

Southeast Asian Media: Patterns of Production and Consumption

*A survey of national media in 10 countries of
Southeast Asia*

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I. INTRODUCTION

This report is an overview of national media in 10 of the 11 countries of Southeast Asia, looking at the kind and variety of news and information that are available to the public on a national scale.

It is not intended to be comprehensive, given the constraints of time and resources, and while I have attempted to make entries as up-to-date as possible, I have had to rely on information that has no doubt already been overtaken by events. I apologise in advance for such shortcomings and would welcome comments or corrections. I am grateful to all those who helped via interviews, data and comments; many of you asked to remain nameless, so not everyone is cited in the footnotes.

Finding common themes in a region so disparate is hard. Perhaps the most obvious theme is that each country is so different that cookie-cutter approaches to any sort of endeavour, whether commercial, political, social or developmental, are likely to face significant challenges. The region spans some of the most repressive regimes and some of the most open, some of the most advanced countries technologically and some of the least developed, some of the most vibrant media landscapes and some of the most constrained.

That said, I would venture the following observations:

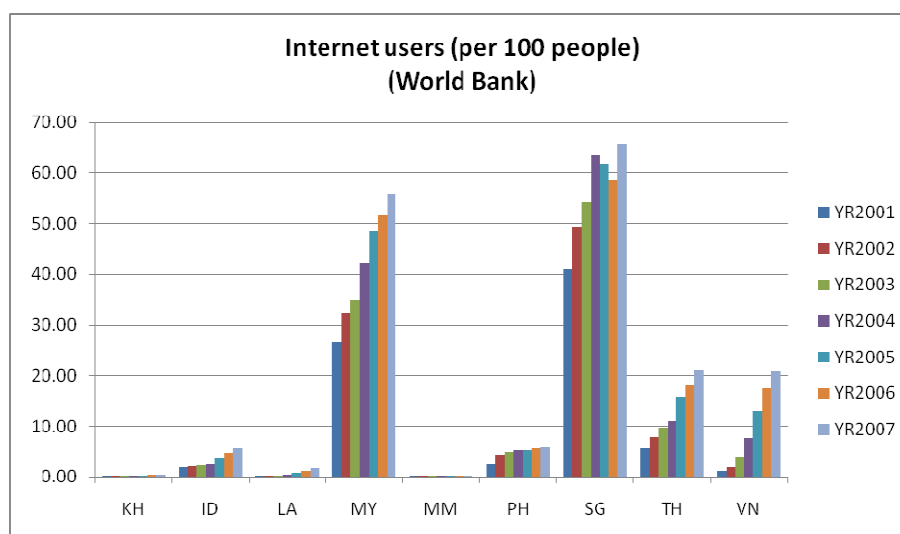
Online is the new underground

With the possible exception of Laos, journalists, bloggers and media practitioners have found ways to circumvent restrictions on news reporting, intimidation and censorship in all the countries surveyed here. From the anonymous stringers feeding stories to Burma's Mizzima and Irrawaddy to the bloggers of Vietnam, news finds a way out, whether the restrictions are technological, legal or physical. Indeed, in some countries traditional media are in danger of becoming irrelevant as political debate, the exchange of views and dissident voices go online.

The Internet is the new business model

The internet is rapidly changing the media landscape by re-defining what media are. Malaysiakini has not only established itself as a respected outlet; it has offered a model of subscription-based journalism that has inspired others outside the country. Web-only outlets in Indonesia, Vietnam and Singapore have also challenged the traditional model of media publishing.

**Chart 1. Internet users in Southeast Asia, breakdown by country
(% of population)**



Source: World Bank

A survey of the most popular domestic websites in Thailand, Philippines and Indonesia, for example, indicates that, at least for now, news websites dominate. The highlighted websites are all home-grown news sites.

Social is the new news

While this high interest is impressive, it's perhaps already being superseded by another trend: the rise of the social network. In Indonesia, for example, there are more than 12 million registered users of Facebook; Most of those have joined in the past six to eight months. The information shared on these networks challenges not only the traditional notion of newsmakers, but also the definition of news itself.¹

The cellphone is the new computer (and newspaper)

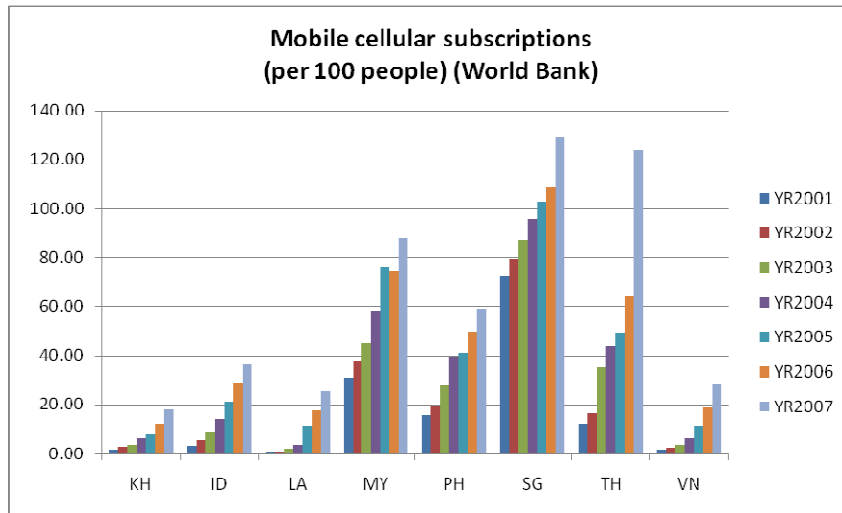
The cellphone is only going to accelerate the above trends. Southeast Asia has long been the region most willing to embrace mobile technology, partly because of the pent-up demand created by poor land-line infrastructure in the 1980s and 1990s.

From Short Message Service (SMS) in the Philippines and Indonesia to the rapid adoption of social networking on BlackBerry phones, for many Southeast Asians the cellphone has long been their most prized possession and, in many cases, their primary

¹ Facebook data, accessed November 2009.

access point to the Internet. As 3.5G (and 4G/WiMAX) spreads around the region, this love affair will continue, reshaping the media landscape further.

Chart 2. Mobile cellular subscriptions in Southeast Asia, breakdown by country (% of population)

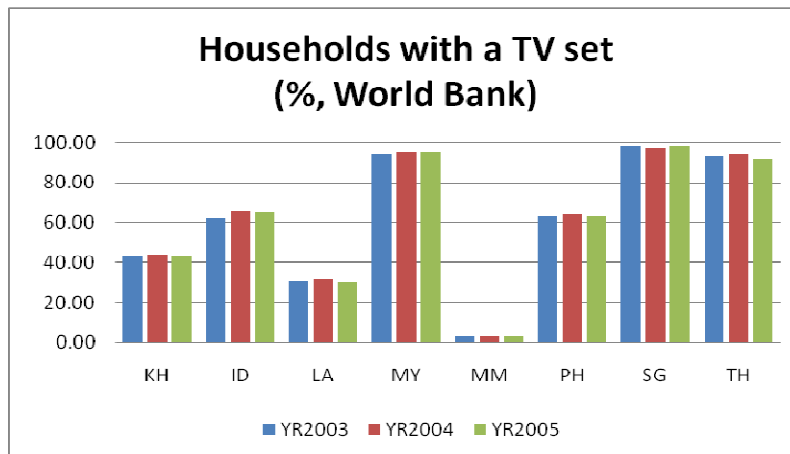


Source: World Bank

Television is still the main pipe

That said, television is still the main, if not only, source of political information for many Southeast Asians. Newspapers either do not reach them or are too expensive. Radio is often not sufficiently compelling. Only Burma sits low in the water for TV penetration, and even there both viewer and provider find a way past the obstacles.

**Chart 3. TV Households in Southeast Asia, breakdown by country
(% of total households)**



Source: World Bank

But while the content and choice on Southeast Asian television has grown over the past 15 years, television channels too often remain in the hands of a self-interested political elite, and, at least on a national scale, there's been little in the way of public service broadcasting to challenge it. The ongoing Thai experiment will be an interesting one to watch; Democratic Voice of Burma (DVB)'s satellite broadcasts into Burma are another.

New divides of access to information

These are all positives. But, while the rise of the internet and mobile telephony has helped circumvent infrastructural and political barriers in the flow of information, it is also creating new divides of access to information, between countries in the region, and within them:

- Developing vs developed
- Urban vs rural
- Middle vs lower class
- Young vs old
- Mobile vs landline or no phones
- Internet vs no Internet
- Broadband vs dialup
- Quality broadband vs low quality broadband

While mobile phone signals cover, for example, an average of 89 per cent of Asia's population, there are still some 184 million rural inhabitants estimated to be beyond the range of a mobile phone signal, including 40 million in Burma, 25 million in Vietnam and 22 million in Indonesia. Meanwhile Malaysia and Thailand boast high rural coverage.²

Broadband, meanwhile, is developing mainly in the "profitable cities and intercity corridors", leaving behind both provincial and rural dwellers, but also those low-income groups in urban areas. In 2007, an average of less than 5 per cent of the population of low-income economies was connected to broadband networks – and those were mainly in urban centres.³

Questioning the quality of internet connections in the face of such disparity may seem academic, but as web-based media move beyond text and image towards video and other bandwidth-intensive content, a divide is appearing between those countries that have and which lack infrastructure able to manage today's applications.

A study by the Saïd Business School at the University of Oxford, for example, listed Singapore top in the region for the quality of its broadband. That was, however, in the third of five tiers, behind Hong Kong, Taiwan, and much of Europe. Singapore was still way ahead of other Southeast Asian countries, with Thailand, Malaysia and the Philippines grouped in the middle of the next tier ("Below today's application threshold"). Indonesia and Vietnam were bottom of the tier.⁴ Overcoming these divides will be critical to the next phase of Southeast Asia's media evolution.

² International Telecommunication Union, *Measuring ICTs in villages and rural areas*, Geneva, 2008.

³ World Bank, *IC4D 2009: Extending Reach and Increasing Impact*, pp. 5-6, available online at <http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTINFORMATIONANDCOMMUNICATIONANDTECHNOLOGIES/EXTIC4D/0,,contentMDK:22229759~menuPK:5870649~pagePK:64168445~piPK:64168309~theSitePK:5870636,00.html> (accessed 13 January 2010). While such reports focus on the development aspects of such divides, the gap is also an informational one.

⁴ Saïd Business School, University of Oxford, University of Oviedo, *Broadband Quality Study 2009*, available online at <http://www.sbs.ox.ac.uk/newsandevents/Documents/BQS%202009%20final.doc> (accessed 13 January 2010).

II. COUNTRY HIGHLIGHTS

1. BURMA



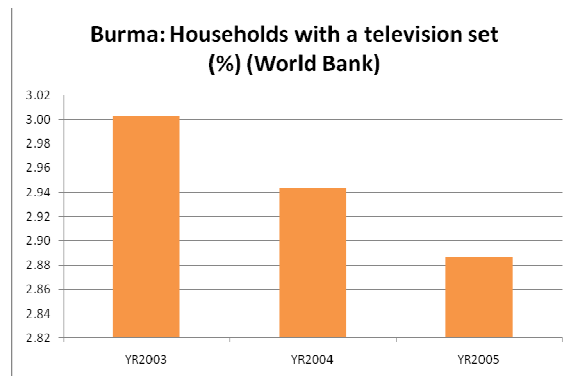
All media outlets are either owned by the Government or censored by them, creating what AMIC's country report calls a "culture that promotes self-censorship".⁵

But this summary conceals a much more dynamic and complex picture. While State media predominate, there are both vibrant independent printed media and an underground audience for media from outside the country, reflecting both Burma's long literary tradition and a continuing appetite for credible news.

⁵ L. Ho, *Myanmar in Asian Communication Handbook 2008*, Asia Media Information and Communication Centre (AMIC), Singapore, p 319.

1.1 Television

Chart 4. TV households in Burma (% of total households), 2003–2005



Television came late to Burma – in 1980 – and for the first five years was limited to Yangon and surrounding townships. As a means of information it is limited by the fact that only a small percentage of households have a television set. That only 10 per cent of the country’s territory has electricity is also a factor. This is not to say that Burmese don’t have access to television sets – sharing them with neighbours, via communal viewing teashops and guesthouses, or by paid viewing in rural areas.⁶

Indeed, while the government’s television channels are the only official sources of news, increasingly Burmese are turning to satellite television from abroad for their news, despite having to walk long distances to watch it – and facing the risk of being caught.⁷

The British-established Burma Broadcasting Service was renamed Myanmar Radio and Television (MRTV) in 1997. It remains under tight government control. Most of its programming centres on “the government’s achievements, army men who sing patriotic songs, and heavily censored news”.⁸ While the official channels carry excerpts from CNN, they are always delayed to give the censors time to check the programs’ content first.

There are two main TV networks: TV Myanmar, which is operated by the Myanmar Radio and Television, and TV Myawaddy, the army-run network, launched in 1995. MRTV launched its first television channel in 1981. By 2005 it had 195 relay stations.

⁶ Interview via email with Khin Maung Win, Deputy Director with DVB, November 2009.

⁷ Interview with the Thailand-based Swedish journalist Bertil Lintner, October 2009.

⁸ Interview with Bertil Lintner, *cit.*

In 2001, MRTV launched an English-language channel, MRTV-3 or Myanmar TV International, broadcasting government news via satellite 17 hours a day domestically, and eight hours a day in Europe and the U.S. A web-based streaming version was launched in 2002 (www.mrtv3.net.mm), followed by an online newspaper in 2003.

Two other channels, MRTV-4 and MRTV-5, have been launched – MRTV-4 in 2006 in a joint venture between MRTV and the privately held Forever Group – under the control of the Ministry of Information, apparently to counter local consumption of satellite TV, in particular DVB, a Norway-based exile channel. (*See below*)

Myawaddy Television is less news-focused, showing more music programs than the channel run by the Ministry of Information.

Since the 2007 uprising, the government has tried to crack down on Burmese watching foreign television via satellite. In early 2008 the government announced a 166-fold increase in the satellite TV licence fee. Despite such restrictions, satellite dishes are becoming more common all over Burma. These are tuned to international channels such as CNN and BBC. VOA has, since February 2009, aired a TV news program on Sunday morning and then repeated it through the week. VOA estimates that 12 per cent of urban households have satellite dishes.

Most interesting of these foreign channels is a station belonging to the exile group Democratic Voice of Burma (DVB), launched in 2005 and telecasting from London via satellite, aiming to reach 10 million people. It is the first independent Burmese TV station in history.¹⁰ Its content is not exclusively news or commentary; shows cover medical issues, music, training and movies. In 2009, they showed a dubbed version of the German feature film, *The Lives of Others*, about Stasi surveillance of the East Berlin cultural scene.¹¹

1.2 Radio

Radio is still the main means for Burmese to obtain information.

Until the launch of Yangon City FM in 2001, BBS/Myanmar Radio was the only radio station in the country. For years, its main broadcast centre was in Yangon, but in late 2007 moved to the new capital at Naypyidaw. Yangon Station now mostly relays Naypyidaw Station's programming. City FM is operated by the Yangon City Development Committee and is primarily an entertainment station.

⁹ A. Sennit, *VOA Burmese service launches new TV programme* (RNW website, 14 February 2009), available online at <http://blogs.rnw.nl/medianetwork/voa-burmese-service-launches-new-tv-programme> (Accessed 13 January 2010)

¹⁰ Interview with Bertil Lintner, *cit.*

¹¹ Interview with Bertil Lintner, *cit.*

Many Burmese listen to the Burmese-language services of foreign broadcasting stations, mainly the BBC and the VOA. VOA broadcasts 3.5 hours of Burmese language programming on shortwave radio, the BBC three hours. The BBC noticed attempted jamming of its broadcasts for the first time in its history in 1995, after carrying an interview with Aung San Suu Kyi.¹²

Other radio services include All-India Radio, Radio Thailand, China Radio International, the Voice of Malaysia, NHK (*Nippon Hōsō Kyōkai*, Japan Broadcasting Corporation) Radio Japan, and a Christian radio station based in the Philippines. In August 2009, Radio Australia announced plans to offer its own Burmese service, initially in English and later in Burmese.¹³

In February 1997, Radio Free Asia (RFA), which is financed by U.S. government funds, started a Burmese language service. The Norway-based Democratic Voice of Burma (DVB) has been broadcasting to Burma since 1992, claiming to reach “millions” of listeners. Signals are beamed via transmitters in Germany, Madagascar and Armenia.

1.3 Print

There are five daily newspapers, all published by the Government. Only the Government can publish daily newspapers.¹⁴

The longest-running circulated paper in Burma is the *New Light of Myanmar*, which takes most of its domestic news from the Myanmar News Agency (MNA), which is also State-run. (The paper had been called *The Working People's Daily* until 1993.) Foreign news is drawn mostly from Reuters, although the articles are heavily censored. *The New Light* has a circulation of 23,500. *Myanmar Alin* (sometimes *Myanma Alin*), is the Burmese edition of the *New Light* and also the organ of the ruling State Peace and Development Council, or SPDC, with a circulation of 174,700. *Myanmar Alin* was the name of a newspaper founded in 1914 and nationalised in 1969.¹⁵

The other two State-run print outlets are the Burmese language *Kyehmon* (sometimes *Kyemon* or *Kyay Hmon*, ‘The Mirror’), with a circulation of about 200,000, set up in the mid 1990s by the Office of the Mayor of Rangoon through the Ministry of Information.

¹² “Burmese jam BBC”, World News, *The Independent*, 22 August 1995, available online at <http://www.independent.co.uk/news/world/burmese-jam-bbc-1597400.html> (accessed 13 January 2010).

¹³ “Radio Australia Plans Launch of Services to Burma”, Radio Australia Press Release, 12 August 2009.

¹⁴ Interview with Bertil Lintner, *cit.*

¹⁵ Interview with Bertil Lintner, *cit.*

At around the same time the Rangoon City Development Committee set up a more populist newspaper called *Myo daw tha-din* (City News); the Office of the Mayor of Mandalay also launched its own newspaper, the *Yadanabon* daily (Yadanabon being the old name for Mandalay). This has a circulation of about 20,000.¹⁶

There has been talk of the junta-created Union Solidarity and Development Association (USDA), a quasi political party, establishing its own newspaper ahead of the 2010 elections, but so far nothing has come of it. There has also been talk of allowing an independent, commercial daily newspaper.¹⁷

All newspaper articles must pass through the censor board at the Press Scrutiny and Registration Division set up by the Ministry of Information in 2005. Under new censorship rules, articles, headlines and covers need prior approval. This leads to widespread self-censorship, not least because of the heavy cost of reprinting or excising material that does not pass scrutiny of the Press Scrutiny Board (PSB).

But this doesn't mean that Burma's printed media are dead. For one thing, the censorship process does not always work as it is supposed to: Reporters Without Borders has said that some publications are able to carry reports that would normally be censored because of what it, in 2008, called "rampant corruption within the censorship board".¹⁸

Moreover, there is a dynamic private sector media – perhaps 500 (non-daily) newspapers, journals and magazines which, according to a long-time observer Bertil Lintner, "may operate under some of the most restrictive laws and regulations in the world, but are nevertheless becoming bolder and more outspoken in their reporting".¹⁹

Although these publications have tiny circulations – lacking the financing, the distribution, and a market willing to pay for individual copies – they nurture Burma's longstanding literary culture, and provide an outlet for the many Burmese wanting to get involved in politics and development. Journalists and editors get around censorship by imaginative writing that lets people read between the lines. The biggest circulation news publication is probably *7-Day News*, which appears every Thursday, and has an estimated circulation of 35,000 (its official circulation is 1,000, but such figures are kept low for tax reasons). Other publications have higher circulation but cover issues such as sport.

¹⁶ Interview with Bertil Lintner, *cit.*

¹⁷ P. Olszewski, *Myanmar Junta Preparing To Broaden Its Media Arsenal In The Run Up To The 2010 Election*, Media Blab, 16 March 2009.

¹⁸ Reporters Without Borders, "Myanmar Times and other media threatened and sanctioned by military censors", 16 January 2008, available online at <http://www.rsf.org/Myanmar-Times-and-other-media.html> (accessed 13 January 2010).

¹⁹ Interview with Bertil Lintner, *cit.*

Journalists still face problems if they step beyond the boundaries of their publications. Editors of at least six publications – including *7-Day News* – were warned in October 2008 not to have contact with exile news organisations (*see below*) and Western news agencies. The PSB also censored articles on the anniversary of Nargis in May 2009, restricting any content that reported on the severity of destruction or people still struggling to rebuild their lives. Two journalists were released under an amnesty in September after being detained for photographing a demonstration of Nargis survivors in June 2008.²⁰

Myanmar Times, an English-language paper set up by an Australian in 2000, has an estimated circulation of 50,000 for its Burmese edition, and 7,000 for its English-language edition. Some say it may have benefited from privileged access to senior generals and ministers, meaning that its stories did not have to pass through the usual channels of censorship. The publication was as a result able to “push the envelope on the boundaries of content”²¹ in covering sensitive domestic issues such as the status of Aung San Suu Kyi and the visits of UN special investigators to Burma, although after the fall of the paper’s protectors, this no longer seems to be the case. One shareholder, Sonny Swe, was imprisoned and his shares bought by Dr Tin Tun Oo, a publisher and secretary of the state-sponsored Myanmar Writers and Journalists Association. In January 2008, the Burmese-language edition of the paper was sanctioned after having run a story that was not approved. (The story was an AFP report about the 167-fold increase in satellite licence fees.) Reporters Without Borders reported that the government ordered that four of the publication’s journalists be fired.²²

Bringing printed publications into Burma is very risky, and can lead to jail sentences, or even worse.

1.4 Online

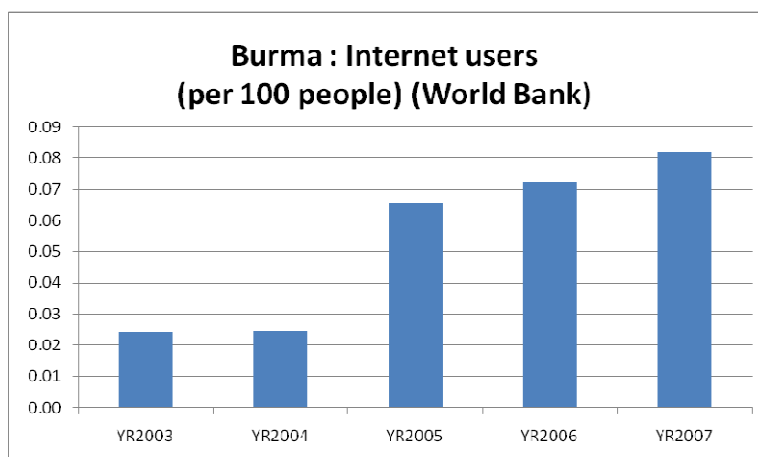
The internet is strictly controlled. Government approval is usually needed to own a network-ready computer, meaning most Burmese access the Internet via Internet cafés. There are no useful estimates of Internet users in Burma: statistics cite anything between 40,000 and 300,000.²³ Whichever is right, Burma is one of 30 countries with less than 1 per cent internet penetration.

²⁰ Committee to Protect Journalists (CPJ), “Two journalists released, 12 still languish in Burma’s jails”, 2009.

²¹ L. Ho, *Myanmar in Asian Communication Handbook 2008*, *cit.*

²² AP Worldstream, “Myanmar weekly newspaper skips issue after drawing censors’ wrath”, 2005, Irrawaddy; Committee to Protect Journalists, “Attacks on the Press in 2008”, 2009; *World Press Trends 2009: China, India and Southeast Asia*, 2009.

²³ ITU, World Bank, OpenNet.

Chart 5. Internet users in Burma (% of population), 2003–2007

Source: World Bank

The Government has announced plans to increase the number of connections, and has introduced a WiMAX network in Yangon in mid 2008.²⁴ The Government blocks access to websites critical of the government, pornographic and gambling sites, popular webmail and blogging services, as well as those belonging to Burmese exile groups and foreign media. Sophisticated users, however, know how to use proxy servers to get around such blocks. The two official Internet Service Providers (ISP) do not appear to have the same list of blocked sites, meaning that some sites are available via one ISP but not via the other. Since 2007, when protests prompted a flood of images, text and video out of the country, the Government has cracked down on usage, briefly closing the internet down entirely.

The CPJ says the Government, which shut down the internet altogether during a popular uprising in 2007, has the capability to monitor e-mail and other communication methods and to block users from viewing Web sites of political opposition groups, according to OpenNet Initiative. At least two bloggers are now in prison. Maung Thura, a comedian popularly known as Zarganar, is serving a 59-year

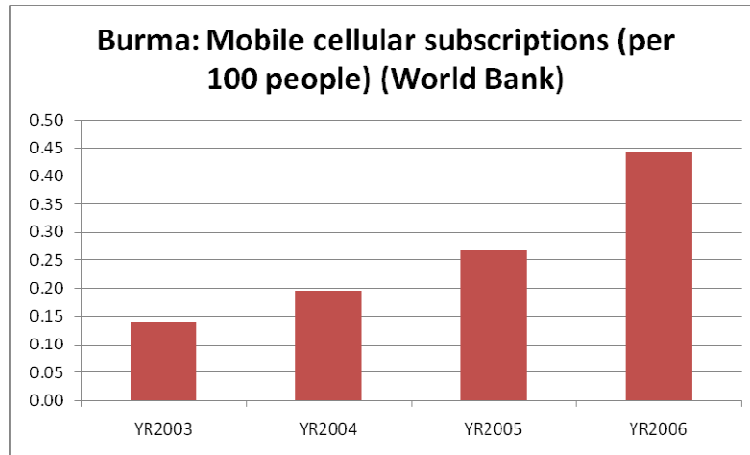
²⁴ RedLink, a private company, claims coverage of Yangon and Mandalay (see their website at <http://www.redlink.net.mm/wimax.htm>, accessed 14 January 2010). The Government is also running its own WiMAX service (Mizzima, “WiMAX Broadband connection by private firm in Burma”, 24 October 2008, available online at <http://www.mizzima.com/news/inside-burma/1186-wimax-broadband-connection-by-private-firm-in-burma.html>, accessed 14 January 2010).

prison term for disseminating video footage after Cyclone Nargis in 2008. Since then blogging has virtually ceased inside Burma, according to Lintner.²⁵

1.5 Telecommunications

There are 500,000 landlines and 213,000 mobile phones, according to the CIA fact book. Other figures estimate 1.1 telephone lines per 100 people, against an average 23.1 in the Asia Pacific region. Cellular reach is even lower, with about 0.4 cellular subscriptions per 100 people.

Chart 6. Mobile cellular subscriptions in Burma (% of population), 2003–2006



1.6 Journalists

Journalists are controlled in part by a system of informants and surveillance. In 2006, according to AMIC, generals handpicked some editors and publishers known to have close links to the Information Minister and offered them positions in the state-controlled Myanmar Writers and Journalists Association.²⁶

²⁵ CPJ, “Attacks on the Press in 2008: Burma”, February 2009, available online at <http://cpj.org/2009/02/attacks-on-the-press-in-2008-burma.php> (accessed 14 January 2010). See also WAN-IFRA, “World Press Trends: China, India and Southeast Asia, 2009”, Singapore, 2009.

²⁶ L. Ho, *Myanmar in Asian Communication Handbook 2008*, cit., p. 321.

