environment in the eight target countries. This produces some very interesting results in itself. It also creates a really useful baseline on the nature of supply before the next two phases of the research – on patterns of consumption and the changing nature of trust – are undertaken. We expect to publish these as working papers during the course of 2010 and then produce a final report on the whole project in early 2011.

I would like to thank Brian Rotheray who worked between January and May 2010 to research and write this report. He has achieved an extraordinary amount in the space of just a few months. As he notes below, this stage of the work would have been impossible without the extensive support of BBC Monitoring. I would also like to thank those funding the overall project, the Carnegie Corporation of New York, BBC Global News and France 24.

Executive summary

This report is focused on the provision of international news. It is based on reviews of the main international broadcasters, news agenda analysis of local and international broadcasters and studies of the media environment in eight countries in Africa and Asia. More definitive findings will emerge after the next two stages of the project – on consumption and trust. Preliminary findings from phase 1 are outlined below:

1. While in many Western countries the provision of foreign news seems threatened, providers of international broadcast news to the developing world face their toughest ever competitive environment. The number of international and regional providers has increased and all the major players now compete across multiple platforms: radio, TV, online and mobile. International broadcast providers face increased competition from local providers as technology and degrees of deregulation facilitate more locally supplied news.
2. There has been increased competition in the provision of externally focused international broadcast news. This arises from a considerable realignment in the main international providers, the arrival of new 'counter-hegemonic' entrants and greatly increased resources from some traditional state-sponsored providers. Well resourced counter-hegemonic entrants such as Al-Jazeera have built considerable audiences from a standing start. Traditional providers such as Russia and China are devoting billions of dollars to launching new TV services and websites in multiple languages. For example, in 2009 China announced plans to spend $7 billion on newsgathering, TV and the press.
3. It seems likely that more is being spent now on externally focused international broadcasting than ever before but impact may not always correlate with expenditure and reliable audience figures are hard to come by. The report illustrates the importance of gaining a better understanding of audiences and where possible tailoring content to their needs and interests. For example, analysis of Arabic-language broadcasts of several providers targeted at Egypt, a country with relatively tight media control, reveals significant opportunities for those broadcasters able to connect with regional issues but surprisingly self-focused news agendas favoured by the Arabic broadcasts in the sample period from Russia, China and Iran.
4. Comprehensive, impartial international coverage remains a scarce commodity in spite of the overall increase in the supply of news. At the international level many of the state-sponsored providers are explicitly focused on presenting their country's particular perspective on international affairs. While they may provide an alternative view of events they rarely if ever present a critical view of their home country and its foreign policy.
5. At a *national* level consumers have generally benefited from the arrival of new entrants and distribution systems but questions remain about the independence of news provided by many domestic state broadcasters and few local operators provide much international news. In many of the countries studied state media consciously plays a state-building role. In Senegal, Cameroon, Kenya and Nigeria local providers offered very little international news in our sample period whereas the sample bulletin of Egyptian provider Nile TV was dominated by regional and international news.
6. In some of the countries studied here, traditional international providers such as the BBC and RFI/F24 with strong followings can still play an important role in providing news for local populations in spite of the changed environment. (See the case of the BBC Hausa report on the transfer of power in Nigeria in section 5.4.3.)
7. However these established international providers face very difficult challenges and choices about delivery platforms (TV, radio, online), numbers of languages, and

degrees of localisation versus globalised services, that stand in contrast to some state-sponsored suppliers with large budgets which enable them to expand on all fronts simultaneously. Many established providers have responded to these pressures by cutting vernacular radio services to expand international TV. While these strategies generally reflect shifts in media consumption they can pose threats to the ability to tailor content to ensure its relevance to local audiences.

8. India – as the world's second largest media market – appears to be an exception to many of the trends outlined here and to present one of the most challenging environments for suppliers of international broadcast news. The wide diversity of local provision in India, including around 50 domestic news channels, means that international providers have to work much harder than elsewhere to add to local provision. However even in India it appears from the news agenda analysis conducted of English-language services that local providers offer limited coverage of international stories.
9. The next two phases of this research will examine figures on consumption and trust and throw greater light on the key points identified here across all eight countries studied.

ABOUT THE AUTHOR

Dr Brian Rotheray holds a BA and PhD in Modern Languages (Leeds University) and an MBA (Bradford University), with periods of study in Russia, Germany and the USA. He is a Fellow of the Institute of Linguists.

He worked for BBC Monitoring as a monitor and senior editor, and on the development of the organisation's news services about the media worldwide.

His research interests are in the impact of international broadcasters on public perceptions and public policy. Recent publications include *The History of BBC Monitoring*, (BBC, 2009).

He worked as a postdoctoral research fellow on the first phase of the Reuters Institute project on 'International News in Africa, India and Pakistan: Provision, Consumption and Trust in a Rapidly Changing Broadcasting Environment' during the first part of 2010.

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The research here was possible thanks to the assistance of BBC Monitoring. The organisation provided three kinds of support. First, it made available its specialist reports and expertise on the media environments of countries included in the study and on the major countries involved in international broadcasting. Secondly, it made available its extensive databases of news reports from sources in the countries studied, so that specific news reports could be examined. Thirdly, it made possible the considerable news agenda analysis exercises conducted by capturing the television and radio material needed and completing detailed summaries of the programmes.

Thanks are due to the Director, Dr Chris Westcott, and his team for supporting the project, to Dr Mohamed el-Doufani and his team for their constant and impartial guidance, to Jan Campbell for support with assembling the data.

Thanks to the other project team members Dr David Levy and Dr Anne Geniets for their help and contributions and to the BBC, Voice of America and France 24 for making available key programme material and audience and media environment data.

References to the material made available by BBC Monitoring and the international and local broadcasters examined are made at the foot of each section. Other books and articles are detailed in the References.

Dr Brian Rotheray, May 2010

As cold waters to a thirsty soul, so is good news from a far country

(Proverbs)

1. Introduction

1.1. Purpose of study

In an increasingly interconnected and globalised world, access to an objective picture of world news appears to be in retreat. Western commercial media organisations are investing less in global journalism. Local providers focus on local news. Popular avowedly 'counter-hegemonic' providers like Al-Jazeera and state-backed broadcasters like Russia Today offer specific views of the world.

This phase of the project maps the new increasingly competitive provision of international news in six African and two South Asian countries and considers:

- What views of local, regional and world affairs are available and to whom?
- What picture is provided by local operators?
- What picture is provided by regional and international providers?
- How has the supply of news from international broadcasters changed in recent years and with what consequences for competition within different markets?

Further phases of the project will:

- Assess patterns of consumption by examining existing data on the eight target countries.
- Review how attitudes to trust in global media sources may be changing through research within target countries.

1.2. Methods

The methods employed for this stage of the project have consisted of three lines of work: the first an examination of a range of largely state-funded international broadcasters and their recent developments; the second a study of eight country environments in which international broadcasters are significant players; and third an analysis of the news agendas of selected international broadcasters compared to examples of their local competitors – some state-funded, some commercial.

In the first element of the exercise, we consider the development of four groups of international broadcasters: first, a set of Western, democratic powers – France, Germany, the UK and USA; second, a set of highly active 'new powers' – Russia, China and Iran; third, key pan-Arab broadcasters; and fourth, a little researched field, international religious broadcasters.

The second element of the study is to examine the evolving media environments of eight countries (in four categories) which international broadcasters target. The categories and countries are: Francophone Africa (Cameroon and Senegal); Anglophone Africa (Kenya and Nigeria); Arabic-

speaking North Africa (Algeria and Egypt); and South Asia (India and Pakistan). In each case, we looked at the nature of the local media scene, including state-run and commercial outlets; regulatory environments; pressures experienced by local media – competitive, political, social and cultural; language issues; the traditional impact of international broadcasters and their current availability to audiences.

The countries selected have common features, including a colonial past and connections with former colonial powers either Britain or France. They also vary considerably in size, situation and dynamics and in the nature, complexity and degree of freedom of their media markets. They are both illustrative and individually interesting.

The third element of the study is a detailed examination of selected news broadcasts from local and international services to gauge their broad subject content and see what news is actually available to consumers on the ground. The scope of the study did not allow us to engage in detailed content analysis for each broadcast. Instead, the running orders for sample news reports were categorised as being respectively to do with political, security, economic and social issues. It was considered whether the news is predominantly to do with the state or more to do with the situation of individuals. Do providers offer positive (nation-building) assessments or more critical voices? In particular, the study considered whether local news providers offer consumers a local, regional or global perspective on news and current developments and – where there appear to be deficits – whether international broadcasters help to broaden both local and global perspectives.

The detailed categories used for the news agenda analyses described above are:

- Geographical focus: *local* (concerning the individual country); *regional* (concerning the country's surrounding region: Africa, Middle East, South Asia); ***international*** (concerning the wider world). The results are shown in charts in each section
- Subject focus: politics; security; economics–environment; education–health; religion–cultural; media; general. The results are described in each section and shown in tabulated form in the Appendix.

Though the analysis covers a limited range of samples over a short period, it goes beyond analysis previously available in extent and scale.

Overall, the project draws on some academic literature, broadcasters' analysis, media monitoring material, original news analysis findings and field research in a way not previously attempted.

2. Choices for international broadcasters

2.1. Background on international broadcasting

From the start, domestic and international broadcasting consisted of two strands: state-run and commercial broadcasting. The US followed the commercial model, with all broadcasting funded through private capital; Europe followed the state-run route (Wood, 1992).

The USSR, France and Germany led the way in the state-funded international use of radio in the 1920s and 1930s. There were two lines to this activity: propaganda efforts for abroad and communication with compatriots overseas. In the first category, Radio Moscow was broadcasting in English, French and German by 1929. Even today, Voice of Russia radio links to that tradition. Britain started its Empire Service in 1932, a service in English and intended for expatriates, not the locals. Other colonial powers also adopted this approach: French broadcasting in North Africa was targeted at Europeans, not Arabs or Africans.

In Africa itself, the first radio broadcasts were made in the early 1920s. Kenya had its first radio station in 1927; Senegal in 1939. Their programmes, too, were for expatriates. On the Indian subcontinent, the beginnings in the mid-1920s were in commercial broadcasting; the authorities took operations over later.

International propaganda efforts intensified – and as now the focus was on the Middle East. By 1937, Italy was broadcasting via powerful transmitters to North Africa and in a total of 17 languages. The BBC started broadcasting in Arabic in 1938, followed by broadcasts in Spanish and Portuguese to (Latin America), then in German, French and Italian.

From the USA, the commercial networks were themselves operating internationally. NBC and CBS, noted for international news-gathering, also had short-wave transmitters and broadcast in several languages. Through the later 1930s, Europe's foremost international broadcaster was also a commercial one – Radio Luxembourg. It had the most powerful transmitters in Europe and could drown out any signals in the UK. In 1939, the advancing German forces took over the facilities and converted them to propaganda use.

The early days of the Second World War showed the impact of international broadcasting. A BBC survey in October 1939 found that only 49% of Britons were satisfied with the BBC, while 53% listened to foreign channels, mainly German ones. Germany created different channels to appeal to different audiences. As well as the overt German services, there were four so-called 'black channels' broadcasting to Britain alone, including the notorious Lord Haw Haw's 'New British Broadcasting Station'. Britain used similar methods, running its own 'black' channels alongside the BBC. It also widened broadcasting to its own territories, beginning programmes for Africans to mobilise them for the war effort.

The Americans changed their approach to broadcast a message to the world at large and to bolster the morale of their armed forces. International operations were coordinated by state-run Voice of America, established in 1942. By 1945 it was operating in 45 languages.

As the Cold War geared up, radio became a major propaganda tool and a vehicle for negotiation. International broadcasting grew exponentially for several decades. The major powers, the USA and the USSR, multiplied their efforts. Communist China, starting later, grew almost to match them; the UK held its own. West Germany, after a period without a voice, became by the 1960s one of top five countries measured by volume of output. There was a proliferation of players, as European, Asian, and African countries joined the game.

On both sides of the divide there were several forms of international broadcaster. On the Eastern side there were official and semi-official ones, projecting an apparent range of views, all intended to garner support for the originating country. On the Western side, there were both clear national voices and 'surrogate' broadcasters, who acted as if they were free operators in their target countries. Both types supplied audiences in closed societies with news and supported them in their principles and beliefs. On both sides output was analysed to secure insight into countries' policies. And while some of the numerous services had a substantial impact, many of the audiences were minute. Yet both sides feared their opponents' influence. Broadcasts were combated by selective jamming. Radio France Internationale stood to one side of the media struggle, its output more cultural-political than political, and its broadcasts were not jammed.

As with the nuclear deterrent, countries were afraid to be left out and short-wave transmitters were easy to acquire. The countries of the Middle East developed capacity and emerged as radio powers. Egypt took on a regional role during the 1950s and remained a top-ten player over subsequent decades. In the 1970s and 1980s, countries like Algeria, Iran and Libya grew significant capacity. Elsewhere, India and Nigeria were substantial international operators.

The collapse of the communist regimes in the USSR and Eastern Europe changed the picture. All countries reconsidered the need for international broadcasting and rapid cuts were made. By the mid-1990s, Russia had less than a quarter of the output of the USSR; and while the USA by far outweighed other countries' efforts, by 1996 ten of the top 30 international broadcasters in output volume were evangelical Christian stations.

2.2 Recent patterns in development

In the 1990s, a combination of political, regulatory and technical development radically changed the international broadcasting environment entirely. From an essentially bipolar exercise, international broadcasting became more complex, fragmented and challenging. Countries that had been the main targets now seemed of declining relevance. There were new media environments. Deregulation meant changes to state-run and state-funded operators and new commercial competition. Across the former USSR and Eastern Europe there were entirely new countries with new broadcasting systems, a vast proliferation of services and – perhaps only temporarily – an opportunity for journalists to operate more freely.

For international broadcasters new opportunities were created by cheaper delivery options. It was possible to operate within target countries, create rebroadcasting agreements and local partnerships and become part of the local scene. At the same time, international broadcasters faced dramatically increased competition, as a result of the arrival of new entrants, both in the domestic markets of target countries, and internationally.

The most striking impact was secured by television. Cable television had spread in the developed world, creating opportunities for new players in established markets. The maturing of satellite communications accelerated the development. State-funded and commercial concerns could now broadcast television internationally; CNN, founded as a cable operator in 1980, emerged as a satellite operator to capture world attention through its direct coverage of the first Gulf War in 1991. Others sought to emulate this success. Radio, still essential to reach large listeners in undeveloped countries, seemed a less exciting option than television and increasingly the Internet and mobile telephony, which radically changed information availability and the freedom to communicate.

Both providers and consumers now fell into new categories. Producers might be state-funded, commercial or non-profit. They might operate at different levels: local (i.e. sub-national), national, regional (i.e. supra-national) or global. Increasingly, the material was available irrespective of borders. Consumers might be local, national, regional or global. They might live away from their homes and consume material from more than one environment – and from diaspora sources. Diasporas became major factors in media flows.

Though audiences declined, international broadcasters remained relevant in places where there was a lack of local, regional or international news, or where there was strong interest in the home of the international broadcaster. Colonial links still exercised a pull. Audiences in Francophone African countries were drawn to French radio. Audiences in Anglophone Africa and South Asia respected the BBC. Traditional audiences remained attractive targets, though as strategic priorities evolved, the focus changed.

Soon all significant powers felt they had to be broadcasting satellite television in Arabic.

In the new situation, international broadcasters had to make strategic choices. Since the 1990s, they have followed one of five basic patterns of development.

1. *Exit strategies.* A few prominent international broadcasters opted to leave the business – in part or entirely. In the 1990s, Switzerland was a top 10 international broadcaster by volume of output. By 1999, it had decided completely to abandon broadcasting and remodel itself as an internet news service. Broadcasting stopped in 2004, to be replaced by multi-lingual Swissinfo.com.

2. *Extreme focus.* Other countries stayed in broadcasting, but with narrow objectives. For example, Portuguese effort is limited to Portuguese-language international television broadcasting via satellite and Portuguese-language radio services (via short wave), targeting expatriates and Portuguese-speaking Brazil and Southern Africa. Poland focuses on Poles abroad, a huge, worldwide diaspora with an insatiable hunger for news from home, brought through satellite television, some free-to-air public-service, some private pay-TV.

3. *Limit radio – move into key television services*. Most major Western international broadcasters – and others – have been obliged to refocus their efforts, drop radio broadcasting in languages no longer regarded as politically key, and target global languages and the Middle East. France, Germany, the UK and the USA were in this situation, as was Russia. The UK reduced its radio services from 40 languages to 30, the French cut from 16 to 12, the Germans from 36 to 17. The Russians came down from 29 to 20. The USA cut spending and dropped services to Eastern Europe, but refocused effort on the Far East and then the Middle East. All established television services in key languages, trading local for regional or global influence.

4. *Unlimited resources?* A limited set of countries was less obliged to cut activities to fund others. Countries like Iran and especially China have maintained their numerous radio services, started ambitious satellite television operations, and expanded news agency operations and overseas partnerships. In the 1990s, Iran was broadcasting radio services in 26 languages. Now it runs radio services in 30 and has global television operations in Persian, English and Arabic. China was a major international broadcaster in the 1980s and 1990s, filling the airwaves with programmes in over 40 languages and numerous frequencies. Now its language services number over 45, with linked websites, and there are major developments in television – with worldwide services in Chinese, English, French, Spanish and Arabic.

5. *New entrants*. The period since the 1990s has seen completely new entrants, both state-funded and commercial, fleet-footed operators like CNN and Al-Jazeera, who have almost immediately become the market leaders and set new operating and editorial trends. These are highly focused operators, largely ignoring radio as an option and making careful choices about language operations and new media services. They are accompanied by growing numbers of regional operators. Turkish television launched an Arabic channel in April 2010.

2.3. Delivery models

Up to the 1980s, radio was simple. The options were medium wave (and long wave in specific locations) for shorter range activities and short wave for longer range work. Short wave was expensive and investments required longer term planning. Post Cold War, some considered dispensing with short wave altogether. Listeners preferred the better sound quality of FM, and international broadcasters could operate closer to their targets. Editorial offices within target countries enabled broadcasters to localise content. Rebroadcasting agreements for local operators to carry the international broadcaster's content created the potential for significant audiences at negligible cost. International broadcasters hurried down this path, sometimes with little overview of what happened to their product; brand issues arose from new associations. Today, broadcasters can also offer their programmes live and recorded via the internet and via mobile telephony, with podcasts, webcasts, and RSS feeds, and radio – associated with internet usage – offers the fullest options for localising, in terms of delivery, interaction, language and content.

Satellite television changed the situation for international broadcasters. It seemed impossible to remain a major league player without being an international television broadcaster. Because the television costs are much higher than radio costs, strategic choices, in part geo-political decisions, had to be made between few television services and many radio ones, and on languages of broadcasting. Conflicts in the Middle East and Afghanistan, followed by 9/11, meant that Arabic became a key broadcasting language. English and Spanish were key international languages. Localisation of content became harder. And although satellite broadcasting appeared to offer freedom of action to broadcasters, the end-to-end broadcasting operation involved other players – satellite operators, individual governments at the receiver end, commercial content packagers, and cable operators – all of whom could impact the availability of the international broadcasters' services and the choice available to consumers.[1]

[1] www.lyngsat.com.

With the change in delivery systems, the rise of satellite TV, and the advent of increased local and international provision, a further choice facing both traditional and new international players relates to the kind of audience they target. For some traditional and new providers the aim remains to attract the largest possible audience, generally through vernacular services. Others, as part of their refocused strategy, and particularly in the case of TV services, choose to concentrate on a smaller, more influential audience, either targeting 'opinion-formers' or , in the case of those suppliers reliant on advertising, the top socio-economic groups.

The picture that has emerged today is of a number of major state-funded international broadcasters drawn from categories 3, 4 and 5 in the patterns of development analysis. As Chart 1 shows, they operate across the available media (with some exceptions) and in a range of languages. The audience figures listed are based on the broadcasters' own claims and do not necessarily equate to the effort expended.

Chart 1. Key international broadcasters 2010

	Television Languages	Radio Languages	New Media Languages	Media Freedom *	Audiences**
China	6	50	57	Not Free	45m – TV ? – Radio
France	3	10	10	Free	20m – TV 46m – Radio
Germany	4	30	30	Free	90m
Iran	8	30	30	Not Free	?
Qatar	2	0	2	Not Free	140m
Russia	4	38	33	Not Free	200m – TV 109m – Radio
UK	3	30	30	Free	230m
USA	2***	45	45	Free	170m

* Freedom House rating

** Data for services and audiences as publicised by the broadcasters and not all are independently verified

*** US state-funded international television broadcasts in Arabic and Persian with programmes produced in Urdu. Commercial broadcaster CNNI broadcasts in six languages and claims a worldwide reach of around 200m.

Sources: BBC Monitoring research

3. Key current international players

This section reviews differing recent developments by international broadcasters. The state-funded 'Western' broadcasters, sharing some strategic intentions while having individual perspectives, experience growing competition from a group of 'new powers', seeking wide international influence, and from regionally popular pan-Arab broadcasters.

3.1. 'Western' broadcasters: France, Germany, UK, USA

A number of Western countries are active international broadcasters, espousing democratic principles and themselves enjoying high levels of press freedom.[2]

3.1.1. France

The main role of France's state-funded international broadcasting is to present a French perspective and ensure that French views are heard on key issues.[3] France 24 now provides television services worldwide in three major languages and focuses on opinion formers. Radio France Internationale offers radio services to regions of key French interest in ten languages.

In general, the French effort is less unified than, for example, Germany's. In addition to RFI and France 24, there exists the longer established TV 5 Monde, and in Francophone Africa competition is provided by Euronews, another collaboration by a wide range of public-service broadcasters. Many French domestic radio and television channels are also internationally available either free-to-air via satellite or through pay-TV providers.

AIMS AND REGULATION

Launched in 2006, France 24 describes itself as 'the new 24/7 international news channel'. It defines its mission as 'to cover international current events from a French perspective and to convey French values throughout the world'. The channel sees itself as 'a true news hub that broadcasts its programs over the airwaves and over the internet in French, English and Arabic' (ten hours a day). It also 'puts also culture at the forefront of its programming'.[4]

Radio France Internationale is less specific in its self-image. It describes itself as a 'public service radio station for people scattered throughout the

[2] www.freedomhouse.org/template.cfm?page=16.

[3] BBC Monitoring Country Profiles: France http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/europe/country_profiles/998481.stm. French media websites as cited. News items as reported by BBC Monitoring (http://news.monitor.bbc.co.uk).

[4] www.france24.com/en/about-france-24.

world' and as 'the leading French radio for round-the clock international news'. It claims 46 million listeners. A key broadcasting target is Africa.[5]

At the heart of European integration, France is home to more than 5 million people of Arab and African descent. A liberal media environment provides for public-service and commercial operations. Foreign broadcasters can operate from French territory. France is home of one of the major satellite companies, Eutelsat, which carries some 3,200 separate television channels and over 1,000 radio services and gives services to over 120 million cable and satellite homes in Europe, the Middle East, Africa and India. The satellite pay-TV operator CanalSatellite, which plays a significant role in Africa, is controlled by media giant Vivendi Universal.

France has been at the centre of legal and political disputes over the distribution of television services internationally. In 2004 the Hizbollah television station Al-Manar was banned from using Eutelsat. In 2010, the Georgian Russian-language television station Pervyy Kavkazskiy began legal proceedings against Eutelsat for breach of contract for discontinuing distribution of its broadcasts.

OPERATIONS

A comparative late-comer to international broadcasting, France 24 television is a global news channel, owned by the public-funded holding company Audiovisuel Exterieur de la France (AEF) launched in December 2006 with services in French and English (Kuhn, 2010). The channel provides 24-hour services in French and English. An Arabic channel started in 2007, increased to 10 hours a day in 2009 and has committed to 24 hours a day from 2010. A Spanish channel has been considered.

France 24 speaks of '260 bilingual journalists representing 35 nationalities', in addition to 'over 1,000 correspondents throughout the world'. It is widely available free-to-air via satellite and on commercial feeds throughout Europe, Africa, the Middle East and South Asia. The station offers RSS feeds and Twitter, Podcast, Facebook, mobile and YouTube access. Not all countries welcome France 24. In February 2010, the Cote d'Ivoire suspended the service 'in order to sanction the unprofessional treatment of information by the French television'.

The older established TV 5 Monde, an international French-language public-service channel co-owned by the French, Belgian, Swiss and French Canadian public broadcasters, carries news and cultural programmes. The service is widely available around the world and significant audiences are achieved. The service can, for example, be received free to air in Cameroun, Senegal and Algeria. It runs a specific Africa internet news site.[6] Most of the content is taken from mainstream networks in the French-speaking world,

[5] www.rfi.fr.

[6] http://www.tv5.org/TV5Site/afrique/index.php – africa portal.

notably France Télévisions, RTBF (Belgium), TSR (Switzerland) and the SRC and TVA networks in Canada.[7]

The multi-lingual international television service Euronews is a more extensive collaborative effort. It currently lists as shareholders 21 public-service broadcasters in: Algeria, Belgium, Cyprus, the Czech Republic, Egypt, Finland, France, Greece, Ireland, Italy, Malta, Morocco, Portugal, Romania, Russia, Slovenia, Switzerland, Sweden, Tunisia, Turkey, and Ukraine, Euronews calls itself 'the leading international news channel covering world news from a European perspective'. Launched in 1993, it now broadcasts in English, French, German, Spanish, Italian, Portuguese, Russian and Arabic and has plans for a Persian service. It offers programmes and interactive services on cable, satellite and terrestrial TV and is available on the internet and via mobile phones. Its stated aim is to analyse and report with balance, maintaining impartiality and avoiding a national viewpoint'. With its distinctively impersonal style, it achieves significant audiences among elites in North Africa. Euronews is available throughout the Middle East and Africa via pay-TV providers.[8]

France is a base for television channels unable to operate in their own countries. Berbere TV, launched in 1999, is based in Paris (and is a sister of Berbere Radio). It broadcasts in Berber languages and French, and targets audiences in France and North Africa. Effectively, the services appear as local services and gather material locally, but are based and transmit from France. A similar example is Beur TV. There are radio equivalents.

In addition, a number of France's domestic channels are popular viewing in Francophone countries, including TF1, France 2, and La Chaine Info. Increasingly access to these services has become commercialised and what used to be free-to-air is now available through pay-per-view providers, such as CanalPlus, which operates across Europe, Africa and the Middle East, and is itself based in France and runs a domestic subscription channel there.

The long-established Radio France Internationale (RFI) also owned by Audiovisuel Exterieur de la France (AEF), speaks of 46 million regular listeners plus 42 million visits to its internet site. Latest data from RFI shows an audience decline to 36 million listeners[9].

The service broadcasts in Cambodian, Chinese, Spanish, French, Hausa, Persian, Portuguese, Russian and Vietnamese, a slight set of languages compared with the heavyweights. RFI operates stations in Romania and Serbia. Most significantly, it runs the Arabic-language Radio Monte Carlo Doualiya, a long-standing international broadcaster community and available

[7] www.tv5.org/TV5Site/reception/signal.php.

[8] www.euronews.net

[9] http://kimelli.nfshost.com/index.php?id=8342.

on medium wave (AM) and FM in many Middle East countries, though its audiences are also reported down from 10 million to 5 million.[10]

RFI transmits via short wave, medium wave, cable and internet, with a presence on 30 satellites covering all five continents. It has a network of FM relays and rebroadcasters across its target countries (170 rebroadcasters in 74 countries). It stresses the availability of new media reception: RSS, Twitter, Podcast, Facebook and reception via mobile phone.

According to one observer the sudden emergence of France 24 could cast doubt on the long-term future of RFI (Kuhn, 2010). In May 2009, RFI announced the closure of six language services.

INTERNATIONAL COOPERATION

Additional forms of media influence come through France's major news agency and through forms of media aid. Agence France Presse (AFP) is one of the major new agencies with an extensive reach, especially in the Francophone world. It runs its own television service AFPTV, producing more than 500 videos per month in Arabic, English, French, German, Portuguese, Spanish, runs news websites and offers services to mobile phones.

France's international public broadcasters are supported in their work by the media development agency Canal France International (CFI). Operating as a subsidiary of France Télévisions but funded largely by the French government, and with a budget of just 16 million euros in 2009, CFI speaks of '20 years serving media in the South', specifically working on the development of television channels in Africa and the Mediterranean region and in Asia.[11]

CFI 'supports processes to foster democracy and good governance', provides training, expertise and programme content. 'Over 4,700 hours' worth of programmes were made available to partners in 2008.'

3.1.2. Germany

With an increasing international profile, Germany sees a need for an international media presence.[12] A major international player through the history of broadcasting, Germany now has a consolidated, focused and unified state-run international service – Deutsche Welle – with flagship television services in key languages backed by radio and forms of media development aid. Germany is also home to major media conglomerates with international broadcasting operations.

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[10] http://kimelli.nfshost.com/index.php?id=8342.

[11] www.cfi.fr/index.php3.

[12] BBC Monitoring Country Profiles: Germany.
http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/europe/country_profiles/1047864.stm.
German media websites as cited.

