Afghan Media in 2010

Synthesis Report

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Contents

Abbreviations and acronyms

ABE	Afghanistan Broadcasting Engineering
ACSOR	Afghan Center for Socio-Economic and Opinion Research
AIBD	Asia-Pacific Institute for Broadcasting Development
AIJA	Afghanistan Independent Journalist Association
AISA	Afghanistan Investment Support Agency
AM	Amplitude Modulation
AMC	Afghan Marketing Company
AMDEP	Afghanistan Media Development and Empowerment Project
ANA	Afghan National Army
ANDS	Afghanistan National Development Strategy
ANJU	Afghan National Journalists Union
ANP	Afghan National Police
AREU	Afghanistan Research and Evaluation Unit
ATRA	Afghan Telecommunications Regulatory Authority
AWCC	Afghan Wireless Communication Company
BBC	British Broadcasting Corporation
BMC	Baltic Media Center
BNA	Bakhtar News Agency
CAF/SCO	Communication Assistance Foundation
CDMA	Code Division Multiple Access
CIA	Central Intelligence Agency
CJPOTF	Combined Joint Psychological Operations Task Force
CJSOTF	Combined Joint Special Operations Task Force
CPJ	Committee to Project Journalists
CSP	Country Strategy Paper
DCN	District Communication Network
DDR	Disarmament, Demobilization and Rehabilitation
DED	German Development Service
DFID	UK Department for International Development
DG	Office of Democracy and Governance (USAID)
DHSA	Development and Humanitarian Services for Afghanistan
DOWA	Department of Women's Affairs
DSL	Digital Subscriber Line
EC	European Commission
EMC	Emerge Media Communication
ERTV	Educational Radio and Television
FGD	Focus Group Discussion
FM	Frequency Modulation
FOB	Forward Operating Base
GDP	Gross Domestic Product
GMIC	Government Media and Information Center
GRP	Gross Rating Point
GSM	Global System for Mobile Communications
GTZ	German Development Cooperation
HMC	High Media Council
ICT	Information and Communications Technology
IFES	International Foundation for Electoral Systems
IMPACS	Institute for Media, Policy and Civil Society
IMS	International Media Support
INGO	International NGO
IOM	International Organization for Migration
IRI	International Republican Institute
ISAF	International Security Assistance Force
ISP	Internet Service Provider
ITU	International Telecommunication Union
IVR	interactive voice response
IWA	Integrity Watch Afghanistan
IWPR	Institute for War and Peace Reporting
KII	Key Informant Interview
MAI	Media Action International
MCIT	Ministry of Communications and Information Technology
MoIC	Ministry of Information and Culture
MSS	Media Support Solutions
NATO	North Atlantic Treaty Organization
NGO	Non-Governmental Organization
OSI	Open Society Institute
OTI	Office of Transition Initiatives (USAID)
PAN	Pajhwok Afghan News
PCO	Public Call Office
PRT	Provincial Reconstruction Team
RIAB	Radio in a Box
RTA	Radio Television of Afghanistan
SAJA	South Asian Journalist Association
UK	United Kingdom
UNAMA	UN Assistance Mission in Afghanistan
UNDP	UN Development Programme
UNESCO	UN Educational, Scientific and Cultural Organization
US	United States
USAID	US Agency for International Development
USG	US Government
VOA	Voice of America

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All outputs of the research (reports, original datasets and annexes) can be downloaded at: www.altaiconsulting.com/docs/media.

Introduction

1. Background

In 2004-2005, the United States Agency for International Development's (USAID) Office of Transition Initiatives commissioned Altai Consulting to conduct the first comprehensive media evaluation of the Islamic Republic of Afghanistan, looking at the impact of the Afghan media on opinions and behaviors three years after the beginning of the country's reconstruction. The evaluation found, among other things: that Afghans were avid and sophisticated media users and that cultural barriers to media use were less significant than previously expected; that the radio played a predominant role throughout the country; and that media are instrumental in social progress and education.

However, since publication of that report[1], Afghanistan's media sector has seen important changes. To inform future assistance from the international community to the Afghan media, it was deemed necessary to assess the current state of the Afghan media – by reflecting a full and accurate audience profile, to determine program preferences, to measure the impact of the Afghan media on local opinions and behaviors and to gauge Afghan expectations in terms of programming and messaging.