1.7 External reporting

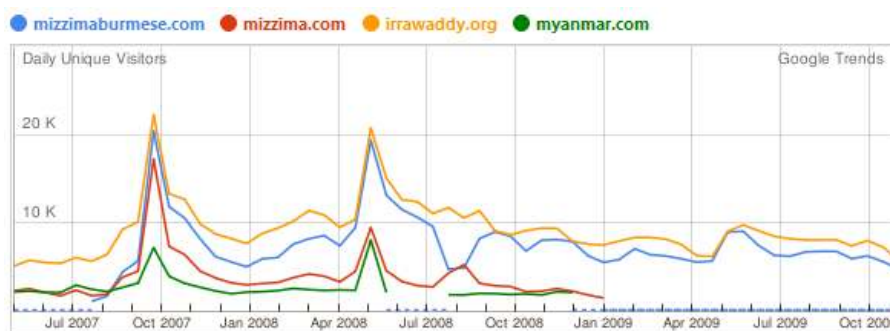
Dissident media have been active since 1988, when dozens of makeshift newspapers and journals mushroomed in the hiatus before the Sept 18 crackdown. When pro-democracy activists fled to Thailand, they set up newsletters, in print and then later also online.

The *Irrawaddy*, for example, began as *Burma Issues* in 1990, and is now a respected monthly magazine (circulation: 3,000) and a daily updated website based in the northern Thai city of Chiangmai. It currently has about seven permanent correspondents inside the country with whom it has regular contact. “They are doing a very risky job inside the country,” says editor Kyaw Zwa Moe, “but they know what they are doing.” A survey conducted by staff in 2008 indicated that about 30 per cent of their readers are inside Burma.²⁷

Mizzima, set up by three Burmese exiles in New Delhi in 1998, carries both an English and a Burmese version, based on information passed back by stringers and ‘correspondents’ inside the country. Mizzima is part of a larger network of websites, Burma News International, which shares stories and republishes content. Mizzima also produces a print monthly, and television content, both for its website (mizzima.tv) and for rebroadcast by DVB.

Traffic to the main Burmese websites indicates the popularity of Mizzima and Irrawaddy; the spike coincides with the unrest of 2007 and typhoon Nargis in 2008. Overall numbers, however, remain relatively small.

Chart 7. Traffic to the main Burmese websites by unique daily visitors (2007–2009)

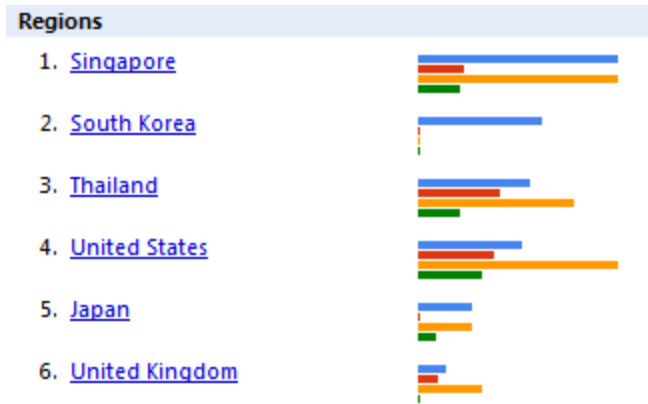


Source: Google Trends, Nov 2009 (<http://bit.ly/4ttcna>)

²⁷ Interview with editor Kzaw Zwa Moe, October 2009.

As a footnote to the above chart, one can see that this traffic is primarily coming from those countries with significant exile Burmese communities.

Chart 8. Origin of traffic to the main Burmese websites



Source: Google Trends, 2009

2. CAMBODIA



Most media in Cambodia are private but affiliated in some way with a political party. Most media outlets are not owned directly by politicians, but by private citizens, albeit with a political agenda.

So while there is no government censorship, “partisan influence leads to strongly biased news coverage”, as the Asia Media Directory puts it.²⁸

2.1 Television

Television is still limited in Cambodia: only 37 per cent of Cambodians say they use it as their primary source of information. Two thirds of households have no sets at home; until recently none of the seven major television stations had the capability of broadcasting throughout the country. AMIC estimated 50,000 cable TV subscribers in 2006, and 10,000 home satellite antennas.²⁹

This changed with the arrival of a local satellite provider in 2008, providing access to every local TV network from anywhere in the country via a low-cost Ku-band satellite dish set. Cambodian DTV Network Limited, or CDN, is a subsidiary of Thaicom, a satellite operator, established in 2007 to provide Decho TV (also TECHO-DTV) which will carry all local Khmer channels for free, as well as some foreign channels, and possible pay-tv services in the future. But the spread of satellite TV may take some

²⁸ J. Maloy, “Cambodia” in *Asia Media Directory* (Werner vom Busch & Alastair Carthew, eds.), Konrad Adenauer Stiftung, Singapore, 2008, p. 34; Confidential interviews.

²⁹ P. Kea, “Cambodia”, in *Asian Communication Handbook 2008*, Asia Media Information and Communication Centre, Singapore, pp. 155ff.

time: each satellite and set top box costs US\$78. As of July, the company said it had distributed 50,000 sets. The service was officially launched in July 2009.³⁰

TV is considered to be strongly under the influence of the ruling Cambodian People's Party (CPP). News content usually constitutes either officials handing out rice, or newspaper reports read aloud on morning television. This greatly increases the reach of the print media in a country with an adult literacy rate of less than 70 per cent. However, the practice highlights the rudimentary state of local broadcast journalism.

There are 11 TV stations nationwide, including two relay stations with French and Vietnamese broadcasts, as well as 12 regional low-power stations (as of 2006). They include:

- Apsara Television (TV11): operated (with Apsara Radio) by the Apsara Media Group, which has close ties to the CPP.
- Cambodian Television Network (CTN): the country's most modern station, launched in 2003, boasts higher production values than other networks. It has changed the game because it brings a Western style approach in contrast to the army and government stations, which still show officials handing out rice. They have to be careful, according to one Phnom Penh-based journalist, but they try to be objective. There's a lot more non-news content on the channel, though, including cooking, health and entertainment. Its owners are Royal Group (www.royalgroup.com.kh) which also owns MobiTel, a mobile phone company.³¹
- Khmer TV (TV9): The first private TV channel, founded in 1993 to support FUNCINPEC, then a royalist organization. It is now said to be owned by a senior minister and supportive of the CPP.³²
- National Television of Cambodia (TVK): owned by Ministry of Information, founded in 1966.
- Phnom Penh Municipal Television (TV3): operated, along with FM 103, in a joint venture between Phnom Penh municipality and Thai Media Company KCS. Was the most popular channel but now eclipsed by CTN. One hour news cast covers most important political issues, as well as unrepresented parties.
- Royal Cambodian Armed Forces Television (TV5) (with Radio FM 98): owned by the Cambodian Ministry of Defence and run by MICA Media Co. Ltd, part of the Thai media conglomerate Kantana. It is one of the most watched TV

³⁰ Agence Kampuchea Presse, "Information minister launches Cambodia's first digital TV system", 13 July 2009.

³¹ Confidential interview; company website.

³² Interview via email with media lawyer Panhavuth Long, November 2009.

stations in Cambodia, with the widest reach; its news coverage is under the control of the Ministry of Defence, and focuses only on government news.

- MyTV. Launched by CTN in early 2009, MYTV is a free-to-air commercial channel aimed at Cambodia's youth market.³³

2.1.1 TV technologies

Cambodia has plans to install digital television by 2015. South Korea has asked Cambodia to test its Digital Multimedia Broadcasting system (DMB), which would allow users to watch TV on the mobile phone and on the move.³⁴ The government reportedly rejected the licence application in October 2009.³⁵

2.2 Radio

Radio is still the preferred way to get information: A survey by the International Republican Institute in 2008 indicated that more than 81 per cent of respondents heard about the Khmer Rouge trial from radio, against 67 per cent from TV.³⁶ Most radio stations are considered to be under CPP influence. FUNCINPEC, a junior partner in Hun Sen's government, has clear control over two major radio stations and three smaller ones in the Northwest. Radio Beehive, the most listened to in Cambodia, has apparently been off the air for some time; its owner has twice been jailed.

- Radio Beehive FM 105 MHz – the most listened to in Cambodia, one of the few totally independent broadcast media outlets. Content tends to skew towards the opposition, partly because it is the only one willing to sell time to opposition parties. Owner is Mam Sonando, an outspoken but unaffiliated activist who was briefly jailed in 2005. (As of November 2009 its status is unclear. Efforts to contact the station were not successful.)
- Phnom Penh Radio FM 103 MHz
- Radio Sarika FM 106.5MHz, set up by the Cambodian Center for Independent Media (CCIM). During normal operations Sarika features radio programs

³³ A. Sennitt, "New TV Channel To Launch in Cambodia", 2008, Media Network, available online at <http://blogs.rnw.nl/medianetwork/new-tv-channel-to-launch-in-cambodia> (accessed 14 January 2010).

³⁴ Agence Kampuchea Presse, "Cambodia supports South Korea's digital multimedia broadcasting system testing", 11 September 2009.

³⁵ Interview with Panhavuth Long, *cit.*

³⁶ IRI/USAID, "Survey of Cambodian Public Opinion, January-February 2008", available online at: <http://www.iri.org/asia/cambodia/2008%20May%2027%20Survey%20of%20Cambodian%20Public%20Opinion,%20January%2027-February%2026,%202008.pdf>

produced by Voice of Democracy (VOD), the radio program production of CCIM, filling up prime time hours with news reporting and hourly breaking news. The rest of the airtime is filled with live radio discussions and thematic radio programs with the support of various local and international donors.³⁷

- Apsara Radio FM 97 MHz
- National Radio of Cambodia AM 918 kHz and FM 96 – owned by Ministry of Information, primarily focuses on government functions and CPP activities.
- Radio Khmer FM 107 MHz
- Royal Cambodia Armed Forces Radio FM 98 MHz
- Women’s Media Centre (WMC) Radio FM 102 MHz founded in 1998, a non-profit focusing mainly on women’s issues. Popular and also buys programming time on local TV stations.

The most respected Khmer-language news services are foreign: Radio Free Asia (RFA), launched in 1997, and the Voice of America, which relay on Radio Beehive and Radio WMC. However the future of RFA is in doubt after a factional dispute within the Phnom Penh office, leading to the dismissal of several employees and a strike by other reporters in July. As of November the issue remained unresolved; Information Minister Khieu Kanharith was quoted as saying on 31 October 2009 that he was investigating RFA’s status as a registered outlet and whether it had broken labour laws.³⁸

2.3 Print

The newspaper world is less vibrant today than five years ago, but this may actually have helped reduce some of the irresponsible reporting, according to one editor.³⁹ The English language press has an easier time, primarily because it is not scrutinized so carefully by the authorities. But the Khmer press still faces the possibility of law suits.

More than 100 daily newspapers are registered in Cambodia, but only about 25 produce a daily product (the rest appear only on special occasions). Only 1 per cent of Cambodians use print as their primary source of information. In part this is because of high illiteracy rates – only 67.7 per cent of adults are literate, according to UNESCO figures. Distribution is also a problem: roads in many areas are poor, and the postal system is “far from comprehensive”.⁴⁰ There are, however, signs that newspapers are

³⁷ Cambodian Center for Independent Media website, http://ccimcambodia.org/index.php?option=com_content&view=category&layout=blog&id=13&Itemid=9 Found Jan 2010

³⁸ CAAI News Media, “Information Ministry Says RFA Not Registered”, 2009.

³⁹ Confidential interview.

⁴⁰ J. Maloy, cit., p. 34.

becoming more popular: of all the Southeast Asian countries in this report, paid-for circulation has risen the most in Cambodia (9 per cent over the past year).

Many newspapers are run by political parties or individual politicians; only the foreign language papers are considered to be free of overt political influence.

Of national mass-circulation dailies the big three are *Kampuchea Thmei*, *Koh Santepheap* and *Rasmei Kampuchea*. Articles in these papers will get cited and picked up by television and radio. This is the full list:

- *Chakraval Daily*
- *Kampuchea Thmei Daily* (owned by the daughter of Hun Sen)⁴¹
- *Kampuchea Thnai Nes* (Cambodia Today)
- *Khmer Amatak* – pro Norodom Ranariddh Party: Circulation 1,000-10,000
- *Kanychok Sangkhum* (see below)
- *Koh Santepheap* (Island of Peace) – CPP affiliated; many of its journalists also work at the Interior Ministry, which helps its main focus on crime.
- *Moneaksekar Khmer* (Khmer Conscience) – Published by the Sam Rainsy Party (SRP). Circulation 5,000 to 6,000
- *Rasmei Kampuchea* (Light of Kampuchea) – Cambodia’s largest daily, according to some sources, it circulates about 18,000 copies; established in 1993
- *Samleng Yuvachun* (Voice of Khmer Youth) Circulation: 3,000
- *Udomkate Khmer* (Khmer Ideal)
- *Wat Phnom Daily*
- *Commercial News* (Chinese) 5,000
- *Raksmei Angkor*

English-language newspapers have smaller circulations and chequered existences.

- *Deum Ampil* – available both in Khmer and English, in print and online, was set up by Soy Sopheap, an anchorman with CTN who has also set up a magazine, and plans to set up a radio station, Deum Ampil Radio, by the end of the year.
- *The Cambodia Daily* – first English-language daily with selected Khmer translations. 8,000 circulation

⁴¹ Interview with Panhavuth Long, *cit.*

- *The Mekong Times* – English newspaper with Khmer translations. Publication ceased in August 2008. Has not reopened.
- *The Mirror* – Published by Open Forum of Cambodia, this is a weekly English-language overview of the Khmer-language press, based mainly on clippings from other publications. It also publishes a weekly Khmer summary called *Kanychok Sangkhum*.
- *Phnom Penh Post* – Cambodia’s oldest English-language paper. Originally fortnightly, it is now daily, with a circulation of 4,000 to 5,000. Its website gets up to 20,000 hits when a major story breaks. The paper won two Society of Publishers in Asia (SOPA) awards in July 2009. It recently launched a Khmer edition.

There is also a news agency, Agence Kampuchea Presse (AKP), which employed about 250 journalists in 2006 and publishes government news. AKP is a government body under the direct supervision of the Ministry of Information. AKP issues the daily AKP news bulletin and the monthly *Kambuja Magazine*.

2.4 Online

Internet connectivity in Cambodia has been hampered by “an acute shortage of IT professionals, high cost of telecommunications, poor infrastructure and delays in adopting the Khmer Unicode script”, according to Cultural Profiles, a British non-governmental website whose content is created in coordination with ministry partners from the country in question.⁴²

Usage is mainly limited to urban areas. Broadband is slow and expensive – US\$40 a month for the cheapest service, in 2008 – and it has about 5,000 subscribers. There are about 500 Internet cafés, typically charging 50 US cents per hour. Most are located in tourist hotspots.⁴³

Political parties, however, are increasingly using the net to get their word across: opposition Sam Rainsy Party promotes itself through its website and a party blog, Khmer Intelligence.⁴⁴ The first bloggers’ conference was held in 2007.

Southeast Asian Press Alliance (SEAPA) reports of a plan by the Cambodian government to regulate the Internet through a law. With the prospect of the new regulation, Um Sarin, president of SEAPA partner the Cambodian Association for the Protection of Journalists, said:

⁴² Ministry of Culture and Fine Arts, *Cambodia Cultural Profile: Internet* (2008, Visiting Arts)

⁴³ Confidential interview.

⁴⁴ KI-Media, “Khmer Rouge War crimes persecutor is appointed”, BBC News, 2009, available online at <http://www.ki-media.blogspot.com/> (accessed 14 January 2010).

It seems the government is applying autocratic rules to control everything about communication. We worry that this law would be used as a tool to control and clamp down on bloggers who harshly criticize the government and we appeal for the government to reconsider its current plan.⁴⁵

2.5 Telecommunications

With very little left of Cambodia's infrastructure after the Khmer Rouge era, and not much investment in the decade after the Vietnam takeover, the country has largely bypassed rebuilding the fixed-line market and embraced other technologies. The number of fixed lines, for example, has remained fairly static at about 45,000 in 2008, most of them in the capital.⁴⁶

Cell phones have taken up the slack: they account for more than 99 per cent of the total number of telephone services in the country. By 2009, there were nine mobile operators competing in a market that has been growing at more than 50 per cent a year. Official figures recorded 4.3 million mobile subscribers (a penetration of 29 per cent) in the country by March 2009; the figure has probably risen to 6 million by now.⁴⁷ There is little sign of the market easing up. Thai communications company Thaicom Plc subsidiary Mfone for example, claims 950,264 subscribers (including prepaid) at the end of the second quarter of 2009, a jump of 65.6 per cent over the same quarter the previous year.⁴⁸

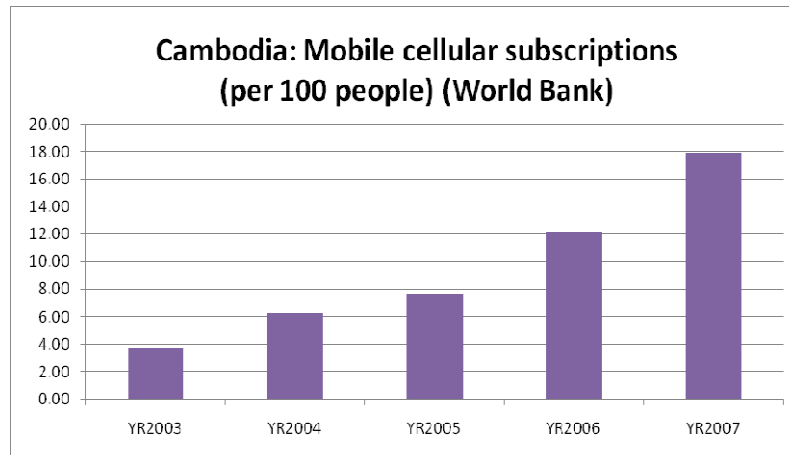
⁴⁵ See SEAPA website: SEAPA, Available online at <http://www.seapabkk.org/newdesign/fellowshipsdetail.php?No=1018> (accessed 14 January 2010).

⁴⁶ Paul Budde Communication Pty Ltd., "Cambodia – Telecoms, Mobile, Internet & Forecasts", September 2009, pp. 32.

⁴⁷ Confidential email, December 2009. The actual number of active users is significantly lower; based on actual calls the number is 2.9 million subscribers. This is due to the high number of unused promotional SIM cards.

⁴⁸ Thaicom, Managements Discussion and Analysis (2009, The Stock Exchange of Thailand), available online at <http://www.set.or.th/> (accessed 14 January 2010).

Chart 9. Mobile cellular penetration in Cambodia (% of total population), 2003–2007



Source: World Bank

The problems that arise from this strong demand and competition are familiar in the region: a lack of investment in maintenance and capacity, leading to drop-outs and, for users of 3G and High-Speed Downlink Packet Access (*HSDPA*) data connections, poor performance. Although it is possible to subscribe to Internet services with a Universal Serial Bus (USB) dongle, services are too slow to be useful.⁴⁹

The lack of fixed lines has also inhibited internet take-up in dial-up and *Asymmetric Digital Subscriber Line (ADSL)*, which require copper lines. Some offer Wi-Fi hotspots but these are small scale deployments, and not particularly reliable. Some companies are now laying their own fibre cable backbones around the country, with the last mile between junction and customer wireless. Chinese TV Company, for example, has installed 2,200 km of ‘underground Optical cable grids’ in Cambodia.⁵⁰

Internet services that do work, then, don’t come cheap: TeleSURF (www.telesurf.com.kh) claims to be “Cambodia’s first broadband service with a coverage that extends to all the country’s major cities”. The fees, however, are beyond the average Cambodian’s reach: from US\$35 a month for a slow connection and a

⁴⁹ Confidential interview with a Phnom Penh-based telecoms executive, September 2009.

⁵⁰ T. Peou, “Information Minister Meets President of Chinese TV Cable Company”, AKP, monitored by BBC, 23 April 2009.

500 MB download limit to the top-of-the-range US\$949 for a 512 Kbps connection and a 60 GB download limit.⁵¹

One company, Chuan Wei, a part of the Thai Boon Roong conglomerate, holds the sole licence to operate a nationwide WiMAX mobility network in Cambodia. The operator may have to scale back its original promises of serving one million business subscribers within two years of service launch. But a WiMAX network may well be the best bet not only to bring broadband Internet to the hinterland, but telephony as well.⁵²

2.6 Journalists

Prison sentences for defamation were eliminated in 2006, but a similar offence of ‘disinformation’ can still land someone in jail. The editor of the main opposition paper, *Moneaksekar Khmer*, was jailed for a week on this charge in 2008 after the CPP foreign affairs minister filed a suit. A journalist for the same paper was murdered, along with his son, during the same campaign. Their killers have yet to be caught. The incident had a chilling effect on local journalists, according to SEAPA.⁵³

The editor of the ‘opposition’ daily *Khmer Machas Srok* was jailed on 26 June 2009 as a result of a Government complaint about articles accusing the deputy Prime Minister of corruption.⁵⁴

The number of lawsuits filed against journalists fell from eight to two between 2007/8 and 2008/9 (May to May), but threats against them rose from seven to 14. Ten journalists were arrested, against six in the previous period.⁵⁵

Fears of further intimidation against free speech were heightened when, in early October 2009, the National Assembly passed articles of a new penal code related to “defamation, insult and exaggeration of information”. The new code does not abolish

⁵¹ Confidential interview, December 2009: high costs of connections to the Internet backbone and a lack of international capacity reduce the real speeds of these connections further.

⁵² Optical Networks Daily, 2009; Interview with a telecom industry executive.

⁵³ SEAPA, “Looking back, looking ahead: Press Freedom in Southeast Asia”, available online at <http://www.seapabkk.org/newdesign/fellowshipsdetail.php?No=1018> (accessed 14 January 2010).

⁵⁴ P. Olszewski, “Defamation The New Weapon Aimed At Cambodian Journalists”, Media Blab, 1 July 2009.

⁵⁵ SEAPA, “Club of Cambodia Journalists: Media Situation”, available online at http://www.ccj.com.kh/ccj/index.php?option=com_ccjnewspage&Itemid=32 (accessed 14 January 2010).

penalties under the previous code introduced by the UN in 1992, but imposes fines of up to US\$2,400. The code fails, however, to decriminalise defamation, as was hoped.⁵⁶

Global websites most accessed from Cambodia – Source: Alexa

- <http://google.com/>
- <http://yahoo.com/>
- <http://google.com.kh/>
- <http://facebook.com/>
- <http://blogger.com/>
- <http://youtube.com/>
- <http://dap-news.com/>
- <http://wikipedia.org/>
- <http://hi5.com/>
- <http://everyday.com.kh/>

Websites most accessed from mobile device in Cambodia – Source: Opera

- <http://www.google.com>
- <http://www.yahoo.com>
- <http://www.hi5.com>
- <http://www.cnn.com>
- <http://www.getjar.com>
- <http://www.my.opera.com>
- <http://www.facebook.com>
- <http://www.gamejump.com>
- <http://www.wikipedia.org>
- <http://www.livescore.com>

⁵⁶ V. Sokheng, “Assembly passes law on speech restrictions”, *The Phnom Penh Post*, 2009, available (upon subscription) online at <http://www.phnompenhpost.com/index.php/2009100728791/National-news/assembly-passes-law-on-speech-restrictions.html>



3. INDONESIA

3.1 Context

3.1.1 From State oversight to political influence

Since the end of the New Order (1966-98), Indonesia's media have thrown off most of their economic and political shackles, and expanded significantly. But similar faces remain in terms of ownership, and while there is none of the heavy-handed control and intimidation of the press of the past, the political interests of the elites can be seen in the output of TV, radio, newspapers and online.

Under Suharto, the Government controlled media through the issuance of licences. These were handed out to ministers or sympathetic businessmen, and withdrawn from those deemed to have offended the government. The result was less than 300 licences across a country of then nearly 200 million people. After Suharto's demise there were over 2,000 newspapers operating; that number has fallen to less than 300, according to one recent survey.⁵⁷

The largest media conglomerates straddle both the New Order and what has followed. Perhaps surprisingly the major media groups, at least those in print, are led by respected journalists or former journalists, who remained credible both during the Suharto era and after.

- Kompas Gramedia Group – the largest integrated media business: also manages property and hotels, including plans for largest telecommunication tower in the

⁵⁷ A. Funnell, "Inside Indonesia's Media", ABC Australia, 25 January 2007, available online at <http://www.abc.net.au/rn/mediareport/stories/2007/1799432.htm> (accessed 14 January 2010). The most recent survey was from the Institute of Research, Education and Information of Social and Economic Affairs (LP3ES) reported in *The Jakarta Post*, "Print media expands despite Internet boom: Survey", 13 November 2009.

world. *Kompas* is one of the largest circulating dailies (about 500,000), and the group has more than 30 subsidiaries in print, electronic, publishing along with regional newspapers, tabloids, magazines. Its owner, Jacob Oetama, is a respected journalist and considered to live unostentatiously and be politically unaffiliated.

- Jawa Pos Group – CEO Dahlan Iskan, a former Tempo journalist, considered close to the president, as well as close to the influential Chinese business community (as well as Beijing), profitable, big in local newspapers – about 150.⁵⁸
- The Tempo Group, a listed company, controlled by respected journalists like Goenawan Mohammad, Fikri Jufri, and Bambang Harymurti.

Then there are the more obviously political media groups:

Media Group (Media Indonesia and MetroTV, among others) is owned by Surya Paloh, a prominent figure in the former ruling Golkar Party. Golkar also owns the newspaper Suara Karya. Surya Paloh recently lost the battle for the Golkar chairmanship to another businessman/politician and media owner, Aburizal Bakrie.

Bakrie, now chairman of the powerful Golkar Party, owns TV stations (antv and TV One) and a successful online news site, www.vivanews.com. His companies are linked to another player, Erick Thohir, whose Abdi Bangsa owns radio stations and a newspaper, and has among his commissioners the former house speaker Ginandjar Kartasasmita.⁵⁹

The recent battle for chairmanship of the Golkar Party was evident in differing coverage of the anniversary of the East Java mudflow disaster. The Indonesian Broadcasting Commission, or KPI, chided both Metro TV and TV One for their coverage in late September, when the Surya Paloh-owned Metro TV showed victims of the mudflow still suffering, while TV One – owned by Bakrie, whose family controls the company linked to the mudflow – showed families in the area prospering.⁶⁰

An increasingly key player is MNC, probably now the main media player. It owns several TV channels, a radio network, a relatively new daily called *Seputar Indonesia* ('Koran Sindo') and several magazines. It is controlled by Hary Tanoesoedibjo, a

⁵⁸ YosefArdi.com, "Jawa Pos Group, So Far", available online at <http://www.yosefardi.com/web/page.php?detail=1&cid=2958>; Interview with journalist and blogger Andreas Harsono, October 2009.

⁵⁹ J. Latul, "Bakrie Group's ANTV and TVOne Stations May Soon Merge", *The Jakarta Globe*, 12 January 2009.