AIMS AND REGULATION

Notably, Deutsche Welle's stated aims include a European as well as a national dimension. It is targeted to people around the world who are interested in Germany and Europe, particularly to those who influence important developments in their respective countries. In countries with authoritarian governments, it is especially targeted to people who are active supporters of democracy, freedom and progress.[13]

Deutsche Welle sees itself as an integrated enterprise, 'a journalistic portfolio including television, radio and online services'. It reports 'nearly 90 million listeners and viewers worldwide every week'. Deutsche Welle has 1,500 employees plus freelancers in over 60 countries, is government-funded and has a budget of around 275 million euros.

The key features of the regulatory environment are the country's championship of European integration, democracy, the rule of law and media freedom; the 'dual' system introduced across the federation since the 1980s, which provides for public-service and commercial broadcasting. Germany's competitive media market is the largest in Europe. National and regional public broadcasters compete with some of the world's largest media conglomerates, including Bertelsmann (owner of RTL). With 45 television channels and 31 radio stations in 11 countries, RTL Group is the leading European entertainment network, operates TV channels and radio stations across Europe and is one of the world's major producers of television entertainment programming.[14]

OPERATIONS

Deutsche Welle began its international television services in German and English in 1992, adding Spanish in 1999, and Arabic in 2002 (in addition to programming in Dari and Pashto). The stated long-term strategy is to create regional programming options. 'For viewers in the Arab World, DW-TV is broadcast around the clock, switching between Arabic and English. This regionalized channel was launched in 2002 and can be viewed in more than 20 Arabic countries.'

In 2009, Deutsche Welle began broadcasting two new TV channels to viewers in Asia and Australia – one with a focus on English-language programming and one with a focus on German. Services are distributed via a global satellite network and the internet, with live streaming, podcasts on-demand.

As late as 1996, Deutsche Welle radio was operating on short wave in around 35 languages, including Danish, Norwegian and Italian. Short-wave operations are now limited to 18 languages, though Deutsche Welle still operates in 30. There is a global language spread. Radio programming is on

[13] www.dw-world.de/dw/0,,3325,00.html.

[14] www.rtl.de.

medium wave and FM in some regions and major cities. Some language services are distributed via websites, which offer multiple access forms and are integrated with the television and radio offerings.

A major emphasis is on Europe, with services in 13 languages. There are broadcasts to Africa in Hausa and Kiswahili, to Asia in Bengali, Indonesian, Hindi, Urdu and to the Middle East in Arabic, Amharic, Persian, Dari and Pashto. Broadcasts in English, Chinese, German, Spanish and Portuguese are for worldwide consumption. Audiences to Deutsche Welle are below those of UK and US international broadcasters.

Deutsche Welle has a history of both competing and cooperating with other public-service international broadcasters like the BBC World Service and RFI. The DW-Akademie (established in 2004) maintains this approach, working with the BBC WS Trust. As well as providing training for journalists, the academy runs projects that 'contribute to more openness, transparency and participation in the electronic media of developing and transition countries' and is 'committed to promoting freedom of opinion around the world'.

3.1.3. UK

With a long tradition of public-service broadcasting, Britain had one of the major international broadcasters of the Cold War period.[15] Directly funded by the UK government, unlike its home service equivalent, the BBC World Service maintained a reputation for editorial independence which remains at the heart of its image.

The BBC refocused after the Cold War and closed 10 of its 40 language services. Its move into international television, in English, Arabic and Persian, has been part state-funded, part-commercial. The BBC's international efforts benefit from synergies with the newsgathering, editorial, technological and reputational strengths of the domestic side of the corporation, including its developments into the new media. International news and broadcasting are at the heart of the BBC's strategy and rationale.

AIMS AND REGULATION

The BBC describes itself as 'the largest broadcasting corporation in the world'. Its mission is 'to enrich people's lives with programmes that inform, educate and entertain'. At an international level, one of the BBC's stated six key purposes is 'Bringing the UK to the world and the world to the UK'.[16]

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[15] BBC Monitoring Country Profiles: UK
http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/europe/country_profiles/1038758.stm.
UK media websites as cited.

[16] www.bbc.co.uk/aboutthebbc/purpose/what.shtml.

The flagship BBC World News is the commercially funded, international 24-hour news and information channel, broadcasts in English to more than 200 countries and territories across the globe and is 'at the heart of the BBC's commitment to global broadcasting'. The BBC describes the service as 'available in more than 295 million homes', with an 'estimated weekly audience reach of 74 million'. This makes it 'the BBC's biggest television service'.[17] The BBC World Service calls itself 'the world's leading international broadcaster providing programmes and content for radio, television, online and mobile phones in English and 31 other languages'.[18]

The BBC seeks significant international audiences and in June 2009 reported a record weekly global audience of 238 million people. BBC World Service, the world's most popular international radio broadcaster, attracted a weekly audience of 188 million, including the new BBC Arabic television channel, while radio listening was 177 million. The largest overseas audiences for BBC news, across all platforms, are in Nigeria (26m), USA (24m) and India (22m). The BBC News website has two versions – one for the UK and the other for international audiences.[19]

The launch of the BBC's Arabic and Persian television services reflects Britain's strategic priorities in the Middle East. Plans aired by the corporation include an Urdu television channel, 'bespoke' English-language programmes for Africa, as well as Hindi television, a Spanish-language channel for Central and South America, and a Mandarin television service.[20]

British and UK-based media are able to operate and report on all aspects of British life and international affairs. Domestically and internationally, the environment provides for public service and commercial broadcasting. Over 800 television services are registered with the regulatory body Ofcom, some operating internationally, including many of the world's most prominent broadcasters. This presence can be awkward; the British government came under pressure to stop the UK activities of the Kurdish television channel MEDTV.

The UK has a long tradition of public-service broadcasting. The BBC, the foremost public-service broadcaster, is a public corporation that provides national, regional and local television and radio services and an extensive website. Its funding is complex. While domestic services are funded by a licence fee charged on television users, the BBC World Service (radio, television and online) is funded by government grant, and BBC World News (English-language international television) is commercially funded.

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[17] www.bbcworldnews.com/Pages/About.aspx.

[18] www.bbc.co.uk/worldservice/specialreports/000000_aboutus.shtml.

[19] www.bbc.co.uk/pressoffice/pressreleases/stories/2009/06_june/02/audience.shtml.

[20] www.broadcastnow.co.uk/SearchResults.aspx?qsearch=1&qkeyword=bbc+urdu+television&x=31&y=8.

OPERATIONS

The BBC operates three international television services: BBC World News (in English), and BBC Arabic and BBC Persian television. All are founded on the same journalistic principles, seeking to offer 'impartial, in-depth analysis of breaking news, as well as looking at the stories behind the news – not just what is happening, but why'.[21]

The corporation seeks global availability for BBC World News and targets high-end audiences. It reports that the channel 'recently overtook CNN in the key breakfast and evening peak slots in Europe'. BBC World News is similar to BBC World Service radio in having a strategy based on regionalising programme streams. To this effect it announced in January 2010 'six news programmes tailored to regional audiences', including a news 'nerve centre' for South Asia.

The second arm in the BBC's international services, BBC Arabic Television, is a news and information television channel broadcast to the Middle East and launched in March 2008. 24-hour programming began in January 2009. A previous attempt to launch an Arabic television service ended in closure in April 1996, after two years on air, when the BBC's Saudi partners withdrew after the BBC broadcast a programme critical of the Saudi Arabian government. Many of the staff who worked for the original BBC Arabic Television service went on to work for Al-Jazeera television.

BBC Arabic Television is the BBC's first publicly funded global television service and was made possible by a £30m restructuring of BBC World Service, the closure of 10 language services and the loss of 200 jobs. The channel is a key element in the BBC World Service strategy and its success is significant for the corporation. It is widely available in the Middle East, distributed by the key satellite systems for the region. It can be viewed via the linked Arabic-language website, www.bbcarabic.com, which carries a live stream of the channel. While strategy has been based on news, a forthcoming approach is likely to be to handle social issues that are not spoken about publicly.

The BBC's next effort in international planning, BBC Persian Television, came on air in January 2009. It is aimed at the 100 million Persian speakers in Iran, Afghanistan, Uzbekistan and Tajikistan. Funded by the UK government, the channel has been condemned in Iranian government statements and has been subject to jamming signals from within Iran. Timothy Garton Ash described the launch of the service as the day Iranian television viewers finally got the channel they have been asking for, a response 'to repeated demands from Iranians themselves for news they can trust, in a society confused by both organised lying and spontaneous

[21] www.bbcworldnews.com/Pages/About.aspx.

conspiracy theories' (Garton Ash, 2009). The service is integrated with well-established BBC Persian radio service and website (bbcpersian.com) and exploits worldwide newsgathering resources. Garton Ash described the potential as immense and as 'a long-term journalistic project, not a short-term political one' (Garton Ash, 2009).

BBC World Service radio is the most listened to of the international broadcasters. Its audience of around 177 million is the largest component of the BBC's international audience, and has been retained despite major cuts in short-wave broadcasting. Though it significantly reduced the scale of its language services from the 1990s onwards, and may well need to reduce them further, it currently broadcasts in more than 30 languages with a global spread, including: Arabic, Bangla, French, Hausa, Hindi, Kiryarwanda, Kirundi, Nepali, Pashto, Portuguese, Somali, Swahili, Tamil, Urdu. Like other state-funded international broadcasters, its delivery strategy combines the use of short- and medium-wave transmissions, FM relays, rebroadcasters, satellite, the internet and mobile telephony.

As an example, BBC Arabic radio is available on over 20 BBC FM relays across the Middle East, and rebroadcast by partner FM radio stations. In addition to its short-wave broadcasts, BBC Arabic also broadcasts on medium wave to the Eastern Mediterranean and in the Gulf region. The service is also distributed by satellite systems including Nilesat and Arabsat. 'The latest news from BBC Arabic is now available on mobile phones, PDAs and other wireless handheld devices.' For instance, 'BBC Arabic breaking news alerts are also offered via mobile operators as a subscription service in Bahrain, Egypt, Jordan, Kuwait, Oman, Qatar, Saudi Arabia, UAE and Yemen.'[22]

BBC World Service's major audiences have been in Africa, South Asia and the Middle East. While there have been significant drops in audience numbers (for example, in India), audience levels and the overall role played by the BBC remain significant. Short-wave listening still attracts big rural audiences. The Hausa Service for Nigeria and the region, the Swahili Service and the Africa Service broadcast in English and French and carry content that aims to resonate with listeners. In both Nigeria and Kenya, as well as providing international news, the BBC also delivers a local news service.

INTERNATIONAL COOPERATION

The BBC's international charity, BBC World Service Trust, cooperates with counterparts in France and Germany and operates in 40 developing and transitional countries worldwide to strengthen the media sector and build professional capacity. The charity's own programming seeks to inform and

[22] www.bbc.co.uk/worldservice/programmeguide.

engage audiences about key development issues and 'reached audiences totalling 119 million people worldwide' in 2006–7.[23]

3.1.4. USA

The USA[24] is the largest and most complex of the world's international broadcasting nations. There are also both publicly funded and commercial sides to the USA's international broadcasting, the latter most often associated with CNN and the notorious 'CNN effect' of the 1990s.

Historically the largest operator in international broadcasting, the USA never lost its lead position, despite post-Cold War cuts. The impact of al-Qaeda, the nature of the post-9/11 world, and the phenomenon of strong anti-US feeling in many parts of the globe have since combined to make the 'winning of hearts and minds' a priority for US government thinking. Today, the USA puts over $700 million a year into publicly funded international broadcasting.

AIMS AND REGULATION

Publicly funded international broadcasting is directed by the Broadcasting Board of Governors (BBG), which coordinates the production and distribution of television, radio, and online output in many languages to many parts of the world (some 100 countries). The US runs parallel systems: first, the clearly US external services and, secondly, the 'surrogate' services that provide alternative domestic services for countries where free and objective journalism is not available. The former operate under the Voice of America umbrella, the latter under the Radio Liberty/Radio Free Europe banner. Some have called this wasteful and ineffective (Hopkins, 1999). The USA also forms the base for numerous émigré media operations, for example, around 20 Persian-language television services are US-based.

The BBG expressly states that it 'supports the broad foreign policy goals of the United States' and that its mission is 'to promote freedom and democracy' through 'accurate, objective, and balanced news, information, and other programming about America and the world'.[25] The board's 2008–13 Strategic Plan 'reaffirms objective journalism as the BBG's core activity' and emphasizes the relevance of its work in a 'world where extremism and authoritarianism militate daily against freedom and democracy'.[26]

The US has the world's most highly developed mass media and is the home of the internet. Programming, music and films have global audiences

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[23] www.bbc.co.uk/worldservice/trust/aboutus.

[24] BBC Monitoring Country Profiles: USA
http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/americas/country_profiles/1217752.stm.
US media websites as cited.

[25] www.bbg.gov.

[26] www.bbg.gov/about/plan.html.

and are used by broadcasters worldwide. Freedom of expression is guaranteed by the constitution. The country's historical role as a champion of democracy, coupled with its pursuit of national self-interest, determine its thinking and approach on international broadcasting.

OPERATIONS

The USA's publicly funded international broadcasting remains truly global in scale, though operations targeting the area of the former Eastern bloc has been considerably reduced. Today, the key areas of focus are in the Middle East and Asia.

Voice of America is primarily a radio broadcaster (which also produces some television services and programming) and operates with global spread in over 40 languages, including Amharic, Bangla, English, French, Hausa, Kiryarwanda, Kirundi, Ndebele, Oromo, Pashto, Portuguese, Shona, Somali, Spanish, Swahili, and Tigrigna.[27] Sister services Radio and TV Marti broadcast in Spanish for Cuba. Services now include the Persian-language Voice of America Persian TV,[28] but radio broadcasts in Hindi have stopped.

As an example, Voice of America broadcasts radio programming for around 12 hours a day in Urdu, on medium wave, via digital satellite signal, and for a limited period each day on short wave. Voice of America added to this in 2005 by launching a 30-minute Urdu-language television service, *Beyond the Headlines*, broadcast by the Pakistani Geo TV.

The Voice of America Charter requires that broadcasts:

- Be accurate, objective, and comprehensive.
- Represent all segments of American society and present a balanced and comprehensive view of significant American thought and institutions.
- Clearly present the policies of the United States.

Radio Free Europe/Radio Liberty, based in Prague and Washington, operates radio services in 28 languages, many the same as Voice of America, and including Urdu.[29] For instance, its Radio Mashaal was launched in January 2010 to counter a growing number of Islamic extremist radio stations in the areas of Pakistan bordering Afghanistan. Radio Mashaal has the aim of covering 'local and international news with in-depth reports on terrorism, politics, women's issues, and health care'. The station also 'features roundtable discussions and interviews with tribal leaders and local policymakers in addition to regular call-in programs'.

RFE/RL's stated mission is 'to promote democratic values and institutions by reporting the news in countries where a free press is banned by the government or not fully established'. The service is 'based on the conviction that the first requirement of democracy is a well informed

[27] www1.voanews.com/english/news.
[28] www.voanews.com/persian.
[29] www.rferl.org.

citizenry'. Its stated aim is to provide 'objective news, analysis, and discussion of domestic and regional issues'. It claims to strengthen civil societies 'by projecting democratic values', to combat ethnic and religious intolerance, promotes mutual understanding among peoples and provides a model for local media.[30] In 1996, it launched a substantial new sister service, Radio Free Asia, to provide services for China, Tibet, North Korea, Cambodia, Laos and Burma.

The USA's most high-profile developments of recent years have been in Arabic-language broadcasting, radio and television. This activity has been brought together within the Middle East Broadcasting Networks, which report directly to the Broadcasting Board of Governors.

Radio Sawa, a 24-hour, seven-day-a-week Arabic-language network, began broadcasting in 2002.[31] It provides a mix of Western and Arabic pop music with news, analysis, interviews, sport and features on political and social issues. It broadcasts from studios in the Washington and Dubai, with news bureaux throughout the Middle East. It uses a combination of medium wave and FM transmitters, digital audio satellite, short wave and internet. Radio Sawa has streams tailored to specific parts of the region, including Egypt, the Gulf, Iraq, Lebanon, the Levant, Morocco and Sudan.

Some have questioned the approach (Pein, 2005). Audience figures published by the USA suggest that the channel is quite successful in reaching young people in countries like Qatar, UAE and Morocco, but less successful in, for example, Algeria and Tunisia.[32]

Al-Hurra (Arabic for 'The Free One'), which launched in February 2004, is an Arabic-language satellite television channel for the Middle East devoted primarily to news and information.[33] It broadcasts to the Middle East via the same satellites used by major indigenous Arabic channels. Al-Hurra also has a special Iraq stream and in 2006 launched a third network, targeting Arabic speakers in Europe.

Taken together, Al-Hurra and Radio Sawa report a 12% weekly reach in Algeria and a 16% weekly reach in Egypt. The figures for Iraq and Qatar are 71% and 86% respectively, but these are countries where Radio Sawa enjoys local FM distribution, whereas in Egypt and Algeria it does not.

Technically advanced, all these various services operate their own websites in their individual languages, offering news, programme and service information, as well as delivery options, such as podcasts, RSS feeds and access via mobiles, for example the My VOA Community (Price et al., 2008).

The services are substantially resourced: Voice of America has 1,200 employees and a (2008) budget of $190m; Radio Free Europe/Radio Liberty

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[30] www.rferl.org/info/mission/169.html.

[31] www.radiosawa.com.

[32] www.bbg.gov/reports/documents/Alhurra-Sawa_Research_Data_Jan_2010.ppt.

[33] www.alhurra.com.

has around 500 employees and a (2006) budget of $75m; Radio/TV Marti has 150 employees and a (2006) budget of $37m; Radio Free Asia has 240 employees and a (2006) budget of $30m. Al-Hurra and Radio Sawa have over 650 staff and a budget of over $100m.[34]

On top of this, the US military operates its own broadcasting system, the Pentagon Channel, giving a 24-hour global satellite television service on news about the US forces, aimed at service personnel stationed around the world, their families and other interested viewers.

COMMERCIAL OPERATORS

The USA's entertainment and IT industries have played a major role in the development of satellite and online communications worldwide and are prominent in the channel spectrum and in the content available.

The USA is home to the largest news and entertainment businesses, including the News Corporation. Bloomberg, a news and data supplier, now operates up-market international and internet services. Also US-based are the influential news agencies Associated Press, UPI and Thomson Reuters.

Cable News Network, founded as a US cable news network in 1980 by Ted Turner, was the first 24-hour television news and first all-news television service in the USA. It became known and watched worldwide in 1991, when it established itself as the prime source of direct news about the progress of the first Gulf War.

CNNI (CNN International) is the version available outside the USA and Canada, and is distributed via satellite, cable and internet. Its reach extends to over 200 million households and hotel rooms in over 200 countries. In many countries free-to-air, it is also included in pay-TV packages. CNNI's slogan of 'Go Beyond Borders' refers to the extent of its media platforms and its wide availability, as well as to the nature of its news. While reporting from all parts of the world, it has a particular emphasis on business news, including information from markets worldwide.

CNNI now operates in six languages: English, Spanish, Arabic, Japanese, Korean and Turkish. In late 2009, it launched a new production centre in the United Arab Emirates. Its strategy involves the management of six regional streams, for example for the Middle East and Africa, running from operating centres, in Atlanta, London, Abu Dhabi and Hong Kong. CNNI also runs internet news services in its different languages of operation – including streaming of its television programmes.

In India, CNN is involved in a partnership operation: CNN-IBN (Cable News Network-Indian Broadcasting Network). This English-language channel is run by the Indian partner company, uses the CNN brand, bases its formats on the CNN model, and operates an associated web service.[35]

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[34] www.bbg.gov; www.bbg.gov/reports/budget.html.

[35] http://ibnlive.in.com.

3.2. The 'new' powers: Russia, Iran, China

Russia, Iran and China are three expanding international broadcasting powers which share a Freedom House press freedom rating of 'not free'.

3.2.1. Russia

In terms of effort, the Soviet Union was for decades one of the foremost international broadcasters. The Soviet Union's collapse brought a splintering of monolithic broadcasting structures and a decline in output. New Russian confidence and power has now brought a growing international television presence. Today, Russia maintains a reduced overall effort in comparison to the 1980s, but is a major international broadcaster at a number of levels.[36]

Russia employs all the electronic media – television, radio and the internet – and is present on multiple platforms. A significant part of the effort involves television and radio services aimed at Russians in the 'near abroad' and worldwide. Efforts are made to appeal to viewers worldwide with flagship television services in English, Arabic and Spanish. The radio Voice of Russia, operating in numerous languages, emphasises continuity of operations and has new interest in the sensitive 'near abroad'.

Overall, the Russian government keeps a tight control on the electronic media, not only through ownership. The press, which has more limited influence, is freer, as is the internet. But the independent-minded journalist working on a sensitive subject has reason to fear arrest and violence.

AIMS AND REGULATION

The state-owned Russian international television announces: 'At Russia Today we are set to step beyond the boundaries of bare facts and bring you the human side of every story . . . Russia Today is here to show you how any story can be another story altogether.' A more explicit purpose is this: 'RT offers a unique insight into many aspects of Russian history, culture and opinions. Our special projects are specifically tailored to accustom the international audience with the Russian perspective.'[37]

The channel stresses a worldwide reach. 'We are available around the world on cable, satellite and online. In Europe, South Africa and North America, RT has an audience of around 200 million paying viewers among the pay-TV subscribers.'

The radio station Voice of Russia calls itself 'the veteran of radio broadcasters' and says it 'shapes Russia's image worldwide and introduces

[36] BBC Monitoring: Russia Media Environment Guide, May 2009. Russia Today and Voice of Russia and other websites as cited.

[37] http://rt.com/About_Us/Corporate_Profile.html.

the world community to Russia and its opinions on global events'.[38] The station's website says the service broadcasts in 38 languages on short and medium wave, FM, via satellite and through mobile link, as well as a profusion of websites. It describes itself as 'among the top five radio broadcasters' and reports 109 million listeners in 160 countries.

The cornerstone of the Kremlin's media policy since 2000 has been to gain and maintain control over Russia's key media assets, the big federal TV channels, Rossiya and Channel One. The press is somewhat freer and some newspapers and magazines forthrightly criticise the authorities. On the internet, opposition websites and bloggers with anti-Kremlin views are generally allowed to operate unchecked. However, the killing of journalists who oppose the authorities, expose wrongdoing or tackle controversial subjects is a feature of the Russian media environment. Russia has seen a media war develop with Georgia, which in 2009 launched a Russian-language television service.

OPERATIONS

Russia's international television services are there to influence world opinion and address a Russian audience in the 'near abroad'. For this there are three types of service.

The most apparent channels to Western viewers are those operating worldwide in English and other languages. Russia Today is a 24-hour English-language news channel launched by Russian state news agency RIA Novosti in December 2005. The channel can be seen in Russia and the former Soviet republics, Europe, the Middle East, most of Asia, southern Africa, the United States, Australia and New Zealand. The channel claims 'we are available around the world on cable, satellite and online'.

In 2007, RIA Novosti began operating an Arabic sister channel to Russia Today, Rusiya al-Yaum. Like other recent foreign entrants to the Arabic TV market, Rusiya al-Yaum has found it hard to attract significant audiences. A Spanish-language channel was launched in December 2009.[39]

Secondly, there are the major domestic Russian TV stations (broadcasting in Russian) which are available by satellite and cable rebroadcasts in various parts of the world. Rebroadcasts in a number of CIS countries have at times been halted or suspended for political reasons, including the hostilities between Georgia and Russia in 2008.

Thirdly, there are international variants of the domestic services aimed at Russians and Russian speakers in the 'near abroad' and worldwide. Channel One Worldwide is available to viewers in the former Soviet republics, Europe, the Middle East, parts of Asia, North America, Australia

[38] http://english.ruvr.ru/about.html.

[39] www.russiatoday.ru; www.rtarabic.com; http://actualidad.rt.com.

and New Zealand.[40] Similar availability is enjoyed by Rossiya's international service, RTR-Planeta, NTV's international service, NTV-Mir, and Vesti, Russia's state-run 24-hour news channel.[41]

Russia's international radio effort is more traditional than its new television services. Voice of Russia operates in over 35 languages. Some 20 are listed as available on short wave including: Arabic, Pashto, English, French, Hindi and Urdu (World Radio and Television Handbook, 2010). Its delivery mechanisms include short and medium wave, satellite and internet. Changes were announced to the service in 2009, with new services to be set up in Georgian and Ukrainian, while 12 languages would be limited to online broadcasting. New emphasis on languages of the former Soviet Union shows a change of direction.

ITAR-TASS is Russia's main state news agency and its news and analysis reflect official Russian policy and priorities. The agency is controlled by the VGTRK, the state media conglomerate that also operates the Rossiya and Vesti-24 television channels, the Radio Russia and Mayak radio stations and the RIA Novosti news agency (whose output also reflects Russian policy and priorities). ITAR-TASS has offices worldwide.

3.2.2. Iran

At the centre of world attention as a result of its nuclear development, Iran is itself one of the main broadcasting targets.[42] Over 30 television services based in the USA, Canada, and European countries target it, including the BBC and Voice of America. Like Russia, Iran has a substantial and far-flung diaspora which it wishes to address. Iran is a regional power and has messages of revolution for the wider world. It makes significant efforts to reach its target audiences through television and radio in a range of key languages.

AIMS AND REGULATION

All Iran's broadcasting is controlled and run by the state and its aims are the state's aims. The website of the overarching broadcasting organisation, Islamic Republic of Iran Broadcasting (IRIB), speaks of a role in winning public opinion. There is an awareness of the impact of the world's media and a sense of Iran being under media siege.

> *When the supranational waves and messages have trespassed the geographical and cultural borders, with domineering empire of*

[40] www.1tvrus.com.

[41] www.rtr-planeta.com; www.ntvmir.ntv.ru; www.vesti.ru.

[42] BBC Monitoring: Iran Media Environment Guide, July 2009. Iranian media websites as cited.

> *Western Media aiming for the cultural conversion of the Independent nations specifically focusing on the Islamic Republic of Iran, IRIB should play its key role in strengthening the country's cultural solidarity as well as stressing National identity together with fighting against the destructive waves more than before.*[43]

Iran's English-language international television service Press TV stresses its aim of providing alternative views,

> *heeding the often neglected voices and perspectives of a great portion of the world; embracing and building bridges of cultural understanding; encouraging human beings of different nationalities, races and creeds to identify with one another; bringing to light untold and overlooked stories of individuals who have experienced the vitality and versatility of political and cultural divides firsthand.*[44]

The international radio service, Voice of the Islamic Republic of Iran, speaks of continuity with its original aim of familiarizing the world with Iran's culture. 'Following the 1979 Islamic Revolution, elaborating on the revolution's stances and the ideals of the Islamic Republic system were put high on the English radio's agenda.' English was used to spread the message to US, Canada and Britain, and to target countries where English is a popular second language, including India and Pakistan.[45]

Iran's electronic media are closely controlled and coordinated by the state. Though the press is freer to voice a range of views, it has limited readership and is vulnerable. Though the election of President Khatami in 1997 saw a dramatic growth of pro-reform newspapers, many were later closed. It is the internet, combined with the use of mobile phones, that has created within Iran the main forum for debate, the expression of differing opinions, the recording of events and the distribution of informal and formal news. Iran has one of the highest internet penetration rates in the Middle East and the internet, news websites and the blogosphere are significant sources for those at home and abroad, despite efforts by the authorities to block or filter websites they consider objectionable.

OPERATIONS

Iran began international television services in 1997 with IRIB's Persian-language Jaam-e Jam service and the multi-lingual Sahar TV. Press TV, an English-language news channel, launched in 2007. Its stated aim was to offer news 'from another point of view' and to be an alternative to 'the global

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[43] www.irib.ir/English/AboutUs/index.php.

[44] www.presstv.com

[45] www.irib.ir/worldservice.

media stranglehold' of Western outlets. The channel reflects Iranian government views. It operates from studios in Tehran, Beirut, Damascus, Washington and London and transmits on 12 satellites around the world (with live streaming from its website[46]).

Al-Alam (The World) is IRIB's 24-hour Arabic news channel. It targets a pan-Arab audience and can be viewed in Europe, the Middle East, Asia-Pacific and North America. Al-Alam began broadcasting in 2003. Its presentation is described as similar to other major pan-Arab channels. It has bureaux in Baghdad, Beirut, Ramallah and Tehran. Al-Alam describes itself as an 'Islamic, international news channel' that is 'independent' and 'neutral', there to present the viewpoints of the Islamic world and 'counter the monopolization of news channels by Western countries'. Al-Alam's website has news in Arabic and Persian.[47]

Sahar TV began as an international television service broadcasting news and general programming in several languages with the aim of 'delivering the message of the Iranian revolution to the outside world'. In 2006, Sahar 1 changed its name to Al-Kawthar (Fount of Abundance) and now broadcasts 18 hours a day in Arabic, promoting Shi'i Islam. The programming is mostly religious and cultural, but there are also news bulletins, political discussions and phone-ins.[48] Sahar TV also broadcasts daily in Azeri, English, Kurdish, French and Bosnian and Urdu.[49]

Jaam-e Jam describes itself as broadcasting to expatriates and those interested in Iranian culture. Channel 1 targets viewers in Europe and the Middle East; Channel 2 (IRIB 2) targets Europe and North America; Channel 3 (IRIB 3) targets the Middle East, Asia and Oceania/Australia.[50]

Iran's international radio effort is both extensive and unified. IRIB operates national and provisional networks and the external service. Together, they are known as the Voice of the Islamic Republic of Iran (VIRI). VIRI World Service broadcasts in 30 languages. Broadcasts are on satellite, streamed on the internet and available on multiple short-wave and medium-wave frequencies. According to the service's website,[51] the 30 languages include: Arabic, Bengali, Dari, English, French, German, Hausa, Hindi, Swahili, and Urdu. The Arabic Service broadcasts round the clock on satellite, medium wave, short wave and FM (for southeast Iraq). It carries a daily programme focusing exclusively on the Palestinian issue.