A large-scale research project was thus planned and conducted from March to August 2010. This research included a deep probe into the media sector and the public's behaviors and expectations. The methodology used to achieved this included a combination of: literature review; direct observations; key informant interviews with most relevant actors involved in the media sector; 6,648 close-ended interviews in more than 900 towns and villages of 106 districts, covering all 34 provinces of the country; an audience survey on more than 1,500 individuals run daily for a week; about 200 qualitative, open-ended interviews; and 10 community case studies. Such an effort guarantees that results presented here are fairly representative of the Afghan population at large.

This document provides a comprehensive synthesis of data collected during the survey. A database of media actors, 16 priority district reports, 10 case study reports, a complete description of the methodology and the original datasets from the main quantitative research and the audience research are publicly available, allowing anyone interested to access more focused information as needed.

2. Objectives of the research

The main goal of the research was to provide USAID, as well as other international donors and implementers, with a comprehensive analysis of Afghan media in order to enable a better understanding of recent developments, to anticipate possible issues and to serve as a tool to inform future assistance to the sector. Four particular objectives were pursued:

Objective 1: Draw a complete picture of the Afghan media landscape in 2010, after eight years of steady development and five years after the first study of the Afghan media, through:
- An updated and comprehensive review of media actors in Afghanistan;
- A review of the capacities and business models of the main Afghan media and their sustainability;
- National and detailed data on media audience and program preferences;
- An analysis of local perceptions and the impact of media in Afghan society on opinion and behavior.

[1] *Afghan Media, Three Years After: Media and Alternative Sources of Information in Afghan Society*, Altai Consulting, March 2005; www.atlaiconsulting.com/docs/media/2005.

Objective 2: Analyze drivers of opinions and behavior in Afghan society and the expectations of Afghans in terms of information:
- Access to information in Afghan society and drivers of influence on key social issues;
- Afghans' expectations when it comes to information/truth/trust in relation to the current direction that the country is taking.

Objective3: Provide USAID with a review of areas of opportunities to accompany future investments in media development and strengthen the sustainability of independent media and their role in a democratic society:
- Identify opportunities at the different levels of the media chain, from macro policy to infrastructure, program design and communication themes;
- Propose methodological guidelines to accompany future developments and monitor the impact of future projects.

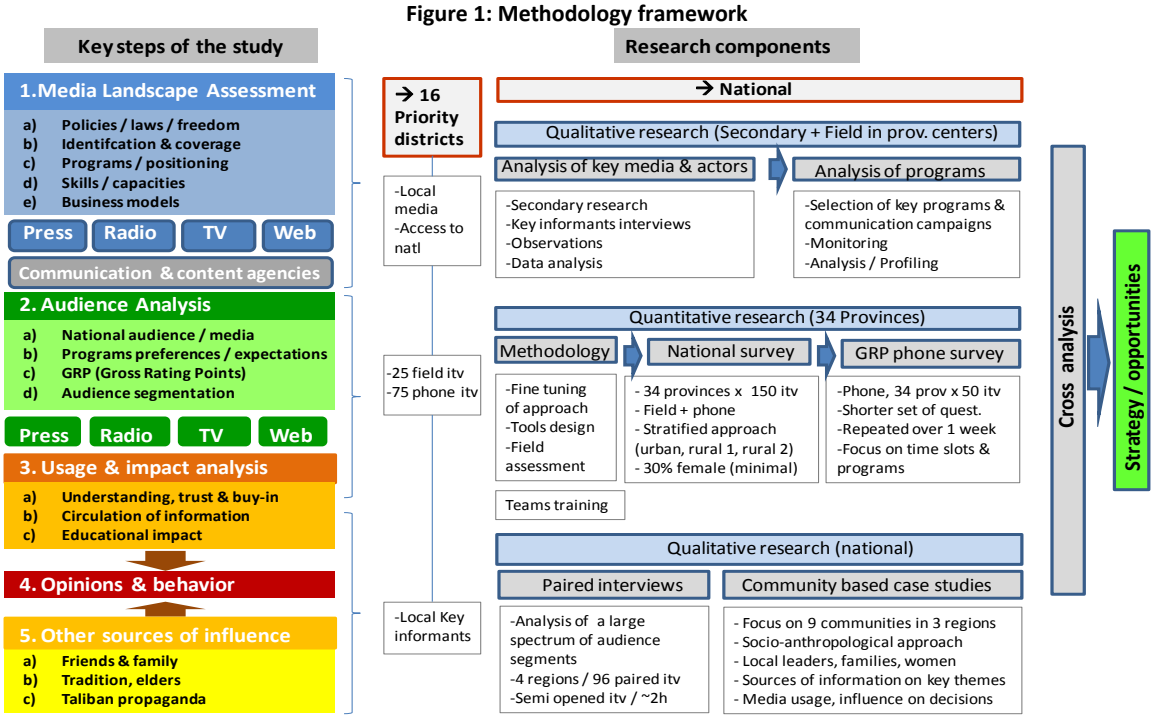
Objective 4: Provide USAID's Office of Democracy and Governance (DG) and Office of Transition Initiatives (OTI) with a specific review of media presence, penetration, perception and opportunities in a small number of targeted priority districts where locally relevant strategies will be proposed.