⁶⁰ "Watchdog warns on owner influence over Indonesian private TVs", *Tempo*, 30 September 2009.

businessman who has nurtured good relations with major political players since the mid 1990s.⁶¹

The downside of this oligopoly, critics say, is that it still concentrates power in the hands of the few, and tends to be very centred on Jakarta. As well as skewing news coverage, this means that many regional publications are headed by Javanese or Jakarta-oriented editors.⁶²

3.1.2 A return to censorship?

Although not directly related to news media, the passing of the Film Law in September 2009 has raised concerns about the government's "return to the easier gate-keeping function all too reminiscent of the repressive New Order":

A dangerous re-bureaucratisation of film making is proposed, stipulating prior approval for films titles and scripts, permission for importing and exporting film, and the compulsory registration of all film making activities. Compulsory written contracts will formalize the relationship between the film industry and the Ministry.⁶³

3.2 Television

3.2.1 Providers

State-run station TVRI had a monopoly until 1989, when the first commercial station, RCTI (Rajawali Citra Televisi Indonesia) began as a local station and was subsequently granted a national licence a year later. Under the New Order even the private TV channels were closely linked to the government – usually via the president's family – and news was, for the most part, anodyne. Since 1998 the number of national channels has doubled. The major channels are RCTI, TPI, SCTV, antv, Indosiar, Metro TV, Trans 7, Trans TV, TV ONE, and Global TV.

MNC owns free-to-air TV networks RCTI, TPI and Global TV, which, according to AGB Nielsen Research, garner a combined audience share of 35.4 per cent; followed by Trans TV's 18 per cent share for its two networks (TransCorp puts it higher, at 24

⁶¹ See profile in *Forbes*, available online at <http://people.forbes.com/profile/hary-tanoesoedibjo/118405> (Accessed 14 January 2010).

⁶² Interview with Andreas Harsono, *cit.*

⁶³ T. Barker and V. Kusuma, "The new law will put films back in the box", *The Jakarta Post*, 9 September 2009.

per cent).⁶⁴ Surya Citra has an audience share of 17.2 per cent; Indosiar 15.9 per cent and Bakrie/News Corp 5.6 per cent.⁶⁵

The 2002 Broadcasting Law stipulated that stations were no longer allowed to have a national reach, but could only build a national network by establishing links with regional stations or build their own regional branches. Implementation of this rule has been slow and difficult, but there has been an important increase in the establishment of regional commercial stations.⁶⁶

TVRI has, since 2005, switched from a State broadcaster to a public service broadcaster (Government Regulation 11/2005), as has RRI (*see below*), although neither have since clearly formulated their vision and missions operationally. As shown above, there has been no noticeable impact on their credibility or appeal as a source of political information. Indeed, both organizations are run by boards of directors, all of whom must come from the civil service, raising questions about their independence from government. But most concerns are about financing: funds are supposed to come from viewing fees, public donations, fiscal budget, and advertising. Viewing fees, however, have not yet been implemented, and donations are few and far between, so both TVRI and RRI rely on the state contribution and on advertising, which amounts to about 2 per cent of the overall budget.⁶⁷

3.2.2 Content and consumption

According to the World Bank there has been a steady increase in the number of households with a television, from 54 per cent in 2000 to 65 per cent in 2007. The figure is closer to 80 per cent for lower- and middle-income families, against an Asian average of 53 per cent.⁶⁸ News constitutes 16 per cent of the average broadcast hour; viewers spent 9 per cent of their time watching it.⁶⁹

Television remains the leader in shaping public opinion and will remain so for a while, as Internet penetration on the outer islands remains low (*see below*).

Television consumption also benefits from price sensitivity in a country that has still not fully recovered from the 1998 crisis: A survey by Nielsen in late 2008 showed that

⁶⁴ Interview with Ishadi S. K., President-director of TransCorp, October 2009.

⁶⁵ OnScreenAsia.com, "The rise and rise of MNC", 1 February 2008, available online at <http://www.onscreenasia.com/article-2413-theriseandriseofmnc-onscreenasia.html>.

⁶⁶ Email interview with Asian Studies researcher Edwin Jurriëns, October 2009.

⁶⁷ Freddy Ndolu on Public Broadcasting In Indonesia at the 18th JAMCO Online International Symposium, 2009.

⁶⁸ World Bank, "ICT At a Glance, Information and Communications for Development", 2009, p. 220.

⁶⁹ AGB Nielsen survey, 2008.

TV viewing had risen as newspaper buying had fallen; while most respondents said they were too busy to buy newspapers, 11 per cent also said newspapers had become too expensive. (Callbacks revealed that 35 per cent of newspaper readers said price increases had impacted their reading habit.)⁷⁰

A 2009 survey by the International Republican Institute bore out the preference for television as a source of information: 82 per cent said they got their information about politics from TV, against 26 per cent from the radio, and 23 per cent from newspapers (the latter two behind friends and family, at 42 per cent).⁷¹

Table 1. Main sources of information in Indonesia, 2009

	LP3ES (2009)	IRI (2009)
Question	Source(s) of information? (%)	Source of political information? (%)
TV	90 (incl radio)	82
Radio	–	26
Print	–	23
Online	34	–

Source: OSI research

Not that television is news-oriented: most channels carry similar entertainment fare – TransCorp’s two channels, for example, are 80 per cent entertainment, 20 per cent news, but while news programs fall far behind in terms of popularity, a survey by Yayasan SET in April 2009 showed that news shows scored high in terms of what viewers considered ‘quality’ programs, among them the talk and news shows *Kick Andy* (Metro TV), *Apa Kabar Indonesia Malam* (TV One), *Liputan 6 Malam* (SCTV) and *Seputar Indonesia* (RCTI).⁷²

Some channels, therefore, have developed a reputation as news channels, especially during key stories. Metro TV for example, was cited by 21 per cent of respondents to the IRI survey as their source of information regarding day to day politics, four percentage points above TV One. Only 5 per cent turned to state-run TVRI for their political information.

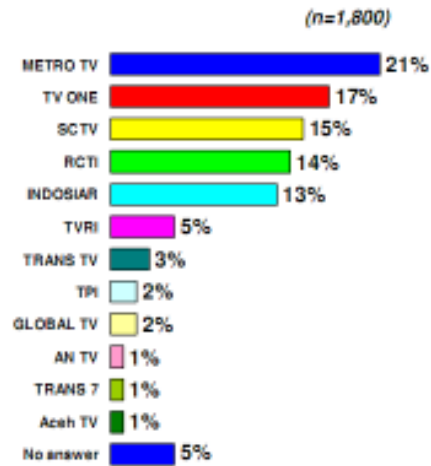
⁷⁰ Nielsen Media Consumption Update, pp. 2-3, December 2008.

⁷¹ IRI, Survey of Indonesian Public Opinion, p. 65, January 2009.

⁷² Interview with Ishadi, *cit.*

Chart 10. Where do you get information regarding day-to-day politics in Indonesia? (TV), 2009

Where do you get information regarding day-to-day politics? (TV)



Source: IRI 2009 survey

3.2.3 TV Technologies

PT Telekomunikasi Indonesia (PT Telkom) has been testing Internet Protocol TV (IPTV) services and, after the issuance of a new decree from the Ministry of Communication and Information, said it was ready to now launch commercially in October or November. This was later put back to 2010; Telkom said in early November it would be launched first in Jakarta, and would then be available in five other more locations by 2011.⁷³

Two consortia led by TVRI and SCTV have been trialing digital transmissions since May 2009; the government expects all broadcasters to migrate by 2018. Indonesia adopted DVB-T format. However regulations are not finalized. SCTV already has a digital broadcast transmitter, while other companies are leasing a tower owned by ANTV.⁷⁴

Satellite television has been available in Indonesia since 1988. Since then, technology for satellite television has changed from analogue to digital. Up to now, there are more than five satellite pay TV operators, namely IndoVision, TOP TV, TelkomVision, Yes TV, Aora TV, and OkeVision.

⁷³ "Telkom to Provide TV Programs on Demand in 2010", *The Jakarta Globe*, 5 November 2009.

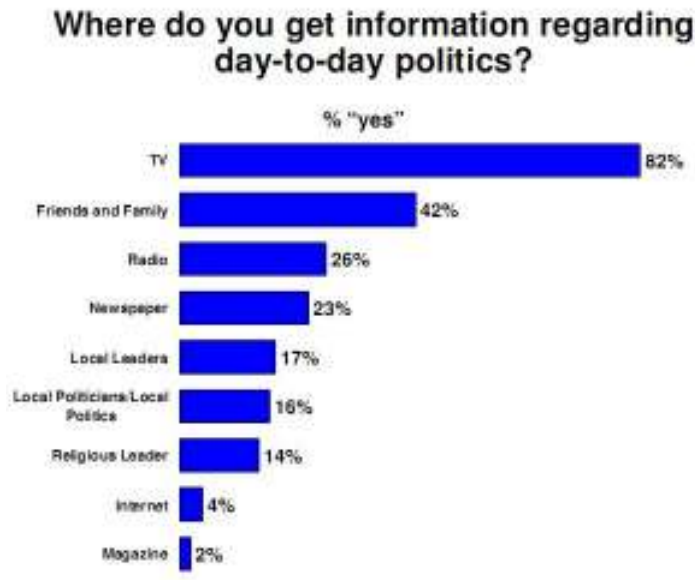
⁷⁴ "Analog Broadcast System to be Terminated in 2012", *Bisnis Indonesia*, 27 June 2009.

3.3 Radio

Radio remains a surprisingly popular medium, even in the cities (where people have access to other media). There are about 2,000 privately owned stations across the country, not including community radio stations. Some in the industry feel that while the quality of TV news reporting is poor, and the propensity to be co-opted by other interests is high, radio has so far offered an attractive alternative.⁷⁵

A Nielsen survey showed that more than 50 per cent of urban dwellers listen to the radio on a weekly basis, but a more recent survey by the same company indicated that its audience has declined by 19 per cent since 2005.⁷⁶ A survey by independent radio network KBR 68H (*see below*) showed that the amount of time people spent listening to radio was increasing, especially in the rural areas. However it comes a poor second after TV as a source of information about day-to-day politics, according to the IRI survey, and is only marginally more popular than newspapers:

Chart 11. Where do you get information regarding day-to-day politics in Indonesia? (TV), 2009



Source: IRI 2009 survey

⁷⁵ Interview with Tosca Santoso, director of KBR68H, October 2009.

⁷⁶ Nielsen Media Index, 2009.

Radio Republik Indonesia (RRI) is the state radio network of Indonesia, set up in 1945 and broadcasting nationwide. It also has a foreign service, Voice of Indonesia. There are about 3,000 radio stations across Indonesia. In Jakarta the key news-oriented/talk radio stations are Elshinta and 911; others, such as Trijaya FM, Pass FM, Smart FM, Sonora, and a new, as yet unnamed one from MRA group, are largely music in format but have news features. Each carries their own bulletins, often from journalists who also work for other outlets on a freelance basis.⁷⁷

KBR68H is a Jakarta-based radio news agency, operating since 1999, providing eight hours a day of news and information to a network of 672 radio stations around the country, with a potential audience of 18 million. It is able to deploy local journalists quickly to news events; during the Padang earthquake there were five journalists at work in the area.⁷⁸

3.4 Print

3.4.1 Consumption

Newspapers fall a distant third behind TV, and slightly behind radio as the preferred source of political information for most Indonesians.⁷⁹

Whether more people are reading or buying newspapers than before is unclear from the available data. A survey by Roy Morgan Research suggested that a steady decline in readership – accelerated by fuel price hikes in 2005 – had bottomed out by early 2009.⁸⁰ Another survey by the independent Institute of Research, Education and Information of Social and Economic Affairs (LP3ES) found that 60 per cent of households used print as a source of information (with 90 per cent saying they used TV/radio; respondents could choose more than one source) and estimated that newspaper circulation had actually risen each year from 2006-8, from 6.06 million in 2006 to 7.49 million in 2008.⁸¹

Recent Nielsen figures, however, suggest that readership is declining, down 18 per cent on last year. If so, this is likely a reflection of economic concerns; although cover prices are low, they still represent a significant outlay for many Indonesians, who indicate they won't buy them if prices go up.⁸²

⁷⁷ Interviews with radio executive in Jakarta; former AJI chairman, currently production director at KBR68H Heru Hendratmoko, October 2009.

⁷⁸ Interview with Santoso, *cit.*

⁷⁹ IRI, Survey of Indonesian Public Opinion, p. 65, January 2009.

⁸⁰ "An upbeat media industry is also defying the odds", *The Jakarta Post*, May 2009.

⁸¹ "Print media expands despite Internet boom: Survey", *The Jakarta Post*, 13 November 2009.

⁸² Nielsen Media Index, September 2009.

3.4.2 Players

The daily market is dominated by players not dissimilar to those under the New Order. As mentioned above, the end of the New Order saw a jump in the number of publications, but economic realities have seen the number drop to the low hundreds. The players can be divided between:

- tabloid-esque dailies *Lampu Merah* (owned by the Jawa Pos Group), *Warta Kota* (owned by the Kompas-Gramedia Group) and *Pos Kota*. *Lampu Merah* sells some 85,000 copies daily, *Warta Kota* about 200,000 and *Pos Kota* about 150,000.⁸³
- more serious dailies, such as *Rakyat Merdeka* (owned by the Jawa Pos Group; its claimed – and widely questioned – circulation of 700,000 would put it among one of the world’s top 100 newspapers), *Kompas* (500,000), and *Jawa Pos* (450,000). Others worth mentioning include *Suara Pembaruan* and *Republika*.⁸⁴
- English-language dailies. *The Jakarta Post*, set up in the early 1980s and, for the past decade pretty much the only player, is now competing with *The Jakarta Globe*, set up and financed by the Riady family’s Lippo Group.

3.5 Telecommunications and internet

3.5.1 Telephones

For many years landline telephones were hard to get, bottling up demand that has been assuaged partially by the growth of fixed wireless services. Some estimates suggest that they account for two thirds of the total fixed line subscriber base.⁸⁵

Cellphone growth – mobile wireless services – has been impressive for similar reasons: an annual rate of growth of about 50 per cent for the past seven years, pushing the subscriber base past 130 million, up from just 12 million in 2003. The government claims credit for this, saying that regulations forced rate cuts that “helped turn Indonesia from being a country with most expensive mobile phone rates in Asia in 2005 into that with most affordable rates by 2008.”⁸⁶

⁸³ “Sensationalism sells, Jakarta dailies prove”, *The Jakarta Post*, 17 October 2008.

⁸⁴ WAN-IFRA, *World Press Trends: China, India and Southeast Asia*, Singapore, 2009.

⁸⁵ Paul Budde Communication Pty Ltd, *Indonesia – Telecoms, Mobile, Broadband and Forecasts*, July 2009.

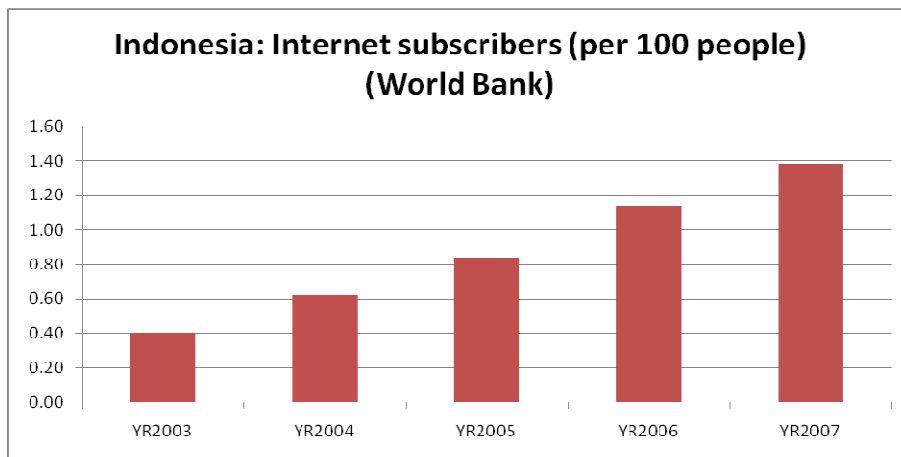
⁸⁶ Budde 2009; Erwida Maulia, “Indonesia launches digital TV, embarks on campaign to provide phone and Web connectivity,” *The Jakarta Post*, 22 May 2009.

This would indicate a penetration of about 55 per cent, although in reality many users have more than one SIM card and/or phone. Either way, the potential for further growth remains high. So too for 3G, which comprised only 7 per cent of subscribers in early 2009. This has emerged as an area where carriers believe they can make money, but while the resulting price war has led to more people using data services on their cellphone, it has also contributed to deterioration in quality, both of data connections and calls. Nevertheless, about 44 per cent of Indonesians are likely to be using a 3G device by 2014.⁸⁷

3.5.2 Internet

While the number of Internet subscribers has risen from 0.2 per 100 in 2000 to 1.4 in 2007, according to the World Bank, the figure rises to 6.0 for those in the lower- to middle-income bracket, highlighting the digital divide that still exists in Southeast Asia's largest, and most populous, country. (The East Asia/Pacific average is 9.3.)⁸⁸

Chart 12. Indonesia: Internet subscribers (% of population), 2003–2007



Broadband penetration has doubled each year since 2006, but is still painfully low: Point Topic, a research consultancy, estimates it to be less than 0.4 per cent of the population in the second quarter of 2009.⁸⁹

⁸⁷ Pyramid Research press release, "Pyramid Research Forecasts Bali High For Indonesian 3G", 13 August 2009.

⁸⁸ World Bank ICT statistics, *cit.*

⁸⁹ F. Vanler, Point Topic Ltd., *World Broadband Statistics*, London, September 2009.

3.5.3 Online

The internet is still very much a minority sport in Indonesia, especially as a source of information. In the IRI survey cited above, only 4 per cent said they got their information about day-to-day politics from the Internet – 10 percentage points behind ‘religious leader’. This figure, however, may be a little misleading. A Yahoo survey in December 2008 of eight “urban cities” revealed that while only 6 per cent access the Internet every day, 28 per cent had done so in the previous month. This figure rose to 64 per cent in the 15 to 19 age group.⁹⁰ In other words, a majority of younger urban Indonesians have already integrated the net into their lives. This figure is likely to be significantly higher a year hence.

An appetite for news

Indonesians with Internet connections use them to view news websites, most notably detik.com and its parcel of news sites, a web-only news service that has been dominant since 1998, outlasting a rash of dot.com pretenders. Detik accounts for six of the top 10 Indonesian-hosted websites in terms of traffic:

Rank	Site
580	http://www.detik.com
1028	http://www.kaskus.us
1753	http://www.indowebster.com
2170	http://www.detiknews.com
2688	http://www.detiksport.com
3102	http://www.detikinet.com
3815	http://www.detikhot.com
3882	http://www.kompas.com
4213	https://ibank.klikbca.com
4821	http://www.indowebster.web.id
7883	http://pemilu.detiknews.com
8783	https://mti.ugm.ac.id
8843	http://www.klikbca.com
10335	http://nasional.kompas.com
10459	http://kompas.com

⁹⁰ Yahoo-TNS Net Index Study, December 2008.

There is also a vibrant blogging community; Enda Nasution, a noted blogger, says its role has been that of media watchdog: “The internet community/bloggers have played a watchdog role on the performance of mainstream media. Issues like reporting blunders or news inaccuracy have been one of favourite subjects of critiques in local blogs and internet fora.”⁹¹

Nearly all major newspapers have an online presence, but none has managed to match the popularity of detik.com. Bakrie-owned ‘citizen journalism’ website vivanews (www.vivanews.com) has gained followers since early 2009, but has made little ground against Detik.com:

Chart 13. detik.com vs. vivanews.com (2007–2009)



Source: Google Trends

However, even Detik shrinks when compared to international social networking sites. As elsewhere in the region, such sites have become increasingly popular as places to share information. While the Yahoo study confirmed the interest in online news – 47 per cent of respondents read news online, more than played games online, downloaded music or shared photos – this is eclipsed by a broader trend: visiting a social networking site (58 per cent).

In Indonesia, Facebook dislodged Friendster early in 2009:

⁹¹ Interview with Enda Nasution, October 2009.

Chart 14. detik.com vs facebook versus friendster.com (2007–2009)

Source: Google Trends

The same is true of the mobile web, which is becoming increasingly popular. While 83 per cent of respondents in the Yahoo survey accessed the web from Internet cafés, or ‘warnets’, the second highest figure – above office, school or home – was via the mobile phone, at 22 per cent. (That number is probably considerably higher now.) Traffic on mobile devices is overwhelmingly social networking-oriented, although this should also be considered a form of information retrieval and exchange. Many users, for example, found out about the July bombings in Mega Kuningan via Facebook or twitter. (*See the tables at the end of this report for details*)

*Global websites most accessed from Indonesia – Source: Alexa (*news websites)*

- <http://facebook.com/>
- <http://google.co.id/>
- <http://yahoo.com/>
- <http://google.com/>
- <http://blogger.com/>
- <http://youtube.com/>
- <http://wordpress.com/>
- <http://kaskus.us/>
- <http://detik.com/>*
- <http://detiknews.com/>

*Local websites most accessed from Indonesia – Source: Netcraft (*news websites)*

- <http://www.detik.com/>*
- <http://www.kaskus.us/>
- <http://www.detiknews.com/>*
- <http://www.indowebster.com/>
- <http://www.detikinet.com/>*
- <http://www.detiksport.com/>*
- <http://www.detikhot.com/>*
- <https://ibank.klikbca.com/>
- <http://www.kompas.com/>*
- <http://www.indowebster.web.id/>

*Websites most accessed from mobile device – Source: Opera (*news websites)*

- <http://www.facebook.com>
- <http://www.friendster.com>
- <http://www.yahoo.com>
- <http://www.waptrick.com>
- <http://www.youtube.com>
- <http://www.google.com>
- <http://www.detik.com>*
- <http://www.peperonity.com>
- <http://www.digg.com>
- <http://www.wikipedia.org>



4. LAOS

4.1 Limited reach

Although they are kept under tight political control, the national media in Laos are not easily available. Newspapers reach less than a quarter of the population,⁹² only 30 per cent of households have a TV set, and the country has one of the lowest internet penetrations in the world.⁹³

Partly this is due to electricity supply problems. Despite Laos's hydropower potential, many villages have no power, or limited power. In its most recent report the Asian Development Bank listed only four economies where problems with electricity were the most commonly identified "major or severe" constraint on business. Three were from South Asia; Laos was the fourth.⁹⁴

According to a United Nations Development Program (UNDP) report, this lack of reach was compounded by the reach of broadcasts from three neighbouring countries, Thailand, China and Vietnam:

The outreach of national media remains limited. Available data indicates that the Lao print and broadcast media cannot reach large parts of the population, partly due to numerous capacity constraints and competition from media in neighbouring countries. In remote districts of Xiengkhouang Province, such as Nong Het and Khoun, villagers can have access to Thai TV and radio, as well as Chinese and Vietnamese radio broadcasting in Lao.⁹⁵

⁹² Laos chapter in WAN-IFRA: World Press Trends – China, India and Southeast Asia 2009, p. 114.

⁹³ World Bank Development indicators.

⁹⁴ Vientiane-based consultant, 2009; ADB *Key Indicators for Asia and the Pacific*, 2009.

⁹⁵ UNDP, *Khoun Radio Support Project: Bringing local news to local people in Xiengkhouang* (2006).

Print circulation is limited: the biggest circulation daily reaches between 6,000 and 10,000 people out of a population of about 6 million. Reading is hampered by the shortage of electricity, by a low literacy rate (the lowest in the region; see chart) and the fact that a significant minority of the population speak their own languages, not all of which have a written form.⁹⁶ This also affects radio audiences: although national radio broadcasts can be heard by 70 per cent of the population, they may not understand them, as only two daily programs are carried in the two main minority ethnic languages, Hmong (used by 8 per cent of the population) and Khamu (used by 11 per cent).

Table 2. Adult literacy rate (in % of population), 2009

	Adult literacy rate, latest figure (%)
Burma	86.4
Cambodia	67.7
Indonesia	88.8
Laos	63.2
Malaysia	89.6
Philippines	93.7
Singapore	91.6
Thailand	92.6
Timor	N/A
Vietnam	86.9

Source: UNESCO

The passing of the country's first Media Law in August 2008, designed to open the media to more private sector participation, does not seem to have led to any great changes in media players or operations. According to *ASEAN Affairs*, the law determines, among other things, the roles, principles, responsibilities, duties and activities of foreign as well as domestic media.⁹⁷ It lays down requirements and rules regarding the establishment of offices in foreign countries by Lao media, and vice versa. In theory the law would allow foreign journalists to set up offices in the Lao PDR for the first time.

⁹⁶ Interview with Vientiane-based consultant, 2009.

⁹⁷ ASEAN Affairs, *Laos' first media law under deliberation* (2008, Bangkok), available online at http://www.aseanaffairs.com/page/laos'_first_media_law_under_deliberation (accessed 14 January 2010).

But Douangdy Outhachack, Chairman of the NA Cultural and Social Commission, says approval of the law does not mean that foreign investors can open and operate a media company in Laos. Only Lao citizens can do that and on terms set up by the government only.⁹⁸ It also provides legal instruments for the State and Party to more effectively guide and manage the media. A report by SEAPA said that “under the reform initiatives, the government will allow private sectors to buy air-time slots in, produce programs and eventually prepare them to invest in new broadcasting outlets.”⁹⁹

In practice, the Vietnam News Agency (VNA) remains the only foreign agency with a bureau based in Vientiane and foreign journalists, required to apply for special visas and restricted in their activities, prefer to visit the country on business visas. Even those that do sometimes find their activities restricted, especially in the run-up to the Southeast Asian Games, which Laos hosted in December 2009.¹⁰⁰

4.2 Journalism

Journalism in Laos is very much part of the establishment. In 2004 there were 344 Lao journalists, all but 54 of them male. Most Lao journalists are members of the official Lao Journalists’ Association. Any journalist who criticizes the government or discusses controversial political topics faces legal punishment, according to Freedom House, which gives it a ranking of 184 out of 195, with a rating of 86–100 being the least free.

Journalists are directed in terms of what they should cover, how much space they should give it, and what they should say. This direction is provided via regular meetings between editors and the Ministry of Information and Culture, where editors are told to give sustained prominence to whatever campaign is the government/party priority at the time, be it reproductive health, measles vaccinations, or traditional musical instruments. Atop a weak educational system, the resulting journalism was as much the result of “ingrained self censorship” as direction from above.¹⁰¹

That said, there are signs that not all journalists are free of the difficulties and temptations of journalists in other parts of Southeast Asia. KPL last year quoted an official of the Media Control Unit as admitting that some journalists have demanded money from sources they have interviewed.¹⁰²

⁹⁸ ASEAN Affairs, 2008.

⁹⁹ “New rules for an old regime?” in *Empty Promises: Press Freedom in Southeast Asia 2009*, Bangkok.

¹⁰⁰ Interview with a Vientiane-based consultant, 2009.