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[46] www.presstv.com.
[47] www.alalam.ir.
[48] www.alkawthartv.ir.
[49] http://sahartv.irib.ir/ and http://setv.irib.ir/
[50] www.jjtvn.ir.
[51] www.irib.ir/worldservice.

OTHER INTERNATIONAL EFFORTS

Iran exercises media influence through its news agencies. The main player is the Islamic Republic News Agency (IRNA), Iran's official state-run news agency. It is government-funded and takes a hard-line position. IRNA's principal objectives include securing the Islamic Republic's national interests, promoting Islamic culture and 'encountering the cultural onslaught of enemies of the Islamic revolution'. IRNA carries reports in Persian, plus Arabic, Chinese, French, English, Spanish and Turkish. It has over 20 foreign bureaux and bilateral agreements with news agencies from over 70 countries. IRNA publishes seven dailies and periodicals, including the Persian-language daily *Iran*, the English-language *Iran Daily* and the Arabic-language *Al-Wifaq*.[52]

3.2.3. China: new superpower

China is a truly global broadcaster,[53] employing all the electronic media – television, radio and internet – present on multiple platforms and frequencies, operating in a wide array of languages with worldwide reach, and using a variety of strategies to reach viewers, listeners and readers, and employing the media themselves as part of a wider historical and political strategy and purpose. China targets world opinion and puts major effort into reaching its overseas diaspora. China is the largest media market in the world; its media remain tightly controlled by the ruling Chinese Communist Party and stiff regulations govern the industry. This is reflected in the nature of its international broadcasting.

AIMS AND REGULATION

In December 2008, in celebration of the 50th anniversary of the establishment of China Central Television (CCTV), Li Chanhcun, the propaganda chief of the Communist Party of China (CCP) and a senior member of the Politburo Standing Committee, made an important speech. Among many other things, he stressed the importance to the Chinese media of strengthen its 'communication capacity' (chuanbo nengli), saying that Chinese television should start producing internationally well-known programs and products, and should increase the competitiveness of China's television, both domestically and internationally. 'We must go "global", strengthening our foreign language channels, expanding our partnerships with foreign television organizations'. (Sun, 2010)

The stated aims of Chinese television reflect these ambitions:

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[52] www.irna.ir

[53] BBC Monitoring: China Media Environment Guide, Feb. 2009. Chinese media websites as cited.

> *China Central Television (CCTV) is the national TV station of the People's Republic of China and it is one of China's most important news broadcast companies. Today, CCTV has become one of China's most influential media outlets. In addition to its TV programs, CCTV has also built up a multi-media broadcasting platform and business operation, which includes movies, newspapers and the internet. CCTV is the main news source for the Chinese people. It is also an important window for Chinese to learn about the outside world, and for the world to find out more about China. CCTV is making efforts to become a global media network with increased international influence.*[54]

In January 2009 the Chinese government announced plans to spend US$7bn to expand key domestic media outlets overseas. Beijing set aside US$2.2bn each for CCTV, the news agency Xinhua and the *People's Daily*, and a further US$300m for Xinhua's smaller rival, the China News Service. The plan called for CCTV, Xinhua and the *People's Daily* to develop their operations globally. CCTV aims to expand its foreign bureaux from 19 to 56 over a three-year period while Xinhua will expand its overseas bureaux from 100 to 186.[55]

CCTV added to its international English service in 2008, setting up French- and Spanish-language television channels ahead of the Beijing Olympics. CCTV launched an Arabic channel in July 2009 and a Russian channel in September 2009.

Xinhua launched trials of an English-language television news channel, CNC, on 1 May 2010. According to Xinhua President, Li Congjun, 'CNC will offer an alternative source of information for a global audience and aims to promote peace and development by interpreting the world in a global perspective.'[56]

Chinese Radio International stresses continuity with the past and its place in an integrated media set-up. The service 'is dedicated to serving our listeners in order to build a bridge for the Chinese people to learn about the world and for the people around the globe to get to know China'.[57]

China's propaganda chief Liu Yunshan wrote in a 2009 New Year's essay for the Communist Party's main ideological journal *Qiu Shi* (Seeking Truth) that

> *it has become an urgent strategic task for us to make our communication capability match our international status. Nowadays, nations which have more advanced skills and better capability in communications will be more influential in the world and can spread their values further.*

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[54] www.cctv.cn.

[55] www.ipsnews.net/print.asp?idnews=50739.

[56] Reported by AP in the *Guardian* http://www.guardian.co.uk/world/2010/apr/30/china-launches-global-tv-news.

[57] /www.chinabroadcast.cn.

Wang Chen, who leads the party's overseas propaganda division, added that media and cultural units should beef up their

> *capacity to broadcast, to positively influence international public opinion and to establish a good image for our nation . . . We must strive to set up a top-line global media arm that covers the entire world and which is multilingual, enjoys a large viewership, has a large volume of information and is strongly influential.*

China's media sector is highly regulated and editorially controlled. The key agencies are the Ministry of Industry and Information Technology (MIIT) and the State Administration of Radio, Film and Television (SARFT). The latter directly supervises China National Radio, China Radio International and China Central Television. Leeway is allowed for independent coverage of stories that are not perceived as threats to social stability or the Communist Party. Outspoken comments on international channels, such as occurred during the Tiananmen tragedy, are rare.

OPERATIONS

Where other state-funded international broadcasters reduced or refocused their activities after the Cold War, China has maintained and expanded its efforts. China is the world's largest TV market. State-run national broadcaster CCTV[58] is China's largest media company. CCTV has begun carrying commercial advertising and gained more freedom in content selection.

CCTV claims a worldwide audience of 45 million for its international satellite channels in Chinese, Arabic, English, French, Russian and Spanish. It runs a Chinese-language channel (CCTV-4) targeting viewers in Hong Kong and Taiwan and the Chinese diaspora. It split into three channels in 2007 – CCTV International Asia, CCTV International Europe and CCTV International America – to provide more specific regional services.

CCTV-9 is a 24-hour English-language international news channel. It plays a key role in external publicity, projecting 'soft power' for China. It was launched in 2000, when the English-language programming was split off from CCTV-4.

China National Radio (CNR) and China Radio International (CRI) are China's two state-owned radio broadcasting networks. China Radio International broadcasts in over 40 languages, in addition to Chinese. Its language services include: Arabic, Bengali, English, French, Hausa, Hindi, Nepali, Portuguese, Pashto, Sinhalese, Swahili, Tamil, and Urdu.[59] CRI is a highly active broadcaster which fills the airwaves. It broadcasts via short-wave radio worldwide on numerous frequencies and is notable for maintaining direct short-wave broadcasts to North America and Europe, which broadcasters like BBC World Service have cut. An extensive network of

[58] www.cctv.cn.

[59] www.chinabroadcast.cn.

short-wave transmitters is supplemented by local FM relays and rebroadcasting agreements around the world. CRI is also broadcast via satellite, internet and mobile phone. CRI now also has over a hundred FM radio partners, as well as 32 AM radio partners in Asia, Africa, North America, Europe, and Oceania (Sun, 2010).

CRI launched its first overseas FM radio station, in Nairobi, in 2006. CRI 91.9 FM in Nairobi broadcasts 19 hours of programmes a day in English, Swahili and Chinese. In 2008, China donated transmitters to relay CRI programmes inside Liberia, and provides an FM transmitter to boost Liberian Broadcasting System radio transmissions. CRI runs lively internet sites for all its language services.

China operates two state news agencies. One is the official news service, Xinhua (New China News Agency), with domestic and international casts. The other news agency, Zhongguo Xinwen She (China News Service or CNS), is targeted specifically at overseas Chinese in Hong Kong and Southeast Asia.

Xinhua News Agency[60] is China's official news agency and is one of the three pillars of the propaganda system. It is the largest newsgathering organization in China and files news in seven languages 24 hours a day (Chinese, English, French, Spanish, Portuguese, Arabic and Russian). Xinhua is the news service of the CCP Central Committee, billing itself as 'the eyes, ears and mouthpiece of the party and people'. Xinhua has a network of over 100 overseas news bureaux, including regional hubs in Asia, the Middle East, Europe, the Americas and Africa. It has agreements on news exchanges with news agencies or media organizations in nearly 100 countries and hosts one of China's largest internet portals, Xinhuanet.

China's Confucius Institutes are a more recent phenomenon. Set up first in 2004 as cultural and Chinese language centres, they already number 300 worldwide, are part of China's soft-power strategy, and are based on the principle that two-way communication is better than one-way (media) communication.

3.3. Pan-Arab and wider

Regarded as a television phenomenon, the pan-Arab media (sources with an outlook that extends across national boundaries and take in the whole Arabic-speaking world) today encompass television, press, and new media and form one of the most studied media developments of recent years.[61]

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[60] www.xinhuanet.com.

[61] BBC Monitoring Media Environment Guide: Key pan-Arab media, Jan. 2010. Arabic media websites as cited.

The origins came in the press and radio, the first players being essentially nationally based but representing powers with ambitions to leadership of the region. Examples included the Egyptian radio Voice of the Arabs (dating from the 1950s) (see Egypt profile) and Libyan Voice of the Great Arab Homeland. Newspapers like the now defunct Lebanese daily *Al-Hawadith* and the Egyptian magazine *Al-Musawar* were also similar in adopting a pan-Arab approach and news agenda.

Today's pan-Arab press, a limited number of influential Arabic-language newspapers established in the 1970 and 1980s, is based outside the Middle East. The three best known and ones with the largest impact are *Al-Hayat*, *Al-Sharq al-Awsat*, *Al-Quds al-Arabi*, all currently operating in London.[62] They acquired and retain influence across the Arabic-speaking world, publishing material that would not be available in individual Middle East countries.

AIMS AND REGULATION

In the 1990s, a set of circumstances provided an environment in which satellite-based transnational Arabic-language television broadcasters (including news broadcasters) could multiply. The growing popularity of satellite television, the desire for an Arab voice, the technological and specific regulatory opportunities all combined with a stroke of luck to facilitate a media revolution in the Middle East. The failure of the first BBC Arabic Television channel suddenly made available at a stroke a complete team of trained news journalists. Al-Jazeera snapped them up. The Qatari royal family made available funds and an operating environment in which a new form of Middle East-based news provider could function, handling controversial material with an impact on the region and beyond. Other channels followed. The providers' target was the Arabic-speaking world, the strategy to provide news material about the region not previously available. International news was given a new and non-Western focus. Pan-Arab television dominates Middle East viewing and the pan-Arab news broadcasters top the viewing figures in many countries of the region (Painter, 2008).

Notably, the pan-Arab media phenomenon no longer has anything to do with radio, for decades the main medium for mass communication in the Arabic-speaking world. And although many Arabic countries have long operated state-run news agencies, these have not developed into significant international operators in the new age.

The foundation of the Arab Satellite Communication Organisation by the member states of the Arab League in 1976 was key. Arabsat's first satellite was launched in 1985. The organisation now runs four satellites (with plans for more) and gives wide coverage over the Middle East, Africa and parts of Europe. It describes itself as 'one of the world's top satellite operators, and by

[62] www.daralhayat.com; www.asharqalawsat.com; www.alquds.co.uk.

far the leading satellite services provider in the Arab world'. The number of television and radio services carried is massive. Arabsat speaks of

> *350+ TV channels and 160+ Radio stations, reaching tens of millions of homes in over 100 countries across the Middle East, Africa and Europe, including an audience of more than 164 million viewers within the 21 Arab countries alone.*[63]

Egypt added its own Nilesat satellite in 1998 (the first Arab country to have its own). This now has 470 television and over 100 audio channels.[64] (See Egypt media profile.)

Premium channels and pay-TV play an increasing role, as viewers negotiate the array of channels, the majority in the entertainment sphere. Religious material has been provided by terrestrial broadcasters, for example Egypt's Holy Quran Radio. Now some 30 of the satellite television channels are religious Islamic ones, some modelled on American evangelical television services, others broadcasting a more puritanical form of Islam (El-Sayed, 2009).

Elements of editorial freedom have proved a key factor. The Qatari rulers tolerate sharp criticism by Al-Jazeera about other Arabic countries of a kind not found on the channel about Qatar itself. Saudi-funded Al-Arabiya has been able to operate in the Media City in Dubai. Yet most of countries of the Arabic-speaking world enjoy limited freedom. On press freedom specifically, Freedom House rates Mauritania and Egypt as 'Partly Free' and all other Arabic-speaking countries, including Qatar and the United Arab Emirates, as 'Not Free'.[65]

OPERATIONS

Hundreds of Arabic-language television services are available, among them numerous news services, some described below. But in television, as in the press, the truly influential channels are few, and it is Al-Jazeera and Al-Arabiya that lead the way.

Al-Jazeera satellite TV is an Arabic-language 24-hour rolling news channel owned and financed by the Qatari government. The station launched in November 1996.[66] It is considered editorially independent, but has been accused in the past of bias and had its bureaux closed in several Arab countries. A 2008 poll by Zogby International gave Al-Jazeera a 53% share of the pan-Arabic audience in the Middle East. In November 2009, Al-Jazeera's management said the channel had 141 million viewers in the Arab world. The station's annual budget is around $100m; studios are in Doha; the channel is

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[63] www.arabsat.com/Pages/AboutUs.aspx.

[64] www.nilesat.com.eg/aboutus.htm.

[65] See Kraidy, and Khalil (2009) Chapter 5 for a useful profile of Al Jazeera and Al Arabiya

[66] www.aljazeera.net.

available globally via satellite. Other Middle East channels use Al-Jazeera bulletins in their news output.

The organization took on a new international dimension when it launched an English-language news and current affairs channel, in November 2006 (Malek, 2006). Al-Jazeera English is based in Doha, with broadcasting centres in Kuala Lumpur, London and Washington.[67] Accessed via the internet, satellite and local cable subscription in selected countries, Al-Jazeera English bills itself as the first Middle East-based international English-language channel, available in over 130 million cable and satellite households worldwide. Its news coverage is global with an anti-hegemonist slant (Painter, 2008).

The station's slogan is 'Setting the News Agenda'. The station's 'corporate profile' outlines its positioning:

> *The organisation is the world's first global English language news channel to be headquartered in the Middle East. From this unique position, Al Jazeera English is destined to be the English-language channel of reference for Middle Eastern events, balancing the current typical information flow by reporting from the developing world back to the West and from the southern to the northern hemisphere. The channel aims to give voice to untold stories, promote debate, and challenge established perceptions.*

Plans for Al-Jazeera to begin broadcasting in Urdu have been aired over recent years, but appear not to have been advanced.

Al-Arabiya is an Arabic-language 24-hour rolling news channel based in Dubai, launched in February 2003.[68] The station is largely owned by members of the Saudi royal family and the Middle East Broadcasting Centre (MBC) group, with other investors from the region. The channel employs some 500 journalists and has an annual budget of around $85m. A 2008 poll by Zogby International gave Al-Arabiya a 9% share of the pan-Arabic audience in the Middle East. Al-Arabiya portrays itself as 'an independent, self-empowered, informative and free-spirited satellite channel', but its ownership has led to some accusations that it has a pro-American and pro-Saudi bias.

The Arabic-language version of Al-Arabiya.net launched in 2004. An English-language news site launched in August 2007 and versions in Farsi and Urdu followed in March 2008, catering to audiences in Iran, Pakistan, Afghanistan and parts of the Indian sub-continent.[69]

Iran closed Al-Arabiya's Tehran bureau in June 2009 after the channel covered protests that followed the presidential elections. Iranian officials had previously complained that the channel's coverage of Iran was unfair, and

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[67] http://english.aljazeera.net.

[68] www.alarabiya.net.

[69] www.alarabiya.net/en/about_aa_net.html.

had expelled several Al-Arabiya correspondents since the channel opened a bureau there in 2003.

The commercial, pan-regional broadcaster Lebanese Broadcasting Corporation (LBC) was established in 1985 by the Christian Lebanese Forces as Lebanon's first private broadcaster.[70] It renamed itself LBC International after the end of Lebanon's civil war in 1990 and is now considered more neutral. LBC Sat launched in 1996, soon followed by LBC Europe, LBC America and LBC Australia. LBC Maghreb started in 2006. A 2008 poll by Zogby International gave LBC a 3% share of the pan-Arabic audience in the Middle East.

Al-Manar TV (The Beacon) is the mouthpiece of the Hizbollah movement in Lebanon.[71] The self-proclaimed 'Station of the Resistance' launched in 1991. A French court banned the station's satellite broadcasts in 2004 on the grounds of anti-Semitism. Al-Manar was designated a 'terrorist entity' and banned by the USA in December 2004. The station was targeted by Israeli air raids during military operations against Hizbollah in 2006, but maintained broadcasting. A 2008 poll by Zogby International gave Al-Manar a 2% share of the pan-Arabic audience in the Middle East.

Al-Hiwar TV (Dialogue) is a London-based channel that launched in 2006, set up by the mainstream local Arab Islamist community, and targeting Arab viewers worldwide. Its expressed aim is to carry the voice of Arabs in exile and be a bridge between the Arabs and other peoples and between cultures.

For details of Al-Alam see Iran.

STRATEGIC DIFFERENCES

In terms of delivery strategies, there is little to distinguish the major pan-Arabic television operators. They all employ satellite delivery and seek a range of outlets. They use Facebook, Twitter, MySpace, and mobile telephone technology (though availability of this may in practice be limited to few countries). They use the internet to deliver live streaming and recorded key bulletins. They generally run developed news websites.

What distinguishes them primarily is their content. Al-Jazeera, in addition to its Arabic services, has English-language programming and web content, the latter with global news and regional news from Africa, the Americas, Asia, Europe, as well as the Middle East. Al-Jazeera was able to criticise developments and officials in Arabic countries in a way that largely remains unique. Al-Arabiya, the main pan-Arabic competitor, remains more conservative in its news agenda and less critical in its approach.

Pan-Arab television has brought innovations in drama and entertainment. Similarly, journalistic advances have been in 'straight' news

[70] www.lbcgroup.tv.

[71] www.almanar.com.lb.

programming, talk shows, phone-ins and interviews. There are still taboo areas, such as domestic violence, drug addiction, that may be entered by international broadcasters like the BBC.

NEW MEDIA

In the Middle East/North Africa region, internet take-up – though low – is expanding. Some states have responded to the growing use of new media to promote social activism by blocking access to networking sites.

The 370 million people in the Arab countries make up more than 5% of the world's population. But less than 1% of the internet's content is in Arabic. Data from the Internet World Stats website showed that in October 2009 there were 57 million internet users in 14 Middle East countries (including Iran and Israel).[72] This represented only 3.3% of internet users across the world. According to the same source, in Algeria around 12% of the population used the internet as against 21% in Egypt.

Most sites are used for personal blogs and social contacts, but social networking sites are also being used as platforms for political activism. There are many social media services dedicated specifically to Arab users. Leading ones include WatWet, a micro-blogging platform like Twitter, and Ikbis, a photo and video sharing service. Watwet, launched in 2008, had 25,000 users in the Middle East by July 2009, double the number of Twitter users in the region. Watwet aims to complement Twitter by offering users more localized services and content in Arabic. There are also Arabic blogging platforms such as Maktoob, founded in 2000 as the world's first free Arabic/English web-based email service, as well as providing Arabic-language content. It has around 16 million users in the Arab world

For decades, governments in the Middle East have dominated the media, trying to keep a monopoly on information and deter criticism of the authorities. Bloggers have eroded those controls on information. The number of Arab bloggers is estimated at more than 500,000, although 70% of these are updated very rarely. A 2009 Harvard University study estimated that the Arabic-language blogosphere consists of about 35,000 regularly updated blogs. (See also Egypt media profile.)

Governments in the region have been keen to tap into the economic benefits of the internet, but are afraid of it being used by dissidents and critics and are investing in censorship technologies to prevent their citizens from accessing a wide spectrum of content considered objectionable by authorities.

3.4. Religious broadcasters – a different aim

The international religious broadcasters show that different strategies are conceivable. By the mid-1990s, evangelical Christian radio stations had

[72] www.internetworldstats.com.

moved high up the league of international broadcasters in terms of output volume. Little was known about their audiences. Today, satellite broadcasting and the internet have given major opportunities to these evangelical broadcasters to operate television, radio and online service worldwide, but in practice a major effort still goes into the most basic short-wave radio broadcasting, targeting Africa and Asia with far more localised services that those of international news providers.

US-based evangelical Christian television stations – such as the Church Channel, God TV, Holy God TV (a Tamil channel) and the Hope Channel – are already an international presence. As one example, the Hope Channel, a Seventh Day Adventist television service launched in 2003 and based in Maryland, broadcasts worldwide in English, Spanish and Portuguese. Its website states that 'Hope Channel International is viewed in Africa, Russia, India, China, Australia, New Zealand, and the Pacific Rim. There are an estimated 89 million viewers in Africa.'[73]

A number of evangelical Christian radio stations, mainly US-based, remain high-volume broadcasters with a strategy based on limiting the means of delivery, while being highly localised in the use of languages and programme content in a way that is not yet feasible in television and does not yet reach audiences online. Adventist World Radio, the voice of the Seventh Day Adventists' Church, is one example. Operating from the USA, it is completely focused on radio. Delivery and content strategy match – with programmes produced by native speakers in over 70 languages. Many of these are untouched by the major international news providers. Unusual examples include: Acholi, Afar, Dinka, Dyula, Fulfulda, Ibo, Malagasy, Masai, Moru, Oromo, Tachelhit, Tigrinya, Yoruba and Zanda (World Radio and TV Handbook, 2010). The station's website is for information about the station rather than a means of delivering programmes. Delivery is focused on short wave, which it regards as 'the most widely-heard broadcast vehicle in the world'. The station uses transmitters situated worldwide, including South Africa and Madagascar, and targeting Africa, Asia, South Asia and the Middle East.[74]

Also based in the USA are: Family Radio Worldwide, broadcasting daily in over 40 languages, the Gospel for Asia, broadcasting less frequently but in 64 languages, and World Harvest Radio, which has a different approach and confines itself to English, Russian and Spanish. The UK-based FEBA Radio (a division of the US Far East Broadcasting Corporation) broadcasts in over 20 languages, while the South-African Trans World Radio operates in over 45 (plus another 20 or so from its Asian operation in Guam).

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[73] http://hopeafrica.tv; and www.hopetv.org/home.

[74] www.awr2.org.

Vatican Radio broadcasts via satellite and other means. The service has more of the feel of an international state-funded broadcaster than that of other religious broadcasters. It describes its main task as being to proclaim the Christian message and to keep the centre of Catholicism in contact with the different countries of the world. Like other international religious radio services, its main transmission effort is short wave and it localises content through broadcasts in over 30 languages.

3.5. New media case study

International news broadcasters generally use the new media in similar ways: first, to deliver news content; secondly, to provide information about themselves, their programming and services; thirdly, to provide interaction with audiences.

An example is the BBC. It runs extensive and integrated websites, with UK and overseas versions. The English-language site carries global and regional news and links to the approximately 30 individual language-service sites run by BBC World Service. The overseas television service BBC World News also has its pages. All these sites provide extensive service information and opportunities to interact – including the 'Have Your Say' and 'World Have Your Say' areas. On 25 March 2010, the latter carried such questions as 'Are social network discussions ever off limits?' and 'Should gay teenagers be able to express their sexuality at school?' The individual language sites run forums and ask questions in line with their particular interests.[75]

The French adopt a similar approach, though a less homogeneous one. France 24 runs websites in their languages of operation. France 24 offers live streaming, global and regional news sites, newsletters, RSS feeds, Podcasts and mobile telephony access, as well as Facebook access and a user community (also on Facebook). France 24 at times also links with the RFI websites, which offers similar options – though the organisations' internet sites run independently.[76]

The Russia Today English-language website provides a regularly updated news site, programme and contact information, journalistic blogs, a feedback facility and discussion forums. By 30 March 2010, the question raised 'Should assisted suicide be legalised?' had received 9 postings; the question 'Has the human rights situation in Russia improved during Putin's time of office?' had received 497.[77]

Iran's English-language Press TV also solicits reader opinion. On 24 March, its 'My Vote' facility had the question 'Why has the US softened its stance on Israel's settlement expansion in the West Bank?' Users are given

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[75] http://news.bbc.co.uk/1/hi/talking_point/default.stm.

[76] www.france24.com/en/livefeed.

[77] http://rt.com/About_Us/Forums.html.

three options: (1) The Israeli lobby wields influence over the Obama administration? (2) The US always changes its stance? (3) The new stance will help the Middle East peace process? The scores on 30 March were (1) 87%, (2) 8% and (3) 5%.[78]

China Radio International has 57 news websites, one for each language service. All are to a pattern, but each distinctively different: providing news; service and delivery information; and links to other Chinese sources. Two-way interaction with audiences is sought. The CCTV-9 English-language website on 25 March asked: 'Is Obama's signing the healthcare bill a big victory for the American people?' and shows 44% 'Yes', 20% 'No' and 36% 'Too early to say'. 'Your Opinion Matters' asked audiences to express their top concerns for the year. House prices in Shanghai and corruption in China were among the answers by 30 March.[79]

Al-Jazeera, which offers podcasts and a range of blogs on Africa, Asia, America, Europe, Middle East, solicits audience opinion in its 'Your Views' area. On 25 March the question 'Has the US lost its leverage with the Israeli government?' showed 472 comments – many giving US addresses.[80]

Voice of America runs a similar range of websites to the Chinese and employs a similar approach. News pages are provided; access details are given; podcasts, RSS feeds, mobile access (to 17 of the language services) and webcasts are offered. The 'My VOA Community' provides a platform for involvement. There are forums, blogs, English-language lessons. But by 30 March the question asked a week earlier in the international news section 'Gulbuddin Hekmatyar: Ruthless Warlord, new Karzai Ally or Both?' had received no comment. The latest item available in the politics section 'Swine Flu (HINI) Vaccine is Here', dating from 4 November 2009, had received one response by 30 March 2010.[81]

What emerges from our survey of the main international broadcasters and the news agenda analysis exercises that follow is that distinctions lie in content rather more than in delivery methods or degrees of interaction with their audiences.

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[78] www.presstv.ir.

[79] http://english.cri.cn; http://english.cctv.com/english/special/say/01/index.shtml.

[80] http://english.aljazeera.net/your_views.

[81] www.myvoa.com.

Chart 2. Key indicators for the eight countries studied

	Algeria	Egypt	Cameroun	Senegal	Kenya	Nigeria	India	Pakistan
Economic, social and political context								
Population (total in millions)[1]	34.9	83	19.5	12.5	39.8	154.7	1200	180.8
GNI per capita (in US$)[2]	4260	1800	1150	970	770	1160	1070	980
Adult literacy rate (% of ages 15 and older, total population)[3]	69.9	71.4	67.9	39.3	85.1	68	61	49.9
Gross primary, secondary, tertiary school enrolment (%)[4]	*74*	*70*	57	*44*	*59*	*51*	*63*	42
Urban population (% of total population as of 2008)[5]	65	43	57	42	22	48	29	36
Sector performance[6]								
Telephone lines (per 100 people)	9.6	14.6	1.0	1.9	0.6	0.9	3.3	2.7
Mobile phone subscriptions (per 100 people)	92.7	50.6	32.2	44.1	42.1	41.7	30.4	53
Personal computers (per 100 people)	*1.1*	3.9	*1.1*	*2.2*	*1.4*	*0.9*	3.3	x
Households with a television set (%)	*91*	*97*	*23*	*43*	19	*25*	*46*	56
Number of Radio broadcast stations[7]	AM 25, FM 1, shortwave 8 (1999)	AM 42 (plus 15 repeaters), FM 22, shortwave 1 (2010)	AM 2, FM 9, shortwave 3 (2001)	AM 8, FM 20, shortwave 1 (2001)	AM 24, FM 82, shortwave 6 (2008)	AM 83, FM 36, shortwave 11 (2001)	AM 149, FM 171, shortwave 54 (2009)	AM 31, FM 68, shortwave NA (2006)
Number of TV broadcast stations[8]	46 (plus 216 repeaters) (1995)	64 (2010)	1 (2001)	7 (2008)	8 (2008)	3 (the government controls 2 of the broadcasting stations and 15 repeater stations) (2001)	1,400 (2009)	20 (5 state-run channels and 15 privately-owned satellite channels) (2006)
Mobile phone usage (minutes/user /month)	147	144	x	x	52	x	440	164
Internet users (per 100 people)	11.9	16.6	3.8	8.4	8.7	15.9	4.5	11.1
Population covered by mobile cellular network (%)	82	95	58	85	83	83	*61*	*90*

Sources:

[1]UN data of 2009, as derived from BBC Monitoring country profile, http://news.bbc.co.uk/1/hi/country_profiles/default.stm (accessed Feb. 2010).

[2]Worldbank data 2008, as derived from BBC Monitoring country profile, http://news.bbc.co.uk/1/hi/country_profiles/default.stm (accessed Feb. 2010).