3. Methodology

The research performed for this study can be divided into three main components: specific research on 16 priority districts, using essentially the same methodological steps as the national survey; national research, including media landscape analysis, a quantitative survey and qualitative research; and a national audience survey.

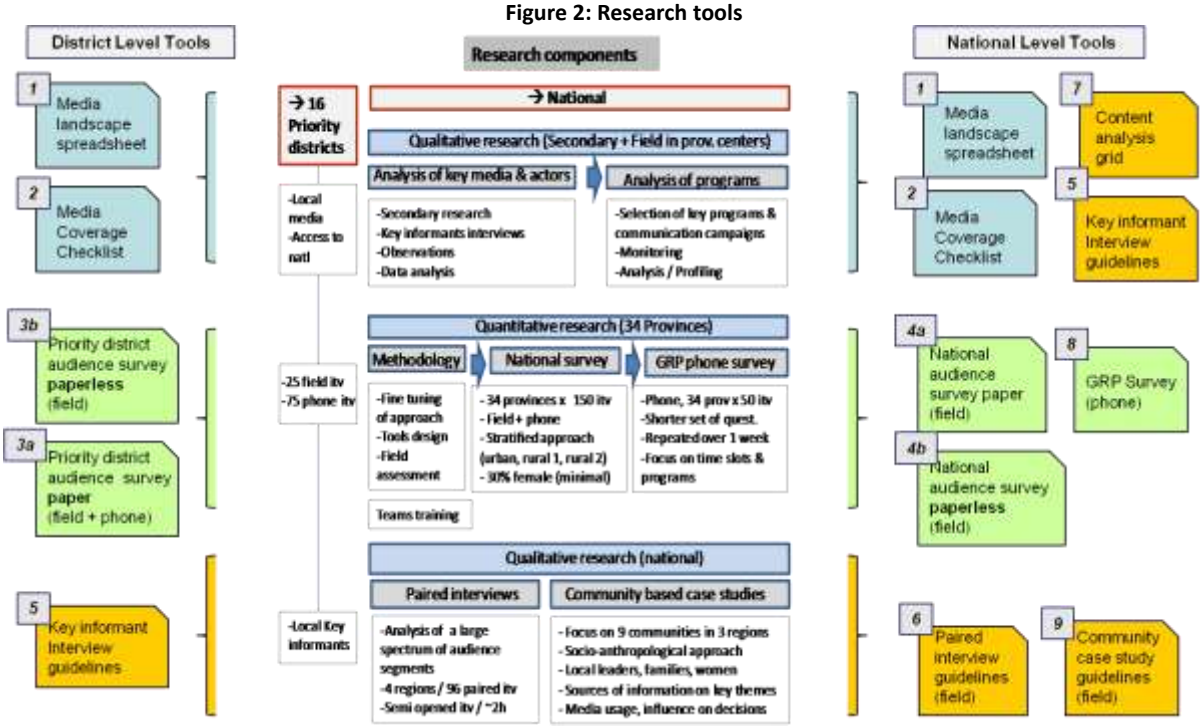
Each of these components aims to address one or several of the main layers of information needed to describe the media in Afghanistan: the media landscape; knowledge of the audience; usage and impact; opinions and behavior; and other sources of influence, as highlighted in Figure 1.