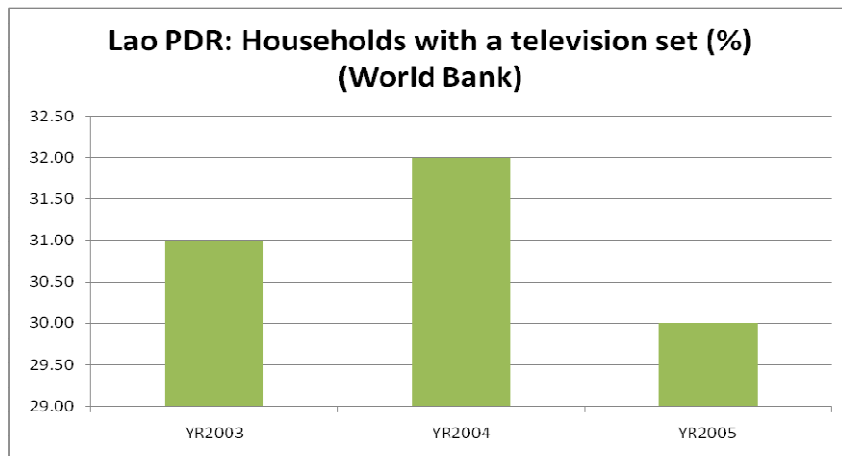
¹⁰¹ The unbylined piece is by an Australian volunteer who worked at two English-language newspapers in Laos from 2006-2008. “Pleasure and Pain of a Laos Life”, 27 April 2008, *Canberra Times*.

¹⁰² Khao San Pathet Lao (KPL), “Journalists ask for money”, 23 July 2008.

4.3 Television

There has been television in Laos only since 1983; there are three national channels, all government-owned and controlled. TV1 broadcasts for 17 hours a day, most of it news and current affairs, while the second, TV3, transmits quiz shows, soap operas and films for eight hours a day in the week and 10 at the weekend. A third channel broadcasts four hours of French programs in a joint venture with TV5 International of France between 2002 and 2004. Lao National Television, or LNTV, was set up in 1993 and has most of its programs broadcast by satellite to all parts of the country to be included in the programming of some 30 municipal and provincial TV stations. It also has news programs in French and English.

Chart 15. TV households in Laos (in % of population), 2003–2005



Source: World Bank

Many Laotians along the border with Thailand also tune in to Thai TV since the languages are similar. Laos requires satellite dishes to be licensed but the ruling is not strictly enforced, allowing many residents to receive international satellite broadcasts.

There are signs of changes, however modest. The first private broadcaster was set up in 2006. Lao Star is a satellite channel, and the government will, under new initiatives, allow private sectors to be involved in new broadcasting outlets.

In 2005, 30 per cent of households owned a TV set. In neighbouring Cambodia that number was 43 per cent.¹⁰³

¹⁰³ World Bank Development Indicators.

In September 2009, China announced it would launch a communications satellite for Laos; no date has been given for the launch.¹⁰⁴

Laos has said it would switch to digital television by 2015, expand radio coverage to 90 per cent of the country, and television reception to 70 per cent of the country.¹⁰⁵ An earlier report quoted the minister of information and culture as saying the target date for switchover was 2020.¹⁰⁶

4.4 Radio

There are 35 radio stations in Laos, all of them government-controlled, up from 14 in 1993. Lao National Radio, established in 1965, is responsible for two Vientiane-based stations, one FM and one medium wave. A third Vientiane station is AM, funded and supervised by the Vientiane Capital Information and Culture Service, broadcasting only to the city. The other 28 stations are operated by the Ministry of Information and Culture, operating in the provinces and reaching about 90 per cent of the population.

4.5 Print

Laos has seen a modest boom in its media in the past 15 years. From a strict diet of government fare the market has grown to embrace privately owned publications, so long as they are non-political in content. Such publications tend to be limited in scope and circulation, and are subject to review after publication – and possible penalty if they do not meet government approval. Importation of any publication deemed indecent, or offensive to “national culture” is illegal, and punishable by fine and/or imprisonment.¹⁰⁷

All the country’s seven daily newspapers are published by government departments, including three foreign language papers: the English-language daily *Vientiane Times*, established in 1994 as a weekly by an agency under the Ministry of Information and Culture, becoming twice weekly in 1996 and, since 2004, daily (it has a circulation of about 3,000); since 1998 the French-language weekly *Le Rénovateur*, also published by the *Vientiane Times*; KPL News has been published since 2003 by the Khao San Pathet Lao (KPL), the country’s official news agency, containing English and French copy in equal measure.

Pasason (also *Pasaxon*) has the country’s biggest circulation, at around 10,000. Its roots lie in 1975, when the Ministry of Information and Culture’s new Department of Mass Media took over the publication of *Lao Issara*, one of the Lao People’s Revolutionary

¹⁰⁴ KPL, “China signs agreement on Lao satellite broadcasting cooperation”, 29 September 2009.

¹⁰⁵ KPL, “Government draws up master plans to develop mass media”, 26 March 2009.

¹⁰⁶ SEAPA, “Lao media develops strongly”, 19 June 2008, Xinhua.

¹⁰⁷ WAN-IFRA, *cit.*, p 114.

Party's mouthpieces which had been operating since 1950. The ministry turned it into the national Lao-language daily newspaper *Sieng Pasaxon* (Voice of the People); in 1979 the name was shortened.¹⁰⁸

The Government does allow limited circulation private publications, which have mushroomed since 2000: 70 of them, most in the capital and covering, in Lao, English and French, issues such as trade, tourism and lifestyle. Few have a bigger readership than 3,000. Many are frothy fashion magazines for younger readers.¹⁰⁹ All newspapers are required to use reports from KPL and adhere to ministry guidelines on sensitive topics. (These would include any coverage of the Hmong ethnic minority, according to SEAPA.)

World Association of Newspapers and News Publishers (WAN-IFRA) estimates that newspapers reach only 23 per cent of the population. United Nations Educational, Scientific and Cultural Organisation (UNESCO) figures indicate there were about six readers of a daily newspaper per 1,000 literate members of the population. Compare that with 133 for the Philippines and 488 for Singapore.¹¹⁰

4.6 Telecoms and internet

The number of landline subscribers has remained fairly static, at around 150,000, amounting to less than two telephones per 100 people.

Cell phone use has been growing rapidly after the ending of a five year monopoly granted to Thailand's Shinawatra in 2002. In 2001, there were fewer than 30,000 subscribers; by 2006 there were 638,000. By April 2009 the number had reached more than 2 million, a penetration of more than 30 per cent. The reason: as elsewhere in Southeast Asia, affordable handsets from China and intense competition between providers. By 2008 there were six licensed operators, reducing revenue per customer and, according to operators, inhibiting investment.¹¹¹

The Internet, however, has not grown at the same pace. With about four internet users per 1,000 people, Laos still has one of the lowest penetrations in the world. It is expensive

¹⁰⁸ Ministry of Culture and Information, *Laos Cultural Profile* (2008, Visiting Arts), available online at http://www.culturalprofiles.net/laos/Directories/Laos_Cultural_Profile/-968.html (accessed 14 January 2010)

¹⁰⁹ SEAPA, Vientiane-based consultant, 2008, Xinhua.

¹¹⁰ WAN-IFRA, p 115; UNESCO.

¹¹¹ Research and Markets, *Laos – Telecoms, Mobile, Broadband & Forecasts; an Overview of the Trends and Developments in the Telecommunications Markets in Laos*, 22 September 2009, available online at <http://www.pr-inside.com/research-and-markets-laos-telecoms-r1493402.htm> (accessed 14 January 2010)

– costing about US\$1 an hour at an Internet café. Usage, however, is wider than one might expect: Internet cafés in villages with electricity are often full at night.¹¹²

Laos Telecom launched the country's first 3G service in October 2008. Subscriber rates remain modest.

The internet is officially controlled by the Lao Network Internet Committee, or LANIC, overseen by five ministries under the umbrella of the Prime Minister's office. The government sporadically monitors Internet usage: it requires all ISPs to submit quarterly reports and link the gateways to facilitate monitoring, but its ability to enforce such regulations appears limited. It has blocked some foreign websites, mostly those operated by Hmong groups, but does not block any major foreign news sources, nor does it have the ability to monitor blogging activity. Citizen users, however, are required to register with the authorities, leading many to either self-censor their online behaviour or use Internet cafés.¹¹³

Websites most accessed from mobile device in Laos – Source: Opera

- <http://www.hi5.com>
- <http://www.google.com>
- <http://www.ownskin.com>
- <http://www.live.com>
- <http://www.waptrick.com>
- <http://www.my.opera.com>
- <http://www.hotmail.com>
- <http://www.teenee.com>
- <http://www.getjar.com>
- <http://www.mobango.com>

¹¹² Vientiane-based consultant, 2009.

¹¹³ Paul Budde Communication Pty Ltd, *2008 Asia – Telecoms, Mobile and Broadband in Cambodia, Laos and Vietnam*, March 2008.

5. MALAYSIA



5.1 Context

Mainstream media in Malaysia are controlled by parties connected to the Government. Although not all outlets toe the government's line, commentators and surveys indicate that mainstream media have lost significant credibility since the 1980s, most recently during and after the 2008 elections.

The rise of online media, particularly news websites that are independently owned and run, has further eroded this credibility and provided an important source of alternative news and commentary.

5.1.1 Bias

A survey by the Centre for Independent Journalism shortly after the 2008 election showed 70 per cent of respondents felt the mainstream media were biased in favour of the ruling coalition, against 9 per cent for Internet sources.¹¹⁴ A closer inspection of the data, however, suggests a more complex picture:

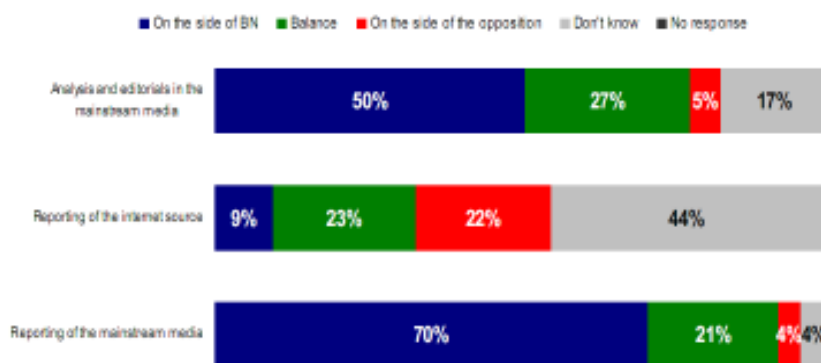
- While Malaysians are clearly sceptical about the quality of information they receive from mainstream media, many are not convinced that online media are any more impartial. More than a third of those *with a view* about Internet sources said they believed that online media were biased in favour of the opposition (against about 5 per cent of mainstream outlets).
- Nearly half the respondents said that they didn't know about bias when it came to the Internet, suggesting the web still remains a closed world to many Malaysians.

¹¹⁴ Center for Independent Journalism, Malaysia, *Media Independence Survey*, May 2008.

- Perhaps the most significant percentages are those of respondents who believed they are getting balanced information: in all three categories – analysis in mainstream media, Internet, reporting in mainstream media – the figure rose no higher than 27 per cent.

Chart 16. How would you describe the slant in reporting of the following media during elections in Malaysia?

Q20. How would you describe the slant in reporting of the following media during elections?



Source: Centre for Independent Journalism Malaysia, 2008 Media Independence Survey

5.1.2 Censorship

The Government's apparent commitment not to censor online media has allowed these websites to flourish. A Bill of Guarantees states that "[a]s part of its commitment to ensure the success of MSC Malaysia Status companies, the Malaysian Government promises to fulfil the following Bill of Guarantees", the seventh of which is to "Ensure no Internet censorship."¹¹⁵ The Communications and Multimedia Act of 1998 further states that "[n]othing in this Act shall be construed as permitting the censorship of the Internet."¹¹⁶

However, the government has sought to rein in publishing on the Internet in other ways: by alleging sedition against some websites, or referring to a section of the CMA

¹¹⁵ MSC, 2009.

¹¹⁶ CMA, *Act 588 Communication and Multimedia Act 1998 Part I – Preliminary* (1998, PNMB-LawNet), available online at <http://www.msc.com.my/cyberlaws/ACT%20588%20-%20Communications%20and%20Multimedia%20Act%201998/a0588s0003.htm> (accessed 14 January 2010).

which prohibits content that is “indecent, obscene, false, menacing or offensive in character with intent to annoy, abuse, threaten or harass another person.”¹¹⁷

5.1.3 Ownership

Many media outlets are either owned directly by the Government (e.g. Bernama) or owned by component parties of the Barisan Nasional coalition government. The Media Prima Berhad (MBP) Group, for example, is linked to the United Malays National Organisation (UMNO). The MBP is a media investment conglomerate which controls most free-to-air television, owns two radio networks and, as of November 2009, holds a 51 per cent stake in the New Straits Times Press (NSTP).¹¹⁸ NSTP is one of the country’s main publishing groups which prints the English-language newspaper *New Straits Times* and the Malay-language dailies *Harian Metro* and *Berita Harian*.¹¹⁹

5.1.4 Consumption

The rise of online media, however, has provided an appealing alternative source of news to urban Malaysians with Internet access. But it’s a gradual shift. Television remains the most accessible medium, watched by 94 per cent of the population, followed closely by radio (92 per cent). More than half the population reads a newspaper on a daily basis (55 per cent) and 21 per cent accessed the Internet regularly. These figures, from mid 2008, have changed little from 2007, except for Internet access, which rose from 18 per cent a year earlier. The internet apart, figures suggest a fairly even level of consumption of information. (More recent figures for radio consumption appear to confirm the steady pattern.)¹²⁰

5.2 Television

Malaysia did not open up the television broadcasting market to private operators until 1995. The average Malaysian can now watch almost twice as many channels as five

¹¹⁷ Lee Min Keong, “Malaysian Govt defends actions in Web censorship”, 2 October 2009, *ZDNet Asia*, available online at www.zdnetasia.com/news/internet/0,39044908,62058287,00.htm (accessed 14 January 2010).

¹¹⁸ “Media Prima Takes Control of NSTP,” *Media Partners Asia*, 26 November 2009, available online at: <http://www.asiamediajournal.com/pressrelease.php?id=1414> (accessed 14 January 2010).

¹¹⁹ E. Yeo and O. Murphy, *Malaysia Media Assessment*, Internews, November 2008.

¹²⁰ Kong Mei Yun, “Radio remains strong among with Malaysians with nine in 10 tuning in weekly”, 20 October 2009, Nielsen, available online at <http://my.nielsen.com/news/20091020.shtml> (accessed 14 January 2010).

years ago (20 vs 11). Indeed, the average number of channels watched has more than doubled over the same period.¹²¹

This may not necessarily mean a broader range of sources of information, since television is restricted by limited ownership and government censorship, which includes guidelines and blacklists of performers, politicians and religious leaders who are not allowed to appear.¹²²

Malaysia has six free-to-air television stations:

Radio Television Malaysia	RTM 1 and RTM 2 (State run)
Media Prima (MBP)	TV3, 8TV, ntv7 and Channel 9 (private)

Radio Televisyen Malaysia (RTM) is a Malaysian State-owned public broadcaster. It both owns and operates a number of radio and television stations in Malaysia. At present, RTM runs eight national, 16 state, seven district radio stations and two television channels. RTM was previously funded publicly through money obtained from television licensing; however it is currently state subsidized as television licences were abolished in 1999.

With its four free-to-air channels, Media Prima commands a 50 per cent share of TV viewership. (See consumption figures below.)¹²³

5.2.1 TV consumption

Kuala Lumpur residents watch about as much TV as Singaporeans, 8.82 hours per week, quite a lot less than their Bangkok counterparts. The highest percentage of that time goes to news and business, but the figure (73 per cent) is significantly less than in Bangkok and Singapore (83 and 86 per cent).¹²⁴ Across the country, 94 per cent of Malaysians watch television with TV3 being the most popular (73 per cent), followed by state-run family channel RTM2 (52 per cent) and infotainment channel RTM1 (42 per cent).¹²⁵

¹²¹ Nielsen Media Index, 2008.

¹²² U.S. Department of State, *2008 Human Rights Report: Malaysia* (2009), available online at <http://www.state.gov/g/drl/rls/hrrpt/2008/eap/119046.htm> (accessed 14 January 2010)

¹²³ Media Prima, *About Us* (2009), available online at: <http://www.mediaprima.com.my/bg.asp> (accessed 14 January 2010)

¹²⁴ Synovate PAX Digital Life survey, Q2-07-Q3-08.

¹²⁵ Nielsen Media Index, 2008.

5.2.2 Digital television

RTM has been experimenting with digital television through RTMi, a digital television channel, whose test broadcast began in September 2006, using the DVB-T standard. In April 2007, RTM announced that digital transmission would continue until 2009. Both of RTM's stations are involved in the trial.¹²⁶

MPB is also running trials.

The Malaysian Communications and Multimedia Commission will put operating the digital TV spectrum out to tender in the third quarter of 2009.¹²⁷ The MCMC has said that the rollout for commercial digital TV is expected by 2012, with analogue switch-off planned for 2015. There are expected to be 19 free digital channels by then.¹²⁸

However the process is likely to be slowed down by the lack of digital receivers and because most TV sets are analogue. Tensions between the idea of a subscription-based service and an ad-supported free-to-air service are also likely to be slowing progress.¹²⁹

5.2.3 Direct-To-Home Satellite Broadcasting

Astro, a private company whose owners are considered close to the Government, has a monopoly on satellite television via very strict licensing regulations (the licence lasts until 2017). It offers subscribers 116 pay-TV channels to about half the country's homes.¹³⁰

¹²⁶ Malaysian Communications and Multimedia Commission, Status of DTT in Malaysia 2007 (MCMC 2007).

¹²⁷ R. Major, "Telekom Malaysia Keen on DTT", 2009, Rapid TV News, available online at <http://www.rapiddtvnews.com/index.php/200905103799/telekom-malaysia-keen-on-dtt.html> (accessed 14 January 2010); B.K. Sidhu, "Fully Digital TV Age", 2009, Star Publication, available online at <http://biz.thestar.com.my/news/story.asp?file=/2009/4/1/business/3598578&sec=business> (accessed 14 January 2010)

¹²⁸ Inside Satellite TV, "Media Prima asks Government for help on DTT", 6 March 2009; Syed Azwan Syed Ali, "Malaysian TV to complete digital switchover by 2015", Bernama; 20 January 2009.

¹²⁹ Interview with malaysiakini's Premesh Chandran, October 2009; Market Intelligence Center, *Telekom Malaysia Projects IPTV Launch in 4Q 2009*, 10 April 2009.

¹³⁰ Astro, Company Background, available online at <http://www.astroplc.com/09/aboutus/companyprofile/background.asp> (accessed 14 January 2010)

5.2.4 IPTV

Malaysia's emphasis on broadband deployment and an existing copper infrastructure makes the country appealing to those looking to roll out IPTV. But so far moves have been limited. Telekom Malaysia is planning a 4th quarter launch of commercial IPTV services, following a 10,000-home trial. Telekom Malaysia currently operates a website, Hypp.TV, which offers online video content to TM's 1.5 million Streamyx high-speed broadband subscribers, but only to the PC.

In 2005, Malaysian pay television operators MiTV and Fine TV embarked on IPTV ventures to win over Astro customers. MiTV failed to attract enough subscribers and down-sized its operation; Fine TV is still trying to win subscribers with reduced rates.

Malaysiakini is working on an IPTV service via a set-top box, hoping to deliver interactive video content on demand. Users would also be able to upload their own programs and syndicate them. Malaysiakini already carries video on a sister website, www.malaysiakini.tv.¹³¹

Mobile television is currently being trialled by Maxis, DiGi and U Mobile (owned by MiTV). In October 2008, Astro launched a mobile TV service for Maxis subscribers.

5.3 Radio

Radio reaches 92 per cent of Malaysians aged 10 years and above in peninsular Malaysia. In East Malaysia, 73.6 per cent of households in Sabah and 83.4 per cent of households in Sarawak have access to radios. There are a total of 57 radio stations in Malaysia, 23 of which are private commercial stations.

Astro, a private company whose owners are considered close to the Government, operates eight FM radio stations, including the top-ranking stations in Malay (ERAFM, 27.5 per cent reach), Chinese (MYFM), Indian (THR) and English (HITZ.FM). Astro also offers 17 digital radio channels over its DTH platform. Astro claims to reach 11 million listeners a week, or 72 per cent of total listeners in the country.¹³²

Media Prima owns several radio stations, including the popular Malay-language hotfm – 23 per cent reach, number 1 on average audience and Fly FM, the 3rd most popular English-language station, and onefm, acquired in January from Radio Wanita Sdn Bhd and renamed.¹³³

¹³¹ Interview with Chandran, *cit.* Market Intelligence Center, *cit.*

¹³² ASTRO website.

¹³³ Media Prima, "About Us", available online at <http://www.mediaprima.com.my/bg.asp> (accessed 14 January 2010).

The rest are run by government-owned broadcaster RTM. RTM runs six national radio stations: three in Malay, one in English and Malay, one in Chinese and Malay, and one in Tamil. It also runs 28 regional/district stations around the country, including in East Malaysia, which are mostly in Malay.

Radio formats are mostly a lightweight mix of talk and music genres (classic, adult contemporary, golden oldies, chart hits etc.), with short news bulletins. In August 2007, however, state news agency Bernama launched a private commercial radio station, Radio24, billed as Malaysia's only 24-hour news and talk station. For now the station is available only in the Klang Valley, or can be heard via the station's website as a live stream.¹³⁴

There are no known community radio stations in Malaysia (unlike neighbouring Thailand and Indonesia).¹³⁵

5.3.1 Radio consumption

Market research company Synovate has compared Kuala Lumpur with Bangkok and Singapore and found that citizens of Kuala Lumpur do not listen to as much radio as their Bangkok or Singapore counterparts: 5.44 hours per week vs 6.09 and 6.52 respectively. This is also true of those who listen to radio online: 2.94 hours for KL, 4.58 for Bangkok and 3.6 for Singapore.¹³⁶

On average, according to market research company Nielsen, 12 per cent (1.99 million) of Malaysians listen to radio in any given 15 minute time slot throughout the day and an average radio listener tunes in for 22 hours a week.¹³⁷

5.4 Print

There are over 30 newspapers and tabloids in Malaysia, published mainly in Malay, English, Chinese and Tamil. The most prominent newspapers include *The Star*, *New Straits Times*, *The Sun*, *Berita Harian*, *Utusan Malaysia*, *Sin Chew Jit Poh* and *Nanyang Siang Pau*.

Ownership is split between:

¹³⁴ Radio 24, 2009, available online at <http://www.radio24.com.my/> (accessed 14 January 2010).

¹³⁵ Interview with KL-based journalist, October 2009.

¹³⁶ Synovate, 2008.

¹³⁷ Kong Mei Yun, available online at <http://my.nielsen.com/news/20091020.shtml> (accessed 14 January 2010).

- Media Chinese International Limited, the result of a merger between Ming Pao Enterprise Corporation, Sin Chew Media Corporation and Nanyang Press Holdings. MCI owns *Sin Chew Jit Poh*, *Nanyang Siang Pau* and *China Press*.¹³⁸
- UMNO's Utusan Group (*Utusan Malaysia* and *Mingguan Malaysia*, a Sunday title). *Utusan Malaysia* is regarded as the UMNO mouthpiece.
- The Star Group (*The Star*, the most widely read English daily). Owned by the Malaysian Chinese Association (MCA), a member of the ruling coalition.
- The Edge Communications (*The Edge*, a weekly, Malaysia's 'best selling and highly regarded publication on business and investment', according to its website; *The Edge Financial Daily*, and others). Owned by a politically unaffiliated businessman.¹³⁹
- Media Prima corporation owns the New Straits Times Press (NSTP), the country's oldest and largest newspaper conglomerate, which publishes *The New Straits Times*, *Berita Harian*, *Harian Metro* and *The Malay Mail*. The company claims a combined circulation of more than half a million copies per day.¹⁴⁰

According to Nielsen Media Research, over the five years to the end of 2007, the overall readership in dailies increased steadily from 51 per cent to 55 per cent. It credits this to a growth in readership of Malay dailies, especially the top-selling *Harian Metro* (which has eaten market share from *Utusan Malaysia* and *Berita Harian*). English, Chinese and Tamil readerships remained stable. *The Star* remains the most popular English-language daily, with four times as many readers as *The New Straits Times* and *The Sun*.¹⁴¹

Government figures tell a different story: average sales of newspapers in 2004 were 3.95 million, but by May 2009, the latest figures available, sales had fallen to 3.67 million. Malay-language newspaper sales fell only slightly – 1.98 million to 1.93 million – but sales of English-language papers dropped more sharply, from 1.06 million in 2004 to 0.84 million in May 2009.¹⁴² This decline can partly be explained by the rise of online media (see below) and partly by a declining readership of English among younger Malaysians.¹⁴³

¹³⁸ Media Chinese International Limited, available online at <http://www.mediachinesegroup.com/> (accessed 14 January 2010).

¹³⁹ Kuala Lumpur-based journalist, 2009.

¹⁴⁰ Company website.

¹⁴¹ Nielsen Media Index, 2008.

¹⁴² Department of Statistics, Malaysia, 2009, <http://www.statistics.gov.my/>

¹⁴³ KL journalist, 2009.

Kuala Lumpur residents spend more time reading newspapers – 4.71 hours a week – than their Bangkok counterparts (3.94) and less than those in Singapore (5.33), but less time reading magazines and reading newspapers online. (The study isn't clear whether such a category includes news websites like Malaysiakini.)¹⁴⁴

Table 3. Largest circulation newspapers (excluding the Sunday papers) in Malaysia

Sin Chew Daily	349,355
Harian Metro	336,603
Star	310,288
The Sun	300,000
Berita Harian	231,163
Utusan	228,802
China Press	223,322

Source: ABC, via Media On Demand)¹⁴⁵

5.5 Telecommunications and internet

Malaysia has lagged only Singapore in the region in terms of communications. In 1990 there was less than one computer per 100 people; in 2006 there were 23. (Singapore had 77 in 2006; Thailand had 7.) Internet penetration has doubled in the past five years, now reaching two in 10 of the population in 2008. The government has vowed to lift that to 50 per cent of households by 2010, and 90 per cent in the Klang Valley, where Kuala Lumpur is located.¹⁴⁶ Malaysia had less than one broadband connection per 200 people in 2003; in 2008, there were nearly 10.¹⁴⁷

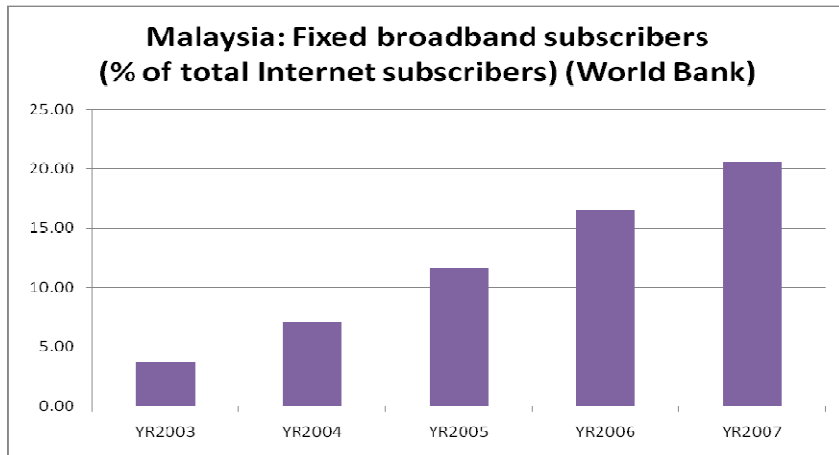
¹⁴⁴ Synovate, 2008.