[3]CIA World Factbook, https://www.cia.gov/library/publications/the-world-factbook/geos/ag.html (accessed May 2010).

[4] Data from ICT statistics of the Worldbank as of 2008, http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTIC/0,,contentMDK:20487483~menuPK:64909262~pagePK:64909151~piPK:64909148~theSitePK:6950074~isCURL:Y,00.html (accessed May 2010). Numbers in *italics* specify years other than 2008.

[5]CIA World Factbook.

[6]Data from ICT statistics of the Worldbank as of 2008. Numbers in *italics* specify years other than 2008

[7]CIA World Factbook.

[8] Ibid.

4. Francophone Africa – 'nation-building' local media

Media environments differ substantially across Africa. As well as local and international broadcasters, there are also regional operators, some new, and including Africa No. 1, Africa 24 and AITV. Across Francophone Africa specifically, considerable differences exist, for instance between Chad with few private operators and Mali with many.

Senegal and Cameroon are the smallest countries in the study and contrast in levels of local media freedom. Analysis shows a limited range of international news available from local sources and an apparent need for outside provision. France's international news services are a key source.

4.1. Cameroon media profile

Cameroon has a relatively simple and controlled media environment.[82] Diversity of news sources has increased since 2000, most strikingly in the press and to some extent in broadcasting. But freedom of expression is limited and the media are subject to government control. Access to a broad perspective on international news through the media is best if you are urban-based, relatively well-off and speak French or English. Pay-TV has made some inroads.

Over 250 local languages are spoken in Cameroon, which has a population of under 20 million. The country was created in 1961 by the unification of two former colonies, one British and one French. No local language commands wide use. The country has two official languages, French and English. The national media are bilingual.

4.1.1. Media regulation

State-run Cameroon Radio Television (CRTV) operates national television and radio networks and provincial radio stations. Its monopoly was broken in 2001 by TV Max, Cameroon's first private television station. Others followed. Numerous private radio stations sprang up after liberalisation of telecommunications regulations. In practice, high licence fees create barriers to setting up television services. There is no independent media regulator. Licensing is controlled by government and the practice of granting provisional licences creates vulnerability for new services.

Freedom House rates Cameroon as 'not free' overall and gives it the same rating for 'press freedom'. Tough libel legislation is in place and journalists can find themselves behind bars. Telecommunications

[82] BBC Monitoring Country Profiles: Cameroon http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/africa/country_profiles/1042937.stm; CRTV website: http://www.crtv.cm/cont/gen; Cameroon Report: Africa Media Development Initiative (BBC World Service Trust): www.bbc.co.uk/worldservice/trust/specials/1552_trust_amdi; France 24 audience data, 2009, RFI audience data, 2010.

development is limited, but mobile phone subscriptions have risen rapidly in the last ten years.

4.1.2. Domestic media

Television has a short history in Cameroon. The state-run television service Cameroon Radio Television (CRTV) was established in 1985. It defines its mission as:

> *the protection of general interest while explaining government policies and objectives; identifying the needs and live up to the aspiration of the population in the domain of information, education, entertainment and culture; contributing to the development of the audio visual sector, making it competitive and respectful of moral values.*

The development of satellite broadcasting at national level since 2001 has improved CRTV availability. Around 23% of households had television sets in 2004 – around a third of them subscribing to pay-TV channels. The only national free-to-air television broadcaster is CRTV. Operators like Canal2, STV1 and STV2 are also available nationally, but on a subscription basis via satellite. An assessment made in 2005 described private television as having a less diversified range of programmes than CRTV. The French agency CFI supports CRTV through supply of programme content.

Radio is more widely available than television. FM delivery is dominant, but medium and short wave are also in use. Around 80 new stations were set up between 2000 and 2005, but state-run CRTV is the only Cameroonian radio with a national footprint. Private radios compete strongly with CRTV at regional level. Non-profit community stations totalled 31 in 2005 (half of them supported by UNESCO). Secessionists in the mainly English-speaking provinces have used pirate radio broadcasts to spread their message.

Some 500 new newspapers and magazines were launched between 2000 and 2005. Content has become more varied, with attention paid to community development, health, education, and other social issues.

4.1.3. International television and radio

A range of commercial and state-financed international broadcasters are available via satellite free-to-air within Cameroon to those with the right equipment installed. The most prominent include France 24, TV 5 Monde and Euronews.

Convenience and range is offered through multichannel pay-TV on satellite and MMDS platforms in the capital and other urban areas. The French company Canal+Horizons will put a subscriber in touch with a local dish installer and currently offers five levels of subscription to largely

Francophone viewing and listening – ranging from 39 channels at the entry level to 72 at the top level (plus sport, film and family viewing packages).

Even Canal+Horizons entry-level 'Access' can significantly widen the subscriber's perspective on international news. The state broadcaster CRTV is present. An African perspective comes from Gabon-based Africa No. 1 and Africable. International broadcasters include RFI, France 24, BBC World Service, BBC Arabic and TV5 Monde. Also offered are the French public-service channels TFI and France 2, plus the private cable news LCI offering a different French domestic perspective. CNN and Al-Jazeera are not present.

Short wave still delivers a significant range of radio listening to the area. Major state broadcasters targeting the area via short wave in English and French include Voice of America, BBC World Service, Deutsche Welle and Radio France Internationale. Regional players using short wave for French broadcasts to the region include: Egypt, India, Iran, Libya, Nigeria, Saudi Arabia, South Africa. Religious broadcasters target the area in French via short wave – for example, Vatican Radio, the US-based Adventist World Radio and the South-African based Trans World Radio.

Radio France Internationale is as popular as a local station and achieves substantial audiences in the country. BBC World Service estimates are modest. Many of the international broadcasters will have very small audiences in Cameroon.

Some international stations are available via satellite free-to-air or via subscription, some are available on FM. Radio France Internationale works hard to be available via FM in numerous urban areas. BBC programming in English, French and Hausa is available across much of the country via FM relays. RFI recently started a news service to Orange mobiles in the country.

4.2. Cameroon news agenda analysis – nation-building media

The news agenda analysis carried out for Cameroon[83] looked at state-run television and radio in contrast to the French international broadcaster:

- The state-run domestic providers focused almost exclusively on domestic issues and their main emphasis was on nation-building.
- The state-run media stressed Cameroon's stability and development.
- There was no obvious questioning of the regime or wide global perspective.
- International players offer regional and global news, but little on Cameroon.

[83] Services reviewed and news items as reported by BBC Monitoring – http://news.monitor.bbc.co.uk. Other websites: www.france24.com/fr; www.rfi.fr; www.bbc.co.uk/french.

4.2.1. The exercise

The news agenda analysis exercise for Cameroon ran over a number of days in January and February 2010, comparing the output of the Cameroon state television and radio services with that of Radio France Internationale. A comparison was also made with the France 24 broadcasts in French in February. The channels and broadcasts were:

1. Cameroon CRTV television news in English
   1830 gmt 7, 8, 11, 12 January and 9, 10 February 2010
2. Cameroon CRTV radio news in English
   1400 gmt 7, 8, 11, 12 January and 9, 10 February 2010
3. Radio France Internationale news in French
   0730 gmt 7, 8, 11, 12 January and 9, 10 February 2010
4. France 24 news in French
   2000 gmt 9, 10 February 2010

4.2.3 Findings

The Cameroon national broadcaster has an explicit remit to support the national government. The opening sequence of the major bulletins on the national television service CRTV shows an image of Cameroon and its place in the world in a deliberate nation-building exercise. A vivid and shining silver map of the world is shown, Cameroon glowing in gold. The image focuses in on Cameroon, tilts, swivels and Africa is shown revolving about the axis of Cameroon. It is a play on the notion of Cameroon as the 'hinge of Africa', at the pivotal point of the continent.

The content of the bulletins, on both television and radio, stresses the country's stability and development. Where there are challenges, they are being addressed and the people are encouraged in their efforts. Cameroon and its presidential regime are shown as respected and endorsed internationally.

The mix of reports on state-run television and radio is similar. The emphasis is on local Cameroon stories. On 10 February, for example, the entire state television news is devoted to a bilingual analysis of the president's message to young people to mark National Youth Day. Sport plays a major role in nation-building in Cameroon, with the country's football team one of the best known in Africa. On both 11 and 12 January the sports news leads the bulletin.

Regional and international stories are fewer than local ones and come high in the running order only if there is a Cameroon connection. Almost all stories involving other countries are actually to do with Cameroon's bilateral relations with them. These reports emphasise Cameroon's position in the world and the country's advancement. On 12 January, a farewell dinner for the departing Chinese ambassador marks his efforts to strengthen bilateral

relations. On 11 January, the mining minister discusses projects with the Korean ambassador. On 7 January, talks are reported with French senators on the establishment of a Senate.

In the period under review, the majority of political figures shown on television were government representatives. In general, there is no obvious questioning of establishment approaches to topical issues.

On state radio there is emphasis on reports to do with the economy, with education and health and with crime. Education items are notable in coming high in the news order. One media report has an opposition figure describing journalists as indispensable partners in fostering peace and development and saying that the objective of political reporting in Cameroon is to enhance nation-building.

In the period reviewed, the state broadcasters carried little material on religion. There were just two such reports – and were as much politics as religion. They cover the departure of the papal nuncio for Cameroon and Equitorial Guinea in a farewell audience with the President and a mass given by the nuncio for the presidential family (8 January). The events are handled like the departure of a visiting minister and the emphasis is on order and the authority of the regime. The nuncio is said to have commended the president for the peace and stability reigning in Cameroon and to have called on God's blessings for the first family and Cameroon as a whole.

This is not an isolated approach. On 2 February, the general assembly of the Union of Cameroon Baptist Churches is reported by state-run television. Delegates are reported to have discussed the role of church elders in promoting peace. On 17 February, both radio and television report the start of Lent as a time when Christians are expected to intensify fasting, meditation and prayer. The stress is on a quietistic view of Christianity meeting people's need for worship.

It is not that the state-run media never reported awkward issues in the sample period. Corruption stories are topical. The television and radio bulletins on 8 January carry a report on the arrest of two former members of government on corruption charges. A much more difficult issue is carried on 17 February when the ruling party's central committee rebuts allegations of embezzlement by the president made by diaspora Cameroonians.

4.2.4. Alternative views

Would international broadcasters provide a better picture of events in Cameroon and a better picture of international events? A test of the news websites run by the BBC, RFI and France 24 suggests that they would not provide a full alternative service on domestic news.[84]

[84] www.bbc.co.uk/french; www.rfi.fr; www.france24.com/fr.

A check carried out on 18 March, for instance, showed that the BBCAfrique.com French-language news website had run just two stories on Cameroon since 2008. The France 24 news website in French returned 110 stories with some reference to Cameroon carried between March 2010 and 2007. Many are sports-related and they do not offer an all-round news service on the country. The RFI French-language news website returned 275 stories on Cameroon, an average of 1–2 per day, and although a supplementary news source, it is not a full one. And the France 24 and RFI news websites, though linked, carry different content. Reports on the same subject with the same headline can be different.

A similar picture emerges from a review of the RFI radio service. The programmes reviewed (*Journal Afrique*) offer a strong contrast to the local providers in the balance of the news they provide. Just two were specific to Cameroon (over six days): about arrests of individuals on corruption charges (stories that are reported in the Cameroonian media). However, the programme does provide a wide range of news reports about Africa. By far the largest category of reports is regional politics (50%). In practice these are stories about political developments in individual African countries or about bilateral developments. International and regional security and crime amount to over 20%.

RFI also runs a daily *Journal Monde* to provide a wider global perspective. The France 24 news programmes review on 9 and 10 February similarly provided a global news perspective with reports from the Americas, Europe, Middle East and Asia. There were none from or about Africa.

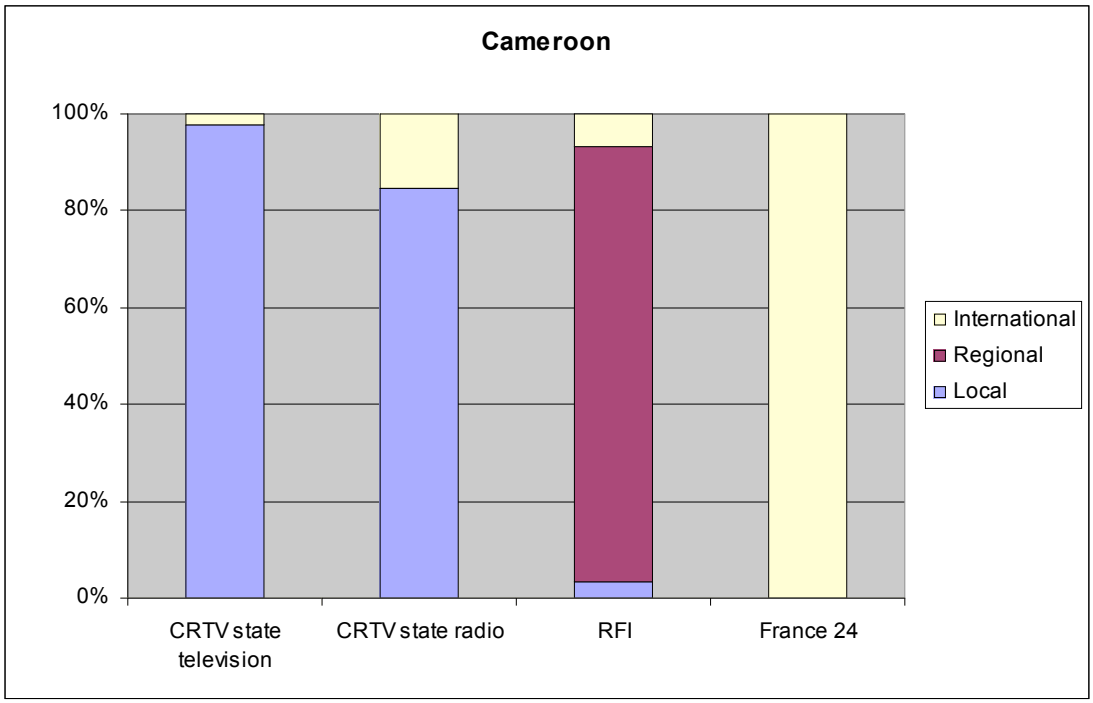
There are other sources within Africa itself. Regional broadcaster Africa No. 1 Radio (in French), operating from Gabon, carries a different mix from either the Cameroon broadcasters or RFI and its audience is significant. Cameroonian listeners would have learnt on 9 February about Cameroon–Central African Republic border issues, not reported by their own state broadcasters. Two reports are unfavourable to China: a report about adulterated dairy products from North China, and a call by the French foreign minister on Western powers to reposition themselves in Africa in the face of China's growing influence.

The Cameroonian press, commercial radio and commercial television also offer alternatives. Of the Cameroonian press, the private newspaper *Mutations* carries the most striking alternative views to the official media. On 13 January, for example, it carries a report on a 'great trek' through the country by Mboua Massock, a candidate for the 2011 presidential elections. On 12 January, the paper carries an interview with Louis Tobie Mbida, another opposition figure, who says he is returning from exile to fight the next election.[85]

[85] www.quotidienmutations.info.

Even the state-owned *Cameroon Tribune* reports on 13 January the arrest of three journalists on charges of publishing classified information in relation to an ongoing corruption trial. One method for Cameroonians to access such views is the internet – for example, www.camerounlink.net/fr.

Chart 3. Analysis of local, regional and world broadcast news supply in Cameroon



This simplified chart records as local all reports with a Cameroon connection (even if with a wider relevance). See Tables 1–4 in the Appendix for closer detail.

4.3. Senegal media profile

Senegal has a simple media environment.[86] It has some diversity of domestic news sources and is comparatively liberal and dynamic. Access to international news depends on an individual's resources, location and education. If you are poor, live in a rural area and speak only a local language, your direct personal experience of international news via the media may be very limited. If you are urban-based, have money and speak French, you can access a substantial range of services and attain a broad perspective on international affairs.

[86] BBC Monitoring Country Profiles: Senegal – http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1064496.stm. Senegal Report: Africa Media Development Initiative (BBC World Service Trust): www.bbc.co.uk/worldservice/trust/specials/1552_trust_amdi; France 24 audience data, 2009, RFI audience data, 2010.

4.3.1. Media regulation

The smallest of the countries included in the study, Senegal has enjoyed one of the most unrestricted press climates in the region. But in summer 2008, amid rising tension between the government and private media, Paris-based Reporters Without Borders expressed concern about 'police violence' against journalists, and about raids on newspaper offices. The government accused journalists of supporting the opposition. The new private television Walf TV was raided by police in March 2008.

Freedom House ranks Senegal 'partially free' overall and as regards press freedom. The constitution guarantees media freedom. The government does not practise censorship, but self-censorship is the practical outcome of laws which prohibit reports that discredit the state, incite disorder or disseminate 'false news'. Yet the private media do criticise the government.

Media regulation changed significantly in 2000 when President Wade came to power. A new regulatory body ended the state monopoly over television and liberalised radio broadcasting. Senegal has a dynamic telecoms sector and mobile phone use is soaring.

4.3.2. Domestic media

The only national free-to-air channel remains the state-run broadcaster Radiodiffusion Television Senegalaise (RTS), which runs RTS1. The RTS website defines its mission as 'To Inform, to Educate, and to Entertain'.[87]

The private free-to-air 2STV service, established in 2003, is available in and around Dakar. The Walfradji media house runs a national daily, commercial radio and now a popular television service, Walf TV, all with developed web presence.[88]

Radio is more widely available. FM delivery is dominant. Private and community stations have increased in numbers since the 1990s, but difficult economic conditions have meant a high failure rate. The press has an established tradition dating back to the nineteenth century as an active supporter of democracy. The number of daily national newspapers increased; there is media cross-ownership.

4.3.3. International television and radio

Broadly as for Cameroon, a range of commercial and state-financed international broadcasters are available via satellite free-to-air within Senegal to those with the right equipment installed.

Greater convenience and range is offered through multichannel pay-TV on satellite and MMDS platforms in the capital and other urban areas. A domestic operator Excaf claimed 36,000 subscribers nationwide in 2006 and

[87] www.rts.sn.

[88] www.walf.sn/radio.

offered 15 channels for a monthly subscription of US$15. Its current offering is unclear.

As in Cameroon, the French company Canal+Horizons will put a subscriber in touch with a local dish installer and currently offers five levels of subscription to largely Francophone viewing and listening – ranging from 39 channels at the entry level to 72 at the top level (plus sport, film and family viewing packages). In 2006, rates were relatively expensive, ranging from US$16 to US$58 a month in a country where the average income is under $80 a month.

Canal+Horizons entry level 'Access' can significantly widen the subscriber's perspective on international news. The services available are broadly the same as in Cameroon.

Short wave still delivers a significant range of radio listening to the area. RFI uses short wave as one of its platforms for the region. Other major international broadcasters targeting the area via short wave are broadly as for Cameroon. Some international radio channels are available on FM in the capital, including BBC World Service (105.6 MHz). Radio France Internationale is available via FM in numerous urban areas in addition to Dakar and launched two new relays in January 2010.

RFI enjoys significant audiences in Senegal. BBC estimates are modest, and many of the international services available will have very small audiences. Audience research is limited.

4.4. Senegal news agenda analysis

The news agenda analysis study for Senegal[89] examined news broadcasts from two Senegalese broadcasters, one state-owned, one private, in contrast to French international broadcasters:

- The domestic providers focused almost exclusively on domestic issues.
- There was a significant difference in news agendas between the state-run television and private radio operator, with the latter much more likely to report criticism of government positions.
- The international providers widen the news agenda to cover international news but have little to contribute on the country itself.

4.4.1. The exercise

The news agenda analysis for Senegal extended over a number of days in January and February 2010, comparing the output of Senegal state television and commercial radio with that of Radio France Internationale. A comparison was also made with the France 24 broadcasts in French in February. Channels and broadcasts reviewed were:

[89] Services reviewed and news items as reported by BBC Monitoring – http://news.monitor.bbc.co.uk/ Other websites: http://www.france24.com/fr/ http://www.rfi.fr/ http://www.bbc.co.uk/french/

1. Senegalese State Television news in French
   2000 gmt 7, 8, 11, 12 January and 9, 10 February 2010
2. Walfadjri FM private radio news in Wolof
   0800 gmt 7, 8, 11, 12 January and 9, 10 February 2010
3. Radio France Internationale news in French
   0730 gmt 7, 8, 11, 12 January and 9, 10 February 2010
4. France 24 television news in French
   2000 gmt 9, 10 February 2010

Reference was also made to BBC Monitoring's summary of Africa No. 1 Radio's news programme in French at 1200 gmt on 12 January and to BBC Monitoring's Highlights from the Senegalese Press for 6, 8 and 12 January 2010.

4.4.2. Findings

A study funded and published by UNESCO in 2005 indicated that people surveyed in countries including Senegal appreciated African-language broadcasts, wanted more and regarded them as having a positive social impact.[90] The most 'local' of the three services reviewed – highly popular Walfadjri FM – had the most local content and used the local language, Wolof, to deliver it. No international broadcaster is known to operate in Wolof, except rare religious broadcasters, so the station has little external competition by language. Walfadjri FM carried no international news at all on the days surveyed. Only three stories had a wider dimension than local affairs. The main emphasis of the news agenda in volume terms was on economic conditions and development – and on education and health. Politics had less space. Religion and culture received attention (often with a connection to politics).

Senegalese State Television carried a wider perspective. There is some international and regional general news and some local political and economic news with wider regional and international dimensions. Substantial space is devoted to local economics and to religion and culture.

As in the Cameroon case, the state broadcaster is sparing in criticism of government moves and plays a strong supportive role. Where foreign affairs are involved, the emphasis is on the status of Senegal and respect shown it. On 10 February, the news leads with a report on Senegalese President Wade receiving the Cape Verde Foreign Minister. On 9 February, President Wade is reported receiving the Portuguese foreign minister, who pays tribute to Senegal's place in international politics. The same day, the president's son, Karim Wade, minister for international cooperation, is reported visiting South Korea in a visited designed to boost cooperation.

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[90] http://portal.unesco.org/ci/en/ev.php-URL_ID=18836&URL_DO=DO_PRINTPAGE&URL_SECTION=201.html.

There is also bad news. A major fire in Dakar is reported on 12 January; an accident in Dakar in which 37 people were injured is reported on 11 January; and Shell workers concern at the company's withdrawal from Senegal is the lead story the same day. But in internal affairs and on domestic issues, the emphasis is on putting measures in place, meeting challenges and proposing solutions. On 9 February, the president is reported to have chaired a discussion on the national agricultural investment programme. On 12 January, the president launched a new literacy programme. On 11 January, the finance minister met press owners to discuss ways of improving working conditions for journalists.

A significant distinction between state and private broadcasters is the tendency of the private station both to balance problems against successes and to report counterpoints to official views. The bulletin on 10 February reports measures to reduce unemployment, but also records protests about water and electricity outages, and notes accusations of mismanagement by airport workers. The bulletin on 9 February reports the Prime Minister opening of a solidarity-with-Haiti week. Local pupils, parents and teachers are to contribute. It reports a teacher's leader supporting the initiative but adding that Senegalese people need support too. There follows a vox pop in which most respondents say help should go to the Senegalese first. In contrast, Senegalese State Television on 9 and 10 February reports the president receiving delegations from a Senegalese workers' organisation to discuss assistance for Haiti earthquake victims. There is no obvious criticism of the aid.

Typically, it is the French-language newspaper *Walfadjri*, a sister of Walfradjri FM, that is the most outspoken of the media reviewed. On 9 February, the paper carries an opinion piece that is plain in its rejection of the government's aid plan for Haiti.

> *The unilateral decision of the president of the republic to levy on civil servants' salaries to assist Haitian earthquake victims is not approved…We should not be obliged to assist the distant neighbour while our house is burning…Charity begins at home.*

4.4.3. Alternative views

Would international broadcasters provide a better picture of events in Senegal and a better picture of international events? As was the case with Cameroon, a test of the news websites run by the BBC, RFI and France 24 suggests that they would not provide a full alternative service on domestic news. A check on 18 March showed that the BBCAfrique.com French-language news website had run just five stories on Senegal over the past year. The France 24 news website in French returned 54 stories with some reference to Senegal carried between March 2010 and 2007. They do not offer an all-round news service on

the country. The separate RFI French-language news website returned 257 stories on Senegal, many on sport and music, many duplicated, and although undoubtedly a supplementary news source, it is not a full one.

A similar picture emerges from a review of the RFI radio service. The programmes reviewed offer a strong contrast to the local providers in the balance of the news they provide. One was specific to Senegal (over six days): an interview with a Senegalese journalist about the row sparked by the country's president recent remarks about Christ. However, the programme does provide a wide range of news reports about Africa (see Cameroon study).

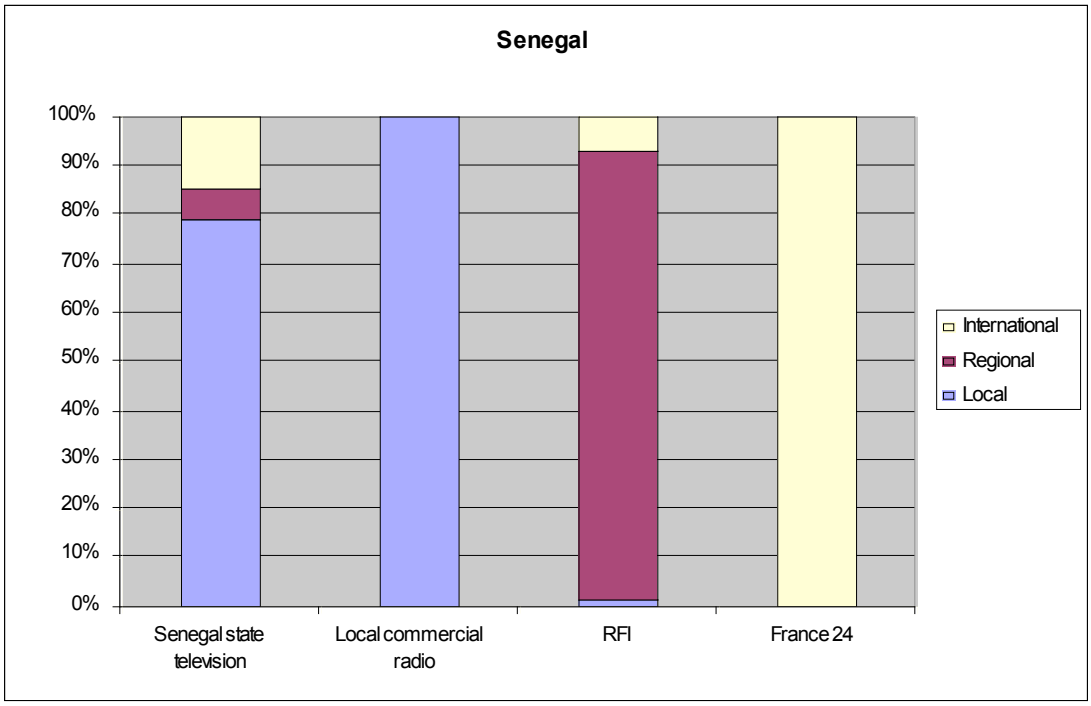
Within Africa itself, the Gabon-based Africa No. 1 Radio carries news different from that provided by the Senegalese domestic and French international broadcasters. Senegalese listeners would have learnt on 9 February about an appeal by the Khalif of Casamance for an end to the war in the region (where there has been long-running separatist activity).

4.4.4. What is not covered by the broadcasters?

One of the most controversial Senegalese news stories of recent times has been the assertion made by President Wade, as reported by the France 24 website on 31 December 2009 that 'the country's Muslim majority did not view Jesus Christ as "God"'. This received some international attention.

By 7–12 January 2010, the affair, which had led to tensions in the country and some outbreaks of violence, was still current. Coverage differed notably between Senegalese broadcasters and the press, even where under the same ownership. Broadcasters surveyed were conciliatory, while the press carried strongly worded pieces on the topic. Both Senegalese State Television and Walfadjri FM carried reports of a meeting between Muslim and Catholic leaders stressing efforts at overcoming the issue. Meanwhile, Walfadjri FM's sister French-language newspaper was carrying the opposition leader's claim that Wade represented a danger to democracy and calling for an end to his period in power.

Chart 4. Analysis of local, regional and world broadcast news supply in Senegal



This simplified chart records as local all reports with a Senegal connection (even if with a wider relevance). See Tables 5–8 in the Appendix for closer detail.

5. Anglophone Africa – outspoken local sources

At the opposite extreme from Senegal, Nigeria represents the most populous country in Africa (150 million population) and one with a complex, varied and vibrant media scene. Kenya (40 million population) shares with Nigeria a British colonial past, corresponding media origins, and currently outbursts of ethnic violence. Analysis shows local media preoccupied with local affairs, together with marked local interest in international news suppliers and a range of alternative voices.

5.1. Kenya media profile

Close to the turbulent Horn of Africa, itself subject to terrorist activity, Kenya enjoys a more diverse and liberalised media scene than many African countries.[91] The media have themselves have been at the centre of conflict in the push for democracy. Amid the violence that followed disputed elections in late 2007, the authorities imposed a ban on live broadcast output.

Most Kenyans rely on the broadcast media, particularly radio, for news. Private networks now have wide coverage across much of the country. Television viewing is substantial. Few Kenyans are regular internet users yet, owing to cost and access problems, but the use of mobile phones is widespread and growing fast. International broadcasters like the BBC World Service enjoy substantial audiences.