Figure 1: Methodology framework



Based on this framework, a number of general and specific research questions were discussed with USAID. Following this, a variety of research tools were developed: close-ended questionnaires for field work or phone interviews; paperless questionnaires; key informant interview (KII) guidelines; observation sheets; and databases (see Figure 2). These tools were translated into Dari and Pashto, back-translated, field tested and modified one last time. Consultants and interviewers were trained at length on the procedures, aims and contents of the tools.

Figure 2: Research tools



3.1. Priority districts

The objective of the priority district research was to provide USAID with a specific and rapid review of media presence, penetration, perception and opportunities in a small number of targeted priority districts, before the full completion of the national research. A list of 16 priority district was proposed by USAID. In each of these districts, three research components were conducted:

- A media checklist to review the presence of media;
- A survey, performed partly in the field and partly through phone interviews;
- A series of KIIs with media actors and community and opinion leaders.

Target locations included the five main cities in Afghanistan: Kabul, Kandahar, Herat, Mazar-e-Sharif and Jalalabad; the districts of two smaller cities: Lashkar Gah (Helmand province) and Khost (Khost); and nine rural districts: Garmser (Helmand), Nad Ali (Helmand), Arghandab (Kandahar), Spin Boldak (Kandahar), Sarkani (Kunar), Khogyani (Nangarhar), Sorubi (Paktika), Urgun (Paktika) and Saydabad (Wardak). A specific report was written for each of these locations.

The fieldwork was undertaken by researchers hired from the districts they were to work in, guaranteeing preliminary knowledge of the terrain and freedom of movement.

a. Media checklist

In each location, the local researcher mapped the presence of media, based on coverage of national and regional media, as well as the specific presence of local media (independent, Radio Television of Afghanistan (RTA), Provincial Reconstruction Teams (PRTs), Taliban, etc.) This work was performed through KIIs and field checks. It was informed by prior knowledge of the status of media presence in the district, gathered through the media landscape component of the broader research.

Over 100 KIIs with community leaders, journalists and outlet managers were performed in the 11 districts (a larger amount of work was performed in the five main cities during the whole media landscape research effort: see below). In some cases, where insecurity and the remoteness of the district contribute to a bare media landscape, KIIs with community leaders (e.g. village elders, members of the *shura* (council)) evidently outnumbered the rest.

b. Survey

The survey component followed the questionnaire used for the national survey, and initially had a target of 25 field interviews and 75 phone interviews per location. In this regard, in each of the 11 districts, 25 interviews of individuals (five per location, in five locations) were performed, following the questionnaire prepared for the national survey.

As the population of each of the five main cities is well above 200,000, it was considered problematic to give statistics (even temporarily) for these cities based on only 100 interviews. Instead, larger samples were drawn for these cities, by merging with the national survey (290 for Kabul, 190 for each of the four other cities).

Field survey

In the most difficult districts, interviewers conducted interviews without paper questionnaires (the “paperless approach”) in order to guarantee their security. In these cases, interviewers wrote down

interview results in the evening on a blank questionnaire. A simplified, more qualitative questionnaire was designed to this effect. Eventually, however, all interviewers could perform interviews with the full questionnaire.

Considering that most districts included in the list of priority districts presented large security challenges (heavy presence of insurgent groups), selection of locations and interviewees was left to the interviewers, who were instructed to make sure that the choice was as representative as possible of the district and its population in a sample of 25.Interviewers had to take care to ensure the representation of: youth and elders as much as middle-aged heads of family; rich and influent families as well as poorer households; women; and, when possible and representative of larger groups, self-declared insurgents.

Phone survey

Phone survey recruitment was performed through snowball sampling, seeded by an initial list of phone numbers previously collected by Altai Consulting in the target districts. Guidelines for diversity of representation were given to phone surveyors to help them select interviewees within the household of the phone owner. As with the field survey, the questionnaire used was the same as the national research questionnaire.

c. Key informant interviews

A series of KIIs was performed by both field researchers and Altai consultants (through phone interviews). These interviews followed semi-directive, open-ended guidelines. Three sets of guidelines were designed to this effect: one for media outlet managers, one for journalists and one for opinion leaders or community leaders.

Depending on presence of local media outlets and journalists in the district, field researchers were to perform KIIs with up to three journalists and Kabul-based consultants with as many media outlet managers as possible. On top of this, field researchers were to conduct eight to eleven KIIs with opinion leaders and community leaders.