¹⁴⁵ Media On Demand, *Newspapers* (2009, Blueocean Technologies), available online at <http://www.mediaondemand.my/MediaTitleSrch.aspx?type=1&src=1,2,3,4,0001,00010111Malaysial0&sort=2&order=DESC> (accessed 14 January 2010)

¹⁴⁶ Internews Media Assessment, *cit.*

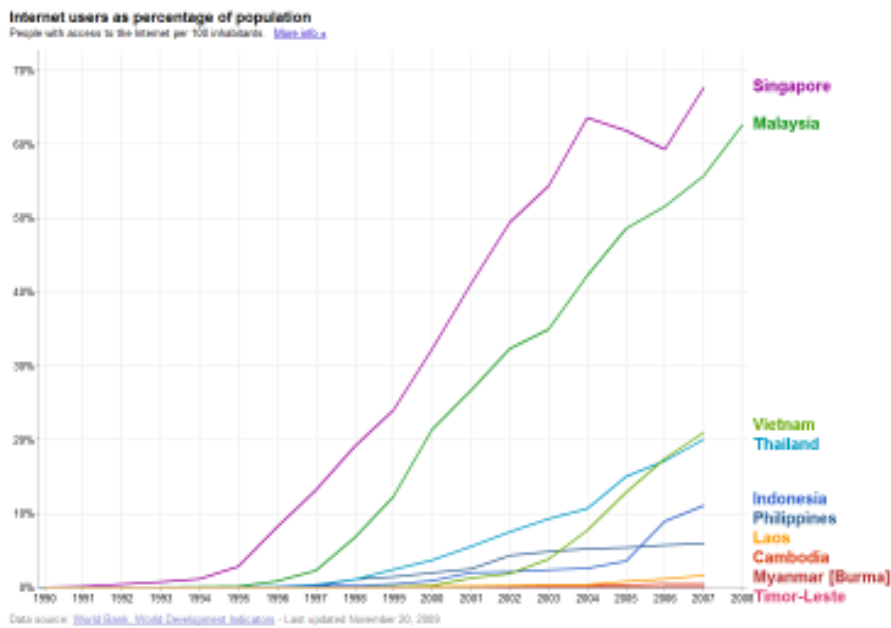
¹⁴⁷ ADB, 2009.

**Chart 17. Fixed broadband subscribers in Malaysia
(% of total internet subscribers), 2003–2007**



Source: World Bank

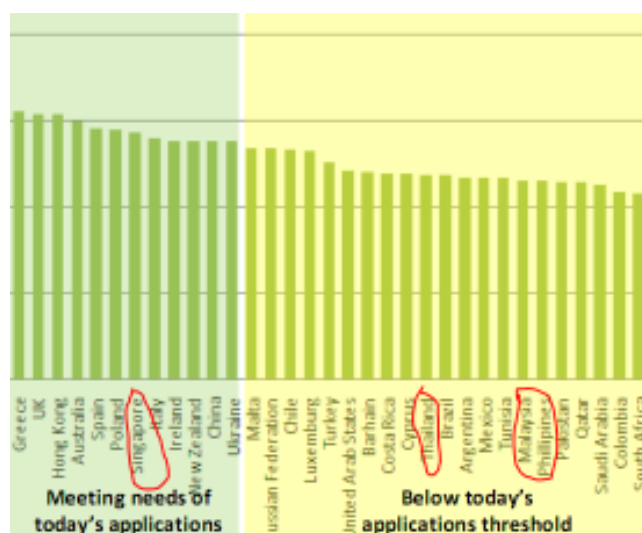
When viewed on a chart, the gap between Singapore and Malaysia, and the rest of the Southeast Asian pack is noticeable.

Chart 18. Internet users as percentage of population in Malaysia, 1990–2007

Source: Internet users as percentage of the population, Southeast Asia (World Bank Development Indicators, as of Nov 2009.)¹⁴⁸

However, this chart doesn't convey the quality of those internet connections: while Singaporeans enjoy speeds that, in the words of Oxford University's Said Business School, "meet the needs of today's applications", Malaysians are getting broadband speeds only slightly faster than those of Filipinos, and slower than those of Thais (*See figure below*)

¹⁴⁸ World Bank, *World Development Indicator, Internet users as percentage of population* (2009, Google), available online at: http://www.google.com/publicdata?ds=wb-wdi&met=it_net_user_p2&idim=country:ZWE:UGA:SDN:SEN:RWA:NGA:KEN:GHA:COG:CMR&tstart=631152000000&tunit=Y&tlen=18#met=it_net_user_p2&idim=country:IDN:KHM:LAO:MYS:SGP:THA:TMP:VNM:MMR:BRN:PHL&tstart=631152000000&tunit=Y&tlen=18 (accessed 14 January 2010).



Source: Broadband Quality Score: A global study of broadband quality, September 2009, by Said Business School

In 2007, Malaysia issued four WiMAX licences as part of an ongoing rollout of wireless broadband technology, Malaysian operator Packet One Networks began its first WiMAX commercial services in August 2008. In October 2009, it announced it had met its target of covering a quarter of the population in peninsular Malaysia, and that it had received approval to roll out its service in East Malaysia.¹⁴⁹

5.6 Online

Malaysia offers a shining example of the possibilities of the internet to deliver information that is not available to others in a tightly controlled media environment. It also offers a glimpse of future business models for online media. But the picture, once again, is mixed.

As mentioned above, Kuala Lumpur residents spend less time reading newspapers online than in Bangkok and Singapore, but visit news websites in roughly the same proportion. Although the proportions are small, figures suggest that the capital's online users are more *au fait* with Web 2.0 technologies such as RSS (Really Simple Syndication, an alternative, and efficient, way to deliver and receive data such as

¹⁴⁹ "East Malaysia Gets P1 W1MAX in 2010", press release, 16 October 2009, company website, available online at: http://www.p1.com.my/pressreleases/20091016_P1_East_Malaysia_Gets_P1_W1MAX.htm (accessed 14 January 2010).

newsfeeds) than their Singapore or Bangkok counterparts: 11 per cent said they had used a web-based news aggregator or feed reader in the past week, against 7 per cent in the other cities.¹⁵⁰

Accessing news on a mobile device, however, remains as limited in all three cities: about 2.5 per cent for reading news, half of 1 per cent for reading an electronic newspaper.¹⁵¹ (See below)

5.6.1 News online

As mentioned, Malaysia has seen an explosion in recent years in the numbers of blogs and websites which offer alternative views and news to Malaysians.

Malaysia's first independent news website, Malaysiakini, started in 1999 and is now a respected part of the Malaysian media and the country's most popular website. In 2002 Malaysiakini switched to a subscription model: For the past five years the website has made a profit, with revenues doubling more or less every year. Traffic lifted significantly during the 2008 election when Malaysiakini briefly opened the pay wall. When the pay wall was put back up, traffic dropped only marginally.¹⁵²

Chart 19. Comparison of visitorship of main news websites in Malaysia, 2007–2009



Source: Google Trends, Dec. 2009

Malaysiakini credits its success with the duality of restricted offline media and open online media. Other news websites have followed suit, including Malaysia Today (mt.m2day.org) – a non-commercial operation by blogger Raja Petra Kamarudin; The Nutgraph (www.thenutgraph.com) – which focuses more on analysis and feature-

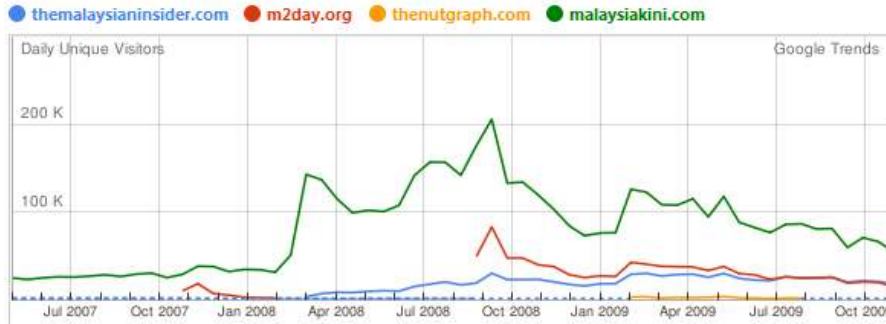
¹⁵⁰ Synovate, 2008.

¹⁵¹ Synovate.

¹⁵² Interview with Chandran, *cit.*

length stories; The Malaysian Insider (www.themalaysianinsider.com) – also run by professional journalists using a network of stringers on the Malaysiakini model. Malaysiakini, however, still dominates.

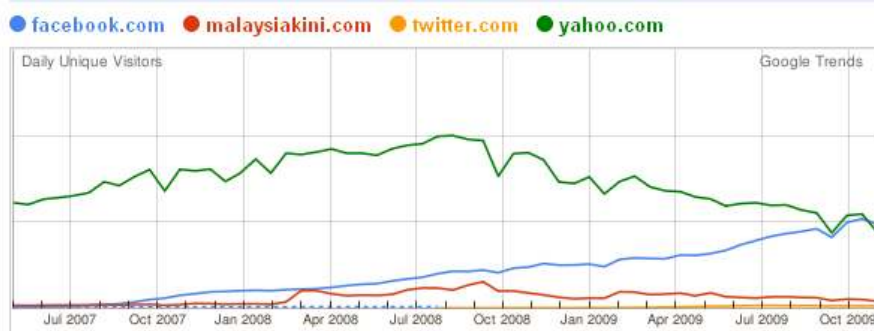
Chart 20. Main web-only publications in Malaysia, 2007–2009



Source: Google Trends, Dec. 2009

It is important to stress, however, that social networking is as popular in Malaysia as elsewhere, eclipsing Malaysian traffic to Malaysiakini and even overtaking traditional mainstay sites like Yahoo.com.

Chart 21. Malaysia social network traffic, 2007–2009



Source: Google Trends, Dec. 2009

5.7 Mobile access

Access to the Internet by mobile phones is moving faster than surveys can usefully record. According to the Synovate survey, Malaysians' access on a mobile device remains as limited as those in Singapore or Bangkok: about 2.5 per cent for reading news, half of 1 per cent for reading an electronic newspaper.

This figure probably understates – and predates – the massive growth seen in accessing social networking sites in the past year, which is as much a mobile phone phenomenon as a fixed computer one. Digi, a mobile operator in Malaysia, for example, said in November 2009 that half the country's Facebook users now accessed the social network through mobile phones.¹⁵³

While usage of mobile phones for accessing data is growing, two things are worth noting. Firstly, the sites being accessed are mostly not local ones; indeed, none are listed in the top 10 being accessed by the popular mobile Opera Mini browser compared with at least one or two elsewhere. This is surprising given the appetite for online news.

The other point is the impressive growth in usage of mobile data in Malaysia – behind only Vietnam and the Philippines. Taking the two together would suggest interesting times ahead for internet news sites.

Table 4. Growth of internet news sites in Southeast Asia, 2009

Country	Page view growth % year-on-year	Unique user growth % year-on-year	Page views per user
Cambodia	371	100	253
Indonesia	437	111	420
Laos	194	41	286
Malaysia	729	250	301
Philippines	1,573	354	705
Singapore	299	23	237
Thailand	238	78	305
Vietnam	7,905	2,353	313

Source: Opera State of the Mobile Web, June 2009

¹⁵³ S. Phoosuphanusorn, "Telenor chief slams 3G delay", 2009, *The Bangkok Post*, available online at <http://www.bangkokpost.com/business/economics/27950/telenor-chief-slams-3g-delay> (accessed 14 January 2010)

Global websites most accessed from Malaysia – Source: Alexa

- <http://facebook.com/>
- <http://google.com.my/>
- <http://yahoo.com/>
- <http://youtube.com/>
- <http://google.com/>
- <http://blogger.com/>
- <http://live.com/>
- <http://wikipedia.org/>
- <http://msn.com/>
- <http://myspace.com/>

*Local websites most accessed from Malaysia – Source: Netcraft (*news websites)*

- <http://forum.lowyat.net/>
- <http://www.malaysiakini.com/>*
- <http://thestar.com.my/>*
- <http://www.maybank2u.com.my/>
- <http://www.mudah.my/>
- <https://www.maybank2u.com.my/>
- <http://www.utusan.com.my/>*
- <http://www.bharian.com.my/>*
- <http://www.thestar.com.my/>*
- <http://www.themalaysianinsider.com/>*

Websites accessed from mobile device in Malaysia – Source: Opera

- <http://www.google.com>
- <http://www.friendster.com>
- <http://www.facebook.com>
- <http://www.yahoo.com>
- <http://www.myspace.com>
- <http://www.youtube.com>
- <http://www.my.opera.com>
- <http://www.wikipedia.org>
- <http://www.tagged.com>
- <http://www.gamejump.com>

6. THE PHILIPPINES



6.1 Balance and danger

The Philippines' reputation for having the freest press in Asia is being challenged by continued reports of killings of journalists and incidences of harassment. The murder of at least 21 journalists in Mindanao in November 2009 brought to more than 100 the number killed since 1986.¹⁵⁴ Despite the setting up of a police task force (before the massacre) to investigate murders of journalists, the Committee to Protect Journalists (CPJ) has estimated an impunity rate of 90 per cent, one of the highest in the world. The Belgium-based International Federation of Journalists (IFJ) called the Philippines “the most dangerous place in the world for media workers” after the deaths.¹⁵⁵

Most print and broadcast media are privately owned. Only IBC (television) and the Philippine Broadcasting Service (radio) are Government-run. Much media ownership is concentrated in the hands of prominent families and businesses. Consequently, some reports tend to be one-sided presentations favouring special interests. Others lack substance. Freedom House, in its 2009 report, said that while the media were “vibrant

¹⁵⁴ *For journalists, a reminder in perilous times*, statement of the Center for Media Freedom and Responsibility, 24 November 2009, available at <http://www.cmfr-phil.org/2009/11/24/for-journalists-a-reminder-in-perilous-times> (accessed 14 January 2010)

¹⁵⁵ J. Joaquin and D. Lhyd Suelto, “US envoy condemns Maguindanao massacre”, 2009, *The Mindanao Daily Mirror*, available at <http://www.dailymirror.ph/Nov/headlines11262009%2604.html> (accessed 14 January 2010)

and outspoken”, “newspaper reports often consist more of innuendo and sensationalism than substantive investigative reporting.”¹⁵⁶

The same is true of TV and radio: although many state-owned TV and radio stations cover controversial topics and are willing to criticize the government, “they too lack strict journalistic ethics”. This independence did not necessarily extend to election time: the Manila-based Center for Media Freedom and Responsibility (CMFR) found that while coverage of the 2007 election was better than 2004, it found “unabashed bias” by government-run networks.¹⁵⁷

6.2 Consumption

More than 96 per cent of Filipinos have access to broadcast media, meaning it is still “the principal source of news and the major venue for discussion of public affairs”, says Melinda Quintos de Jesus, executive director of the CMFR.¹⁵⁸

Indeed, 92 per cent of people said they had watched television in the past week, against 28 per cent who said they had used the Internet in the past month, according to a survey by Nielsen in March 2009.¹⁵⁹ That said, the TV figure was a decline from 98 per cent in 2007, whereas radio appears to be enjoying a resurgence in popularity: 80 per cent listened to it in the past week, against 69 per cent in 2006.

Compare this with a 2003 national government survey, the Functional Literacy, Education and Mass Media Survey (FLEMMS), which showed that while more people had radio than TV (81 per cent vs 45 per cent), TV was the preferred source of information over radio or newspapers: 62 per cent vs 57 per cent and 47 per cent respectively. (The FLEMMS 2008 survey is not yet available.)¹⁶⁰

Nielsen and other surveys suggest that Filipinos are getting their information less from traditional media – TV and newspapers – and more from the internet. This may indicate both a rising interest in, and access to, the Internet, but perhaps also a declining confidence in the accuracy and impartiality of traditional media. (*See below*).

¹⁵⁶ Freedom House, *Freedom in the World 2009 – Philippines*, 2009, available online at <http://www.unhcr.org/refworld/category,COI,,,PHL,4a64528e1e,0.html>. (accessed 14 January 2010)

¹⁵⁷ Quoted in Freedom House 2009.

¹⁵⁸ *Broadcasting: Information or Entertainment*, Philippine Journalism Review, Vol. XV, 1, 2004.

¹⁵⁹ Alexander Villafania, *Declining Filipino TV, print consumption* (2009, Manila, INQUIRER.net), available online at <http://newsinfo.inquirer.net/topstories/topstories/view/20090326-196378/Declining-Filipino-TV-print-consumption> (accessed 14 January 2010)

¹⁶⁰ NSO Publications, *Functional Literacy, Education and Mass Media Survey (FLEMMS)* (2003, National Statistics Office), available online at <http://www.census.gov.ph/data/publications/pubflemms.html> (accessed 14 January 2010).

6.3 Television

ABS-CBN Broadcasting Corporation (ABS-CBN) was ranked the largest media broadcasting company in the Philippines, operating a network that reaches more than 95 per cent of the country's television households. It is owned by Lopez Group's Benpres Holdings. It also provides news and entertainment for nine cable channels, including its own SkyCable. ABS-CBN airs 20 hours a day on Channel 2 in Metro Manila and through its 26 TV stations and 10 affiliates across the Philippines. The company claims that Channel 2 was the most popular television station in the country with an average audience share of 45 per cent.¹⁶¹

The study by Yahoo!/Nielsen in March 2009 showed that while ownership of televisions had risen – 93 per cent of the country now owns a TV set – the percentage of people actually watching them has dropped somewhat – 92 per cent said in 2008 they had watched it in the last week against 98 per cent in 2007. Nielsen explained this trend as Filipinos watching their favourite shows via “home video” – presumably locally rented DVDs and VCDs – rather than on live TV.

This may in part be because of limited access to satellite television. Cable TV, launched as long ago as 1969, is only now starting to really grow, substantially boosted by the prospect of bundling broadcasting with Internet, telephony and other services. While DTH satellite TV has been available in the Philippines since 1999, its large-scale adoption awaits the entry of a major player into the market.¹⁶²

One problem with TV in the Philippines is that the line has blurred between news and entertainment. The current practice is to devote an entire section of a news program to “infotainment” – “Star Patrol” for TV Patrol in ABS-CBN 2, and “Chikka Minute” for 24 Oras in GMA-7, according to Alaysa Tagumpay Espadero Escandor. The news content, as a result, is further condensed: the non-infotainment reports are usually one to two minutes in length. This restriction has resulted in “soundbite journalism,” in which facts and arguments are condensed into catchphrases that, at best, offer only a cursory look at issues.¹⁶³

¹⁶¹ Benpres Holdings Incorporation, *Broadcasting*, 2008, Pasig City, Benpres Holdings Incorporation, available online at <http://www.benpres-holdings.com/portfolio.php?id=39> (accessed 14 January 2010).

¹⁶² Paul Budde Communication Pty Ltd., *Philippines Broadcasting*, September 2009, available online at <http://www.budde.com.au/Research/Philippines-Broadcasting.html?r=58> (accessed 14 January 2010)

¹⁶³ Alaysa Tagumpay E. Escandor, *The Power of the Image* (2009), available online at http://he-il.facebook.com/note.php?note_id=118573479598 (accessed 14 January 2010).

6.3.1 Digital television

The Philippines has set a deadline of 2015 for the completion of switchover to Digital Terrestrial Television (DTT). This means that the National Telecommunications Commission (NTC), which is spearheading the transition, has six years to prepare the rest of the country for a different kind of migration.¹⁶⁴

6.4 Radio

There were about 1,000 radio stations around the country in 2007, a slight increase on 2006. The number of licensed radio stations fell from 171,792 in 2005 to 128,905 between 2005 and 2007.¹⁶⁵

ABS-CBN also owns what it calls the country's leading radio network of 17 radio stations and six affiliates.¹⁶⁶

Radio appears to still be popular: the number of people listening to it has risen each year since 2006, from 69 per cent to 80 per cent. Ownership has remained steady, despite growing mobile phone ownership (43 per cent in 2006, to 55 per cent in 2008), which might be expected to replace the ownership of radios. Indeed, the Nielsen figure, although based only on urban respondents, closely matches that of the national FLEMMS survey of 2003, suggesting that radio ownership is evenly spread across the country.

Indeed, an older FLEMMS survey reflects similar numbers: the radio endures because it is cheap, runs on batteries and doesn't require a satellite dish.¹⁶⁷

6.5 Print

There are two types of newspaper in the Philippines: the tabloid, which is usually in Tagalog, and the broadsheet, which is usually in English. The top tabloids enjoy circulations of more than 600,000, on a par with Indonesia's *Pos Kota* or Thailand's *Matichon*.¹⁶⁸

¹⁶⁴ Anton Javier B. Dizon, "NTC 30th Anniversary Deadline to Digital", 23 July 2009, *BusinessWorld*.

¹⁶⁵ National Statistics Office: *Philippines in Figures*, 2009.

¹⁶⁶ Benpres Holdings Corporation, *cit*.

¹⁶⁷ FLEMMS, 1994.

¹⁶⁸ WAN-IFRA. Nielsen figures for circulation are from reports quoting the Nielsen Media Index. See, for example: Alexander Villafania, "Declining Filipino TV, Print consumption", 26 March 2009, *Inquirer.net*.

There were more than 645 newspapers in 2005, the latest year for which official figures were available; 100 more than two years earlier. Most of them are regional. There are 22 national paid-for dailies, with an estimated reach of 31 per cent in 2008.¹⁶⁹

The most widely read newspapers are:

- *Manila Bulletin*
about 661,000 readers (Nielsen); circulation 220,000 (WAN-IFRA).
- *The Philippine Star*
about 738,000 readers (Nielsen); circulation 200,000.
- *Philippine Daily Inquirer*
The most reputable, and vibrant, of the broadsheets. Nielsen Media Index survey: 49 per cent of those who had read a broadsheet the day before said they had read the inquirer. Synovate survey indicated it was the paper of choice for 44 per cent of respondents. This translates to about 964,000 readers (Nielsen). Circulation 260,000 (Barker, 2009).
- *The Manila Times*
187,000 circulation (WAN-IFRA).

Although the broadsheets are national, the geography of the Philippines and the rise of satellite communications have reduced their readership beyond Metro Manila. The 2003 FLEMMS survey showed that while 41 per cent of people in NCR said they read newspapers, the number fell to 25 in Central Luzon and in Central Visayas. The lowest figure was 9 per cent in the southern Autonomous Region in Muslim Mindanao. Not only do newspapers take longer to reach there, but the content touches them less than those in the capital region.

6.5.1 Consumption

As mentioned above, consumption of newspapers appears, at least according to some sources, to be falling. The FLEMMS 2003 survey showed it lagged television and radio as the preferred source of information, and the Nielsen survey shows that the number of people reading newspapers and magazines has dropped sharply: 15 per cent in 2008 vs 20 per cent in 2006, and 7 per cent for magazines against 18 per cent in 2006. Compare this to Internet usage: 28 per cent of people said they had accessed the net in the past month.

¹⁶⁹ National Statistics Office; *Synovate Media Atlas Finds Print And TV Still Main Channels In Reaching Filipino Consumers*, press release July 2009, available online at http://www.marketresearchworld.net/index.php?option=com_content&task=view&id=2707&Itemid=76 (accessed 14 January 2010).

A recent Synovate survey, however, suggests more resilience, especially among wealthier Filipinos. The study found an increasing number of upscale socio A and B groups reading newspapers, from 56 per cent in 2007/ 2008, to 64 per cent in 2008/ 2009.¹⁷⁰

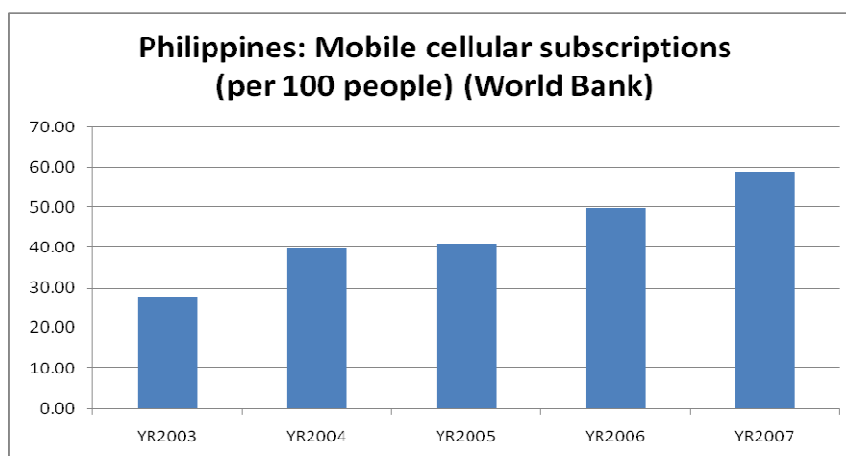
The general decline, according to Nielsen Executive Director Jay Bautista, is that there are no new markets for print publications to tap. As found elsewhere in the world, younger generations are getting their information from the Internet.¹⁷¹

6.6 Telecommunications and internet

6.6.1 Cellular phones

The Philippines continues its love affair with the cell phone: the number of mobile telephone subscribers in the Philippines somehow continues to grow, in large part due to the popularity of SMS services as well as the price and inaccessibility of fixed-line services. There were 60 cellular subscriptions per 100 people in 2007, a nearly seven-fold increase over 2000, and higher than the Asia Pacific average. All but 1 per cent of the population had cell phone coverage, a feat for such a sprawling country.¹⁷²

**Chart 22. Mobile cellular penetration in the Philippines
(% of population), 2003–2007**



Source: World Bank

¹⁷⁰ Synovate press release, see footnote above.

¹⁷¹ Alexander Villafania, *Internet consumption gaining ground* (INQUIRER.net, 26 March 2009). Available online at <http://newsinfo.inquirer.net/topstories/topstories/view/20090326-196378/Declining-Filipino-TV-print-consumption>.

¹⁷² World Bank ICT, op cit.

Although in 2005 and into 2006 the growth rate had slowed significantly, by the second half of 2006 the market had once again started to grow rapidly, continuing through 2007 and 2008. In 2009, however, there were signs that the global recession was having an impact on the local economy and in turn on the local mobile market. Nevertheless the market continued to grow. As with elsewhere in the region, this growth has come from the margins: lower income groups and the geographically remote.¹⁷³

6.6.2 Internet

Even though the Philippines has such vibrant media, or perhaps because of this, the Internet was slow to take off. This is partly due to a slow roll-out of services: not until 2006 was there a significant surge in broadband uptake, with an estimated 340,000 subscribers by year-end, rising to almost 1 million in mid-2007, providing a much needed boost to a market where over half the users are still accessing the Internet at cyber cafes and other such venues. The jump followed the expansion of the SmartBro service by the Philippine Long Distance Telephone Company (PLDT), the country's dominant telephone carrier, a wireless broadband product similar to WiBro in South Korea. Despite the new growth, overall broadband penetration remains low; there were only 11 broadband services for every 1,000 people in the country early in 2008.¹⁷⁴

The internet sector is, however, well positioned for growth, with a deregulated market, strong government support for IT development, and an increasingly Internet savvy population. Internet usage is growing: 34 per cent of urban Filipinos have a computer at home, with most of those connected to the internet, according to Yahoo/Nielsen. These figures are skewed, of course, to the wealthier parts of the population; the World Bank's latest figures from 2007 show a more modest 7.3 per cent of the population with a computer at home, relatively low among its neighbours although still higher than the regional average (5.6 per cent). Internet usage, according to the World Bank, is also more modest than the Yahoo/Nielsen figures suggest, with 2.8 subscribers per 100 people. Among wealthier Filipinos, however, the figures are higher: In the Greater Manila Area, 46 per cent of respondents have access. When different age categories were compared, the younger age segment turned out to be the highest at 60 per cent.