5.1.1. Media regulation

Freedom House rates Kenya 'partly free' overall and as regards press freedom. A 2006 report for the BBC World Service Trust described positive growth of the Kenyan media sector since the restoration of multi-party democracy in 1992 and the regulatory environment has allowed private television and radio to establish itself alongside state-owned channels and a vigorous press. More recently, Kenya's media have been in the spotlight over their coverage of the political violence sweeping the country and the government's move to limit some broadcast output, including live coverage. There were raids on media premises, including those of private television station KTN and *The Standard* newspaper in 2006. In 2007 the government tabled a new bill that sanctioned tighter media controls. Journalists staged protests, fearing the new legislation would limit media freedom. The Communications Amendment Bill, signed into law in January 2009, remains a topical and controversial issue in the Kenyan media today.

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[91] BBC Monitoring Country Profiles Kenya – http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1024563.stm; http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/africa/7171372.stm; http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/africa/7808815.stm. Kenya Report: Africa Media Development Initiative (BBC World Service Trust): www.bbc.co.uk/worldservice/trust/specials/1552_trust_amdi; BBC audience data, 2009.

Kenya has a very low level of telephone landline access. Broadband availability is tiny and computer ownership low. But mobile phone ownership climbed to 30% in 2007.

5.1.2. Domestic media

Radio is the most popular medium, especially in rural areas. Nearly all households have a radio set. There are scores of stations, a very different picture from the days before 1995, when state broadcaster KBC enjoyed a monopoly. Most outlets are privately owned. Vernacular stations have increased. Station styles are often informal and free-wheeling.

State-owned Kenya Broadcasting Corporation operates national channels in Swahili and English and local services in 15 languages. KBC news gives prominence to government activities and its style is traditional. Capital FM was the first privately owned station. Others include popular music radio Kiss 100 FM; Radio Citizen targets rural listeners; Umoja FM played a significant role in 2007 as a pro-opposition station.

There has been growth in stations broadcasting in local languages and targeting the six main ethnic communities: Kikuyus (central Kenya), Luos (west), Luhyas (west), Kalenjins (northwest), Kambas (southeast) and Kisiis (southwest). They command significant audiences and there have been fears they could inflame ethnic tensions.[92]

Television ownership is on the rise, around 40% today and up from just 15% in 2000. Free-to-air stations feature local news alongside imported programmes. Some carry reports from international broadcasters, including the BBC. Key broadcasters include state-owned KBC Television, whose Channel 1 covers most of the country. It carries more home-made material than private rivals. KBC Channel 2 targets urban viewers with entertainment-based formats. In 1990, Kenya Television Network (KTN) became the first station to break the state monopoly. Its style contrasts strongly with KBC's output, but much of the country is out of range of its signal. Other services include NTV, run by Nation Media, and Citizen TV.

Satellite television is out of the financial reach of many Kenyans and cable availability is limited. STV/TV and the South African satellite service MultiChoice are pay-TV platforms. The latter offers around 40 international channels. CTN is a cable pay-TV operator aimed at the affluent in Nairobi. Pan-regional East African TV operates from Tanzania.

The Kenyan press is the most sophisticated in the region. Four daily English-language newspapers are published from Nairobi, but only the *Daily Nation* and *The Standard* can claim national circulation.

The internet has become an important feature of the local media, but availability is largely confined to urban areas, with numerous cyber-cafes.

[92] www.irinnews.org/Report.aspx?ReportId=76346.

Following a ban on live broadcasts and call-in shows imposed in 2007, blogs and forums emerged as significant sources of news, information and comment.

The interaction between mobile phones, the media and the internet is increasing, especially for the better off. If you have a mobile phone with the relevant features, you can access news websites, including the BBC. You can listen to BBC and local radio on FM and watch television, if you have the right technical support. Voice of America reported large volumes of downloads for its programmes. The local media use SMS to send news alerts. Mobile phones and texting have greatly added to the popularity and liveliness of phone-ins.

5.1.3. International broadcasters

FM is the most popular form of radio, but a third of listeners still use short wave. International broadcasters, including the BBC, are available via local relays. There is an established history of listening to foreign radio stations in Kenya, where the BBC World Service enjoys a large audience. A BBC-commissioned survey in November 2009 showed a weekly reach of 22% for the BBC's Swahili Service, plus 8% for the English-language service. VOA had 7% and DW 2%. There are now newcomers to the market.

The Chinese have added to their short-wave transmissions by establishing an FM presence in Nairobi and their audiences are higher than elsewhere in Africa. China has also recently set up three Confucius Institutes in Kenya.[93]

Full-time FM relays of the BBC World Service are on the air in Nairobi (93.9), Mombasa (93.9) and Kisumu (88.1), and some BBC programmes are also rebroadcast by private Kameme FM. The Voice of America has an FM relay in Nairobi and Radio France Internationale is relayed on FM in Mombasa.

With access to international television limited but on the up, there are now audiences for major channels. A 2009 BBC survey gave an 11% weekly reach to both BBC World News and CNN, with Al-Jazeera in English rating lower. The choice of viewing in the region is substantial, and though a large proportion of the services are in Arabic, Kenyan viewers can receive many of the international channels available over the Asian subcontinent.

5.2. Kenya news agenda analysis

The news agenda analysis for Kenya compared local state and commercial broadcasters with British and Chinese international services. The exercise showed the following.

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[93] According to a study for the Georgetown Center for International and Strategic Studies, 'The first Confucius Institute in Africa was established in Nairobi in 2005. . . . Today there are 19 such institutes in Africa': http://csis.org/files/media/csis/pubs/090310_chinesesoftpower__chap3.pdf.

- There are striking differences between the approach of the Kenyan state and commercial broadcasters.
- Differences between international broadcasters are substantial.
- Key media influences can be seen outside the mainstream.

5.2.1. The exercise

The news agenda analysis for Kenya examined six services on one day in February, three services each in English and Swahili. Two were Kenyan: one commercial, one state-run. Two were international radio broadcasters using a local vernacular. Two were international television services broadcasting in English.

1. Kenya state-run national KBC radio in Swahili
   1000 gmt 10 February 2010
2. BBC World Service radio in Swahili
   1530 gmt 10 February 2010
3. Chinese Radio International (CRI) on local (Nairobi) FM in Swahili
   1700 gmt 10 February 2010
4. Kenya private national KTN television in English
   1800 gmt 10 February 2010
5. BBC World News television in English
   1900 gmt 10 February 2010
6. CCTV-9 Chinese international television in English
   1500 gmt 10 February 2010

5.2.2. Findings

The two Kenyan national services showed similarity in subject matter.[94] Their leading stories were the same (minister denies involvement in scandal). And the majority of the stories were on local Kenyan issues. However, the treatment of the stories was strikingly different.

Notably, the Kenyan commercial television station KTN relates to audiences by canvassing their views on political and other issues in the course of the news bulletins themselves. For example on 10 February, the bulletin led with two items on corruption scandals and viewers were twice asked during the bulletin 'Do you think there is a conspiracy of silence on corruption by the coalition partners?' The bulletin concluded with the poll result. 60% said 'Yes' and 40% 'No'.

On KTN, stories on politics were followed in volume by economic and security issues. The one regional African story was security-related. The one

[94] Services reviewed and news items as reported by BBC Monitoring – http://news.monitor.bbc.co.uk. BBC Monitoring study for BBC: Domestic Broadcaster International News Coverage, 2009, BBC Monitoring research

local Kenyan story with an international connection was to do with the media – and involved the station itself.

On the state-run radio KBC, too, politics were followed by security, then economics and health. A study conducted by BBC Monitoring for the BBC in December 2009 broadly confirmed this tendency, showing local news to comprise 70% of KBC bulletins, with regional and international news at 30%.

BBC radio and television news agendas were very consistent. The majority of the stories were international. On BBC World Service Radio in Swahili, the top stories are about political or security news in Greece, Sri Lanka and Pakistan, plus an avalanche in Afghanistan. Two are then to do with politics in African countries: Nigeria and Rwanda. The final news item is about the transfer of wildlife in a drought-affected area of Kenya.

On BBC World News later that evening, a programme visible in but not directly targeted at East Africa, the mix of items is similar. The BBC's bulletins provide an international dimension on politics and current affairs that the domestic media are not providing. The BBC's Swahili Service also has a range of other programming and opportunities to handle issues of local concern to Kenyans.

The Chinese state-run radio and television offered contrasting offerings to Kenyan viewers and listeners. The international television service CCTV-9 in English (again not targeted specifically at East Africa) carried a wide spread of international news reports. Only one was about China – a trade fair in Shanghai. But none at all was about Africa. The bulk of reports are to do with politics and security. Some are on the same stories covered by BBC World News – strikes in Greece, election in the Ukraine.

The Chinese Radio International programme in Swahili broadcasting on FM in Nairobi has almost no common ground with the CCTV-9 bulletin carried just two hours earlier. The only shared story is on the Iran's nuclear enrichment capacity (the final item for CRI and the first for CCTV-9). Otherwise, CRI carries three stories on politics in Africa, none directly related to Kenya. The bulletin's first five stories are all to do with China and its economic development.

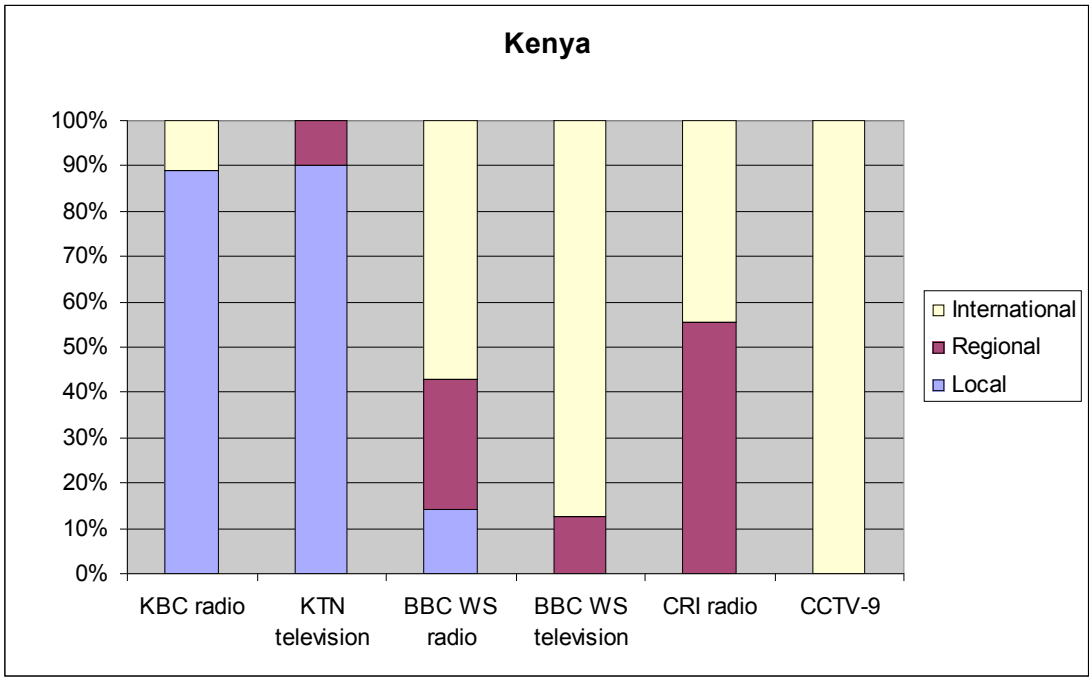
Of the two international broadcasters, the most notable single report is perhaps the one by BBC World News about British judges calling on the British government to disclose secret documents relating to a Guantanamo detainee. Would a parallel report be imaginable on CCTV-9?

5.2.3. Missing the action?

Yet both international and Kenyan national broadcasters might ask: is the real media action in Kenya now elsewhere? In April 2010, it was reported that Muslim clerics had banned a sports and entertainment pay-TV channel in

Northeast Kenya. Active Islamist media are now operating in and around Mombasa on the coast. Radio Salaam carried extensive programming during the first half of February on subjects such as Islamic courts in Kenya, the provocation of Muslim youths and the need to back tribal leaders. Over the same period elsewhere in Kenya, the station Radio Nam Lolwe (in Dholuo) was carrying a 'heated debate during an interactive talk show' in which listeners spoke of 'tensions rising in parts of western Kenya'. BBC Monitoring reported that the moderator 'has a difficult time pleading with callers to avoid hate speech' (16 February). On 13 and 15 February respectively, in Nairobi, Inooro FM and Coro FM (both broadcasting in Kikuyu) asked listeners to express their views on ongoing corruption scandals. Callers rang in and text messages were read out – some calling for the Prime Minister himself to resign. This kind of programming is popular. With the recent history of the use of mobile phones in Kenya to incite inter-ethnic bad feeling, it also carries risks.

Chart 5. Analysis of local, regional and world broadcast news supply in Kenya



This simplified chart records as local all reports with a Kenya connection (even if with a wider relevance). See Tables 9–14 in the Appendix for closer detail.

5.3. Nigeria media profile

Nigeria, Africa's most populous country,[95] with over 250 ethnic groups, is the continent's leading oil producer, but few Nigerians have benefited from the oil wealth and more than half the population lives in poverty. There are ethnic tensions and fears than the country could fragment.

Nigeria reached independence from the UK in 1960. It has one of the most vibrant media in Africa, much of it in private hands. State-run radio and TV services reach virtually all parts of the country and operate at a federal and regional level. All 36 states run their own radio stations, and most of them operate TV services. Radio is a key source of information for many Nigerians. International broadcasters, including the BBC, are popular.

5.3.1. Media regulation

Freedom House rates Nigeria as 'partly free' overall and as regards press freedom. Although the 1999 constitution guarantees freedom of expression, of the press, and of assembly, the state often uses arbitrary measures to suppress criticism in the media. Criminal prosecution is used against journalists covering sensitive issues such as official corruption, separatist movements, and communal violence. In addition, Sharia (Islamic law) statutes in 12 northern states impose severe penalties for press offences. Relations between the media and the government have improved since the end of military rule, but Reporters Without Borders says Nigeria is often a violent place for the press, with journalists suffering beatings, unfair arrests and police raids.

Provision exists for public-service and commercial broadcasting. Private radio and TV stations have been licensed, and there is take-up of pay-TV. Significantly for international broadcasters, live local rebroadcasting of news and current affairs was banned in 2004.

5.3.2. Domestic media

Radio is slightly more widely used than television: 64% of adults listen to the radio daily compared to 59% viewing television.[96] Nigerian radio operates at different levels: national, state (regional) and local. It comes in state-run and commercial forms and is both in English and in numerous vernaculars (especially Hausa).

State radio is well regarded and is the dominant force in the market. Only in large urban areas like Lagos, where there is greater competition, is this not the case. Private stations like Ray Power (which is a BBC partner)

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[95] BBC Monitoring Country Profiles: Nigeria – http://news.bbc.co.uk/1/hi/world/africa/country_profiles/1064557.stm; Nigeria Report: Africa Media Development Initiative (BBC World Service Trust): www.bbc.co.uk/ worldservice/trust/specials/1552_trust_amdi; BBC audience data, 2009.

[96] BBC Audience data 'Nigeria – Performance at a Glance', May 2009, BBC GND/IPSOS – unpublished report.

achieves audience levels close to 70% in Lagos and over 20% nationally. Many of the private stations are lively and music-based.

As with radio, state television dominates the market, attracting audience levels around 70% weekly. Again, this dominance falls away in Lagos, where competition comes from stations like African International Television, Galaxy television, Silverbird television and TVC continental. State-run television operates at national and regional level. Viewing is concentrated in urban areas, though services reach virtually all the country. The progress of competing private stations is limited by high costs and scarce advertising revenue. Legislation requires 60% of output to be locally produced.

There are more than 100 national and local newspapers and magazines, some state-owned. The private press is often critical of the government, but circulations tend to be low because of high level of illiteracy, high cover prices and low advertising revenue.

Nigeria is Africa's largest telecoms market and 70% of people have access to mobile phones, but internet use is still low. Few Nigerians have internet access at home and usage is more occasional than frequent. Internet cafes are spreading in urban centres, but many are unregistered and may suffer crackdowns. Usage of the internet services provided by international broadcasters is as yet minimal.

5.3.3. International broadcasters

There is a significant tradition of listening to international radio in Nigeria. The BBC occupies a special place in Nigerian public life, as the news agenda analysis shows. And it is not alone; a number of international broadcasters have retained significant audiences. Though numbers are falling, the BBC still reaches almost a third of the population each week. Voice of America is the BBC's main international competitor (12%) weekly, followed by Deutsche Welle (8%).

The ban on the rebroadcasting of news broadcasts by local partners means that international broadcasters are reliant on short wave. The range of international broadcasters targeting the region in English includes: Radio France Internationale, China Radio International, Voice of Russia, All-India Radio and a number of religious broadcasters. But although audiences in English are substantial, it is audiences in Hausa that are the key. A number of international broadcasters offer Hausa broadcasts via short wave, including the BBC, Voice of America, Deutsche Welle, China Radio International, Radio France Internationale, and the Egyptian, Libyan and Iranian external services, as well as the religious broadcasters Trans World Radio and Family Radio Worldwide. Though a number of these broadcasters have few listeners, others have really significant audiences. For the BBC, for instance, two-thirds of its audience are listening in Hausa – on short wave.

A number of these broadcasters run Hausa-language websites in association with their radio broadcasts. However, take-up is extremely low. For example, the BBC reaches 27% of the population weekly by radio; it reaches less than 0.1% of the population online. Most online traffic that it does attract comes via mobile devices and goes to the BBC's sports sites.

A significant range of international television services are available to viewers in Nigeria, both free-to-air and via commercial operators, such as the South African-based MultiChoice. However viewing is as yet significantly lower than for international radio. There is no international television broadcasting in Hausa.

BBC World News competes with CNN International (6% of the population watching BBC World News on a weekly basis compared to 8% watching CCNI weekly, according to BBC figures). Other international channels available are Al-Jazeera, Sky News, Euronews and Deutsche Welle TV, but audience figures are lower.

Nigeria is itself an international broadcaster.[97]

5.4. Nigeria news agenda analysis

The news agenda analysis carried out for Nigeria compared three local providers with three international broadcasters. It shows:

- The BBC played a very major role in reporting key Nigerian internal issues and itself became part of the agenda.
- Local broadcasters report detailed local issues but little wider material.
- International broadcasters offer a wider agenda and major local contributions.

5.4.1. The exercise

The survey of broadcasting for Nigeria[98] studied the news programmes of three local providers and three international broadcasters on 10 February 2010. Broadcasts were in English and Hausa. The study also examined further progamming in mid-January. The specific channels and broadcasts were:

1. Nigerian African Independent Television in English
   1900 gmt 10 February 2010
2. Nigerian Metro FM radio (Lagos) in English
   1800 gmt 10 February 2010
3. Nigerian Radio Katsina in Hausa
   1200 gmt 10 February 2010

[97] www.voiceofnigeria.org.

[98] Services reviewed and news items as reported by BBC Monitoring – http://news.monitor.bbc.co.uk/ Voice of America Hausa bulletin summary details supplied by VoA.

4. Radio France Internationale in Hausa
   0700 gmt 10 February 2010
5. BBC World Service radio in Hausa
   0530 gmt 10 February 2010
6. Voice of America in Hausa
   1500 gmt 10 February 2010

5.4.2. BBC status

Arguably, the single most notable media event concerning Nigeria in the early part of 2010 was the interview given by the Nigerian President Umaru Yar'Adua on 11 January while he was in Saudi Arabia receiving treatment for heart problems. The President said he was 'doing better', but it was not just what he said that was of interest, but who was carrying the interview. In fact, the interview was given not to a Nigerian media outlet but to BBC World Service radio. At a time when rumours of the President's death were being reported by local Nigerian radio, the fact of the interview quickly became a media story in Nigeria. The choice of station for the interview by the President speaks of the BBC's perceived influence within Nigeria. Radio France Internationale was content to report the interview on 12 January. But within Nigeria the choice of the station was controversial. While one Nigerian senator told the *Daily Trust* website on 12 January that the interview brought hope to the nation, the same website noted mixed views. Some opposition leaders said the interview had eased tension caused by the President's absence, but others described the action as a vestige of colonial mentality and wondered if the British Prime Minister would address his people through Radio Nigeria. 'Now the president must speak to his own people, Nigerians, through any of the national broadcast stations, the News Agency of Nigeria or local newspapers', one politician was reported as saying. 'Anything short of that is totally unacceptable.'

5.4.3. Findings

By 10 February 2010, the story of the Nigerian President's position had moved on significantly and all the broadcasters studied were reporting the transfer of power to the Vice-President Dr Goodluck Jonathan.

THE LOCAL BROADCASTERS

The regional (state-run) Radio Katsina, in its midday bulletin in Hausa, led on the transfer of power to the Vice-President and reported a minor cabinet reshuffle. After that, the news shifts to the economy and education. There is a report on a regional budget for 2010 and another on natural gas.

The Lagos commercial music station Metro FM, which has a lively website covering music, sport, news and social issues, carried a 15-minute bulletin at 1800 gmt on 10 February, almost all of which is devoted to local Nigerian news. The lead item covers a statement by Acting President Goodluck Jonathan that critical areas for the future of Nigeria were power, infrastructure, security and employment. There is nothing further on the issue of the transfer of power (a subject the station covered in similar depth the previous day). The remaining stories are mostly concerned with local political and economic/social questions – for example, upcoming state elections; infrastructure development projects in Lagos; the need to develop technical and human resources nationwide. The bulletin concludes with two reports about crime in Nigeria.

The main news on the Nigerian African Independent Television on 10 February was a much more extensive affair: an hour-long broadcast at 1900 gmt. Again, this led on the transfer of power to the Nigerian Vice-President, also covered considerably the previous day. By now, the station's approach is to cite the minister of information on the minutiae of procedural issues rather than any statement or call by the Acting President. She speaks of the need to resubmit a memorandum on the transfer to the Federal Executive Council and concludes by announcing a contract for an athletes' hostel and the National Stadium. The second item is a report on the cabinet reshuffle. Further mention of the power transfer and an expression of support appear much later in the agenda. The other items are largely to do with local and lower level politics and the country's economy.

The Nigerian African Independent Television, Metro FM radio and Radio Katsina had in common that no quantity of international or regional African news was carried in the bulletins reviewed. There were no obvious differences that would relate to them being either Hausa-language or English-language bulletins.

THE INTERNATIONAL BROADCASTERS

The international broadcasters studied – BBC World Service radio, Voice of America and Radio France Internationale – all broadcasting in Hausa, showed completely contrasting approaches on the day of the study. In different ways, two strongly contrasted with the local providers in the breadth of their international and regional agendas.

RFI's approach – in keeping with the situation in Nigeria – was to lead on reports about the incoming Acting President, his calls for support and opposition reaction to the transfer of powers. But after that opening, RFI – rather like the local news providers – leaves the story and for the remainder of the bulletin focuses on other topics, some international, some regional. Around half the reports are concerned with politics and the remainder are mostly related to security issues. African stories covered include relations

between Sudan and Chad, Somali pirates, an incident of looting in South Africa. Looking further afield, there are reports on political development in Sri Lanka and the Ukraine, and EU views on Iran's nuclear agenda. There are reports from the Lebanon, India and Haiti.

Voice of America is the second most popular international broadcaster in Nigeria, with a range of programming and a dedicated website. In general, its broadcasts combine international and regional African news with material specific to Nigeria. In this respect, its programme reviewed on 10 February was not typical. Unusually it contains only three items – all lengthy and all are devoted to Nigerian issues. The lengthiest – and last – is about social and family issues. The first two – and the majority of the programme – are to do with the transfer of power with Nigeria and assessments of the Acting President. The fact that the majority of the programme is devoted to this issue can be said to be in keeping with the historic and momentous nature of the occasion.

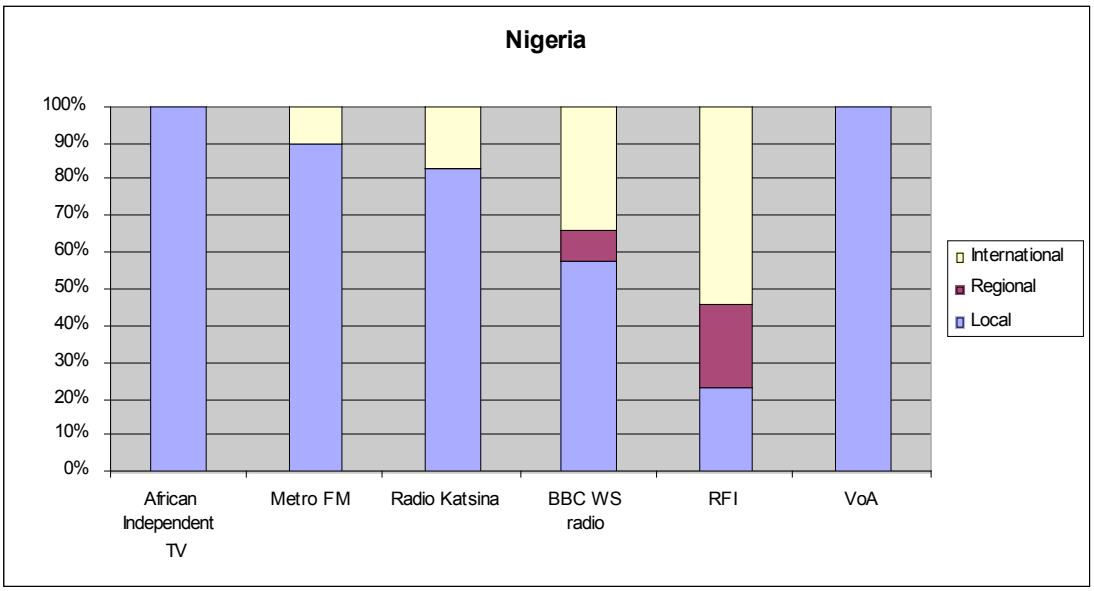
The BBC occupies a remarkable position within Nigeria in the scale of its audiences (estimated in 2009 at 30% of the adult population for all services and 20% for the BBC Hausa service). The bulletin on 10 February reflects the BBC's role as a provider of international news balanced by that as a provider of authoritative news on Nigeria and the region.

BBC Hausa Service therefore gives the transfer to power to the Nigerian Vice-President as its top headline, carries the story again as item four of its international news, and then devotes an entire segment of its broadcast to the power transfer issue, with five separate reports or interviews, before the broadcast moves to other dispatches and coverage.

In detail, the Nigeria power transfer segment carries a report on a nationwide address by the Acting President; a report that human rights activists and members of the opposition have condemned the power transfer as a violation of the constitution; a report on the original interview given by President Yar'Adua to the BBC; an interview with an academic on reasons why the President might have chosen the BBC for his interview; and an interview with a political scientist on parliament's decision to transfer power to the Vice-President. It appears a balanced set of contrasting and considered views and fuller than local alternatives studied.

The remainder of the bulletin covered major international developments, almost all political – for instance Iran's uranium enrichment move and President Obama's statement that the US would impose fresh sanctions on Iran, and the US welcome for talks between Sudan and Chad. The BBC's own status as a broadcaster again emerges in a report that the Lebanese President had told the BBC he feared that a new war with Israel was possible.

Chart 6. Analysis of local, regional and world broadcast news supply in Nigeria



This simplified chart records as local all reports with a Nigerian connection (even if with a wider relevance). See Tables 15–20 in the Appendix for closer detail.

6. North Africa – where regional voices dominate

Arabic-speaking North Africa brings different considerations of identity. Egypt, the most populous Arab country (80 million population) and Algeria illustrate aspects of new availability, media access and alternative sources in the region.

6.1. Algeria media profile

Algeria[99] has limited and highly controlled domestic broadcasting, but a lively and more outspoken press. Satellite-dish ownership is high. Stations based in France target viewers in Algeria and other European channels are watched. Arabic channels operating across the Middle East are popular. The lines between domestic and international media are blurred, as are those between the commonly spoken languages. There are limitations to internet access and activity, though there were estimated to be over 5,000 Algerian blogs in late 2008, covering social, cultural and political topics.

The country has recently emerged from a brutal internal conflict after Islamists were denied an election victory in 1992. More than 150,000 people died. Since then, Islamist insurgency has been replaced by al-Qaeda-inspired militants carrying out a deadly bombing campaign. Algeria can be a dangerous place for journalists.

6.1.1. Media regulation

Freedom House defines Algeria as 'not free' overall and as regards press freedom specifically. Although Algeria's constitution guarantees freedom of expression, government dominance over the broadcasting sector, economic constraints and difficulties faced by journalists limits this in practice.

Algeria's television and radio stations are state-controlled and offer a limited range of opinions and programmes. No private broadcasting is permitted. Though Algeria's lively private press often criticises the authorities, legislation imposes prison terms and fines on journalists found guilty of insulting the president or any public institution. Journalists are targeted for exposing embezzlement and state advertising is employed as a lever to keep papers in line. Internet users and service providers can face prosecution over material deemed to be offensive or harmful to public order. Bloggers have been charged and sued for postings.