3.2. Media landscape

The media landscape component of the research aimed broadly at understanding the current situation of the media in Afghanistan as seen from the perspective of media actors. It focused on the following key questions:

- What is the legal and policy environment for media development, and how is this environment enabling or constraining for media actors?
- Who are the media actors in the country, including: media outlets; content producers; donors and non-governmental organizations (NGOs) involved in media development; organizations using the media as a communication channel; and companies or NGOs delivering services to the media? What are the main characteristics of the media market sector?
- What are the most important programs broadcast in the country? How are they characterized? What are they trying to achieve?

Tools designed to conduct this component included: a media organization spreadsheet, filled out for both secondary research and primary research performed at various stages of the mission; media checklists filled out during field missions; and KII guidelines for media actors (media outlet managers and journalists (interviews with other types of actors were more *ad hoc*)). Approximately 130 KIIs were

conducted with relevant media stakeholders in Kabul, Kandahar, Herat, Mazar-e-Sharif and Jalalabad cities. These included: outlet managers from television, radio and print; government officials involved in media affairs; NGOs supporting media; representatives from the advertising sector; providers of content, including news agencies and producers; and representatives from the international community (development agencies, embassies). Additionally, more than 200 media outlets were contacted around the country to gather details on their activities (on top of the ones already contacted through the priority district component).

Two media roundtables were organized with key representatives from the Afghan media sector, which specifically contributed to a sense of ownership of this report and its recommendations.

More than 3,000 hours of television and radio programs broadcast by the most important media were recorded and screened, and a critical analysis of content was performed across roughly 200 television programs, 100 radio programs and many publications and websites.

Besides this report, the other main output of this component is a database of media actors, grouping information for as many accessible media outlets in Afghanistan as possible.

3.3. Quantitative survey

The quantitative survey aimed at gathering information on access to media, consumption behaviors and opinions in the broader Afghan community. This was achieved through a close-ended, directive, one-to-one interview conducted with over 6,648 people in 102 districts of all provinces in the country.

a. Sampling

The sample followed a multi-step, stratified sampling plan.

Selection of locations

All 34 provinces were visited. It was decided, on USAID's request, that at least three districts in each province be visited. In addition, for representativeness purposes, three types of locations were to be visited in each province:

- **Urban strata (Type 1):** Urban areas – for some provinces, the provincial center or the most populated settlement was visited, although these might be considered as rural towns;
- **Peri-urban strata (Type 2):** Rural or semi-rural areas within a radius of 10-30km from urban centers and still in the coverage area of local television and FM radio stations' broadcasting;
- **Rural strata (Type 3):** Remote rural areas, well outside the coverage area of the main TV and FM stations.

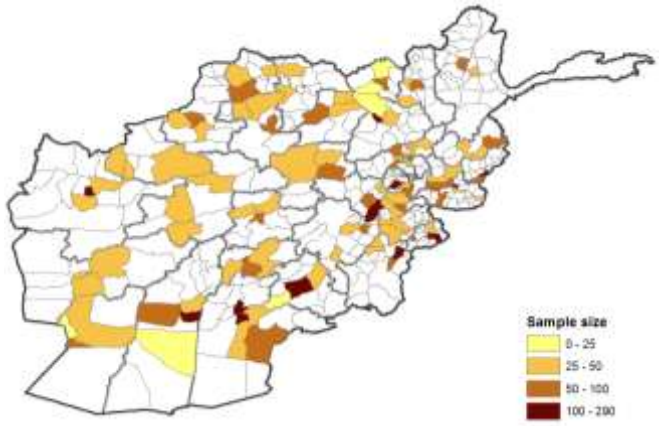
In this regard, it was decided that districts would be selected according to their coverage status, with on average five locations per district, all five sharing the same coverage status.

By default, the district of the provincial capital or of the largest city or town in the province was selected as Type 1 area. Districts for Types 2 and 3 areas were selected from within the list of districts in each province, taking into account media coverage or lack thereof, as well as outstanding security and logistics issues. In some cases, it was impossible to identify a Type 2 district (i.e. a district distinct from the provincial center district, but with settlements still within the coverage area of local broadcast media).

Thus, the provincial center district was considered as both Types 1 and 2, and two districts were selected as Type 3 areas.