¹⁷³ Paul Budde Communication Pty Ltd, *cit.*

¹⁷⁴ P. Evans, *2008 Asia – Telecoms, Mobile and Broadband in Malaysia and Philippines*, Paul Budde Communication Pty Ltd, available online at <http://www.budde.com.au/Research/2008-Asia-Telecoms-Mobile-and-Broadband-in-Malaysia-and-Philippines.html> (accessed 14 January 2010).

6.7 Online

There is no filtering of the internet, according to the OpenNet Initiative.

Most newspapers have websites. Some, like *The Manila Bulletin*, have electronic editions that match the layout of the offline edition.¹⁷⁵ ABS-CBN and *The Inquirer* both have websites in the top 10 trafficked Philippine websites – *The Inquirer* with four – but well above all of them is the GMA network’s website, which ranks well above the others.

Chart 23. The most visited websites in the Philippines (2000–2008)

View most visited websites for country:

Rank	Site	First Seen
5010	http://www.gmanews.tv	June 2006
10771	http://now.abs-cbn.com	July 2004
12522	http://inquirer.net	November 2001
22112	http://archives.free.net.ph	August 2005
24500	http://smart.com.ph	October 1996
31555	http://www.delicatepussies.com	August 2000
32079	https://www.bpiexpressonline.com	April 2000
33056	http://tsikot.yehey.com	April 2004
33123	http://www.bpiexpressonline.com	June 1999
33370	http://203.177.171.168	unknown
38282	http://sports.inquirer.net	January 2008
38368	http://business.inquirer.net	January 2007
43441	http://globalnation.inquirer.net	January 2007
43590	http://www.cebupacificair.com	February 1999
49268	http://www.foxyreviews.com	August 2006

Source: *Netcraft October 2009* (see end of chapter for more updated data)

A different picture emerges, however, once the *Inquirer*’s sub-domains are not counted separately, making the website the most popular among the free by some way.

¹⁷⁵ *Wireless News*, 7 August 2009: “Pressmart Offers Electronic Edition of Manila Bulletin Newspaper.”

Chart 24. Comparison of popular websites in the Philippines (2007–2009)



Source: Google Trends

If the social networking effect is factored in, however, a better perspective on news sites in the Philippines emerges.

Chart 25. Comparison of news sites with social networks (2007–2009)



Source: Google Trends

Filipinos have been as enthusiastic in their adoption of social networking tools as they were of SMS; this was particularly true during the storms of September 2009 when phone networks were overloaded. Instead some people turned to Facebook and Twitter to pass on information, and, in some cases get help. Others contributed to an online map tracking Typhoon Pepeng. (See figure below)

GMANews.TV Storm Watch: Pepeng – Google Maps (<http://bit.ly/hZD94>)*Global websites most accessed from the Philippines – Source: Alexa*

- <http://facebook.com/>
- <http://yahoo.com/>
- <http://google.com.ph/>
- <http://youtube.com/>
- <http://friendster.com/>
- <http://google.com/>
- <http://blogger.com/>
- <http://wikipedia.org/>
- <http://multiply.com/>
- <http://zynga.com/>

*Local websites most accessed from the Philippines –
Source: Netcraft (*news websites)*

- <http://www.gmanews.tv/>*
- <http://now.abs-cbn.com/>*
- <http://archives.free.net.ph/>
- <http://smart.com.ph/>
- <http://203.177.171.168/>
- <https://www.bpiexpressonline.com/>*

- <http://www.bpiexpressonline.com/>*
- <http://www.delicatepussies.com/>
- <http://porn.fishadultgames.com/>
- <http://www.cebupacificair.com/>

Websites accessed from mobile device in the Philippines –

Source: *Opera (*news websites)*

- <http://www.friendster.com>
- <http://www.google.com>
- <http://www.yahoo.com>
- <http://www.facebook.com>
- <http://www.youtube.com>
- <http://www.wikipedia.org>
- <http://www.pinoywap.net>*
- <http://www.mbmgl.com>
- <http://www.symbianize.com>
- <http://www.sulit.com.ph>

7. SINGAPORE



Singapore's media have been described as “tightly constrained” (Freedom House, 2009) and “highly regulated” (BBC, 2009).

They have also, in the words of one assessment, “served to maintain and sustain the hegemonic domination of the country's ruling party over policy and the populace.”¹⁷⁶

There are two main media companies:

- Singapore Press Holdings (SPH), which has a virtual monopoly over the newspaper industry, publishing 17 newspapers in Singapore and 100 magazines in Singapore and around the region. It is a publicly listed company, but ownership is complicated by two different share types, shareholdings by nominee companies, and the fact that the government has to approve holders of the more powerful management shares (see below). One 10-year old study by students at Hong Kong University (Chu Yee-ling & Wong Man-yee, 1999) concluded that Temasek Holdings, a government investment company, holds a significant, albeit indirect, stake in the group.¹⁷⁷

¹⁷⁶ Jaspal Singh, *Singapore*, in *Asian Communication Handbook 2008*, Indrajit Banerjee & Stephen Logan (eds.) (Singapore, 2008); Freedom House country report, available online at http://www.freedomhouse.org/inc/content/pubs/fiw/inc_country_detail.cfm?year=2009&country=7700&pf (accessed 14 January 2010). The BBC country profile of Singapore can be found here: http://news.bbc.co.uk/2/hi/americas/country_profiles/1143240.stm (accessed 14 January 2010).

¹⁷⁷ Chu Yee-ling & Wong Man-yee, *Singapore: SPH-Government Relationship* Asia Media Project, (Hong Kong, 1999), available online at http://jmsc.hku.hk/students/jmscjournal/critical/elainandmargaret_04.htm (accessed 14 January 2010).

- MediaCorp, 100 per cent owned by Temasek Holdings,¹⁷⁸ which has a monopoly over free-to-air television and owns most of the country's radio stations.

Both operations are the result of a series of Government-led mergers going back to the 1970s. MediaCorp Pte Ltd is the national broadcaster previously known as Radio Television Singapore (1965-1980), Singapore Broadcasting Corporation (1980-1994) and the Television Corporation of Singapore (1994-2001). The organisation started out as a Government department and was progressively corporatized. MediaCorp Pte Ltd was set up as a private company 100 per cent owned by Temasek Holdings. It is not public listed.

The two media companies have attempted to make inroads into each others' business: SPH with its own TV service, SPH Mediaworks, and MediaCorp with a free daily newspaper, *Today*. SPH Mediaworks, set up in 2001, including two free-to-air terrestrial channels, led to a ratings war that only ended in 2004.¹⁷⁹

Foreign media are encouraged to base their regional headquarters in Singapore but defamation suits have discouraged critical coverage of the country.¹⁸⁰ In 2006, the government dropped exemptions for several foreign publications, including the *Financial Times* and *International Herald Tribune*, meaning they were required to appoint a local legal representative and provide security deposits of S\$200,000 (US\$144,000).¹⁸¹ In November 2009 the *Far Eastern Economic Review* and its editor reportedly paid more than S\$400,000 (US\$288,000) to settle a defamation suit filed by Prime Minister Lee Hsien Loong and his father, Minister Mentor Lee Kuan Yew.¹⁸²

¹⁷⁸ See: http://www.temasekholdings.com.sg/our_portfolio_portfolio_highlights_major_investments.htm (figures are marked as of 31 March 2008).

¹⁷⁹ SPH/MediaCorp press release, "Channel i to close on 1 January 2005 Channel U and Channel 8 to have complementary programming", Singapore, 7 December 2004, available online at <http://www.sph.com.sg/article.display.php?id=109> (accessed 14 January 2010).

¹⁸⁰ The Ministry of Information, Communication and Arts website lists Reuters [now Thomson Reuters], CNBC Asia and the Dow Jones Group as having their regional headquarters located in Singapore, available online at <http://app.mica.gov.sg/Default.aspx?tabid=174> (accessed 14 January 2010).

¹⁸¹ Ministry of Information, Communication and Arts, *Circulation Of Foreign Newspapers In Singapore*, Singapore, 3 August 2006, available online at <http://app.mica.gov.sg/Default.aspx?tabid=79&ctl=Details&mid=540&ItemID=653> (accessed 14 January 2010).

¹⁸² Agence France Presse, "Magazine pays damages to Singapore leaders: lawyer", Singapore, 17 November 2009), available online at http://www.google.com/hostednews/afp/article/ALeqM5iV_tffIE-6e17Dq0-b8T3qZIBEKA (accessed 14 January 2010).

7.1 Television

MediaCorp Pte Ltd operates all free-to-air terrestrial local television channels licensed to broadcast in Singapore, as well as 14 radio stations.

Cable TV is dominated by StarHub, majority owned by Temasek Holdings,¹⁸³ which offers all the terrestrial channels and about 150 foreign channels, including CNN and BBC. SingTel has launched its IPTV service, Mio TV, which may eat significantly into StarHub's dominance after its successful bid in September 2009 for the rights to the hugely popular English Barclay's Premier League football matches.

All channels are digital and most offer parallel High-Definition TV (HDTV) versions. StarHub shut down analogue transmissions in July 2009.¹⁸⁴

7.1.1 Mobile TV, IPTV, web TV

In 2001, MediaCorp TV introduced the world's first outdoor digital television service, TV Mobile, on buses and in food courts. It was also the first in the world to use Digital Video Broadcasting technology to deliver high quality mobile TV programs to public commuters.¹⁸⁵

In 2006 MediaCorp launched its own IPTV service, allowing customers to access to MediaCorp programs on their computers. SingTel and StarHub offer similar services, including mobile TV.

SPH's foray into broadcasting ended when its two channels set up in 2000 were merged with those of MediaCorp in 2004. After the merger, MediaCorp once again had a monopoly on free-to-air terrestrial channels. SPH has since launched a web-only TV station, Razor TV.

¹⁸³ StarHub Limited, "Investor Relations Ownership Summary (Singapore)", available online at <http://phx.corporate-ir.net/phoenix.zhtml?c=183543&p=irol-ownershipsummary> (accessed 14 January 2010).

¹⁸⁴ DMAAsia, "StarHub to end analogue TV service from July", Singapore, 18 February 2009.

¹⁸⁵ Ang Peng Hwa, *Singapore Media* (Unpublished paper contributed to journalism.sg website by author, Singapore 2007). Dr. Ang is currently professor at the Wee Kim Wee School of Communication & Information at Nanyang Technological University, Singapore. Available online at <http://journalism.sg/wp-content/uploads/2007/09/ang-peng-hwa-2007-singapore-media.pdf> (accessed 14 January 2010).

Household ownership of satellite dishes is illegal although international TV channels are available on StarHub's cable TV and SingTel's mio IPTV services.¹⁸⁶

7.2 Radio

Singapore's radio stations are mainly operated by MediaCorp with the exception of four, which are operated by Singapore Armed Forces reservists' association, SAFRA Radio, and SPH UnionWorks. Most radio content is music and talkback.

The BBC World Service is the only foreign station in Singapore, running on an FM channel and using Singapore as a base for short-wave relays to the region.

7.3 Print

Newspaper ownership and management are governed by the Newspaper and Printing Presses Act of 1974, which requires the chief editor or proprietor to have a permit and gives the government the power to appoint the management shareholders of all newspaper companies and to control any transfers of such management shares.¹⁸⁷

The print media are dominated by Singapore Press Holdings (SPH), publisher of the flagship English-language daily, *The Straits Times*. SPH publishes all daily newspapers with the exception of *TODAY*, which is owned by MediaCorp. A total of 16 newspapers are in active circulation. Daily newspapers are published in English, Chinese, Malay and Tamil.

The Straits Times, the country's oldest newspaper, is a broadsheet with multiple sections, including coverage of regional and international news. Ang Peng Hwa, professor at Nanyang Technological University's School of Communication and Information, wrote in a paper published at journalism.sg in 2007 that *The Straits Times* "is as close to what can be considered a quality paper, as the term might be generally defined, in the Singapore setting. It is a local paper, a national paper and a regional and international paper – all in one – and billed as the national paper of record."¹⁸⁸

¹⁸⁶ Media Development Authority, Press Release, 20 June 2003, "Hotels and Selected Educational Institutions Can Now Install TV Receive-Only (TVRO) Satellite System", available online at www.mda.gov.sg/wms.www/thenewsdesk.aspx?sid=484 (accessed 14 January 2010): "The restriction on satellite dishes in households will continue, to prevent the in-flow of undesirable contents that are at odds with Singapore's multi-racial and multi-religious society."

¹⁸⁷ Singapore Attorney General's Chambers, *Newspaper and Printing Presses Act*, Section 10, available online at http://statutes.agc.gov.sg/non_version/cgi-bin/cgi_legdisp.pl?actno=2002-REVED-206&date=20050415&method=whole&doctitle (accessed 14 January 2010).

¹⁸⁸ Ang Peng Hwa, *cit.*

7.3.1 Consumption

Despite Singapore being one of the most wired countries in the world, newspaper readership appears to be rising. Circulation of all newspapers was 1.75 million in 2008, compared to 1.13 million ten years ago. This translates to 36 per cent of the population in 2008 against 28 per cent ten years ago.¹⁸⁹

7.4 Online

Singapore has one of the most developed Internet infrastructures in the world. The first in the world to deploy Digital Subscriber Line (DSL) commercially back in 1997, 80 per cent of households now have access to broadband (2008). Subscription rates have doubled in the past five years, from 10 per cent to 22 per cent. This is matched in Asia only by Taiwan with 22 per cent, Hong Kong with 27 per cent and South Korea with 32 per cent. World Bank figures differ somewhat; in 2009 the percentage of Internet subscribers with fixed broadband was 46 per cent.¹⁹⁰

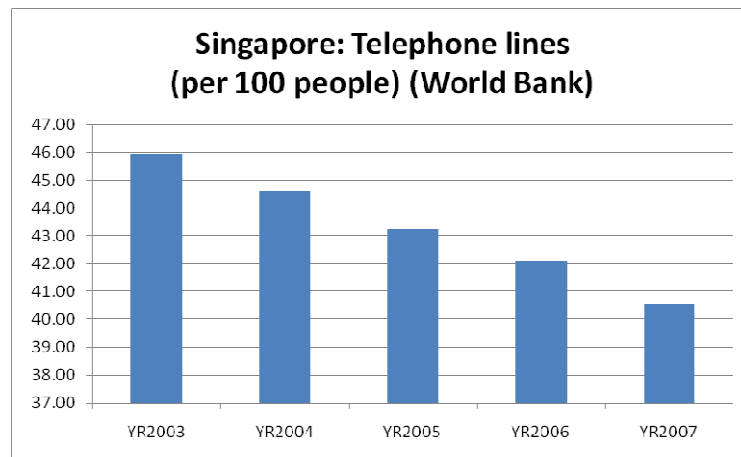
An ultrafast broadband network will reach a quarter of Singaporean households in the first three months of 2010, offering initial speeds of 25 Mbps.¹⁹¹

Cell phone usage is growing significantly – so much so that the number of fixed lines per 100 people has dropped between 2000 and 2007 (from 48.3 to 40.6).

¹⁸⁹ Yearbook of Statistics (Singapore Government, 2009). Available online at <http://www.singstat.gov.sg/pubn/reference/yos09/statsT-culture.pdf> (accessed 14 January 2010).

¹⁹⁰ Asian Development Bank, *Key Indicators for Asia and the Pacific, 40th Edition* (Manila, 2009); World Bank, Global Information and Communication Technologies.

¹⁹¹ *Straits Times*, 7 October 2009.

Chart 26. Telephone lines (% of population) in Singapore (2003–2007)

Source: World Bank

As of 2007 there were 129 mobile phone subscriptions per 100 people.¹⁹²

(Official government figures are higher: 128.7 per cent household broadband penetration, 96 per cent fixed line household penetration, and 134.5 per cent mobile phone penetration, as of September 2009.)¹⁹³

Only seven websites are blocked, all of them pornographic, according to OpenNet tests.¹⁹⁴

SPH has made several forays online. Its business daily, *Business Times*, was the first to launch an online edition in 1995, claiming to be the first online newspaper in Asia. In the same year SPH launched a portal, AsiaOne.com, which has its own editorial team but relies on copy from SPH's stable of publications. In 2000 it launched Project Eyeball, the country's first integrated online and print publication, which closed less than a year later after readership fell steadily. In 2007 it relaunched its *Straits Times* website, www.straitstimes.com, which has continued to gain readership, making it, on some reckonings, the most trafficked site in Singapore (see charts below).

¹⁹² World Bank, DPP Quick Query data, accessed in November 2009.

¹⁹³ Ministry of Information, Communications and the Arts, *Singapore at a Glance* (Singapore, 2009). Available online at <http://app.www.sg/who/1/Singapore-at-a-Glance.aspx> (accessed 14 January 2010).

¹⁹⁴ OpenNet Initiative, *Singapore*, 10 May 2007. Available online at <http://opennet.net/research/profiles/singapore> (accessed 14 January 2010).

Since October 2009, only the first few paragraphs of most of *The Straits Times*' own news stories are available outside the subscription wall. SPH has also launched other online services such as classifieds, and STOMP, which incorporates celebrity blogs and photos and videos by members of the public.

MediaCorp's most popular website is ChannelNewsAsia.com, which carries news and video from its reporters and agencies.

All of these websites overshadow independent websites, such as popular blogger mrbrown's, although there has been a downward trend for such sites in recent months.

Chart 27. Popular sites in Singapore, 2009



Source: Google Trends, Nov 2009

Alternative websites and blogs are critical of the government, within certain constraints. Gopalan Nair, a former Singapore lawyer, was charged in June 2008 for posting insults online aimed at a high court judge, and later sentenced to three months in jail.¹⁹⁵

Other bloggers, writers and commentator either post anonymously or write more circumspectly. Others employ humour: Lee Kin Mun, also known as Mr. Brown, is a blogger and podcaster who, until 2006, wrote a popular column in the *Today* newspaper. After ministerial criticism the column was suspended. His blogs and podcasts continue to be popular.

More serious websites such as The Online Citizen, running since late 2006, carry articles that are sometimes critical of government policies, among them pieces by retired prominent Singaporeans. Critical comments can also be found in forums and in the comments sections of websites like straitstimes.com. On the other hand, most such

¹⁹⁵ Southeast Asian Press Alliance, *Empty Promises: Press Freedom in Southeast Asia*, p 18. (Bangkok, January 2009).

comments are made anonymously, and it's not possible to gauge how representative – or how genuine – such views are.

The use of Twitter during the so-called AWARE saga, when two groups publicly vied for control of a women's organization, indicated the potential of social media tools both to propagate information quickly, and to organize.¹⁹⁶

Perhaps more significantly, the episode illustrated way that “things have already changed”, in the words of Cherian George, associate professor at NTU and head of the Division of Journalism and Publishing at the Wee Kim Wee School of Communication & Information. “The government can't dictate the agenda in a way it could five to ten years ago, when it could influence to a large degree what people were talking about and when.”¹⁹⁷

Global websites most accessed from Singapore – Source: Alexa

- <http://facebook.com/>
- <http://google.com.sg/>
- <http://yahoo.com/>
- <http://youtube.com/>
- <http://google.com/>
- <http://blogger.com/>
- <http://live.com/>
- <http://msn.com/>
- <http://wikipedia.org/>
- <http://livejournal.com/>

*Local websites most accessed from Singapore – Source: Netcraft (*news websites)*

- <http://www.sgx.com/>
- <http://www.straitstimes.com/>*
- <http://www.asiaone.com/>*
- <http://www.streetdirectory.com/>
- <http://www.channelnewsasia.com/>*
- <http://forums.hardwarezone.com.sg/>

¹⁹⁶ Alicia Tan Min Qi, *Shut Up and Sit Down: Singapore's Social Movements through Twitter* (flowtv.org, 29 May 2009). Available online at <http://flowtv.org/?p=3919>

¹⁹⁷ Interview with Cherian George, Singapore, October 2009.

- <http://support.creative.com/>
- <https://internet-banking.dbs.com.sg/>
- <http://www.zdnetasia.com/>*
- <http://asia.cnet.com/>

Websites accessed from mobile device in Singapore –

Source: *Opera* (*news websites)

- <http://www.google.com>
- <http://www.facebook.com>
- <http://www.wikipedia.org>
- <http://www.youtube.com>
- <http://www.cnn.com>*
- <http://www.live.com>
- <http://www.bbc.co.uk>
- <http://www.yahoo.com>
- <http://www.my.opera.com>
- <http://www.channelnewsasia.com>*

8. THAILAND



8.1 Polarisation, bias and delayed reform

Political instability has polarized most parts of Thai society, even families, and this is also true of the media. Since 2006 a significant proportion of the media has been perceived to be, in varying degrees, anti-Thaksin, which has led to the emergence of pro-Thaksin outlets in recent months.¹⁹⁸

There is concern that this polarization of Thai media is undermining their credibility: in some instances two different outlets report contradictory facts, which leaves the public distrusting the media as a whole.¹⁹⁹

Political instability has also deferred reorganizing Thai broadcasting. A delay in forming a National Broadcasting Commission has in turn postponed allocation of frequencies for radio, TV and cellular networks. This has meant that TV and radio stations remain mostly in the hands of government agencies, whilst licences for telecommunications 3G have yet to be issued.²⁰⁰

8.2 Consumption

Polarisation and instability have made Thailand more politicized as a society: more than 70 per cent of respondents in a recent poll said they were “somewhat or very interested” in politics (against 55 per cent in Cambodia in 2003, 28 per cent in Indonesia in 2003). This is not just a Bangkok-centric or a youth matter: the figure rises to 77 per cent in the north and 75 per cent in the northeast, and interest actually

¹⁹⁸ Thai News Service, *Pro-Thaksin papers and magazines proliferate* (2009).

¹⁹⁹ Interview with Somkiat Tangkitvanich, Thailand Development Research Institute, October 2009.

²⁰⁰ TDRI, *NTC Faces 3G Challenge* (Bangkok Post, 2008).

increases steadily with age: the most interested age group is 50-59, with a percentage of 81 per cent.²⁰¹

This is almost certainly having an impact on media consumption, although comparative figures are not readily available.

In terms of consumption, television is by far the most popular of the three offline media.

Table 5. Most popular media in Thailand, 2009

How often do you	Every day	3-4 days	1-2 days	<1 x a day	Never
Watch TV	87	7	4	1	1
Listen to radio	25	9	10	4	52
Read newspaper	23	14	22	11	31

Source: The Asia Foundation, Democracy Survey, Aug 2009

This popularity may not, however, be representative of the younger generation, many of whom do not watch TV at all – or if they do, watch it on their computer.²⁰²

8.3 Television

The Government has, since 2007, owned and controlled all six national terrestrial TV stations. MCOT Pcl, formerly a State enterprise and now 77 per cent Government-owned, owns two stations, one of which it runs itself while the other is managed by a private company. Similarly, the army owns two, running one itself. The Public Relations Department of the Prime Minister's Office owns and runs another. The other national terrestrial channel, TV Thai, is run by the Thai Public Broadcasting Service, set up in 2007 to replace the only privately owned channel, Thaksin-owned Independent TV, or iTV.

ITV had originally been set up in the wake of the 1992 “Bloody May” protests, which had highlighted the absence of a TV station broadcasting news and information free of state intervention. A 30-year concession was awarded in 1995 by the Prime Minister's Office, on condition that news and information account for at least 70 per cent of airtime. The Asian financial crisis of 1997-98 caused heavy losses for the station, rendering it effectively insolvent, leading to a lifting of a ban on any one shareholder

²⁰¹ *Constitutional Reform and Democracy in Thailand: A National Survey of the Thai People*, Asia Foundation, 2009.

²⁰² Asia Foundation survey.

owning 10 per cent of the station. Shin Corporation, owned by Thaksin, was requested to buy a stake – which it did, buying shareholder Siam Commercial Bank’s stake for US\$60 million.²⁰³

After Thaksin became prime minister in 2000 the station was granted permission to reduce the amount of news coverage, and concerning the coverage it *did* offer, was accused of biased coverage towards Thaksin. In 2006, a court invalidated the earlier decision and fined the broadcaster heavily. In the wake of the September 2006 coup the government moved to close the station. In January 2008, it was replaced by the Thai Public Broadcasting Service, legally protected from political and commercial influence via financial support from “sin taxes” from alcohol and tobacco duties of up to THB 2 billion (US\$61 million). Programming centres on documentaries and children’s programs. While the station and its supporters say it is the country’s only independent broadcaster – the “BBC of Thailand” – its critics say this is not yet the case.²⁰⁴

Thailand has several non-terrestrial channels: in Thai TV, part owned by the Nation Multimedia Group, and ASTV, a 24-news channel owned by the Manager Media Group, owned by Sondhi Limthongkul, a fierce critic of Thaksin. ASTV played a major role in the protests that brought down Thaksin, and was funded almost entirely from donations and from selling goods bought at wholesale prices from supporters and sold retail to other supporters. The Manager Group also publishes newspapers, magazines and a very popular website.²⁰⁵ (*See below*)

There are also about 700 local unlicensed cable TV stations, many of which are associated with one political side, which rebroadcast the national channels and satellite channels such as ASTV as well as creating their own content.²⁰⁶ ASTV’s perceived image as partisan is, some say, not only accurate but deliberate, and challenges even the pretence of journalistic objectivity. In a crisis, ASTV supporters say, impartiality is not a valid principle. One has to choose between one side and another.²⁰⁷

Although the TV channels are all indirectly controlled by the government, this does not mean they are mere propaganda tools. Most news programs, particularly on

²⁰³ P. Handley, *The King Never Smiles: A Biography of Thailand’s Bhumibol Adulyadej*, Yale University Press, 2006, pp. 424-5.

²⁰⁴ U. Siriyusak, “The Future Challenges of Communication and Media Reform in Thailand, 2008”, presented at SPICES 2008: The 3rd International Conference on Inter-Asian Culture, Communication, Conflict and Peace, Penang; Interview with professor of Southeast Asia politics Duncan McCargo, October 2009; Interview with editor-in-chief of The Nation group Thepchai Yoon, October/November 2009.

²⁰⁵ Thai-ASEAN News Network, “Thai TV Station Sells Goods to Survive”, 2009, available online at <http://tannetwork.tv/tan/ViewData.aspx?DataID=1018756> (accessed 15 January 2010).

²⁰⁶ Interview with the Thai media rights advocate Supinya Klangnarong, October 2009.

²⁰⁷ Interview with the Thai researcher Somkiat Tangkitvanich, 2009.

channels run by outsourced companies, strive to provide basic, balanced information without too much interpretation. The most popular of these are programs in which hosts read excerpts from the daily press and discuss them with their guests. These programs, which can last up to three hours, began with Sorrayuth Suthassanachinda who would read out excerpts from the day's papers and then discuss them with studio guests.²⁰⁸

There remain, however, many issues that are too sensitive for TV to address, such as the role of the military, the monarchy, the judiciary and the Privy Council. This makes watching TV less appealing to the intellectual middle class.²⁰⁹

8.4 Radio

The structure of radio station ownership is similar to that of TV stations, with the army owning 127, the Public Relations Department 147, and MCOT owning 62. Concessionaires run the stations.²¹⁰

There are, however thousands of unlicensed community radio stations, operating low-power transmitters, have proliferated in the last few years, offering listeners an alternative to the government-controlled stations.