Language is a significant factor in broadcasting. Berbers preserved some of their language and culture from Arab influence and make up a third of the population. Historically, language has been a tool of power. Today,

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[99] BBC Monitoring Country Profiles: Algeria http://news.bbc.co.uk/go/pr/fr/-/1/hi/world/middle_east/country_profiles/790556.stm; BBC Monitoring Algeria Media Environment Guide, 2009, France 24 audience data, 2009, BBC audience data, 2000

both Berber and Arabic are heavily mixed with French, which has been the dominant language of the local elite. More conventional forms of Arabic are not always well understood.

6.1.2. Domestic media

Television is the dominant medium in Algeria and offers a route to wider perspectives on international affairs. The dividing lines between domestic and international broadcasting are blurred. Over 90% of homes have televisions. Of 5 million television households, 4 million access satellite services.

The national television service ENTV (Enterprise Nationale de Télévision) carries programmes in Arabic, Berber and French, transmitted terrestrially and via satellite. It is run and controlled by the state. New services were launched in 2009 to widen the spectrum of Berber dialects covered and offer a religious channel al-Quran as a moderate alternative to extreme Islamist voices.

Algerian viewers watch a lot of foreign television and the presence on buildings of numerous satellite dishes is a noted phenomenon. There is still support for the state-run local ENTV and though viewing of Al-Jazeera is very significant, French domestic and international channels, and the Moroccan-based bilingual French/Arabic service Medi1 are popular. Its language is readily understood.

Algeria is large and uses satellite broadcasting internally and externally. External and domestic services elide. Algeria's Channel 3 (Al-Thalithah TV) is a state-controlled entertainment and news channel which broadcasts to the Arab world and Africa and is watched at home. State-controlled Canal Algerie broadcasts to viewers in the Americas, Europe and Africa, and is popular in Algeria.

Radio is also state-controlled and, though less dominant, is more localised. Algeria's National Radio Company, Entreprise Nationale de Radiodiffusion Sonore (ENRS), comprises national channels in Arabic, Berber and French, and 40 regional stations.

The press sector has been volatile. Today there are some 50 dailies, in Arabic and French, offering a range of viewpoints, some critical of government. Rapid growth in mobile phone usage goes alongside low broadband access, so most internet users rely on dial-up connections and cyber-cafes.

6.1.3. International broadcasters

With around 600,000 Algerian migrants in France and other cultural links, interest in French broadcasters is significant. It is at least matched by interest in Arabic-language channels broadcasting across the Middle East. A range of commercial and state-financed international broadcasters are available via

satellite free-to-air within Algeria to those with the right equipment installed. These include: France 24, TV5 Monde and Euronews, as well as a range of pan-Arab services like Al-Jazeera, Al-Arabiya and others. Interest in France 24 has grown since the launch of its Arabic-language service.

French domestic channels like the private TF1 have been popular in Algeria and viewers were disconcerted to find in early 2009 that many of these channels had disappeared from their screens as the distibutor Canal+ tightened up on its control of material previously accessible to descramblers and pirates.

Berbere TV, launched in 1999, is based in Paris. It broadcasts in Berber and French, and targets audiences in France and North Africa. The same group also produces Berber radio programmes, which can be accessed via internet and satellite. Effectively, they appear as local services and gather material locally, but are based abroad and transmit from abroad. Beur TV, a France-based privately owned channel, is similar in targeting audiences in France, the Maghreb and the Middle East.

Greater range is offered through pay-TV services, such as the French company Canal+, but at a cost many are not able or willing to pay.

There is a history of listening to foreign radio stations in Algeria, much of it from neighbouring countries Morocco and Tunisia. The Morocco-based Medi1 (with its sister television service) has been the most popular. Paris-based Berbere Radio and Beur FM target audiences in France and North Africa.

Some international and regional radios are available via satellite free-to-air or via subscription. No international radio channels are available locally on FM. Radio France Internationale uses short wave as one of its platforms for the region. Other major state broadcasters also use short wave for Arabic and French transmissions to the region include US Radio Sawa, BBC World Service, Deutsche Welle, Radio China International. Some of these services have audiences in Algeria.

6.2. Algeria news agenda analysis

The news agenda analysis carried out for Algeria[100] compared one local provider with two pan-Arab television services and France 24:

- Consumers need to look beyond the limited local broadcasting for a wider agenda and have the means and opportunity to do so.
- Al-Jazeera's new agenda is likely to appeal to an audience concerned about the fate of Arab and other Muslims.
- Both pan-Arab channels reviewed followed a news agenda focused away from the Northern hemisphere.

[100] Services reviewed and news items as reported by BBC Monitoring – http://news.monitor.bbc.co.uk.

6.2.1. The exercise

The survey of broadcasting for Algeria studied the news programme of one local provider (with a regional slant), general news programmes in Arabic of two pan-Arabic television stations Al-Arabiya and Al-Jazeera, together with the latter's daily programme for the Maghreb, plus news programmes in Arabic and French from France 24 on two days in February 2010. The channels and broadcasts were:

1. Algerian A3C TV News in Arabic
   1830 gmt 9 and 10 February 2010
2. Al-Jazeera television news in Arabic
   1200 gmt 9 and 10 February 2010
3. Al-Jazeera *Maghreb Harvest* in Arabic
   2100 gmt 9 and 10 February 2010
4. Al-Arabiya television news in Arabic
   1100 gmt 9 and 10 February 2010
5. France 24 television news in Arabic
   1300 gmt 9 and 10 February 2010
6. France 24 television news in French
   2000 gmt 9 and 10 February 2010

6.2.2. Findings

All four providers looked at in this study – the local and three internationals – focused heavily on news in the politics category. The international providers' second area of emphasis was security, closely followed by the economy. In contrast to some other surveys, none of the news providers – local or international – offered anything in the category of education, health or science.

The Algerian provider A3C television, which operates via satellite and is both an internal and external channel, carried the widest spread of reports by subject of any of the providers looked at. It focuses heavily on Algeria and with a strong nation-building angle. There is emphasis on development – improvements in local housing, roads, tourism and environmental projects. In politics there are reports on Algeria's relations with other countries (Saudi Arabia) or organisations (NATO), and on Algeria's position on the Western Sahara. These emphasise either Algeria's status or view. There is also international news, such as on clashes in Afghanistan, but these are low priority. A report on 10 February marks the 50th anniversary of French nuclear tests in Algeria, with calls for France to accept responsibility for the consequences of colonialism. This type of approach is echoed in the Al-Jazeera programmes.

The news agendas presented by France 24 in its French and Arabic news broadcasts for 9 and 10 February resembled each other. The

emphasis was on international news in the categories of politics and security. The shorter Arabic bulletins led on the top stories of the day – Iran's move to start enriching uranium and statements and reactions to this move; strikes in Greece over the government's austerity package. The one specifically French story over the two days was France's decision to sell warships to Russia and US concern about the move. There were no stories specifically related to Algeria or the Maghreb. Regional stories on the Arab world concerned a report about security threats in the Yemen, the political situation in Iraq and the normalisation of relations between Chad and Sudan. Western, human interest stories were the arrest of Michael Jackson's doctor and reports on snow storms in the USA.

France 24 bulletins in French were similar in form and emphasis. A difference lies in the greater number of stories directly related to France or the EU: a French soldier killed in Afghanistan; controversy over the detention of teenagers after a French college brawl; weather alert over snowfalls in France; a new EU Commission. There were no stories about the Maghreb. The only story relating to the Arab world concerned the release of a Reuters cameraman held in Iraq by US forces.

Al-Arabiya's news agenda on 9 and 10 February is heavily focused on the main international political news stories. On both days, it leads on Iran's move on uranium enrichment and reaction from major powers to the move – the USA, Russia, China. Regional political stories cover Chad–Sudan talks, upcoming Iraqi elections. Stories not covered elsewhere are a report on the living conditions of Muslims in France, and a report on an Egyptian denial that surveillance cameras are to be installed in mosques. Interestingly the Saudi-interest report on a visit to the kingdom by the Qatari emir covered by Al-Arabiya was not mentioned by the Qatari station Al-Jazeera.

Al-Jazeera in its news programmes also focuses on the Iranian nuclear issue. Stories in the politics and security category dominate the bulletins. There is no news specifically about Algeria or the Maghreb, and yet the reporting would interest a viewer concerned about the situation of the Palestinians or Muslims elsewhere. On 9 February the lead report is on extra-judicial executions in Northern Nigeria, with exclusive footage of executions. Security stories cover special operations by Israeli forces. The 'good news' story is one of triumph through adversity: a feature on a Palestinian youth who educated himself in prison. There is little news about Europe – the only story covered substantially being the Ukrainian election. European views are not featured on major regional or international developments.

Al-Jazeera has a distinct appeal to an Algerian audience in its programmes targeted at the region. The *Maghreb Harvest* programme focuses exclusively on regional issues, with the approach being to handle the region as an entity rather than single out individual countries within it. There are few 'good news' stories and no reports of economic, social or

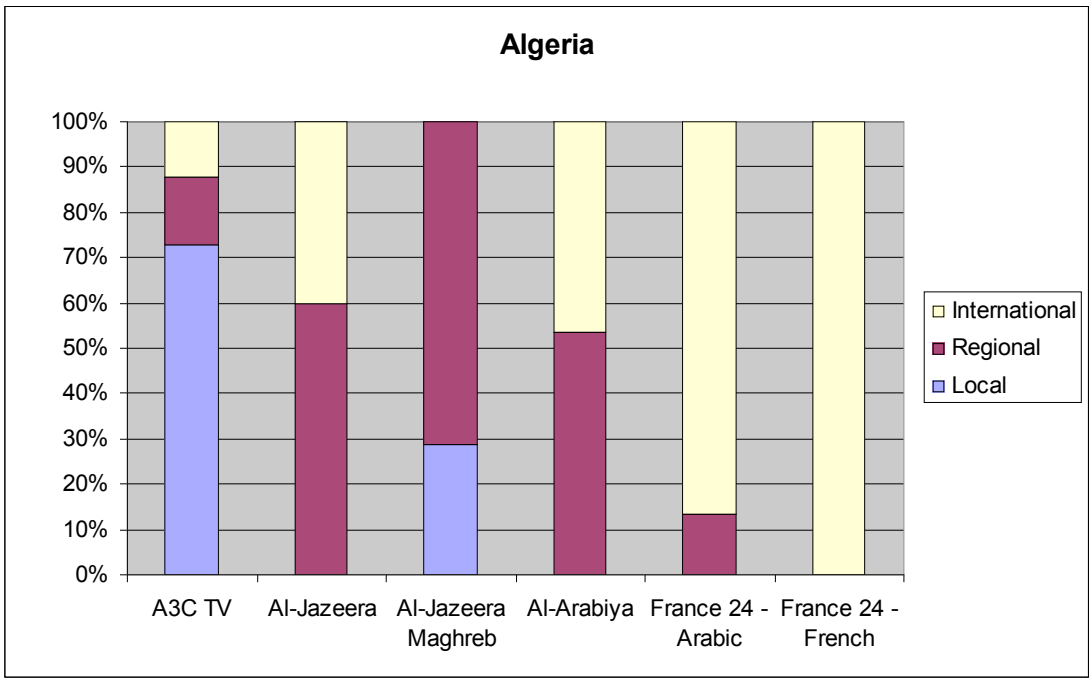
technological development of any kind. Instead there are stories about suffering caused by the Maghreb's colonial past. On 9 February, for example, there are reports on mounting calls for compensation for the colonial era as well a criticism of Italy over its treatment of migrants.

6.2.3. More alternative views

With no local commercial broadcasters to offer an alternative view to the state-run stations, consumers have the option of the local and freer press and the internet, where distinctly different and less positive angles are to be found. As examples:

- On 6 February, the El-Khabar website reports that 2,000 Algerian doctors have emigrated in the past two years.
- On 7 February, the Echourek El-Youmi website reports terrorists extorting money from farmers.
- Also on 7 February, the website of the Algerian newspaper *Liberté* carries a report on links between al-Qaeda and the drugs trade in the Sahel.
- On 6 February, an Arabic-language jihadist website urges the Muslim youth of the Islamic nation in general, and of Algeria in particular, to support jihad and to offer resistance to non-Muslim foreign powers.

Chart 7. Analysis of local, regional and world broadcast news supply in Algeria



This simplified chart records as local all reports with an Algerian connection (even if with a wider relevance). See Tables 27–35 in the Appendix for closer detail.

6.3. Egypt media profile

Egypt is a key media player in the Middle East.[101] The most populous Arab country, it is the region's largest single national media market. There is variety of national television, radio and press sources, as well as lively internet use. Yet Egyptians choose Al-Jazeera as their favourite television channel.

Egypt has historically been a major producer of Arabic films, programming and music and the fact that Egyptian Arabic is well understood across the Middle East has made its products accessible (Boyd, 1982). Egypt has a history as an international broadcaster, dating back to the early 1950s. More recently, it was the first Arab country to launch its own satellite and its channels are widely available. The Egyptian press is read across the Arab world (El Amrani, 2005).

Egyptians can access numerous state-run and private television channels and three-quarters of the population have access to satellite

[101] BBC Monitoring Country Profiles: Egypt, http://news.bbc.co.uk/1/hi/world/middle_east/country_profiles/737642.stm; BBC Monitoring Egypt Media Environment Guide, 2010, BBC audience data, 2009, France 24 audience data, 2009, RFI audience data, 2010.

television. Privately -owned newspapers, with an independent editorial line, have made an impact on the Egyptian media scene. Yet the state substantially controls the media and journalists are subject to harassment and arrest. The internet has become an important media platform, with young activists using it to express opposition to government policy and practice.

6.3.1. Media regulation

Freedom House rates Egypt as 'not free', but rates its press as 'partly free', in recognition of the courage of Egyptian journalists and the greater range of viewpoints represented. The Egyptian constitution provides for freedom of opinion and expression, but legislation partially restricts these rights in practice. Dissemination of 'false news' and criticism of the president remain criminal offences. Yet journalists express views on a wide range of previously taboo issues.

The government part-owns the three largest daily newspapers and controls the licensing, printing and distribution of newspapers, including those of opposition parties. The state was traditionally the owner of all electronic media. Private television and radio are now permitted and there has been talk of privatising the dull state-run services (El Amrani, 2005).

6.3.2. Domestic media

Egypt's state TV, Egyptian Radio and Television Union (ERTU), established in 1960, has changed in recent years to meet competition from pan-Arab networks. It runs eight terrestrial channels: two national and six regional ones.[102] There is a blurred line between Egypt's own domestic and external services. Nile Thematic TV (also state-owned) was established in 1998 to win back audiences. It has 12 channels, including the Arabic-language Nile News channel.[103]

Private satellite television channels emerged after the government established the Media Production City, a free media zone, in 1997. Private stations have spoken out about corruption and government performance.
Free-to-air Al-Mihwar TV and Dream TV both carry topical talk shows; OTV aims to counter religious extremism. There are a number of free-to-air religious channels. Muslim channels include: Al-Nas TV, Al-Rahmah TV and Azhari TV. Christian channels Aghapy TV and CTV are run by the Coptic Orthodox Church.

Most leading Arab pay-TV networks are based at the Media Production City in Cairo. Among them are Orbit, Arab Radio and Television (ART), Showtime and Star Select, each having a package of mostly non-Arabic channels, consisting of films, sports, soaps and news. Saudi-owned Orbit

[102] http://ertu.org/tv_channel/ch1.html.
[103] www.nilenews.tv.

TV is popular for talk-shows on Egyptian issues. Pay-TV in the Arab world is targeted at the more affluent consumer, but many use illegal connections.

Though private stations are now allowed, overall Egyptian radio has seen little change in recent years. The religious Holy Koran Network rates as the most popular station.

Independent newspapers have emerged in recent years and pushed the boundaries of political reporting. This has been well received by readers and demand is apparent at news stands, where independent newspapers are placed within easy reach of readers.

Egypt has a weak landline network, but significant mobile phone use. Internet penetration is behind many Middle Eastern countries, but the internet has become a forum for publicising human rights abuses and organising protests. Egyptian media organisations run active internet sites of their own and there were more than 160,000 Egyptian blogs by the end of April 2008, representing 30% of Arab blogs. Some 19% were political. Online radio stations include Horytna (Our Freedom) Radio;[104] Mahatat Masr Radio;[105] and Radio Al-Misriyin, the online mouthpiece of the Egyptian ruling National Democratic Party (NDP).[106]

6.3.3. Egypt's external broadcasting

Egypt has a lengthy history as an international broadcaster. Under Nasser's leadership, it was the first Arab country to construct high-powered transmitters to reach its own people so as to carry the Nasserite pan-Arab message.

In 1998, Egypt launched its first satellite. Its network comprises three major channels. Egyptian Satellite Channel 1 (ESC1) broadcasts in Arabic and targets Egyptian expatriates and Arab audiences worldwide; ESC USA; Nile TV International broadcasts in English, French and Hebrew. International radio broadcasting comes from two networks. The Voice of the Arabs (Sawt al-Arab), established in 1953, has three radio stations broadcasting in Arabic, one dedicated to Palestinian affairs. The Directed Network comprises 48 radio stations broadcasting in 35 languages.

6.3.4. International broadcasters

Foreign television dominates Egyptians' viewing. A vast range of Arabic-language channels, such as Al-Jazeera and Al-Arabiya, together with Western offerings like BBC Arabic, the US Al-Hurra and CNN, as well as Euronews and France 24, are available to viewers via satellites covering the region, which include Arabsat, Nilesat and Intelsat. Al-Jazeera was rated

[104] www.horytna.net.
[105] www.mahatetmasr.com.
[106] http://hezbradio.com.

substantially the most popular in surveys commissioned by the BBC in 2006 and 2008 (44% and 68% weekly reach respectively). Al-Hurra scored 5% and 11% respectively and BBC Arabic got 4% in 2008, its launch year. Euronews shows strongly in French surveys.

Short wave still delivers a significant range of radio listening to the area and major state broadcasters targeting the area via medium and short wave in Arabic include US Radio Sawa, BBC World Service, Deutsche Welle, Voice of Russia, Radio China International and Radio Monte Carlo. Some international radios are available via satellite (free-to-air or via subscription). No international radio channels are available locally on FM.

There is a history of listening to foreign radio stations in Egypt, but figures are declining in the face of competition from satellite television. The BBC Arabic Service achieved a 4% weekly reach in 2008, Radio Sawa had 6%, the long-established Radio Monte Carlo 2%.

6.4. Egypt news agenda analysis

The news agenda analysis carried out for Egypt[107] compared one local provider with two pan-Arab television services and six other international television broadcasters in Arabic (American, British, Chinese, French, Iranian and Russian). It concluded that on the review day:

- The Egyptian and pan-Arab broadcasters covered a range of regional and international stories but little European content or perspective.
- Al-Jazeera featured a high proportion of material showing concern about the fate of Arabs and Muslims.
- Western international broadcasters had a wider range of international stories.
- Other international broadcasters mainly reported on their own countries.

6.4.1. The exercise

The survey of broadcasting for Egypt studied the news programme of one local provider, two pan-Arab broadcasters, and five other state-funded international television broadcasters operating in Arabic on one day in February 2010. The channels and broadcasts studied were:

1. Nile News television in Arabic
   1600 gmt 10 February 2010
2. Al-Jazeera television in Arabic
   1200 gmt 10 February 2010

[107] Services reviewed and news items as reported by BBC Monitoring – http://news.monitor.bbc.co.uk. BBC Monitoring study for BBC: Domestic Broadcaster International News Coverage, 2009.

3. Al-Arabiya television in Arabic
   1100 gmt 10 February 2010
4. Al-Alam (Iranian) television in Arabic
   1700 gmt 10 February 2010
5. CCTV-9 (Chinese) in Arabic
   1200 gmt 10 February 2010
6. Russia Today in Arabic
   1400 gmt 10 February 2010
7. BBC Arabic television in Arabic
   1700 gmt 10 February 2010
8. France 24 television in Arabic
   1300 gmt 10 February 2010
9. Al-Hurra (US) television in Arabic
   2200 gmt 10 February 2010

6.4.2. Findings

The programmes reviewed fall into three broad categories. First, there are programmes that offered a range of international and regional reports from a distinct Middle East perspective. These came from the pan-Arab channels, including the Egyptian domestic one. Secondly, there was a set of international broadcasters that offered different perspectives on international and regional affairs. Some differences were to do with their country connections. These services are: France 24, BBC Arabic Television, and Al-Hurra. And thirdly, there was a set of International broadcasters whose main preoccupation in their broadcasts was to report about their own country or its point of view. These broadcasters are the Chinese CCTV, Russia Today and the Iranian Al-Alam.

PAN-ARAB

Within Egypt itself, Nile News is the most popular indigenous news channel. Satellite-based, it is a local domestic service for Egyptians and Egypt's regional voice. On 10 February, Nile News was unusual among the domestic broadcasters reviewed in this study in providing a programme more devoted to international and regional than to local domestic news. On the day there was no purely Egyptian news. Two reports with an Egyptian dimension related to military activity in the Gaza Strip and stressing the importance of Egyptian proposals as a key to reconciliation. The majority of reports were about the Muslim world. They divided equally between international and regional, and between political and security-related stories. Other subjects did not come up. A study conducted by BBC Monitoring for the BBC in December

2009 broadly confirmed this tendency, showing local news to comprise 20% of bulletins with regional and international news at 80%.[108]

On 10 February, the broadcast led on a suicide attack in Pakistan, followed by a two-way discussion from Islamabad with a political analyst on the Pakistan government's claim about the death of a Taliban leader. There was substantial coverage of the Iranian nuclear issue. Reports from the Sudan stressed the exclusiveness of Nile News reporting – indicating a wish to emphasise the authority of the service. Two reports on Yemen – one about the risks from Somali al-Qaeda supporters there – were followed by news on clashes in Somalia itself. Other than a report on the Ukrainian election, there were no reports to do with Europe. No European views were noted on other topics reported. In this respect and as regards its general news agenda on the day, the Nile News programme's closest parallels were among the pan-Arab services, Al-Jazeera and Al-Arabiya, its closest competitors.

Nile News contrasted with Egyptian external radio station Voice of the Arabs. On 10 February, one third of the reports and features in the Voice of the Arabs 0600 gmt news programme related to Palestine.

Surveys show that Al-Jazeera is the most popular channel in Egypt. Its 1200 gmt news broadcast on 10 February offered viewers a wide range of both 'hard' and 'soft' news, with considerable geographical spread and an emphasis on the Muslim world. There is greater stress on regional than international stories. Reports on politics and security dominated the broadcast. News about Europe was limited and European views were not featured on major regional or international developments. A lengthy report on the Iranian nuclear issue carried Iranian and US official views and an interview with the channel's Tehran correspondent judging that sanctions had not worked in the past.

Regional stories covered included a lengthy report on Morocco–Polisario talks in New York, with the views of both sides and the mediating UN. Moves to mediate between government and rebels in Yemen were covered. Several stories would interest viewers concerned at the fate of fellow Muslims: a Syrian court sentencing a Muslim missionary to imprisonment; the Israeli authorities granting awards to soldiers for 'special operations'. Rare 'good news' stories include one of triumph through adversity – about a Palestinian youth who educated himself in prison. A similar 'soft' news story, on the condition of children in Jordanian care centres, closes the broadcast.

The Saudi channel Al-Arabiya rates the third most popular television channel in Egypt, according to BBC surveys in 2008. Its news agenda on 10 February focused on the main international political news stories. The top

[108] BBC Monitoring study for BBC. Domestic Broadcaster International News Coverage 2009, unpublished report.

items were about Iran (the nuclear enrichment issue and internal Iranian protest). There followed reports on the death of Taliban leader in Pakistan and the crash of an Ethiopian aircraft. A report on differences between the USA and Russia over a planned US missile shield in Europe was the only story containing a European element.

There is a body of reports on regional issues – Middle East and African – on upcoming elections in Iraq and Sudan. The bulletin concludes with a section covering softer, human interest stories. There is a report on the damage caused by Israel to Palestinian refugee camps on the West Bank. And there are two reports with direct local relevance to Egyptians: denial by the Egyptian government that surveillance cameras are to be installed in mosques and…a report on a wedding for two chimpanzees at Cairo zoo.

'WESTERN' NEWS AGENDAS

The Arabic-language broadcasts of the French, British and US public-funded channels offer a distinct difference to the pan-Arabic channels. The short (15-minute) bulletin from the Arabic-language service of France 24 at 1300 gmt provided little news of the Arabic-speaking world. Its characteristic was a focus on developments in Europe and a French interpretation of events. Politics dominated. Though the range of international news was not extensive, there was a unique perspective.

The top three reports were about strikes held by public-sector workers in Greece over the government's austerity programme, with the France 24 correspondent reporting the country's mood; plus a report on an upcoming EU summit to discuss the Greek situation and that in Spain and Portugal.

The next three items concerned the Middle East. France 24 reports President Obama's view on sanctions against Iran over uranium enrichment – with an interview from a French lawyer about the legality of sanctions.[109] Second comes a report about the anniversary of the Iranian Revolution, with the Iranian authorities' call for unity balanced by opposition calls for peaceful protests.

The BBC Arabic Television news programme on 10 February is unique in this exercise in not carrying a report on the Iran uranium enrichment issue. Overall, the 30-minute news programme carried a wider range of international and regional stories than the short France 24 programme. But though there was a wider range of subject matter (about 50% of reports on security), there were no specifically Egyptian stories.

The lead story was the civil war in Somalia. Next followed reports on an attack on a police patrol in Pakistan; Lebanese fears of war with Israel; clashes between Yemeni forces and rebels; USA denial that its missile shield in Europe targets Russia. There are reports about the Ukrainian

[109] See section 8 for a detailed analysis of the treatment of the Iranian uranium enrichment story for four Arabic-language broadcasters.

election outcome; the Nigerian Vice-President taking over as Acting President; the financial crisis in Greece.

The most notable single report concerned British judges calling on the British government to disclose secret documents relating to a UK Guantanamo detainee (also carried by the BBC World News in English). As in the Kenya study, of all the channels reviewed here, this appeared the only case observed in our sample of a service casting its 'home' government in an unfavourable light. The programme concluded with an item about a new NASA telescope that captures photos of the sun's atmosphere – an uplifting story on the power of science not covered elsewhere.

The US Arabic-language television Al-Hurra carried a range of reports in its half-hour bulletin at 2200 gmt, described as being 'for Europe'. The reporting was book-ended by US perspectives: a lead item about US sanctions on Iranian companies and an extensive closing item about opinions on the US administration's priorities in the Middle East.

In between, the bulk of the programme was devoted mainly to international and regional political stories. There were reports on the anniversary of the Iranian Revolution; the ceasefire between government and rebels in Yemen; the banning of candidates from upcoming Iraqi elections; Morocco–Polisario talks in New York; Nigerian government support for the new Acting President. A specifically Egyptian story was an interview with the Muslim Brotherhood lawyer about the accusations being made about some of the movement's leaders. There were no European stories or views – barring the Russian view of the Iranian nuclear issue. Other than a report on snow storms, there was no news about the USA.

'SELF-FOCUSED' NEWS AGENDAS

Three international broadcasters reviewed were mainly occupied reporting on their own country or that country's point of view. These broadcasters were the Chinese CCTV-9, Russia Today and the Iranian Al-Alam.

The Chinese offer the most extreme example. Chinese television CCTV-9 in Arabic was notable in carrying just one report about the Middle East. Over half its reports were about China (in contrast to the CCTV-9 English-language news broadcast of the same day). The five top news items in this Arabic bulletin were political, economic and general news: China–North Korea relations; the Chinese foreign ministry's view on the Korean nuclear issue; a Chinese rescue team returning from Haiti, Chinese legal action against an Australian mining firm; a Chinese economist's view about consumer confidence. There follow four items of international news: the Ukrainian election outcome; two Japanese car manufacturers recalling vehicles over safety issues; the impact of an avalanche in Afghanistan. The remaining seven reports in the programme are 'soft' cultural news items, five with a Chinese angle, including Chinese New Year preparations across

Southeast Asia and Australia and various items on Chinese culture. The bulletin's single Middle East report is about a UAE footballer failing a drugs test but insisting on his innocence. The BBC programme monitor noted that the Arabic was accurate, that delivery was accented, and place-names not Arabised, making for difficulties understanding some reports.