The list of districts was then shared with USAID for discussion. A small number of changes were asked for so that a larger number of US Government (USG) "key districts" could be covered. When no methodological concern was identified, districts were replaced. The final list of districts is attached as an annex to this report. As noted above, in each district five locations were selected, usually at random from within the list of settlements of the district. In a number of cases, the target location had to be changed for outstanding security or logistics reasons.

Figure 3: Sampled districts

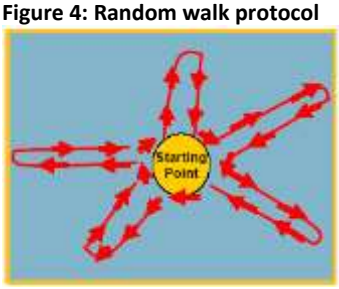


The sample size was initially meant to be 150 per province and 300 in Kabul. As the list of 16 priority districts included five main cities (Kabul, Kandahar, Herat, Jalalabad and Mazar-e-Sharif), and as the sample for priority district research was too limited, given these cities' sizes, it was decided to merge the quantitative survey work for priority districts in these cities with the national survey. The resulting sample size was thus of 400 interviews for Kabul, 250 for Kandahar, Jalalabad, Herat and Mazar-e-Sharif and 150 for all other provinces. Sample size per district was selected according to the relative size of the urban vs. rural population in the province. Such segmentation was meant to reflect the reality of rural areas, whereby the provincial capital is more a central bazaar than a real town. Since the demographics of each province were not directly matched, survey data were post-weighted.

Selection of respondents

Within each location, households were selected according to a "random walk protocol," starting from a predefined landmark. Interviewers stopped at regular intervals in the street they had to sample.

Figure 4: Random walk protocol



Within the household, interviewees were selected at random with the help of a Kish grid. In districts where it was possible to recruit female interviewers, 50% of interviews were conducted with women/girls. As a result, the sample for the national research contains about 30% female respondents, interviewed in 70 districts of 28 provinces.

b. Data collection

Data collection was performed by provincial teams of trained interviewers, who were for the major part recruited from the province in which they had to work. A total of 90 interviewers were recruited: for most provinces, the team comprised one male and one female interviewer, working together in the same location but on different households. Five interviewers were recruited for Kabul and four in each of the four main cities (Herat, Jalalabad, Kandahar and Mazar-e-Sharif).

The questionnaire used for the quantitative survey was similar to the one used in the priority district research. It included 200 questions split into six sections:

1. General purpose questionnaire, given to every interviewee, including socio-demographic questions and general questions about information sources and media usage (66 questions);
2. Radio section (40 questions);
3. Television section (41 questions);
4. Newspaper section (20 questions);
5. Internet section (14 questions);
6. Mobile phone media section (19 questions).

Sections 2-6 were asked only to interviewees who declared using the specific media.

The questionnaire was developed and discussed with USAID, field-tested and translated into Dari and Pashto.

c. Quality control, data handling and analysis

To ensure quality, interviewers were contacted on a daily basis by a consultant in charge of the team. In each location, interviewers had to perform a series of tasks to facilitate potential checks of their fieldwork (drawing a map of the location visited and identifying households visited, taking pictures near a landmark and with a known member of the community, etc.)

Interviews were monitored randomly during and after fieldwork by field monitors who were not part of the data collection team. Monitors performed random re-interviews on a subset of questions with the same respondents. Additionally, phone monitoring was performed from Kabul on a random selection of households with a valid phone number. Field monitors were themselves in constant contact with the management team in Kabul, and monitored through phone calls.

When questionnaires were received in Kabul, they were inspected visually to assess the biggest potential problems. A small number of such issues, usually arising as a result of misunderstood guidelines rather than fraud, were spotted in time for additional fieldwork to be performed in replacement of unusable questionnaires (approximately 2% were redone in a small number of districts). In some areas, questionnaires could not be redone and had to be completely discarded, which lead to a discrepancy between the target value and the actual number of useable questionnaires: of the 6,700 questionnaires planned (both priority districts and general survey merged), 51 were discarded (0.76%).

When judged satisfactory, data were entered into EpiData data entry software and exported to SPSS, then checked for consistency and cleaned.

The data were then weighted to match known demographics of provinces: weighting variables included province population and gender. The original (cleaned) dataset, the weighting plan and the recoding scripts are annexed to this report.