As of July 2009, the National Telecommunications Commission acts as a temporary regulator/licensor for community radio and cable television, issuing a first licence for 300 days which can be renewed for a similar period or until the new regulator comes into existence.²¹¹

8.5 Print

Although not read as thoroughly or widely as one might expect, newspapers form the core of newsgathering in Thailand. They cover more terrain than do radio and TV, both of which rely on them for a good deal of their content, particularly since the rise of the "what's in the papers" show in 2000. These three-hour shows convey the newspapers' content to a much broader audience, cementing their role as news breakers.

²⁰⁸ Interview with McCargo, *cit.*

²⁰⁹ Interview with Klangnarong interview, *cit.*

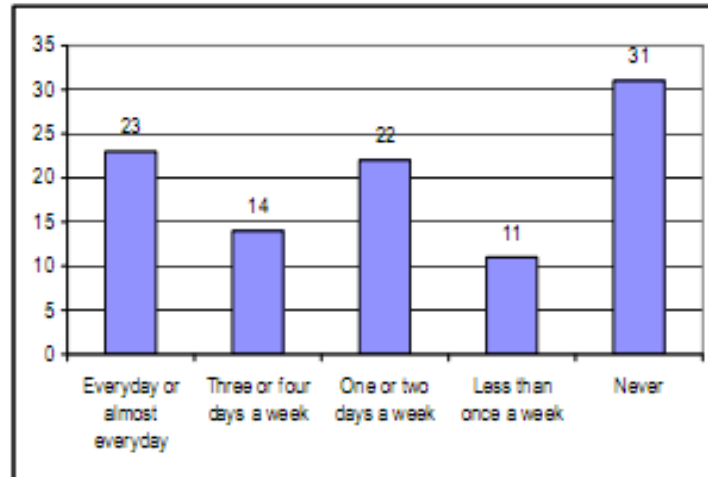
²¹⁰ O. Biggins, "Thailand" in *Asian Communications Handbook*.

²¹¹ See K. Tortermvasana, "Local broadcasters register in droves", *The Bangkok Post*, 16 June 2009, available online at <http://www.bangkokpost.com/business/telecom/18559/local-broadcasters-register-in-droves> (accessed 15 January 2010).

Newspapers, like radio, are not widely consumed, though the number of people who never read them is smaller (about a third of the country never touch one, compared to 52 per cent who never listen to radio).

Chart 28. Newspaper readership in Thailand

How many days a week do you read a newspaper? (Q88)



Source: Asia Foundation survey

Thai Rath and the big papers claim circulations above one million. If these unaudited figures were true, the papers would be by far the biggest in Southeast Asia. Their real impact may be greatest as sources of information and content for radio and television.²¹²

Newspapers are privately owned and not subject to tight government supervision. Nearly all are published in Bangkok and distributed to all parts of the country. Although all newspapers have their political leanings, they cannot all be characterized as partisan. In recent years the ratio of news to advertising has declined, which has reduced the amount of investigative reporting.²¹³

²¹² McCargo interview, 2009; Interview with anonymous blogger, known as Bangkok Pundit, October 2009.

²¹³ Supinya interview, 2009.

Thai Rath (publisher: Vacharapol Co Ltd) is possibly Thailand's most influential newspaper. If its circulation figures are to be believed, it is among the Top 20 daily newspapers in Asia, the only one from Southeast Asia.²¹⁴ *Thai Rath's* reporters are considered to have connections to every political group, meaning their reports are more widely read, and reducing the perception that the newspaper is too closely identified with one group or another. The newspaper's website is also increasingly popular. (See below)

Similar "tabloid broadsheets" (tabloid in content, broadsheet in size) are the *Daily News*, similar in style and content to *Thai Rath*, with a claimed circulation of 900,000; *Khao Sod*, part of Matichon Pcl, a publishing group and publisher of *Matichon* (See below); and *Kom Chad Luek*, claiming a circulation of 850,000 and owned by the Nation Multimedia Group.

The main quality daily is *Matichon* (600,000 claimed circulation), some of whose columnists are seen as rare impartial voices in the current climate. Other quality dailies include *Naew Na* and the business daily *Krungthep Turakij*, also owned by the Nation Multimedia Group. *Phoojadjarn Daily* – claimed circulation is around 70,000 – is the core asset of Sondhi Limthongkul's media empire, Manager Media Group. The online edition is Thailand's most popular news website.

English-language dailies include *The Bangkok Post*, with a claimed circulation of 65,000. *The Nation*, with a claimed circulation of 60,000, is the flagship publication of the Nation Multimedia Group.²¹⁵

Local media have recently reported the emergence of more than 10 "red" publications that openly support Thaksin.²¹⁶

8.6 Telecommunications

Both cellular communications and the internet are – like TV and radio – victims of the political bottleneck over regulation.

Although Thais are big users of cell phones (penetration is about 92 per cent – 57 million people – and expected to be 100 per cent by the end of 2009; this is up from 4 million in 2001), data services have yet to take off due to regulatory delays in issuing 3G and WiMAX licences.

At present the three fixed broadband providers are charging similar prices to South Korea for a service that is much slower, and in a country where the GDP is considerably lower. Penetration is low as well: 2.2 per cent in 2008. Thais are currently

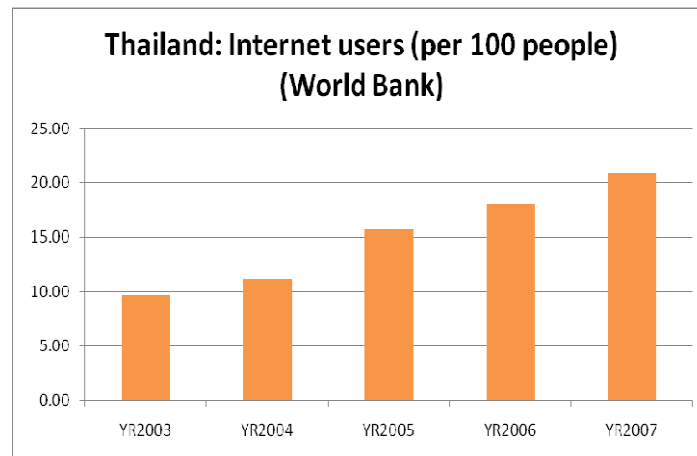
²¹⁴ WAN-IFRA, 2009.

²¹⁵ Interview via email with Thai veteran journalist Kavi Chongkittavorn, November 2009.

²¹⁶ Thai News Service, "Thailand: Pro-Thaksin papers and magazines proliferate", 16 July 2009.

forced to use mobile data services like General Packet Radio Service (GPRS), Enhanced Data GSM Environment (EDGE), older and slower cousins of the 3G and 3.5G already in use elsewhere in the region.²¹⁷

Chart 29. Internet penetration in Thailand (% of population)



Source: World Bank

8.7 Online

Thais and foreigners have increasingly turned to the Internet both as a source of information and as a way to project their points of view. Newspaper websites feature prominently in the list of top ten domestic websites. (*See below*) There are about 13.5 million users of the internet.²¹⁸

The Government has been ambivalent about the internet, temporarily blocking access to websites such as YouTube (April 2007) over a slideshow deemed offensive to King Bhumibol Adulyadej. New regulations hamper ISPs since they are required to store traffic data for 90 days, and are criminally liable if a person connected to their ISP posts offensive content. Some users have noticed apparent blocking by the Ministry of

²¹⁷ Pyramid Research, "Thailand Set for Broadband Surge", 1 October 2009, available online at http://www.lightreading.com/document.asp?doc_id=182443 (accessed 15 January 2010); BuddeComm, "Thailand – Key Statistics, Telecommunications Market and Regulatory Overview", 11 February 2009.

²¹⁸ Interview with Chongkittavorn, *cit.*

Information and Communication Technology of some Google searches and web pages, including the king's entry on Wikipedia.²¹⁹

8.8 Social media

Blogs in both English and Thai have increasingly become a forum for debate, challenging traditional media for analysis and commentary. According to *Bangkok Pundit*, an anonymous but influential blogger:

[I]ts influence is more widespread than strict numbers. Internet material is also printed out and circulated. The internet is away of disseminating information and not just a media form.²²⁰

Twitter has emerged as a potent tool for politicians, particularly for those in the Thaksin camp who feel denied a platform in conventional media. Twitter began to take off in Thailand only in 2009, when Thais used to it post first-hand photos of the unrest. Since then Thaksin and his aides have used Twitter to bypass the mainstream media, most of which do not interview him. "So one tweet by Thaksin is seen by about 20k, but then papers and TV report on what he tweets, so there is a wider audience."²²¹

Usage in Thailand is still relatively low, with fewer than 30,000 daily unique visitors, compared to Facebook's 230,000+, and hi5, Thailand's most popular social networking site.

Chart 30. Most popular Social networking sites in Thailand (2007–2009)



Source: Google Trends for Websites, Dec 2009

²¹⁹ 2Bangkok.com, "Website censorship in Thailand", available online at <http://www.2bangkok.com/blocked.shtml> (accessed 15 January 2010).

²²⁰ Email interview with Bangkok Pundit, September 2009.

²²¹ Bangkok Pundit is available online at <http://www.asiancorrespondent.com/bangkok-pundit-blog> (accessed 15 January 2010).

Still, Twitter is not far off the website of Thailand's most popular daily newspaper, *Thai Rath* which, after hitting a high of more than 80,000, has fallen to fewer than 50,000 today.

Chart 31. Twitter vs Thai Rath (2007–2009)



Source: Google Trends for Websites, Dec 2009

Global websites most accessed from Thailand – Source: Alexa

- <http://google.co.th/>
- <http://live.com/>
- <http://google.com/>
- <http://hi5.com/>
- <http://facebook.com/>
- <http://youtube.com/>
- <http://sanook.com/>
- <http://msn.com/>
- <http://pantip.com/>
- <http://yahoo.com/>

*Local websites most accessed from Thailand – Source: Netcraft (*news websites)*

- <http://www.pantip.com/>*
- <http://www.manager.co.th/>*
- <http://www.stock2morrow.com/>

- <http://ads.pantip.com/>*
- <http://www.bangkokbiznews.com/>*
- <https://www.ktzmico.com/>
- <http://www.thairath.co.th/>*
- <http://forums.overclockzone.com/>
- <http://www.matichon.co.th/>*
- <http://www.thaiwater.net/>

Websites accessed from mobile device in Thailand –

Source: *Opera (*news websites)*

- <http://www.google.com>
- <http://www.hi5.com>
- <http://www.live.com>
- <http://www.hotmail.com>
- <http://my.opera.com>
- <http://www.pantip.com>*
- <http://www.manager.co.th>*
- <http://www.gamejump.com>
- <http://www.youtube.com>
- <http://www.livescore.com>

9. TIMOR-LESTE



The media in Timor-Leste (East Timor) are hampered by the same problems that have held back other parts of the country's development: capacity and infrastructure. A shortage of skilled journalists, a shortage of communications infrastructure, and continuing political uncertainty have all played a part. In addition, the country is burdened by the legacy of massive violence and destruction that were unleashed against the country by Indonesian forces in 1999. Despite major investment in capacity building, the country's traumatic recent history and low socio-economic development have hindered the evolution of a professional media. That said, the rise of Tetum as the country's national language has helped foster a journalists' profession and holds promise for the future of independent, quality media.

9.1 Language

Under Indonesian rule (1975–1999), the Tetum language was not taught; indeed, it was banned, as it had been under Portuguese colonial power – although the Roman Catholic Church adopted it as its liturgical language, thereby making it a focus for cultural identity. Since independence, Tetum has become one of two official languages, with one of its four dialects spoken by perhaps 80 per cent of the population. Formal teaching of the language is only now beginning to be reflected in the quality of journalism. The change in Government has also helped; less prevalent now is Portuguese, the other official language but little understood outside Dili. This switch from the language of the elite to the more commonly spoken Tetum has also stimulated a more open political discourse – and helped journalists, few of whom were proficient in Portuguese.

9.2 Journalism

The profession of journalism is undeveloped. Journalists are poorly paid and until recently felt cowed by defamation laws (a new penal code has decriminalized defamation), as well as by the threat of violence. The number of journalists has halved since 2000 to 150. This may also reflect reduced funding; media projects proliferated under the United Nations administration between 1999 and 2002, but many have since closed. Initiatives to address this include greater professionalisation: with support from the International Center for Journalists (ICFJ), the national university began a course on journalism in 2009, enrolling 90 students,²²² while the President hosted the second annual media awards in November 2009.²²³

9.3 Consumption

In terms of consumption, radio and television remain the primary source of information, with newspapers providing information for only a minute section of Timorese. Television is close to usurping radio's position as the main source of information, when the results of two International Republican Institute (IRI) polls, and three Asia Foundation polls, are compared.

Table 6. Main sources of information in Timor-Lest (2001–2008)

	2001 (TAF)	2003 (IRI)	2004 (TAF)	2008 (TAF)	2008 (IRI)
Radio	30	63	40	38	31
Television	9	12	16	24	27
Family or neighbours	/	5	10	5	13
Newspapers	8	1	5	2	3
Local chiefs	62	9	9	11	9

Source: IRI, National Survey Results, 2003/2008; 2001 results²²⁴
(figures may not add up to 100)

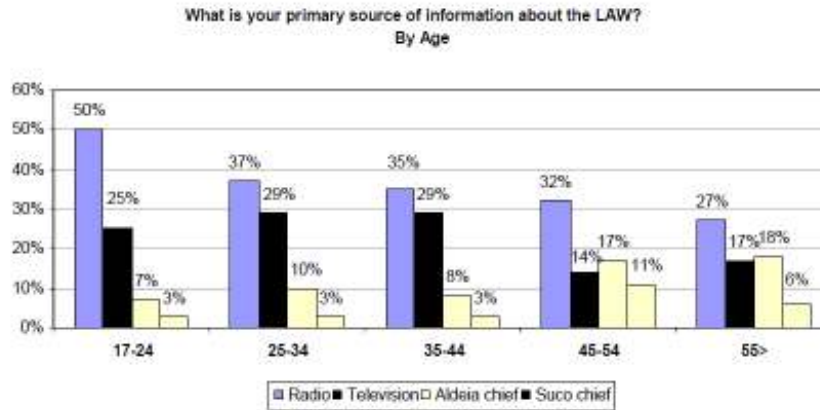
²²² ICFJ, "Renewed Timor-Leste media program launches country's first university journalism course", 2009, available online at <http://www.icfj.org/OurWork/AsiaPacific/EastTimorMediaProgram/GrantExtension/tabid/966/Default.aspx> (accessed 15 January 2010).

²²³ ICFJ, "2nd Annual TL Media Awards Dinner Scheduled for 21 November", 2009, available online at <http://www.icfj.org/OurWork/AsiaPacific/EastTimorMediaProgram/tabid/316/ctl/Details/mid/7885/ItemID/1675/Default.aspx> (accessed 15 January 2010).

²²⁴ The Asia Foundation, "East Timor National Survey of voter Knowledge", 2001, available online at <http://www.asiafoundation.org/pdf/EastTimorVoterEd.pdf> (accessed 15 January 2010).

Some, however, question the size of such a shift, saying that while TV is on the rise, it is still some way from overtaking radio as the main source of news for the majority. The truth may be somewhere between: the survey by the Asia Foundation in 2008 – on public access to information about the law – found that Timorese choices whether to turn to radio, TV, or their local community leader have a lot to do with age.

Chart 32. Main source of information about the law (2008)

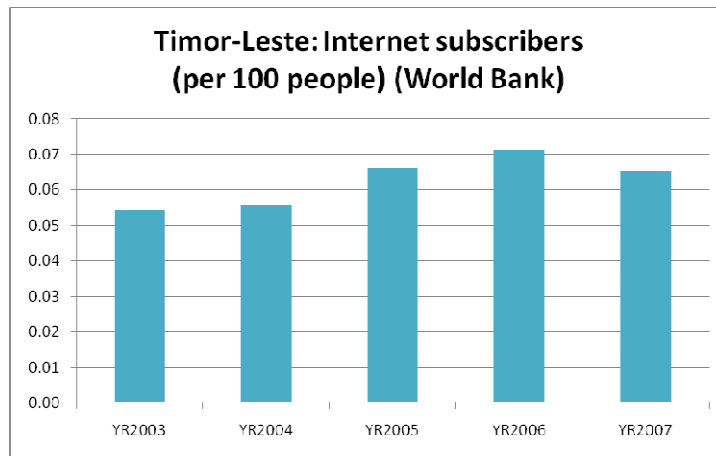


Source: A Survey of Citizen Awareness and Attitudes Regarding Law and Justice 2008²²⁵

²²⁵ S. Everett, “A Survey of Citizen Awareness and Attitudes Regarding Law and Justice 2008”, 2008, The Asia Foundation, available online at <http://www.asiafoundation.org/resources/pdfs/2008LawJusticeSurvey.pdf> (accessed 15 January 2010).

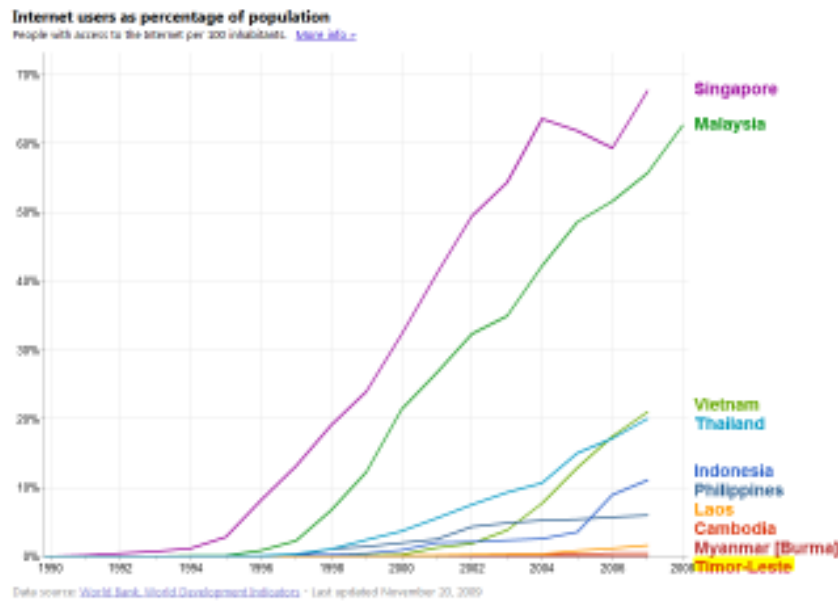
9.4 Telecommunications

Chart 33. Internet penetration in Timor-Leste (% of population) (2003–2007)



Source: World Bank

Cell phones are the most important form of communication in a country with few landlines – two per 1,000 people, against a regional average of 231 – and with few Internet connections outside the capital (1 internet subscriber per 1,000 people, against a regional average of 93, according to the World Bank). Timor sits below Burma in terms of internet connections.

Chart 34. Internet users in Southeast Asia (% of population) (1990–2008)

Source: Internet users as percentage of population, World Bank Development Indicators, as of Nov 2009

In 2003 Timor Telecom, a joint venture with 50.1 per cent owned by Portugal Telecom, began operating fixed line and mobile telephone services. As of the first quarter of 2009, Timor Telecom had 137,000 customers, a population penetration of 12 per cent.²²⁶ (This is a significant rise: the United Nations Economic and Social Commission for Asia and the Pacific (*ESCAP*) lists Timor as having had cell phone penetration of 4.3 per cent in 2007, itself a doubling over 2003.) As elsewhere in the region, many Timorese have cell phones because they are cheap – US\$10 against US\$50–60 in 2005 – but cannot afford to use them, an SMS costing 10 US cents compared to 5 cents in Indonesia.²²⁷

Part of the problem, some believe, is a lack of investment. In late September 2009, Portugal Telecom said it would invest more than US\$54 million on upgrading its cell phone network, to include laying an undersea cable for Internet access doubling the number of mobile phone aerials to 80, and a 3G network within two years. This may in part have been a response, not only to public complaints of overcharging – Timor

²²⁶ “Timor Telecom Expanding GSM Network”, *Cellular News*, 7 September 2009, available online at <http://www.cellular-news.com/story/39488.php> (accessed 15 January 2010).

²²⁷ Interview with Dili resident, October 2009.

Telecom has been accused of charging overseas telecommunications companies inflated rates which lead to high call charges – but also of revived talk of ditching its 15-year monopoly, granted in 2002. In July 2009 President Jose Ramos Horta met the head of Digicel, a cellular operator that specialises in setting up in difficult environments, which is hoping to obtain a licence to provide telecommunications services to Timor-Leste. Digicel has had a presence in Dili for more than a year, and has already funded some events.²²⁸

9.5 Television

TV and radio tend to lead the news, rather than the more usual pattern of newspaper journalists ‘breaking’ stories. This is in part because there’s not much news to break, and partly because relations between newspaper journalists and officials and other Dili luminaries are not always smooth. Of all the three, radio is probably the best organized, but TV is increasingly become the “source” of news, which radio and print then pick up on. This is primarily because ministers and politicians prefer television as it enables them to speak directly to the populace.

Television is becoming a more popular medium, and likely to overtake radio as a means of obtaining information. This is partly to do with TVTL becoming available via satellite outside Dili from 2007: the government then embarked on an ambitious campaign to put in satellite dishes and televisions in most of the *suku* (the lowest administrative unit of which there are 442; TVTL estimates say that 350 are currently operational). Electricity also remains a problem.²²⁹

9.5.1 Resources

Television in particular has suffered from a lack of resources as the UN handed over to the Timorese in May 2002. When United Nations Mission in Support of East Timor (UNMISET) concluded its mission in 2005, it handed control of Timor’s public radio and television to the government public broadcaster, Radio-Televisão Timor Leste (RTTL), whose infrastructure had been set up by the UN. At the time some key donors, including the United States, felt it unnecessary to continue funding, a decision opposed by the nascent Timorese government. The result has been that RTTL is the only media outlet that receives state funding, albeit at a level which represents only a

²²⁸ Interview, ex UN official, September 2009; *Tempo Semanal*, “President Ramos Horta Speaks Out Against Telecom Monopoly”, 17 July 2009. Available online at <http://temposemanaltimor.blogspot.com/2009/07/president-ramos-horta-speaks-out.html>; *cellular news* (2009), Skype.com, ESCAP.

²²⁹ Interview, Dili resident, November 2009.

fraction of what it received when it was under United Nations Transitional Administration in East Timor (UNTAET)'s control.²³⁰

RTTL has been aided by the advent of cheaper digital technology, which has enabled it to build studios and buy equipment at a fraction of what it used to cost to equip a station. But it still faces significant challenges in staffing and equipment.

TVTL was until recently the only domestic TV channel and, despite its funding source, operates at arms length from the government. It broadcasts 2 to 4 hours a day on a channel which for the rest of the time broadcasts material in English, Portuguese and Indonesian supplied by Portugal, UK and Australia. A new private TV station has been set up in Dili, along with an FM radio station, although at present the TV channel is accessible only by Internet.

Last year the government passed a law establishing radio and TV state-owned companies, meaning in effect that they must raise some of their own funding. At present there is no advertising, but this will surely change.

9.6 Radio

Radio is still the most popular means of obtaining information for most Timorese. There are at least 21 radio stations. The main station is Radio Timor-Leste, broadcasting in Tetum, Portuguese and Indonesian. Coverage is limited in some areas, including the politically sensitive area of Viqueque on the southeastern coast.

Other radio stations include Radio Kmanek, and Radio Falintil, and Radio Renascença, while there are also FM retransmissions of RDP Internacional from Portugal, Radio Australia, and the BBC World Service. Roman Catholic Radio Timor is also popular.

There are about 14 community radio stations around the country, in regional languages such as Tokodede and Fataluku.

9.7 Print

Print represents a small, albeit growing, portion of the media consumed. This is primarily an urban-rural gap: in the 2003 IRI survey 61 per cent said they never read a newspaper, but that percentage dropped to 44 in Dili; in Liquica, 25 km west of Dili, the figure was 85 per cent (the question was not asked in the 2008 survey). Newspapers – and, increasingly, blogs – tend to be read by the elite.

There are three national dailies – quite a number, given the small size of the population – but none reaches more than 2,000 people and few copies are distributed beyond the

²³⁰ S. Kalathil, "Timor-Leste Media Assessment", February 2006, funded by USAID/Timor-Leste, available online at www.pdf.usaid.gov/pdf_docs/PNADF898.pdf (accessed 15 January 2010).

major towns (the UN used to fund distribution outside Dili but this has dwindled in recent years). The largest is *Suara Timor Lorasae*, formerly *Suara Timor Timur*, founded in 1993. STL has the capacity to print 12,000 units per hour, but only up to 2,000 copies are printed.

The Media National Group, established in 2003 by businessman Jorge Serrano, began publishing a Portuguese language weekly, *Seminario*, and, in 2005, the daily *Jornal Diario Nacional*, effectively subsidized by the government through bulk purchase. *Timor Post* is the country's second largest daily, owned by the Timor Post Group, but has refused Government support, and is "barely breathing".²³¹

9.8 Online

Internet usage in Timor is obstructed by the same problem as international telecommunications: namely the satellite uplink that connects the country to the rest of the world. ESCAP recorded Timor as having an Internet penetration of 0.1 per cent, putting it on a par with Burma.

That said, in Dili there is a vibrant blogging scene among the elite, including by political parties. A news website called Timor Today was set up in March 2009, with the help of the ICFJ, which has also set up several "media houses" around the country with Internet connections and facilities for journalists to have access to reporting equipment.²³²

For most Timorese, however, the cost of internet access is excessive: the only internet service provider provides broadband for US\$250 to 300, while internet cafes charge up to US\$1.50 a minute. Compare this to Indonesia, where an internet café would charge about US\$0.70 an hour.

²³¹ K. Ilagan, "Timor-Leste Turns 7: Press Freedom remains in peril", *Daily PCIJ*, 20 May 2009, Philippine Center for Investigative Journalism, available online at <http://www.pcij.org/blog/?p=3491> (accessed 15 January 2010).

²³² ICFJ, "Renewed Timor-Leste media program launches country's first university journalism course", available online at <http://www.icfj.org/OurWork/AsiaPacific/EastTimorMediaProgram/GrantExtension/tabid/966/Default.aspx> (accessed 15 January 2010).

10. VIETNAM



All of Vietnam's conventional media are owned and tightly regulated by the government. The media are structured in levels, the central organisations being equivalent to government ministries, affiliated structurally to the Prime Minister's Office, and ideologically to the central committee of the Communist Party of Vietnam: Vietnam Television, Radio Voice of Vietnam, and Vietnam News Agency. National newspapers are also controlled centrally, owned and published by the party's central committee departments, central party and government institutions, ministries and social institutions.

Although market competition has prompted the Vietnamese media to embrace popular culture, newspapers, radio and television are still compelled to adhere to the fundamental tenets of Marxism-Leninism and the ideals of HỒ Chí Minh. Although this gives Vietnam's media the appearance of slavish adherence to government and party, in fact there is significant room for manoeuvre. As Nguyen Anh Tuan, CEO and editor in chief of VietNamNet, puts it:

This is because, while Vietnam is a one-party state, its politics are anything but monolithic. Competing power blocks within the state and party use newspapers to advance their interests and compete with rivals. Vietnamese politicians are acutely aware of the role that the press can play in advancing, or derailing, their careers.²³³

The most dynamic sector of the media in terms of news is the press, while radio and television continue to reflect the government and party line. The internet is also

²³³ Nguyễn Anh Tuấn, "From VietNet to VietNamNet: Ten Years of Electronic Media in Vietnam," Joan Shorenstein Center on the Press, Politics and Public Policy Discussion Paper Series, Harvard University, 2008.

increasingly popular as a place to express, not only as a source of information from conventional and official sources but a forum for discussion and alternative points of view.