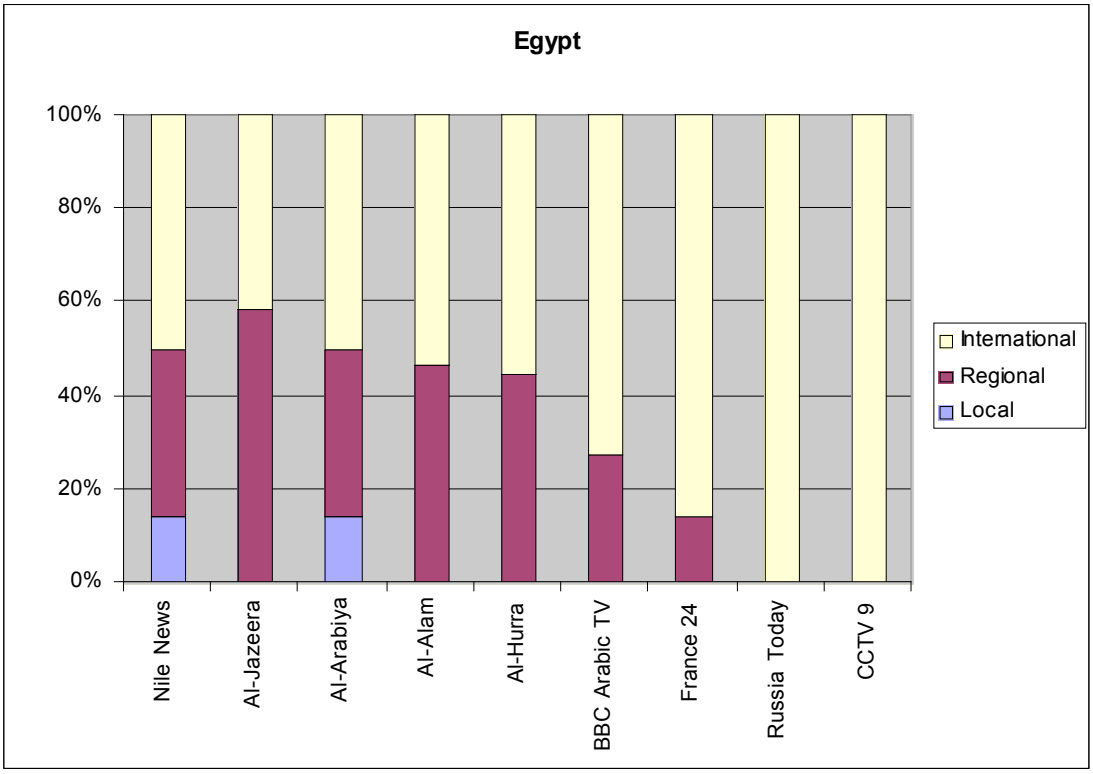
In Russia Today's broadcast, three-quarters of the reports were about Russia or gave a Russian view on international affairs. The bulletin led with a report on Iranian uranium enrichment. The Chairman of the Russian National Security Council was reported saying Moscow backed political solutions. Next, the Russian foreign minister was shown holding meetings with former US State Secretary Madeleine Albright and a NATO delegation. A Russian army chief criticised US plans for a missile shield in Europe. Reports not given a Russian slant were: the death of Pakistani policemen in a suicide attack and news of Honda and Toyota's decision to recall vehicles over safety concerns.

On 10 February, the Arabic-language Iranian television Al-Alam had some similarities with the Chinese and Russian approach. In the half-hour news broadcast at 1700 gmt, one-third of the reports were about Iran or stressed an Iranian view on a major issue. Reports cover the anniversary of the Iranian Revolution; and talks between the Iranian Speaker and a leader of the Palestinian Islamic Jihad. There are US, Israeli and Brazilian reactions to Iran's decision to begin enriching uranium – both negative and positive. A third of reports were on security-related issues, including reports on a potential cease-fire in Yemen; clashes involving Somali gunmen; a bomb blast in Pakistan; Indian missile tests. The arrest and questioning of Muslim Brotherhood members in Egypt were reported.

ALTERNATIVE VIEWS

There are other sources on issues such as the Muslim Brotherhood. The general impact of Islamist media on the Egyptian press has been noted (Richter, 2008). On 10 February, we see that both the Cairo-based daily newspapers *Nahdat Misr* and *Al-Misri al-Yawn* carry reports about the Muslim Brotherhood movement and arrests of members. On 11 February the daily *Al-Sha'b* reports charges against arrested members and the start to interrogations. Stronger views come on 10 February on the website of the Jordanian Muslim Brotherhood, which condemned the arrests in Egypt and said they would have no impact. The Muslim Brotherhood maintains its own website which carried numerous reports on 10 February about the arrests and critical reaction to them.

Chart 8. Analysis of local, regional and world broadcast news supply in Egypt



This simplified chart records as local all reports with an Egyptian connection (even if with a wider relevance). See Tables 27–35 in the Appendix for closer detail.

7. South Asia – the medium of English

The countries of South Asia overall enjoy diverse and dynamic media environments, share a colonial past, have large, far-flung diaspora and are a region at the centre of world attention over levels of terrorist activity. Yet India and Pakistan represent sharp contrasts in economic and technological development, security situations, levels of press freedom, media scale and range.

7.1. India media profile

India, the world's largest democracy and the second most populous country (population 1.2 billion),[110] emerged as a major power in the 1990s. Though the gaps between rich and poor are vast and the state of the economy varies between highly advanced and traditional, India has a fast-growing and powerful economy. The country also has a major cultural influence and is militarily significant. Over recent years, India has experienced internal violence and terrorist attacks. Relations with neighbouring Pakistan are tense, over disputed Kashmir and terrorism.

India is the world second largest media market and enjoys a complex, dynamic and comparatively liberal media environment. There is a wide diversity of domestic news sources, both state-run and private and including numerous 24/7 news channels. There is a history of interest in foreign media, though consumption has declined. India has a large and widespread diaspora and is a vigorous exporter of films and broadcasts.

7.1.1. Media regulation

Freedom House rates India 'free' overall and 'partly free' as regards press freedom. Deregulation of broadcasting and mobile telecoms in the 1990s have revolutionised the market. India has the freest press in South Asia and India's constitution provides for the right to freedom of speech and expression. However, media freedom is threatened by increases in violence by political parties and religious and separatist groups. While the internet in India remains largely unrestricted, online journalists and bloggers have been arrested.

7.1.2. Domestic media

India came comparatively late to television, which began on a tiny scale in the late 1950s. For over three decades, domestic television was dominated by the state-run domestic service Doordashan. Indian broadcasting has flourished since the monopoly was broken in 1992. The array of channels is still growing

[110] BBC Monitoring Country Profiles: India, http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1154019.stm; BBC Monitoring research, BBC audience data, 2009.

(Mehta, 2010). Private cable and satellite stations command large audiences. News programmes often outperform entertainment shows (Kohli, 2003; Cottle and Rai, 2008).

India has the fastest growing television market in the world with hundreds of services. The number of news channels alone rose from one in 1998 to over 50 in 2010. Examples operating in English have included: New Delhi TV (NDTV); CNN/IBN; CNBC-TV18. Examples operating in Hindi include: STAR TV; Aaj Tak; Zee TV.

Three notable phenomena are: first, the international availability of some of these services; secondly, the tendency for news to be sensationalised and sport- and celebrity-linked; thirdly, the trend towards localisation of news. Increasingly, channels have moved into vernacular languages to match local interests.

The cable TV market is one of the world's largest. Multi-channel, direct-to-home (DTH) television has been a huge success. Operators have attracted millions of subscribers. DTH subscribers could reach 60 million by 2015.

In all this, Doordarshan Television, the public TV, has maintained a position, now operating over 21 services including its flagship DD1 channel, which reaches some 400 million viewers.

Radio is much less popular than television and has been described as a highly under-utilised medium in India. Radio broadcasting in the country dates back to the mid-1920s. After commercial beginnings, the authorities took over in the 1930s and post-independence All-India Radio was the monopoly provider. This situation has in some respects continued. Although music-based FM radio stations have proliferated in the cities since they were permitted in 2000, only All India Radio is allowed to broadcast news.

India has the oldest press in Southeast Asia. The press is lively and thriving in the current climate. Circulations have risen and new titles compete with established dailies. Internet use has also soared and by 2007, around 60 million Indians were online. Mobile phone subscriber levels escalated after liberalisation of the mobile telecoms market in 1994.

7.1.3. International broadcasters

Historically, international broadcasting had a significant influence in India and the BBC World Service, as one example, enjoyed some of its largest audiences in the country. Sri Lankan radio had significant audiences in the southern states. Much of this changed with media deregulation in the 1990s and the increasing choice in the domestic market. Audiences for international radio broadcasters began to melt away. This situation, coupled with India's position as a settled and mature democracy, meant that it was less of a

strategic priority for some major powers. Voice of America has dropped its broadcasting in Hindi.

Yet there are international broadcasters who continue to target India both in English and Hindi. Examples include: China Radio International, Deutsche Welle, Voice of Russia and the Japanese radio external service. Regional players include Iran and Pakistan, while religious broadcasters targeting the country include Radio Vatican and Trans World Radio. Some of these operators will have small audiences, but BBC World Service radio still achieves audiences of some 20 million weekly (significant for its overall performance). Most of this audience is for the vernacular Hindi service.

The All India Radio monopoly on radio news broadcasting within India is an obstacle to international broadcasters in establishing rebroadcasts through local partners.

As for international radio, India is not high priority in the targets for international broadcasters – especially when it comes to vernacular languages. Nevertheless, international TV broadcasters do target the region in English, including: Al-Jazeera television, BBC World News, Deutsche Welle television, CCTV-9 and Russia Today, as well as CNNI. In the case of BBC World News, a specific stream aims at attracting local viewers.

Because India is such an attractive market, commercial TV operators have targeted the country from the first opportunity, often through local partnerships. Example include: CNN/IBN and CNBC-TV128, among the leading news channels.

7.2. Pakistan media profile

Pakistan society is under extreme social, political and economic pressure and its citizens live under threat of violence.[111] Pakistan itself is under pressure to combat terrorism at home and there is tension in relations with India. The country is populous (population around 160 million) and has a widespread diaspora. Pakistan's media are varied and lively, but not free. Television is the dominant medium. Research suggests increasing scepticism about the domestic news media.

The strategic significance of Pakistan is reflected in the efforts by international broadcasters to target the country. There is considerable choice, though the widest access depends on an individual's resources, location and education. But international news media, too, are viewed with scepticism.

[111] BBC Monitoring Country Profiles: Pakistan, http://news.bbc.co.uk/1/hi/world/south_asia/country_profiles/1157960.stm; BBC Monitoring Pakistan Media Environment Guide, 2009, BBC Monitoring research; BBC audience data – 'Pakistan Performance', 2009 unpublished report.

7.2.1. Media regulation

Freedom House rates Pakistan as 'partly free' but as 'not free' in respect of press freedom. Recent periods of martial law meant tightening of media rules under emergency rule. Even now, the constitution and other legislation authorize the government to curb freedom of speech on subjects including the constitution, armed forces, judiciary and religion. The regulatory authorities have intervened to restrict and halt broadcasts, particularly those critical of the government, and to ban live news coverage during periods of political unrest. Most telling for international broadcasters are restrictions on the broadcasting of live news through local partners. The regulators periodically order a halt to the carriage of foreign television channels via cable in periods of tension.

Language is a significant broadcasting issue in Pakistan, where some 60 languages are spoken. English is used as the official language, Urdu is the national language and understood by some 80% of the population, though only 7% use it as a first language, far fewer than Pashto and especially Punjabi.

7.2.2. Domestic media

Television is the dominant medium and a growth area. More households own television sets than radios. In 2006, there were 20 television channels (5 state-run and 15 privately owned). Today, there are around 50 private channels, available via satellite or cable, to which a minority have access. There are no private, terrestrial stations.

The state-run operator Pakistan Television Corporation Ltd (PTV) comes under the direction of the Ministry of Information and Broadcasting. It operates PTV Home, an internationally available news channel PTV News, regional networks in several number of languages and entertainment channels. Commercial television has been permitted since 2002 and the regulatory authority (PEMRA) has issued over 80 satellite television licences since then (though not all have been taken up). A number of news channels have come into existence, which include: Geo News (Urdu), part of the Geo TV group; ARY News (Urdu and English), part of the ARY group; Aaj TV; Dawn News (English and Urdu), Express News (Urdu) and Express 24/7 (English). A number of religious channels have also come into existence, including: ARY's QTV, Haq TV, Peace TV.

The state radio broadcaster, the Pakistan Broadcasting Corporation (PBC), also under the control of the Ministry of Information and Broadcasting, operates nationally and regionally and runs 31 stations throughout the country, including Kashmir. It operates in English, Urdu and 19 regional languages and reaches around 95% of the population. Much of the content is entertainment, some religious and educational, some news.

Radio Pakistan transmits nationally on medium wave and on FM in urban areas. It runs a separate commercial FM entertainment network to attract young listeners. News and current affairs programmes are broadcast in Urdu, English and regional languages. In 1995, private-sector FM broadcasting was permitted in Karachi, Lahore and Islamabad. Over 100 private FM radio stations have been licensed, but they are not permitted to broadcast their own news programmes. Scores of unlicensed FM stations are also reported operating in the tribal areas of Northwest Frontier Province, usually by clerics. Some of them are accused of fanning sectarian tension. The Taliban frowns on television.

Pakistan's press is among the most outspoken in South Asia, but its influence is limited by a literacy level of around 50%. The number of titles fell sharply between the mid-1990s and 2006, but circulation doubled. There is cross-ownership of newspapers and broadcasting outlets. Analysis has suggested that the editorial standards of English-language and Urdu-language press are different, with the former relatively more careful and impartial.

Mobile phone use has skyrocketed in Pakistan, reaching over 90 million in 2009. Although fibre systems are being constructed throughout the country to speed network growth, fixed-line availability is still limited. So although many domestic news providers, including state and commercial broadcasters, run news and information websites and although bloggers played a part is by-passing media regulations in the 2007 state of emergency, internet usage is still limited, with only 18 million users in 2008 in a population of more than 170 million.

7.2.3. International broadcasters

A range of commercial and state-financed international broadcasters are available via satellite free-to-air within Pakistan to those with the right equipment. These include CNNI, BBC World News, Al-Jazeera, Russia Today and CCTV-9. They have lower viewership then domestic channels. The audience for BBC World News, for example, fell from 4% in 2006 to under 2% in 2008.

Major state broadcasters target the area via short wave in English: Voice of America, the BBC World Service, Deutsche Welle, Voice of Russia and China Radio International. Yet though they attract some listeners, this is not the route to large audiences, which come from broadcasts in Urdu. International operators using Urdu include BBC World Service (which has had permission to have news bulletins rebroadcast locally), Voice of America, Voice of Russia, China Radio International. Regional broadcasters include: All-India Radio, Voice of Turkey, Saudi Arabian radio, and Voice of the Islamic Republic of Iran. Radio Sedaye Kashmir, a station that represents

Indian points of view on Kashmir, broadcasts in Urdu and Kashmiri, using All India Radio short-wave facilities.

Voice of America runs radio broadcasts in Pashto, as well as Urdu, and has Urdu television programming aired by Geo TV. The USA also operates Pashto-language services as part of the Radio Liberty/Radio Free Europe network. Pashto-language Radio Mashaal, launched in 2010, aims to counter Islamic extremist radio stations in Pakistan's Northwest Frontier Province and Tribal Areas.

While there are very small audiences in Pakistan for many of these services, the impact can be considerable. The BBC has enjoyed the largest audiences, and though they have been falling, the BBC World Service is still the second most popular station in Pakistan (after Radio Pakistan itself) and reaches some 9 million listeners weekly. Research suggests the Voice of America has been growing its audience and its level of trust.[112]

7.3. South Asia news agenda analysis

The news agenda analysis for South Asia[113] is different from the others. The size and complexity of the broadcasting markets meant that it was impossible to conduct news agenda analysis along similar lines to that conducted elsewhere. Instead the analysis presented here looks at television broadcasting in a single language and one that is not the native language of the countries targeted. International broadcasters target the Indian subcontinent in vernacular languages – but almost exclusively through radio and internet news services. Both the BBC and Al-Jazeera have had plans to start operating in Urdu and Voice of America provides video content rebroadcast by Geo TV. For now, the major international television broadcasters target the region with services in English. International radio broadcasters are barred in both India and Pakistan from offering news programmes through local outlets. Satellite television can offer live news.

In India and Pakistan, English is also used by domestic broadcasters to reach local elites, though it appears increasingly hard to make this financially supportable. Just days after the review period, the Pakistan television channel Dawn News TV changed tack. On 22 February, it stopped being a purely English channel and started broadcasting a three-hour slot in Urdu. Dawn News had already retrenched. Forty staff lost jobs in January 2010. As a result of the change at Dawn News, Express 24/7 can now bill itself as the only 24-hour English-language news channel in Pakistan. Bloggers have questioned the viability of English-language television in Pakistan in the longer term.

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[112] BBC audience data 'Pakistan Performance 2009'

[113] Services reviewed and news items as reported by BBC Monitoring. BBC Monitoring study for BBC: Domestic Broadcaster International News Coverage, 2009.

7.3.1. Summary of findings

The news agenda analysis carried out for South Asia on 9 and 10 February compared the output of one Indian, one Pakistani and three international television services – all broadcasting in English – and concluded:

- The local providers are overwhelmingly focused on local news and issues and provide almost no picture of international affairs.

- The international providers offer perspectives on international news and vary considerably in the extent to which they regionalise or localise their news content and in their editorial stance.

7.3.2. The exercise

The survey of broadcasting to South Asia studied the news programmes of one Indian, one Pakistani and three international television services, all broadcasting in English, on 9 and 10 February 2010. The channels and broadcasts studied were:

1. Indian NDTV news in English
   1530 gmt 9 and 10 February 2010
2. Pakistan Dawn News TV in English
   1700 gmt 9 and 10 February 2010
3. CNN International in English
   1500 gmt 9 and 10 February 2010 (for South Asia)
4. Al-Jazeera television in English
   1500 gmt 9 and 10 February 2010
5. BBC World News in English
   1600 gmt 9 and 10 February 2010 (for South Asia)

All were recorded and monitored in New Delhi.

7.3.3. Findings

INDIAN NDTV NEWS

A study conducted by BBC Monitoring for the BBC in December 2009 indicated that between 33% and 38% of NDTV's stories were on international (including regional) issues and 62–7% were local.[114] Of the international stories, over 40% were either drawn from news agency copy or direct translations of them.

Under the categorisation employed by this study, compatible results are found in the NDTV news programmes on 9 and 10 February. Some 75% of the stories are purely local, with just 10% about regional or international stories. The remainder are local stories with an international connection.

[114] 'BBC Monitoring Study for BBC. Domestic Broadcaster International News Coverage, 2009', unpublished study.

Politics is the main subject category, followed by economics – though economic stories often have a political dimension. Where international stories are reported there may be an element of trivialisation. The broadcast on 10 February closed with a report about a White House spokesman making fun of Sarah Palin for making notes on the palm of her hand. Many of the political stories are to do with national and local (i.e. state) developments and disputes. Much attention is paid to India–Pakistan relations and to the Kashmir situation.

Considerable attention is paid to sport, especially cricket, which is not restricted to the closing section and also appears during the body of the broadcasts. Excitement is drawn not only from the matches but also from controversial issues surrounding the game, which become politicised – for example, the organisation of the Indian Premier League.

Some subjects are covered in some depth with discussion and a variety of views. The Indian government decision not to allow the cultivation of GM vegetables is the lead on 9 February and comprises a substantial report, an interview with the Environment Minister and a discussion with panellists representing opposing views. Here as throughout the programme, the output is highly produced. Graphics help the viewer assess the pros and cons of the issue. The use of split screens allows both panellists to be viewed and the contributions and reactions seen simultaneously.

Pace and variety are also injected through the constant use of tickers, the cutting of interviews, for example, into segments which can be mixed with other contributions, plus the number of items covered. The overall effect is that the channel is both considered and balanced. The GM discussion is both probing and reasoned and, though the viewpoints are opposed, the manner is civilised. A report on strongly worded statements made by the Pakistani foreign minister before imminent bilateral talks contrasted them with more conciliatory remarks made some weeks before to draw conclusions about pre-talks posturing.

PAKISTAN DAWN NEWS TV

In the Dawn News programmes on 9 and 10 February some 70% of the stories are purely local, and 30% are regional or international (and that includes sport). International reports themselves often have local relevance; around a third of them here have a local connection. As would be expected in the prevailing circumstances, the major subject category by some margin is security (around 35%). Dawn's news programmes are one hour long (like those of NDTV and Al-Jazeera) and carry around 25 reports each day – more than other sources. The pace is fast, though business was hampered on 9 February by technical difficulties.

A viewer gains an impression of world events from the news: the Iran uranium enrichment issue; the impact of the Haiti earthquake. Some are more

in the nature of curiosities: the trial of Michael Jackson's doctor; snow storms in the USA. And there is sport – predominantly cricket, including investigations into Pakistan's poor recent performance. Sports reports appear in the body of the programmes.

There is fuller coverage of regional affairs: the announcement of parliamentary elections in Sri Lanka and the arrest of the defeated presidential candidate. But the bulk of the reporting is either directly about Pakistan or about Pakistan in relation to another country – most frequently India or Afghanistan. Reports emphasise the status of Pakistan. US Defence Secretary Gates is quoted praising Pakistan's fight against terrorism. A report that Pakistan will hold talks with India stresses that Pakistan is not backing down on long-standing bilateral issues.

Local reports on security issues centre on incidents or on political aspects rather than the impact of insecurity on the population. Examples of coverage are: deaths in a suicide bombing (extensively covered on 10 February); the attempted assassination of a local politician; the reported death of a Taliban leader. In contrast the Pakistani Urdu channel Samaa TV in March 2010 launched a series called 'Affected: they are victims too', detailing the stories of individual victims of terrorist attacks, including Christians.

There is a proportion of economic news. The closest this comes to covering the impact on local people is a report on the non-arrival of promised aid in an earthquake zone. Local politics are covered in detail.

CNN INTERNATIONAL

The two 30-minute CNNI news programmes targeted at South Asia on 9 and 10 February contrast to the local providers. Over two days, the news focused almost exclusively on international affairs – traditional straight news. A feature that distinguishes CNNI is its accent on international business news.

Politics and economics are the dominant themes. Politics has international spread, touching on Europe, Africa, the Middle East. On 9 February, reports include: the transfer of power to the Nigerian Vice-President; Ukrainian presidential elections; Iran's uranium enrichment moves. On 10 February, strikes in Greece against government austerity measures are covered at length. Later in the programme comes a report on the first actions of the Nigerian Acting President. Further brief reports include a British court forcing the government to release files relating to the treatment of a British terror suspect. Economic reports cover topical developments, like Toyota's recall of cars over safety concerns, and regular reports on stock market performance in the USA, Europe and Asia.

There are a number of general news stories with an international spread. A report on visitors briefly marooned on the observation deck of the world's tallest building, in Dubai, differs sharply from the style to be found on Al-Jazeera. There was little evidence of regionalisation in the programmes.

There was just one brief reference to a local Pakistan story, the reported death of a Taliban leader. CNNI in general carries sports news (including cricket) and featured a report on a struggling English Premier League club on 10 February.

BBC WORLD NEWS

The BBC World News programme targeted at South Asia, like CNNI's, is just 30-minutes duration. It has a different approach and is more regionalised and localised. Around 80% of the reports are international in the sense of being about the world outside India and Pakistan. However, half of them concern regional issues, some with a very local connection. And the remaining 20% of reports directly concern India or Pakistan. There is also a wider spread of subject matter, although politics and security dominate. Stories come from South Asia, the Far East, Middle East, Americas. The overall balance is towards Asia.

The main international story covered on both days was from the region: the dissolution of parliament in Sri Lanka and arrest of the main opposition candidate for the presidency. Other stories concern: the Iranian uranium enrichment issue; extra-judicial killings in Nigeria; strikes over the government austerity programme in Greece.

Stories about India include: India's shock defeat by South Africa in cricket; Amnesty International's criticism of the UK company Vedanta over its mining operations in Eastern India. The report on a British court forcing the government to release files relating to the treatment of a British terror suspect (also covered by CNNI) is the sole reviewed example of a station carrying an unfavourable report on its 'home' government. The repeated use of menus, teases, stings and headlines contribute to the programme's pace – while references to the BBC News website offers a source of different types of news, science and human interest.

AL-JAZEERA TELEVISION

The content on Al-Jazeera International's English television news programme at 1500 gmt on 9 and 10 February also contrasts to local providers. It is more heavily focused on international news. Around 90% of the reports are about international news, though that includes a proportion of closer regional issues, while 10% of reports have a local Indian or Pakistani connection.

In other respects, Al-Jazeera's news programme resembles local providers. The programmes are one-hour long and stories are explored at length. There is emphasis on exclusives, and exclusiveness shapes the programmes. On 9 February, the lead item devoted 9 minutes to reports of extra-judicial killings in Northern Nigeria – featuring footage obtained by Al-Jazeera. Throughout the story is captioned 'Al-Jazeera exclusive'.

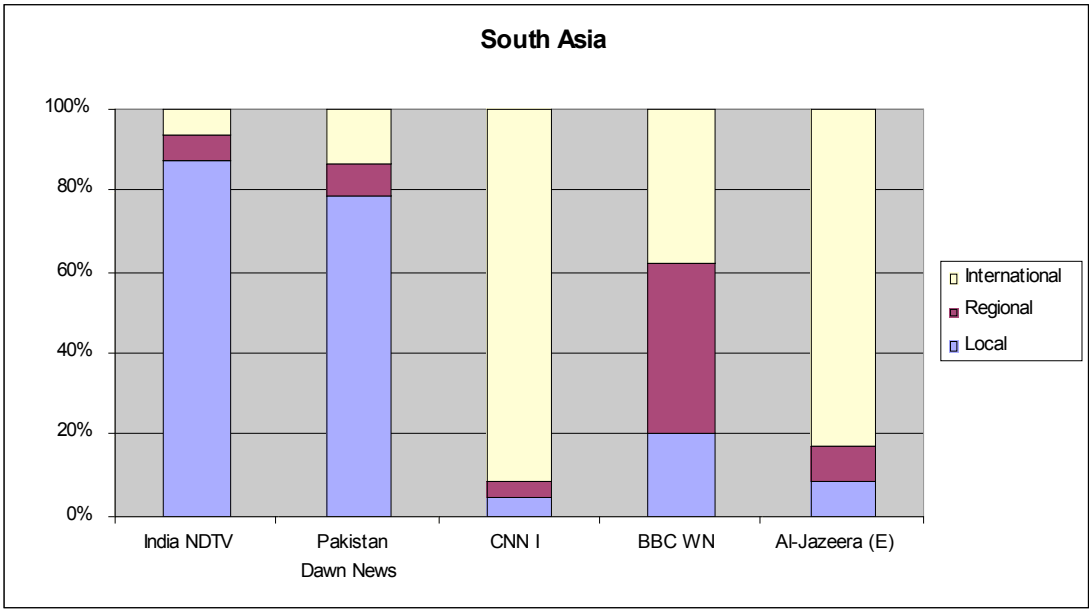
International politics form the largest single news category and while the geographical balance is away from the USA and Europe, overall the spread is considerable, with reports from the Middle East, Africa, the USA, Europe and Eurasia, as well as South Asia. Stories include: Iran's uranium enrichment moves, including Russian and US views; the transfer of power to the Nigerian Vice-President; the Ukrainian presidential election; rapprochement between Sudan and Chad. Al-Jazeera provides original news angles, for instance on political and economic ties between Israel and Azerbaijan.

International security involves attention to state-level bilateral concerns, like the differences between the USA and Russia over the former's missile shield plans, and coverage of the direct impact of insecurity on individuals, for instance in a summary of clashes in Nigeria.

Stories on regional issues are more limited in number but the subject matter is varied and again connects to the situation of individuals, for instance a report on the impact of security operations in Afghanistan on the population. Another report focuses on the role of the Afghan police in maintaining security, the difficulties caused by an absence of female officers and problems of recruitment.

On India and Pakistan directly, the death of a Pakistani Taliban leader is reported; as is India's decision to delay the introduction of GM vegetables. Another Al-Jazeera connection to South Asia audiences is through sport. Its programmes on both days cover cricket, English Premier League football and the Winter Olympics.

Chart 9. Analysis of local, regional and world broadcast news supply in India and Pakistan



This simplified chart records as local all reports with an Indian or Pakistani connection (even if with a wider relevance). See Tables 36–40 in the Appendix for closer detail.

8. Four international broadcasters' treatment of a single story, 9 and 10 February 2010: Analysis by Mohamad Agha

8.1. Background

The ongoing tension between Iran and the international community over Iran's nuclear programme and the possibility of Iran developing nuclear weapons was exacerbated when Iran announced that it had begun the process of enriching uranium to 20%. The Iranian decision came after lengthy talks with the UN and delegates from France, Russia and the USA which culminated in a proposal drafted in October 2009 requiring Iran to send its low enriched uranium to Russia to be enriched to 20% and then sent to France for conversion into metal fuel rods. However, the proposals did not move beyond the draft form because of the conditions imposed by both sides on the implementation process.

A comparative analysis of media coverage of the Iranian announcement of its uranium enrichment programme and its offer for further talks showed mostly subtle but occasionally marked differences in the coverage of the story by four Arabic-language television channels.

8.2. Detailed analysis

The television channels selected for the purpose of the analysis all led their bulletins on 9 or 10 February 2010 with a report on recent developments in Iran's nuclear energy programme and the production of 20%-enriched uranium at the Natanz plant in central Iran. The selected channels – Qatari Al-Jazeera, Russia Today, France 24 and US Al-Hurra for Europe – also covered the proposal made by Iranian Vice-President and Director of the Atomic Energy Organization Ali Akbar Salehi for further talks, international reaction to Iranian uranium enrichment, US sanctions and calls for further international sanctions. Al-Jazeera's report was 6 mins 25s, Russia Today 4 mins 25s, France 24 3 mins 24s and Al-Hurra 4 mins 17s.

1. Al-Jazeera [Arabic] 1200 gmt 10 February

2. Al-Hurra [Arabic – US] 2200 gmt 10 February

3. Russia Today [Arabic] 1400 gmt 10 February

4. France 24 [Arabic] 1300 gmt 9 February

Al-Jazeera and Russia Today led the report with Ali Akbar Salehi's proposal for talks on the swapping of uranium fuel for low-enriched

uranium, providing the exchange took place in Iran. However, the two channels diverged in their interpretation of the Iranian move.