Extraction was done on a national, regional or provincial basis. At national level, the confidence interval is considered to be lower than 1.3%; at provincial level, it is at worst 8%[2].

[2] These estimates consider a confidence level of 95% and a standard deviation of answers of 50% of the variable mean (worst case scenario).

3.4. Qualitative research

As the quantitative survey was essentially made up of close-ended questions, it provided only superficial information on such topics as preferences, trust, impact, opinions, behaviors and use of other sources of information. To gain in-depth knowledge on these topics, qualitative research was organized in two directions: paired interviews and community case studies.

a. Paired interviews

The objective of paired interviews was to gather enough in-depth information on various segments of the population of media users, to document their preferences, habits, trust, perceptions and behaviors. Paired interviews take the form of a semi-directive, open-ended discussion along a set of predefined guidelines.

The rationale behind using paired interviews was to address local issues arising when performing focus group discussion(FGD) exercises: past experience in doing qualitative research in Afghanistan has led us to consider that classic FGDs have important limitations – the main one being that traditional notions of respect for elders or social rank make it quite hard to assemble a large enough group of people and to ensure that they participate actively in a debate/discussion using their own ideas. Another limitation relates to the ability to recruit groups of people who are socially and demographically homogeneous.

Paired interviews were therefore preferred. Each paired interview involved two people with a similar profile (e.g. two urban teachers, two uneducated housewives, two urban students below 25), recruited using a snowball approach in the research location. The interviewees usually knew each other and were used to discuss and debate their opinions.

In total, 96 paired interviews (192 respondents) were organized in six regions: Kabul, east, northeast, northwest, west and south. In each region, one urban and one rural location were selected. In each location, six paired interviews were organized, split by gender, age group and level of education. Representation of major ethnic groups was ensured.

The interviews were based on open-ended questions and conducted in a quiet area, away from any external influence. There were two main objectives: to assess appreciation, understanding, satisfaction and trust in media in general; and to obtain a deeper understanding of how traditional sources of information and communication throughout the community interact with media.

b. Community case studies

Objectives

The case studies were based on a methodology developed and implemented successfully in 2004-2005 by Altai Consulting for the 2005 media study. These case studies targeted concepts that were too broad to be dealt with sufficiently by the quantitative research and that required the pursuing of investigative lines too specific to be covered in "semi-quantitative" paired interviews. They therefore added breadth to the scope of the study.

They focused in on information sources in coherent communities and their impact on the members of those communities, with a particular focus on impacts on opinions and behavior. Unlike the other tools in the study, the emphasis was on the community level rather than the individual, and thus on traits and

habits shared by the majority of those that constituted the community. An ancillary aim was to obtain an understanding of the issues and characteristics unique to the community in question, which characterized it as distinct from other communities in the country, in order to highlight particular issues of import for the study.

Methodology/tools

A team of national researchers was trained and supervised by an international Dari-speaking project manager. The main premise of the methodology was for the research team to become a part of the community, and of community life, and thereby to understand many of the issues by way of integration. To avoid the often-observed trap of overemphasizing responses when the topic of research is disclosed, the research teams did not reveal that their purpose was to undertake research on media in Afghanistan. A more general explanation was given, that they were undertaking research on Afghan culture and traditions. This allowed responses about the media to be given more spontaneously, thereby giving researchers a more natural and realistic understanding of the role of the media. In interviews in communities, researchers rarely raised the topic. Rather, they waited for it to be announced by interviewees, which then allowed them to prompt further.

A team of researchers, usually composed of the international Dari-speaking researcher and one or more national researchers, travelled to purposively selected communities, spending between two and five days in each. In three out of ten case studies, in communities located in Kandahar province, a national researcher was sent alone, because of security concerns. The researcher received intensive training and was in constant communication with the project manager.

The main tools adopted in the communities included:
- In-depth and unstructured interviews with different profiles of media users and non-users;
- Observation of different forms of media, meetings, communal events and places of informal gathering in each location (mosques, chaikhana (tea houses), public baths, bazaars, community centers, schools, homes and other informal gathering places);
- Debates with local village chiefs (*maliks*), *mullahs* and *shura* members.