The trick, both online and offline, is knowing what you can get away with. This is not easy. As one Westerner with a long acquaintance with Vietnam puts it:

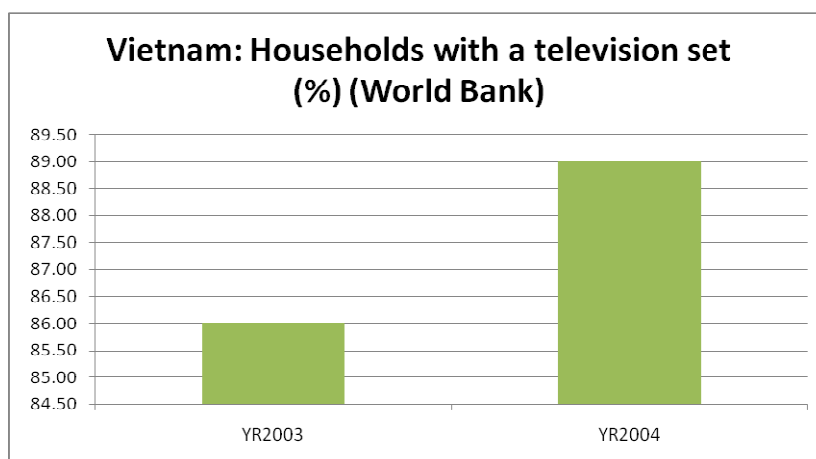
Think of it as a colouring book; as long as you colour inside the lines you're OK. Stray outside and you get your knuckles rapped. Stray again and it'll get worse. Unfortunately the lines are dotted and some are invisible, so nobody knows where they are.²³⁴

The result is a to-and-fro between government and media (and blogosphere) where even editors of established party organs can find themselves in deep water. As the party prepares for its 2011 congress, the situation is not expected to get any clearer.

10.1 Television

Television is the most popular medium, at least in terms of minutes spent: 215 minutes per day, against 120 for radio and 35 minutes for the internet.²³⁵ There are two domestic broadcasters, both under the government. About 90 per cent of households can receive the national radio station, VOV, and 87 per cent the country's two main TV channels.

Chart 35. Television households in Vietnam (% of total households)



Source: World Bank

²³⁴ Interview with long-time resident, October 2009.

²³⁵ ITU, 2005.

Vietnam Television, or VTV, is the largest television network, broadcasting nine free-to-air channels and available internationally via satellite. The first, which started broadcasting in 1990, focuses on news and current affairs. The rest cover education, sports, ethnic issues, youth and southern issues. VTV also operates the largest cable network (VCTV) and a direct-to-home satellite service. These carry the nine VTV channels, nine Vietnamese subscription channels (VCTV1 – VCTV9) and about 40 international channels. DVB-T was officially adopted as standard for terrestrial digital broadcast by VTV in 2001.²³⁶

The other major player is Vietnam Multimedia Corporation or Vietnam Television Corporation (VTC). Founded in 1988 by Vietnam Television to construct television stations, it was handed over to the Vietnam Ministry of Post and Telematics in 2003. VTC operates several channels, only two of them free to air.

On 6 January 2009, VTC's Vietnam Digital Television officially broadcast eight Full HDTV channels through Vietnam's first satellite, Vinasat-1.²³⁷ In May 2008 VTC launched Vietnam Online, a "two-way information channel that will communicate the policies of the Communist Party and the Vietnamese State to the public, and will receive comments from the people and businesses concerning the management of the central government." The 30 minute program is broadcast online on the government portal www.chinhphu.vn and simultaneously on its two free-to-air-channels.²³⁸

There are at least 64 provincial radio and television stations.

10.2 Radio

Vietnam's national radio station, now called the Voice of Vietnam (VOV), started broadcasting from Hanoi, just a week after the declaration of the Democratic Republic of Vietnam in 1945. In 1978, all radio stations were brought under one administration. All broadcast under the direction of the government. VOV has six stations, which reach more than 90 per cent of all households in Vietnam.

In addition, most cities and provinces have their own radio stations.

10.3 Print

While most of the country's newspapers toe the line of their government or party sponsors, what is surprising is how many don't. Journalists have become the vanguard of reform in Vietnam, particularly in criticizing local administrators. "The press here does play a very important role, and it's a real press, not a vehicle," says the Westerner

²³⁶ Official website.

²³⁷ *VNA*, "Nation has first high-definition TV channels", 6 January 2009.

²³⁸ "Government launches multi-media communications programme", *Thanh Nien*, 14 May 2008.

with a long acquaintance of Vietnam. One account estimates that 90 per cent of corruption cases that are brought to judgment were revealed by the media. Once the darling of officials for their uncritical reporting, nowadays officials “often try to avoid being interviewed by the media”.²³⁹

While much of the noisiest reformist writing may be online, via blogs or by online-only publications, conventional newspapers are making enough waves to attract the occasional backlash. In January 2008, the editors of *Thanh Nien* and *Tuoi Tre* were told their contracts would not be renewed. The two papers conducted a joint expose of a road building scam; the journalists involved were punished in October.²⁴⁰

The number of newspapers and magazines has doubled in the past decade. There were ten paid-for daily national newspapers in 2008, and 45 regional and local paid-for dailies. Total average circulation per issue was 2.8 million in 2008, according to WAN-IFRA.²⁴¹ As of 2004, newspapers reached about 35 per cent of the population. In the past few years the more dynamic papers have eclipsed the old market leader. *Thanh Nien* doubled its circulation between 2000 and 2006. The most popular, however, remains *Cong An Hồ Chí Minh* which is published four times a week and is renowned for its police stories; it is owned and run by the city’s police. Circulation is up to 400,000.

WAN-IFRA figures show that it is Hồ Chí Minh City-based newspapers that have a wider circulation than Hanoi ones: *Tuoi Tre* (‘Youth’), a publication of the Hồ Chí Minh Communist Youth Organization, can trace its roots back to propaganda leaflets handed out by students in Saigon during the Vietnam War. It has grown to become the largest newspaper in the country: in 2007, a little over a year after becoming a daily newspaper, it reported a daily circulation of 450,000. As can be seen below, it also runs highly popular online versions: an English version, Vietnews online (www.vietnews.vn) and a Vietnamese version, Tuoi Tre Online (www.tuoitre.com.vn).

Nhan Dan – the communist party organ, set up by Hồ Chí Minh’s comrades in 1951 – is more conservative, with a circulation of 220,000 per day. Its website, the first online official electronic newspaper, claims 800,000 to 1,000,000 visitors per day.²⁴²

Tap Chi Cong San – the organ of the central committee – and *Quan Doi Nhan Dan* – the organ of the central party of the Army – both have circulations of about 80,000 copies a day.

²³⁹ H. Dinh, “Vietnam” in *Asian Communication Handbook*, p. 531, Singapore, 2008.

²⁴⁰ “Muting the Messengers”, *The Economist*, 15 January 2009.

²⁴¹ WAN-IFRA, *World Press Trends: China, India and Southeast Asia*, 2009, Singapore.

²⁴² Nhan Dan, “About”, 2009, Nhan Dan, available online at <http://www.nhandan.com.vn/english/about.htm> (accessed 15 January 2010).

The other reformist Saigon paper is the 23-year old *Thanh Nien* – organ of the Hồ Chí Minh Communist Youth League (*Đoàn Thanh niên Cộng sản Hồ Chí Minh*) – with a circulation of about 200,000, and a claimed readership of 2 million per week. It also has an English language website at www.thanhniennews.com.²⁴³

10.4 Online

Since VietNamNet was established in 1997, the Vietnamese government's attitude towards the Internet and online media has evolved to one that is perhaps best described as guarded ambivalence. On the one hand, the government recognizes the importance of the Internet as an essential element of the contemporary world... On the other hand, the suspicion with which some government officials viewed VietNet, while lessened, still remains.²⁴⁴

Over the past decade, Vietnam has gradually broken up a monopoly on Internet services: from one provider in 2000, there were 18 in 2007. Internet growth has surged: today 24 per cent of the population is online, putting it on a par with Thailand. That figure almost doubles in Vietnam's four biggest cities, according to a study by Yahoo! released in April 2009.²⁴⁵

A lot of this traffic is focused on news. Visiting news websites is the most popular among Vietnamese: 89 per cent said they had read online news in the past month, even more than had used a search engine.²⁴⁶ These figures are borne out by a list of the top ten websites by traffic which shows six of the top seven being straight news sites:²⁴⁷

²⁴³ Wikipedia; company websites; *Dinh*; WAN-IFRA

²⁴⁴ Nguyen Anh Tuan, 2008.

²⁴⁵ Yahoo!-TNS Net Index, *Fact Sheet*, 2009.

²⁴⁶ Yahoo!, 2009.

²⁴⁷ NetCraft, 2009.

Chart 36. Popular websites in Vietnam

Rank	Site	First Seen
927	http://vnexpress.net	March 2002
7941	http://tangthuvien.com	January 2008
8572	http://dantri.com.vn	March 2006
9427	http://www.vnexpress.net	October 2000
10802	http://ngoisao.net	October 2002
10993	http://www.tuoiitre.com.vn	October 2003
12237	http://vietnamnet.vn	January 2004
18180	http://www.tcnh-dhtm.org	December 2008
18520	http://mp3.zing.vn	October 2007
18588	http://lamnha.com	June 2006
21615	http://210.245.120.166	unknown
24445	http://thuongmai.biz	March 2008
25053	http://kenh14.vn	March 2008
27082	http://f60s.com	April 2009
27638	http://support.spacegate.vn	September 2009
27866	http://210.245.120.163	unknown
30348	http://www.vnn.vn	October 1997
30859	http://www.thanhnien.com.vn	February 2004

Source: NetCraft, Oct 2009 (For more updated figures, see tables at end)

This traffic is growing. The internet is increasingly a source of information, up from 200,000 unique daily visitors for the most popular website in mid 2007, to nearly 400,000 in November 2009.

Chart 37. Visitorship of popular websites in Vietnam (2007–2009)

Source: Google Trends for Websites, December 2009

While conventional media cannot operate outside the umbrella of a sponsoring party or State organization, online has been a different story. Vnexpress, for example, is owned by FPT Group, Vietnam's leading software company. VietNamNet was set up by the founder of the VietNamNet Media Group, Nguyen Anh Tuan, a graduate of Harvard Business School. Tuan, who set up the first ISP to provide email and web access, is a highly regarded business and community leader.

VietNamNet has a pro-reform voice. A report on the front page of the English-language edition of the website in September 2009 is an investigative report by a team of undercover reporters investigating Hồ Chí Minh City's solid waste treatment complex.²⁴⁸

VietNamNet's survival, Tuan said in 2007, is down to his efforts to build a broad-based network of supporters, and by not questioning the party's core tenets of Marxist-Leninism and its version of Vietnamese history. Tuan has won several awards including one from the Prime Minister as one of Vietnam's ten most distinguished and talented young people. Financially, however, the website relies on income generated from other parts of the business, including the ISP. Mobile content, however, has made that unit the most profitable, providing entertainment, information and ringtones, along with SMS.

Not all news sites are so lucky. Intellasia, a news website run by a foreign company, was shut down in August 2007 for posting "distorted and reactionary content" and now operates from outside the country.²⁴⁹

²⁴⁸ Nhat Tan, "The 'secrets' behind HCM City's 'state-of-the-art' waste treatment project", 2009, VietNamNet Bridge, available online at <http://english.vietnamnet.vn/reports/200910/The-secrets'-behind-HCM-City's-'stateoftheart'-waste-treatment-project-871> (accessed 15 January 2010).

²⁴⁹ "US State Dept Human Rights Report", 2009; Reporters Without Borders, "2008 Annual Report", p. 112.

Online content – at least on local sites – is monitored closely. Some overseas Vietnamese sites are blocked. All access to the Internet must be through a local ISP, all of which must store 15 days of data and provide public security agents with assistance and workspace to allow them to monitor online activities. Cybercafés must register the personal information of their customers and store records of sites visited. Compliance with these rules may not, however, be extensive.²⁵⁰

In October 2008, the Ministry of Information and Communication set up a new office, the Administration Agency for Radio, Television, and Electronics Information, tasked with monitoring the Internet and bloggers.²⁵¹

10.5 Bloggers

Bloggers form an important part of Vietnam's online information world. The CPJ sees bloggers as filling "the gap in independent news that is left by the traditional state-controlled media"²⁵²

The government estimates there are more than a million bloggers, and has, according to the OpenNet Initiative, been steadily refining its legal framework to bring social media under firmer control.²⁵³ Three bloggers were arrested at around the same time as the VietNamNet reporter was detained; although all were subsequently released, "their arrests have underscored your government's reputation as one of the world's worst violators of Internet freedom", the CPJ wrote to the government on 25 September 2009.²⁵⁴

10.6 Telecommunications

By early 2009, there were almost 70 million cell phone subscribers in Vietnam, representing a national penetration of 80 per cent, more than 80 per cent of them pre-

²⁵⁰ "Vietnam", report by OpenNet Initiative, 9 May 2007, available online at <http://opennet.net/research/profiles/vietnam> (accessed 15 January 2010).

²⁵¹ CPJ, "Vietnam cracks down on bloggers and online journalists", available online at <http://cpj.org/2009/09/vietnam-cracks-down-on-bloggers-and-online-journal.php> (accessed 15 January 2010).

²⁵² CPJ, "10 Worst Countries to be a Blogger – Reports – Committee to Protect Journalists", 10 April 2009, available online at <http://cpj.org/reports/2009/04/10-worst-countries-to-be-a-blogger.php> (accessed 15 January 2010).

²⁵³ OpenNet report on Vietnam, *cit.*

²⁵⁴ CPJ letter to Nguyen Minh Triet, President of the Socialist Republic of Vietnam, "Vietnam's Triet urged to fulfill promises on reform", 25 September 2009, available online at <http://cpj.org/2009/09/vietnams-triet-urged-to-fulfill-promises-on-reform.php> (accessed 15 January 2010).

paid customers. Despite this widespread use, the government has been slow to embrace 3G, limiting the effectiveness of cell phones as a means of accessing information.

On 13 August 2009, the Ministry of Information and Communications granted 3G licences to four companies, all of them existing players in GSM: Viettel, VinaPhone, MobiFone, and a joint venture of EVN Telecom and Hanoi Telecom.²⁵⁵

*Global websites most accessed from Vietnam – Source: Alexa (*news websites)*

- <http://google.com.vn/>
- <http://yahoo.com/>
- <http://zing.vn/>
- <http://vnexpress.net/>*
- <http://google.com/>
- <http://facebook.com/>
- <http://dantri.com.vn/>*
- <http://youtube.com/>
- <http://24h.com.vn/>*
- <http://lauxanh.us/>

*Local websites most accessed from Vietnam – Source: Netcraft (*news websites)*

- <http://vnexpress.net/>*
- <http://dantri.com.vn/>*
- <http://tangthuvien.com/>*
- <http://www.vnexpress.net/>*
- <http://ngoisao.net/>
- <http://vietnamnet.vn/>*
- <http://www.tuoiitre.com.vn/>*
- <http://210.245.120.166/>
- <http://mp3.zing.vn>
- <http://210.245.120.163/>

²⁵⁵ Thai News Service, “Vietnam ready for 3G phone services, says Deputy Minister”, 23 September 2009; “Vietnam – Mobile Communications and Broadcasting”, report by Paul Budde Communications Pty Ltd., available online at <http://www.budde.com.au/Research/Vietnam-Mobile-Communications-and-Broadcasting.html?r=58> (accessed 15 January 2010).

Websites accessed from mobile device in Vietnam –

Source: *Opera (*news websites)*

- <http://www.google.com>
- <http://www.dantri.com.vn>*
- <http://www.vnexpress.net>*
- <http://www.my.opera.com>
- <http://www.vietnamnet.vn>*
- <http://www.yahoo.com>
- <http://www.vatgia.com>
- <http://www.vietbao.vn>*
- <http://www.zing.vn>
- <http://www.gamejump.com>

ANNEX 1: REGIONAL DATA AND FIGURES

Newspapers: circulation

Based on circulation, Singaporeans appear to be the biggest readers of newspapers, followed by Malaysia and Thailand. Then there's a big gap before the second tier: the Philippines, Vietnam and Indonesia. Burma, Cambodia, Laos and Timor-Leste all have 11 or fewer copies per 1,000 per people.

Paid for dailies: total average circulation 2004-8/titles per adult population (000)

Country	2004	2005	2006	2007	2008	Copies per 1,000 people
Burma	470	403	380	370	420	11.8
Cambodia	50	55	55	55	60	6.3
Indonesia	4,866	4,900	5,000	5,100	5,450	32.1
Laos	23	25	25	25	25	6.3
Malaysia	2,608	2,750	2,911	4,711	4,479	259.8
Philippines	3,790	3,780	3,780	3,760	3,760	60.7
Singapore	1,011	1,009	1,050	1,218	1,200	305.7
Thailand	6,850	7,300	7,300	7,300	7,350	142.4
Timor-Leste	2	4	3	3	3	4.2
Vietnam	2,760	2,800	2,800	2,820	2,800	43.7

* or latest available figure

Source: WAN-IFRA World Press Trends 2009, China, India and Southeast Asia

All countries measured showed growing advertising, with the exception of crisis-wracked Thailand.

Newspaper advertising expenditure 2004–2008 (US\$ million)²⁵⁶

Country	2004	2005	2006	2007	2008*
Burma	–	–	–	–	–
Cambodia	–	–	–	–	–
Indonesia	447.02	476.98	622.29	817.75	941.36
Laos	–	–	–	–	–
Malaysia	703.16	732.45	744.84	888.41	1,018.56
Philippines	154.73	155.08	142.09	189.63	211.31
Singapore	437.87	442.17	476.73	546.36	585.21
Thailand	613.3	613.89	610.5	732.86	714.28
Timor-Leste	–	–	–	–	–
Vietnam	51	59.4	68.3	77.04	84.01

Source: WAN-IFRA World Press Trends 2009, China, India and Southeast Asia

The Internet wave**Internet advertising**

The beginnings of a migration to Internet advertising for online newspapers can be seen in the 2008 figures.

Internet advertising expenditure 2004–2008 (US\$ million, current prices)

Country	2004	2005	2006	2007	2008*
Indonesia	–	–	–	0.66	0.62
Laos	–	–	–	–	–
Malaysia	–	–	–	14.49	19.46
Singapore	–	–	–	21.19	14.08
Thailand	8.53	3.72	4.47	5.75	6.64
Timor-Leste	–	–	–	–	–
Vietnam	0.3	0.4	0.5	0.49	0.58

Source: WAN-IFRA World Press Trends 2009, China, India and Southeast Asia

²⁵⁶ World Association of Newspapers.

Southeast Asia's Social Web

Southeast Asia is one of the most dynamic, but diverse, social networking regions in the world.

- Indonesia, the Philippines, Malaysia and Singapore are all in the top 30 countries in terms of **number of Facebook users** (7th, 17th, 21st and 29th, respectively).²⁵⁷
- Indonesia, the Philippines and Thailand are among the top 20 in terms of **fastest growing number of Facebook users** (1st, 6th and 19th respectively).
- Among the eight countries for which data are available, three different social networking sites are the most popular:

Country	Most popular
Cambodia	Facebook ²
Indonesia	Facebook ¹
Laos	hi5 ³
Malaysia	Facebook ¹
Philippines	Facebook ⁴
Singapore	Facebook ¹
Thailand	hi5 ¹
Vietnam	zing.vn ¹

Sources:

1 – Many Eyes, Social networks in the world, updated as of 2 June 2009, 03:39 PM, available online at <http://manyeyes.alphaworks.ibm.com/manyeyes/datasets/social-networks-in-the-world-june-versions/1>.

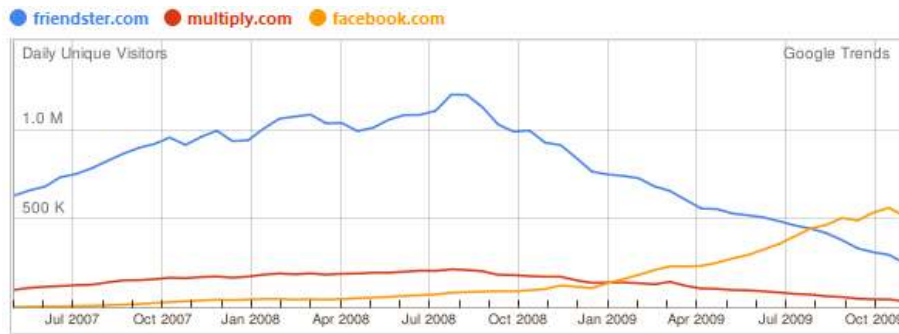
2 – Alexa.com (<http://www.alexa.com/topsites/countries>)

3 – Based on Opera mobile page views.

4 – Google Trends, available online at <http://trends.google.com/websites?q=friendster.com%2C+multiply.com%2C+facebook.com&geo=PH&date=all&sort=0>

In the past few months Facebook has overtaken Friendster as the most trafficked social networking site in the Philippines.

²⁵⁷ NickBurcher.com, available online at <http://www.nickburcher.com/2009/07/latest-facebook-usage-statistics-by.html> (accessed 15 January 2010).



In other words, social networking is big, but it is far from homogeneous, suggesting that the web is evolving in different ways in each country.

Mobile web

This is borne out by traffic on the mobile web – the pages that are most visited by users on their cell phones. (The following data, unfortunately, do not include absolute numbers so it is not possible to compare traffic volume. What is clear is that the mobile phone is catching on as a way to access the Internet).

Country	Page view growth since May 2008 (%)
Cambodia	371.0
Indonesia	436.8
Laos	194.1
Malaysia	728.9
Philippines	1,572.5
Singapore	299.4
Thailand	237.5
Vietnam	7904.7

Source: Opera State of the Mobile Web, May 2009

The sites visited on mobile phones vary greatly. Here is the breakdown of the top 10 sites country by country.

Cambodia	Indonesia	Laos	Malaysia	Philippines	Singapore	Thailand	Vietnam
Google	Facebook	Hi5	Google	Friendster	Google	Google	Google
Yahoo	Google	Google	Friendster	Google	Facebook	Hi5	Dantri*
Hi5	Friendster	Owskin	Facebook	Yahoo	Wikipedia	Live.com	Vnexpress*
CNN	Yahoo	Live.com	Yahoo	Facebook	YouTube	Hotmail	Opera
Getjar.com	Waptrick	Waptrick	MySpace	YouTube	CNN	Opera	VietNamNet*
Opera	Peperonity*	Opera	YouTube	Wikipedia	Live.com	Pantip*	Yahoo
Facebook	Digg.com	Hotmail	Opera	Pinoywap*	BBC.	Manager*	Vatgia*
Gamejump	Getjar.com	Teenee*	Wikipedia	mbmgl.com*	Yahoo	Gamejump	Vietbao*
Wikipedia	Detik.com*	Getjar	Tagged	Symbianize	Opera	YouTube	Zing.vn*
Livescore	Gamejump	Mobango	Gamejump	Suit.com.ph*	CAN*	Livescore	Gamejump

Source: Opera State of the Mobile Web, May 09 (*local website)

ANNEX 2: LIST OF ABBREVIATIONS

ADSL	Asymmetric Digital Subscriber Line
AMIC	Asia Media Information and Communication Centre
ASEAN	The Association of Southeast Asian Nations
BBC	British Broadcasting Corporation
CNN	Cable News Network
CPJ	Committee to Protect Journalists
CPP	Cambodian People's Party
CTN	Cambodian Television Network
DSL	Digital Subscriber Line
DTT	Digital Terrestrial Television
DVB	Democratic Voice of Burma
EDGE	Enhanced Data GSM Environment
ESCAP	United Nations Economic and Social Commission for Asia and the Pacific
FLEMMS	Functional Literacy, Education and Mass Media Survey (Philippines)
GPRS	General Packet Radio Service
HDTV	High-Definition TV
HSDPA	High-Speed Downlink Packet Access
ICFJ	International Center for Journalists
IFJ	International Federation of Journalists
IPTV	Internet Protocol TV
IRI	International Republican Institute
ISP	Internet Service Provider
KPI	Indonesian Broadcasting Commission
LANIC	Lao Network Internet Committee

MBP	Media Prima Berhad (MBP) Group (Malaysia)
MNA	Myanmar News Agency
MRTV	Myanmar Radio and Television
NHK	Nippon Hōsō Kyōkai, Japan Broadcasting Corporation
NSTP	New Straits Times Press
NTC	National Telecommunications Commission (Philippines)
RCTI	Rajawali Citra Televisi Indonesia
RFA	Radio Free Asia
RSS	Really Simple Syndication
RTM	Radio Televisyen Malaysia
RTTL	Radio-Televisão Timor Leste
SEAPA	Southeast Asian Press Alliance
SMS	Short Message Service
SOPA	Society of Publishers in Asia
SPDC	State Peace and Development Council (Burma)
SPH	Singapore Press Holdings
SRP	Sam Rainsy Party (Cambodia)
TVK	National Television of Cambodia
UMNO	United Malays National Organisation
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNMISET	United Nations Mission in Support of East Timor
UNTAET	United Nations Transitional Administration in East Timor
USB	Universal Serial Bus
USDA	Union Solidarity and Development Association (Burma)
VNA	Vietnam News Agency

VOA	Voice of America
VOV	Voice of Vietnam
VTC	Vietnam Television Corporation
VTV	Vietnam Television
WAN-IFRA	World Association of Newspapers and News Publishers
WMC	Women's Media Centre (Cambodia)

ANNEX 3: LIST OF COMPANIES MENTIONED

AGB Nielsen Research	Media Group Indonesia
Apsara Media Group	Mfone
Astro	MICA Media Co. Ltd
Boon Roong	MiTV
Chinese TV Company	MNC
Chuan Wei	MobiFone
DiGi	MobiTel
Digicel	Nation Multimedia Group
DTV Network Limited	New Straits Times Press (NSTP)
Edge Communications	Packet One Networks
EVN Telecom	Portugal Telecom
Forever Group	PT Telekomunikasi Indonesia
FPT Group	Red Link
Hanoi Telecom	Royal Group
Jawa Pos Group	Shin Corporation
Kantana	Shinawatra
Kompas Gramedia Group	Siam Commercial Bank
Laos Telecom	Singapore Press Holdings (SPH)
Lippo Group	SingTel
Manager Media Group	SPH Mediaworks
Matichon Pcl	Star Group
Maxis	StarHub
MCOT Pcl	TeleSURF
Media Chinese International Limited	Telkom Malaysia
MediaCorp	Temasek Holdings
Media National Group	Tempo Group
Media Prima Berhad (MBP) Group	Thaicom
	Thai Media Company KCS
	Timor Post Group

Timor Telecom

TransCorp

U Mobile

Utusan Group

Vacharapol Co Ltd

Vietnam Multimedia Corporation

Viettel

VietNamNet Media Group

VinaPhone

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