> [Al-Jazeera:] *The Iranian scenario was to make a last minute move to pull the rug from under the feet of the West. The new development now is the announcement made by the director of the Iranian Atomic Energy Organization proposing that the exchange of nuclear fuel [for low enriched uranium] with the West had to take place simultaneously and on Iranian soil.*

Russia Today said: 'Here is Iran defying its foes by enriching uranium at 20% at Natanz' and added: 'This step was described by the United States and its allies as provocative.' The Russia Today correspondent in Tehran reported:

> *The decision [to enrich uranium at 20%] is justifiable as far politicians here are concerned since the superpowers have decided against supplying Iran with fuel for the Tehran Institute for Scientific Research unless the latter handed over all its low-enriched uranium to Russia in a single consignment, which has been rejected outright by the Islamic Republic.*

The correspondent added: 'Thus, Tehran has been trying to play a double game; although its nuclear plan has escalated the situation to a great extent, it has left the door open for future negotiations on the way of obtaining nuclear fuel.'

Both Al-Jazeera and Russia Today reported the Iranian justification for producing high-level uranium, namely that the superpowers refused to supply Iran with the fuel required to operate the Tehran installation. Russia Today showed a video report of the Iranian Foreign Ministry spokesman Ramin Mehmanparast saying that the enrichment did not contravene international conventions and IAEA principles, and that 'The West has time to change its perspective and supply us with the fuel and, consequently, we shall stop the 20-per-cent enrichment process.'

Al-Jazeera made a distinction between the imposition of sanctions and the US president's stance, which it reported as being favourable to leaving the door open to negotiations with Iran, and said:

> *Although it is too early to say that the option of sanctions would win over the Obama option of leaving the door open for negotiations with Iran, changes in the Russian stance have become noticeable now, which also raises questions on the likelihood of the Chinese stance remaining steadfast vis-à-vis the stances of the other superpowers.*

Al-Jazeera's correspondent reporting from Tehran said that President Ahmadinezhad had left the door open for unconditional negotiations on the exchange of nuclear fuel for low-enriched uranium right from the beginning and Ali Akbar Salehi simply echoed what had been offered previously.

Russia Today highlighted the Russian government's position and quoted Chairman of the Russian Security Council Nikolay Patrushev saying that his country was committed to resolving the issue peacefully

> *but the international community has not succeeded in achieving that yet. Iran has the right to develop a nuclear programme for peaceful purposes and no one would object to that. However, like the other members of the international community, we object to Iran possessing nuclear weapons.*

Russia Today also quoted Patrushev saying that, although Iran has stressed that it was not planning to produce nuclear weapons 'its actions, such as increasing the uranium enrichment level to 20%, raised serious doubts in the world'. The channel interviewed an Iranian political analyst who stressed that faced with a denial of its right by Western states, Iran had no option but 'to take two steps forward and one step back in order to assert its right that is stipulated in international conventions'.

France 24 began with reporting the commencement of uranium enrichment at Natanz, saying: 'From word to deed, Iran today began to enrich uranium at a high grade at Natanz in central Iran, two days after announcing that it would do so.' France 24 was the only channel to report that the enrichment process was carried out under the supervision of an IAEA team and added that the presence of the team did not prevent widespread international condemnation and threats of tightening international sanctions on Iran. The channel was also the only one to quote Ali Akbar Salehi saying that the production was at experimental level.

The channel reported US Defence Secretary Gates's statement after meeting President Sarkozy in Paris urging the international community to work together to ensure that Iran returned to the negotiating table. The channel quoted Robert Gates saying that French and US views on the issue were close.

Unlike all the other television channels selected, Washington-based Al-Hurra for Europe began the first item with the US Treasury announcement regarding the imposition of new sanctions on four Iranian companies associated with the Revolutionary Guards and the extension of sanctions on an Iranian construction company.

Al-Hurra said that the US Treasury announcement followed President Obama's call for new sanctions on Iran because it had rejected all the proposals made to resolve the issue through diplomatic means and the offer of deals regarding the enrichment of uranium. Al-Hurra quoted President Obama saying:

> *The international community is taking rapid steps towards the imposition of new sanctions on Iran because of its nuclear programme after having made efforts to resolve the problem with Iran through*

diplomatic means by offering deals on the enrichment of uranium but Iran has rejected all these offers.

Al-Hurra focused on changes in the Russian position and quoted the Russian deputy foreign minister saying that the imposition of sanction has become more possible after Iran raised the level of uranium enrichment to 20%. Al-Hurra said: 'It is significant that with the announcement of the US stance, the Russian deputy foreign minister said that the imposition of sanctions on Iran had become more likely following its enrichment of uranium at the level of 20%.'

The channel argued that, despite China's ambiguous position:

these developments are too big to leave room for doubt that the superpowers are getting increasingly closer on the imposition of sanctions on Iran, despite Director of the Iranian Atomic Energy Organization Ali Akbar Salehi's statement that an agreement on swapping of nuclear fuel was still open to discussion.

8.3. Conclusion

All four broadcasters gave prominence to this story and covered the same basic points – the Iranian decision to enrich uranium to 20%, international reactions, Iranian proposals for further talks, US sanctions and calls for further sanctions. The key differences between the broadcasters' approaches to this story can be identified as differences of perspective and differences in the approach to causes and consequences.

Al-Jazeera's report gave more prominence to Iranian willingness to hold further talks on the exchange of low enriched uranium for nuclear fuel and highlighted the Iranian official stance of having no option but to produce 20% enriched uranium to secure fuel for the Tehran medical research facility.

While highlighting Iran's offer of talks and its reasons for producing fuel grade uranium, Russia Today also gave prominence to the US readiness to cooperate and engage in talks with Iran and stressed Russia's opposition to attempts by Iran to develop nuclear weapons and the international community's doubts about Iran's nuclear programme.

France 24 focused on the commencement of uranium enrichment to 20% by Iran, worldwide condemnation of the Iranian action and threats of international sanctions. The channel reported Iranian reasons for beginning the enrichment process and the US position as stated by Defence Secretary Robert Gates after meeting President Sarkozy in Paris. The only reference made by France 24 to the French government's stance was in quoting Gates as saying that the US and French positions were close.

Al-Hurra for Europe's approach was markedly different from the other three broadcasters selected for the analysis. Al-Hurra focused on the US Treasury announcement on the imposition of new sanctions on four Iranian

companies associated with the Revolutionary Guard Corps as a consequence of the Iranian decision to produce uranium enriched at 20%. The channel highlighted President Obama's call for further international sanctions, changes in the Russian position – quoting the Russian deputy foreign minister on the increasing likelihood of international sanctions on Iran – and the possibility of a change in China's stance.

9. Conclusion

The key question underlying this study is about the continuing relevance of international broadcasters. Do they still offer distinctive content in a much more competitive environment? The conclusion to be drawn from the analysis conducted is that they can provide news perspectives not available from local providers. These can be perspectives on local news, most often when broadcasting in vernacular languages. They are more likely to be perspectives on global news. It is harder for traditional international broadcasters to establish and keep mass audiences than for those better able to create a common identity with viewers across a region. Nevertheless, in all the countries studied, with the exception of India, international broadcasters attract considerable attention and at times play a strong internal role. Yet there are often increasingly numerous and attractive alternatives.

The most striking impact has been achieved in recent years by the new entrants such as Al-Jazeera. International broadcasters with apparently unlimited resources, like China, have received considerable media and academic attention, but large audiences have as yet rarely been registered in known surveys. Western broadcasters, who have opted to limit radio and move into key television services, have achieved overall momentum, but sometimes at the cost of local relevance.

9.1. The target countries

Considerable differences can be seen among the target countries selected. They vary hugely in size and population: from India at 1,170 million to Senegal at 12 million. The complexity of the media systems and the variety of indigenous sources vary accordingly, as do their levels of technological development. Senegal and Cameroon are the simplest and most limited markets. Algeria is highly controlled and has high levels of audiences for foreign media. India is one of the world's largest markets and is served by a highly dynamic, growing and diversifying media sector which is very active internationally. The need for supplementary sources of news and information is higher in countries like Cameroon, Algeria and Pakistan than it is in India.

Despite the apparent differences, it is the similarities that are the more striking, especially if India is taken as an exception. The similarities relate to four broad areas: media environments; security situations; international connections; language. These factors may increase the need for impartial sources of news and information about international and about local affairs.

All the target countries enjoy lower levels of media freedom than the developed world (even India). With the exception of India, the target countries' indigenous media are subject to limitations of different kinds and vulnerable to forms of pressure. The limitations may be in the number of available sources (Cameroon, Senegal), legal obstacles to the establishment of

new broadcasting outlets (Cameroon) or restrictions on broadcasting news (as in India, Pakistan and Algeria). The vulnerability may be in the pressure on journalists aiming to report freely (Cameroon, Algeria and Egypt). Within these local media environments, state-run broadcasters tend to give explicit or implicit support to the existing authority and play a state-building, or state-binding role. Commercial broadcasters are more lively and to some extent critical, though less so than the press.

Several of the target countries are linked in the fear of violence. This may be terrorist violence – currently most extreme in Pakistan, but also experienced in India, Algeria, Egypt and Kenya. It may be ethnic violence – as in Nigeria and Kenya. It may be separatist clashes – as in Senegal.

The target countries are linked in having a colonial past – French or British. The domestic media and broadcasting environments were first established under colonial rule. All eight retain close connections with the former colonial powers, including language connections, and have substantial diasporas in them, so that there exists an ongoing natural interest in the colonial powers and in news from and about them. All the eight countries either have, or had, high audience levels for the international broadcasters of their former colonial powers.

Though language environments vary (from Arabic-speaking Egypt to Cameroon with 250 languages and dialects in use), in all the target countries, there is also a growing power in the application of vernacular languages and a strong identity draw from their use. There are often specific and key factors to the form of language current. For example, Arabic is a vehicle to Middle East broadcasters establishing a supra-national identity. Yet in the Maghreb distinctive characteristics of local forms of Arabic lead audiences to specific sources relevant to them. Local and regional vernacular broadcasting is a growth phenomenon, is associated with new and interactive forms, and has been linked with ethnic tensions.

9.2. The major international broadcasters

The similarities between major state-funded international broadcasters broadly relate to their strategies for delivery. They have traded radio for television and have moved online. They use television for key audience groups and maximise free availability. They use radio in a wider range of languages to reach more local audiences. Where possible, all use local partners to reach local audiences. They link radio and television with internet services and have the widest range of languages on the internet. Although, as yet, online internet usage is the smallest of the three forms of delivery, all see it as the future and all offer almost the same delivery options. All offer routes for interaction with audiences, which they see as key.

All the international broadcasters claim to offer audiences a distinctive perspective and describe news as their top priority content. Yet though the appearance of the international broadcasters is superficially similar, with slick presentation and orderly and interactive websites, the distinctions between them are considerable: in the audiences they seek; the purpose in reaching them; the scales of operations (including differences between the current potentials of television, radio and new media delivery) and – most tellingly – their editorial approach.

The distinction in targeting lies in the weight attached by countries to targeting their own people abroad. Countries like China, Russia and Iran place much emphasis on targeting diasporas. For countries like the USA, the UK, France and Germany, this is no longer a stated priority.

After that distinction, all state-funded international broadcasters seek 'foreign' audiences abroad in countries regarded as key, often for geo-political reasons. Substantial differences exist between international broadcasters in the range, scale and focus of their operations. Some major players, like Al-Jazeera and CNN, are focused on television supported by the internet and operate in a restricted set of languages. Most major state-funded international broadcasters combine television, radio and new media, but to varying extents – France broadcasts on radio in 12 languages, the USA in around 50. Radio allows localisation; the internet has the potential to provide it as usage spreads; television can only target global elites and regional audiences in high-priority languages which command substantial populations.

A key difference lies in the purpose of the targeting. China, Russia and Iran stress their countries' news and positions; France, Germany, the UK and USA express a purpose which is much more to do with a view of democracy and the role of the media in free societies.

The Russian, Chinese and Iranian providers may provide insights, but not a critical view of the home country. The French, German, UK and US providers may offer more self-critical views. The pan-Arab providers are critical of fellow Arab governments, more silent about their own. Yet they are best able to establish a rapport with viewers, creating a common identity with an Arab audience beyond national boundaries and reporting on previously taboo issues. The Chinese in particular may take a very strategic view. And although a determination to report their own position may restrict interest for now, the example of Kenya shows that they can secure audiences.

9.3. Contrasting international and local broadcasters

The contrasts between the international and the local providers are considerable as regards: the type of news offered; the level of localisation achieved; the range and attraction of the output; the resources available. The study has shown that in some cases there is a blurred line between national

and international broadcasting (for example, in Egypt and Algeria). The strong general assumption that local broadcasters focus on local domestic news is borne out by the study. The exception is formed by Egypt. The tendency to broadcast largely local news and for international news to be carried where it has a very local bearing is most extreme in Francophone Africa. The phenomenon is also to be seen in the Anglophone Africa study, where it is modified by the global interest in the major stories developing internally in Nigeria. A similar factor plays a part in news in Pakistan, while the Indian media focus on South Asian news. In the Arabic-speaking region, where once national news broadcasters reported almost exclusively on internal affairs, a different dynamic of 'national' identity has been facilitated by satellite television.

Local and regional broadcasters are able to localise news much more than international television broadcasters and usually more than international radio services. Examples of international broadcasters providing local alternative services are now largely limited to priority cases, such as the BBC's Hausa service and to the US-funded Radio Liberty 'surrogates'.

In smaller countries the local broadcasters have difficulty matching the attractions of the output of international commercial services. Their resources are too limited. But even in cases where considerable resources are expended by state-run operators and a considerable range of services provided, as in Egypt, it is outside players who are the most popular.

9.4. Mass or opinion former audiences

Faced with increased competition and scarce resources many of the traditional Western international broadcasters have refocused their efforts, funding the move into TV and the internet at least in part by reducing the number of language services on radio. This change has often been accompanied by a renewed focus on targeting 'opinion former' audiences, or people who are deemed to be strategically important by the broadcaster and often its funder. At one level this is a pragmatic response to the difficulty of localising professionally presented – and relatively expensive – TV services; it makes more sense to have a very well executed and attractive TV services in only three languages (as the French and British do) rather than compromise quality – and competitiveness – in order to multiply the different languages. However, as noted above, the result is that these services tend to have more international and less local content. The next phases of this project – on consumption and trust – will reveal the impact on audiences in more detail. For the moment it seems reasonable to posit that more international content might limit the audience among those who need local news, but at the same time opens up the possibility of reaching a more internationally focused audience, largely made up of opinion formers or others who feel they need to

know about the big international issues beyond their country. So while the news agenda analysis reveals the limited extent to which many international broadcasters cover local news, the degree to which this matters will depend both on factors affecting demand for local news from international suppliers (such as the quality and quantity of supply from within the local market) as well as the audience that the international broadcaster is trying to reach.

9.5. Areas for further research

Several unknowns about the impact of international broadcasters emerge from this study. In the case of increasingly significant broadcasting powers like Iran and China, little is known about the impact of their services in targeting diasporas and other audiences. While available audience research shows Iran and China as low-level competitors, we know they attach weight at senior political level to their international broadcasting efforts. We know less about how they measure impact and success.

Little has ever been known about the levels of resource, consumption or impact of the major religious broadcasters. At the very local level, little is known about the level of listening to and impact of the local community stations that have been established across the developing world with NGO and UNESCO support. For international broadcasters, the benefits of association with local partners is understood in terms of audience reach, but other branding aspects are less clear.

9.6. The role played by international broadcasters

Overall, there appears a strong case for the kind of international broadcasting conducted by countries like France, Germany, the UK and USA. Their audiences can be very substantial and their local status high, even in relation to local providers (for example, in Nigeria, Kenya and Pakistan). Elsewhere, they may be substantial and the services offered may not be available from local providers in terms of international news coverage and, in some cases, of local and regional news.

However, sufficient localisation to attract significant audiences is harder to achieve through television than through radio. Localisation is clearly possible through the internet, but internet availability is not yet adequate everywhere.

While the Western international broadcasters are by no means the only sources of international and local news, the alternative providers, who include Russia, China and Iran, provide news perspectives to which Western governments appear unwilling to hand the field. And there are other sources, local, regional and diaspora, with very different perspectives, which will fill any vacuum.

LITERATURE SURVEY AND REFERENCES

Aspects of international, regional and local broadcasting relevant to this work have been studied and written about over recent years.[115] The overall impact of changes in broadcasting brought about by a combination of technical development and regulatory change and leading specifically to satellite distribution has been considered from strategic, political and cultural viewpoints (Chalaby, 2003, 2005; Norris and Inglehart, 2009), and diminishing state control over news flows explored (Price, 2002). The rise and availability of 24-hour news channels is assessed and mapped (Cushion and Lewis, 2010).

The phenomenon of pan-Arab television has received most attention. The broad impact has been assessed (Kraidy et al., 2005; Hafez, 2008a; Pintak, 2008). The impact in relation to views of the West has been gauged (Tatham, 2006). Al-Jazeera has been the main focus of attention (Seib, 2008). The overall story has been told (Miles, 2005), the nature of the broadcaster examined (Zayani, 2005), its influence on other Middle East broadcasters described (Sakr, 2005). The content of Al-Jazeera's broadcasting has been compared with that of other international providers (Painter, 2008; Barkho, 2006, 2007).

The general development of broadcasting in the Middle East has been followed over time (Boyd, 1982; Rugh, 2004) and the recent emergence of differing forms of Islamic religious broadcasting noted (El-Sayed, 2009).

The history and recent development of broadcasting in India has been detailed (Kohli, 2003) and the impact of transnational broadcasting reviewed for India and wider South Asian markets (Thussu, 2005; Page and Crawley, 2005). The changing nature of news and its delivery as a form of entertainment has been studied (Thussu, 2007a, 2007b), as has the diversity of news now available (Cottle and Rai, 2008).

The general and specific development of the media in Africa has been tracked over time (Martin, 1991) and the historical interaction of media and democracy in Africa considered (Hyden et al., 2002; Tetley, 2008). Most recently, the interplay between media and identity in Africa have been studied (Njogu and Middleton, 2009), as has the development of transnational television (Mytton et al., 2005).

Interest in individual international broadcasters, such as Voice of America, has led to detailed accounts (Heil, 2003). The overall history of international broadcasting has been documented from both political and technical viewpoints (Wood, 1992). Recently, attention has been paid to new developments by international broadcasters, with often sceptical assessments of their likely impact. US developments have been reviewed (Price et al., 2008). An assessment of French international broadcasting has been made (Kuhn, 2010) and the intentions behind China's recent major developments analysed (Sun, 2010).

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[115] This is an initial survey of the literature. There will be a fuller literature review in the final report of the overall project.

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Appendix: News agenda analysis charts

Cameroon study

Table 1. Cameroon state television CRTV in English

1830 gmt 7, 8, 11, 12 January and 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	6		4		
Economic/ Environment	9		3		
Education/ Health/Science	4	1	2		
Security/Crime/ Law	6				
Religion/ Culture			2		
Media					
General/ Inc sport	5				1

Table 2. Cameroon state radio CRTV in English

1400 gmt 7, 8, 11, 12 January and 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	2		4		
Economic/ Environment	9		2		
Education/ Health/Science	5		2		
Security/Crime/ Law	3				
Religion/ Culture	2		2		
Media					
General/ Inc sport	2				6

Regional = African.

Table 3. Radio France Internationale in French

0730 gmt 7, 8, 11, 12 January and 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	2			29	
Economic/ Environment				6	2
Education/ Health/Science				1	
Security/Crime/ Law				11	2
Religion/ Culture					
Media					
General/ Inc sport				5	

Table 4. France 24 television news in French

2000 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					8
Economic/ Environment					2
Education/ Health/Science					
Security/Crime/ Law					3
Religion/ Culture					
Media					2
General/ Inc sport					5

Regional = African.

Senegal study

Table 5. Senegal state television RTS1 in French

2000 gmt 7, 8, 11, 12 January and 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	3	3	2		
Economic/ Environment	11		8		
Education/ Health/Science	5		1		
Security/Crime/ Law	1		1		
Religion/ Culture	9				
Media	1				
General/ Inc sport	4			4	9

Table 6. Senegal Walfadjri FM commercial radio in Wolof

0800 gmt 7, 8, 11, 12 January and 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	5				
Economic/ Environment	14		3		
Education/ Health/Science	10				
Security/Crime/ Law	4				
Religion/ Culture	8				
Media	7				
General/ Inc sport	2				

Regional = African.

Table 7. Radio France Internationale in French

0730 gmt 7, 8, 11, 12 January and 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	1			30	
Economic/ Environment				6	2
Education/ Health/Science				1	
Security/Crime/ Law				11	2
Religion/ Culture					
Media					
General/ Inc sport				5	

Table 8. France 24 television news in French

2000 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					8
Economic/ Environment					2
Education/ Health/Science					
Security/Crime/ Law					3
Religion/ Culture					
Media					2
General/ Inc sport					5

Regional = African.

Kenya study

Table 9. Kenya state KBC radio in Swahili

1000 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	2		1		
Economic/ Environment	2				
Education/ Health/Science	1				
Security/Crime/ Law	1	1			
Religion/ Culture					
Media					
General/ Inc sport					1

Table 10. BBC World Service radio in Swahili

1530 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				2	1
Economic/ Environment	1				
Education/ Health/Science					
Security/Crime/ Law					2
Religion/ Culture					
Media					
General/ Inc sport					1

Regional = African.

Table 11. Chinese Radio International (CRI) in Swahili

1700 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				4	
Economic/ Environment				1	4
Education/ Health/Science					
Security/Crime/ Law					
Religion/ Culture					
Media					
General/ Inc sport					

Table 12. KTN commercial television in English

1800 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	4				
Economic/ Environment	2				
Education/ Health/Science					
Security/Crime/ Law	1	1		1	
Religion/ Culture					
Media			1		
General/ Inc sport					

Regional = African.

Table 13. BBC World News television in English

1900 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				1	3
Economic/ Environment					
Education/ Health/Science					2
Security/Crime/ Law					1
Religion/ Culture					
Media					
General/ Inc sport					1

Table 14. CCTV-9 television in English

1500 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					3
Economic/ Environment					3
Education/ Health/Science					
Security/Crime/ Law					2
Religion/ Culture					1
Media					
General/ Inc sport					5

Regional = African.

Nigeria study

Table 15. Nigerian African Independent Television in English

1900 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	6				
Economic/ Environment	3				
Education/ Health/Science					
Security/Crime/ Law	1				
Religion/ Culture					
Media					
General/ Inc sport					

Table 16. Nigerian Metro FM radio (Lagos) in English

1800 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	3				
Economic/ Environment	2				
Education/ Health/Science	1				
Security/Crime/ Law	3				
Religion/ Culture					
Media					
General/ Inc sport					1

Regional = African.

Table 17. Nigerian Radio Katsina in Hausa

1200 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	2				
Economic/ Environment	2				
Education/ Health/Science	1				
Security/Crime/ Law					
Religion/ Culture					
Media					
General/ Inc sport					1

Table 18. Radio France Internationale in Hausa

0700 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	3			1	3
Economic/ Environment					1
Education/ Health/Science					
Security/Crime/ Law				2	2
Religion/ Culture					
Media					
General/ Inc sport					1

Regional = African.

Table 19. BBC World Service radio in Hausa

0530 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	6			1	1
Economic/ Environment					2
Education/ Health/Science					
Security/Crime/ Law					1
Religion/ Culture					
Media	1				
General/ Inc sport					

Table 20. Voice of America radio in Hausa

1500 gmt 10 Feb 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	2				
Economic/ Environment					
Education/ Health/Science	1				
Security/Crime/ Law					
Religion/ Culture					
Media					
General/ Inc sport					

Regional = African.

Algeria study

Table 21. Algerian A3C TV News in Arabic

1830 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	1	5	5	4	2
Economic/ Environment	8		3		
Education/ Health/Science					
Security/Crime/ Law	1	2	1	1	1
Religion/ Culture	2				
Media	1				
General/ Inc sport	5				1

Table 22. Al-Jazeera television news in Arabic

1200 gmt 9, 10 Feb 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				4	4
Economic/ Environment					3
Education/ Health/Science				1	
Security/Crime/ Law				8	1
Religion/ Culture					
Media				2	2
General/ Inc sport					1

Regional = African and Arabic-speaking Middle East.

Table 23. Al-Jazeera television *Maghreb Harvest* in Arabic

2100 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics		1		2	
Economic/ Environment				3	
Education/ Health/Science	1			1	
Security/Crime/ Law	1	1		1	
Religion/ Culture					
Media				3	
General/ Inc sport					

Table 24. Al-Arabiya television news in Arabic

1100 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				7	8
Economic/ Environment				1	1
Education/ Health/Science					
Security/Crime/ Law				3	2
Religion/ Culture				1	
Media				2	
General/ Inc sport				1	2

Regional = African and Arabic-speaking Middle East.

Table 25. France 24 television news in Arabic

1300 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				1	8
Economic/ Environment					1
Education/ Health/Science					
Security/Crime/ Law				1	2
Religion/ Culture					
Media					
General/ Inc sport					2

Table 26. France 24 television news in French

2000 gmt 9, 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					8
Economic/ Environment					2
Education/ Health/Science					
Security/Crime/ Law					3
Religion/ Culture					
Media					2
General/ Inc sport					5

Regional = African and Arabic-speaking Middle East.

Egypt study

Table 27. Nile News television in Arabic

1600 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				3	4
Economic/ Environment					
Education/ Health/Science					
Security/Crime/ Law		2		2	3
Religion/ Culture					
Media					
General/ Inc sport					

Table 28. Al-Jazeera television in Arabic

1200 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				1	2
Economic/ Environment					1
Education/ Health/Science				1	
Security/Crime/ Law				4	1
Religion/ Culture					
Media				1	1
General/ Inc sport					

Regional = Africa and Arabic-speaking Middle East.

Table 29. Al-Arabiya television in Arabic

1100 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				3	5
Economic/ Environment					
Education/ Health/Science					
Security/Crime/ Law				1	1
Religion/ Culture	1				
Media				1	
General/ Inc sport	1				1

Table 30. Iran Al-Alam television in Arabic

1700 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				2	6
Economic/ Environment					
Education/ Health/Science					
Security/Crime/ Law				4	2
Religion/ Culture					
Media					
General/ Inc sport				1	

Regional = Africa and Arabic-speaking Middle East.

Table 31. Chinese CCTV-9 television in Arabic

1200 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					3
Economic/ Environment					3
Education/ Health/Science					
Security/Crime/ Law					1
Religion/ Culture					5
Media					
General/ Inc sport					3

Table 32. Russia Today television in Arabic

1400 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					4
Economic/ Environment					2
Education/ Health/Science					
Security/Crime/ Law					2
Religion/ Culture					
Media					
General/ Inc sport					

Regional = Africa and Arabic-speaking Middle East.

Table 33. BBC Arabic Television

1700 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					3
Economic/ Environment					2
Education/ Health/Science					1
Security/Crime/ Law				3	2
Religion/ Culture					
Media					
General/ Inc sport					

Table 34. France 24 television in Arabic

1300 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					4
Economic/ Environment					1
Education/ Health/Science					
Security/Crime/ Law				1	
Religion/ Culture					
Media					
General/ Inc sport					1

Regional = Africa and Arabic-speaking Middle East.

Table 35. US Al-Hurra television in Arabic

2200 gmt 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics				3	1
Economic/ Environment					1
Education/ Health/Science				1	
Security/Crime/ Law					
Religion/ Culture					
Media					
General/ Inc sport					2

Regional = Africa and Arabic-speaking Middle East.

South Asia study

Table 36. Indian NDTV television in English

1530 gmt 9 and 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	8			2	1
Economic/ Environment	5				
Education/ Health/Science					
Security/Crime/ Law	4		1		
Religion/ Culture	3		1		
Media	1				
General/ Inc sport	5				1

Local = India/Pakistan. Regional = South Asia, including Afghanistan, Bangladesh, Sri Lanka, Nepal.

Table 37. Pakistan Dawn News television in English

1700 gmt 9 and 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	6			2	1
Economic/ Environment	8		2		
Education/ Health/Science	1				
Security/Crime/ Law	13		2		
Religion/ Culture	4		1		
Media					
General/ Inc sport	3		1	2	6

Table 38: CNN International television in English

1500 gmt 9 and 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					9
Economic/ Environment				1	6
Education/ Health/Science					
Security/Crime/ Law	1				
Religion/ Culture					
Media					
General/ Inc sport					5

Local = India/Pakistan. Regional = South Asia, including Afghanistan, Bangladesh, Sri Lanka, Nepal.

Table 39. Al-Jazeera television in English

1500 gmt 9 and 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics					12
Economic/ Environment	1				7
Education/ Health/Science					
Security/Crime/ Law	1			2	6
Religion/ Culture					
Media					
General/ Inc sport	1			1	4

Table 40. BBC World News television in English

1600 gmt 9 and 10 February 2010

	Local	Local/Regional	Local/International	Regional	International
Politics	1			6	4
Economic/ Environment	1				
Education/ Health/Science					1
Security/Crime/ Law	1			2	1
Religion/ Culture			1		
Media					1
General/ Inc sport	1			2	2

Local = India/Pakistan. Regional = South Asia, including Afghanistan, Bangladesh, Sri Lanka, Nepal.