Guidelines were produced to guide the research and to provide a blueprint for the days spent in the community. Although it was challenging to create specific guidelines for an undertaking that involved mainly observations and unstructured interviews, after a number of initial drafts the team settled on a set of guidelines that outlined the essential research questions to be answered and a framework for its achievement, while allowing enough flexibility for local specifics.

The main topics addressed by the guidelines included:
- The “story” of the village/community (geography, history, economics, population) and other contextual information;
- Feelings and perceptions of the community towards government, the development/reconstruction process and the international community;
- Sources and flow of information and opinions;
- Perceptions and impact of the media;
- Consumption of media and the dynamics surrounding it;
- Other location-specific topics, as outlined in the locations section below.

Ten community case study locations were purposively selected across five provinces in the North, South and West of the country, as well as in Kabul and its surrounds, with a mix of urban, peri-urban and rural locations.

This component gave birth to a short case study report for each community (annexed to this report), and key information has been integrated in this report.

3.5. Audience survey

As the unique general-purpose questionnaire was not adapted to collect very precise audience data, an audience survey was organized. The audience survey was meant to collect detailed broadcast media consumption information over a sample of about 50 respondents per province, randomly selected. Each respondent was to be interviewed every day of the week for one week, through phone interviews. Each day, respondents were asked to detail their media consumption for the past 24 hours. As this was a difficult aim, the planned methodology had to be adapted to solve particular issues, as explained below.

a. Sampling

The sample was to be drawn at random from within phone numbers collected through the national survey. The national survey had interviewed 150-400 people selected at random from all provinces: from among these interviews, 50 were needed to participate in the audience survey. At the end of the national survey questionnaire, interviewees who listened to radio and/or watched TV were asked if they had access to a phone and would like to participate in the audience survey. Positive answers were ordered randomly in a list of phone numbers for each province. Within the two weeks prior to the audience survey, potential respondents were called to verify that they were still willing to participate in the survey and to fix a preferred time of interview.

Although initial data tended to show that the quota of respondents would match in most provinces, the final check showed that additional recruitment was needed. A recruitment process through phone was thus organized. Interviewee recruitment and selection were done through snowball sampling using existing numbers on the phone list, and a Kish grid system was used to select an interviewee within the household of the phone holder. Each newly identified interviewee was asked to answer the first part of the national survey questionnaire to ensure they qualified in relation to their socio-demographic data.

b. Data collection

The questionnaire was extremely simple and quick to run: it consisted merely in asking the following questions: What radio or TV station have you listened to/watched today, from midnight to one hour ago? For how long? Did you listen/watch alone or with other people? Did you listen/watch with attention or while doing something else?

The survey started as a test on July 9, 2010, and was begun in full the next day. The week was selected as the first week suitable to represent a normal audience (in particular, one not interrupted by the Football World Cup). Things did not go exactly as planned: several provinces or districts were totally unreachable for a whole day, owing to mobile network issues. In addition to large dropout rates in some areas, this left us after the first week of the survey with only a small number of provinces for which we had an acceptable number of interviewees answering. A decision was thus taken to extend the polling to the following week to access interviewees for whom data were missing. The polling slowed down from July

19 and ended on July 27. Initial analysis of the dataset showed problematic socio-demographic biases, in particular an extremely low number of females interviewed.

Another decision was thus taken to carry out another round of interviews with missing profiles, from August 22-28. By then, the survey counted 13,208 interviews of 1,765 unique individuals (on average one individual each 8.8 days), 1,705 of whom had attached useful audience information, including 13% female interviewees.

Figure 5: Audience survey questionnaire

c. Data handling and analysis

Data were entered, checked and cleaned, normalized and imported into a relational database format (MS Access). There were then weighted to match known demographics of provinces (province population and gender). The confidence interval resulting from the sample bias at the national level is considered to be lower than 2.5%[3]. Although only a third of the sample was drawn from the national survey respondents, answers to comparable questions usually match closely, giving good confidence in the accuracy of the results.

4. Incidents during data collection

Security incidents occurred during the field research in some districts of the less secure provinces (Logar, Paktika, Paktya, Khost, Kunar, Nuristan, Nangarhar, Kunduz, Helmand, Kandahar, Farah and Badghis).

The main issue encountered was in Tarnak-wa-Jaldak district of Zabul province, where constant fighting between coalition forces and the Taliban prevented interviewers for performing any work at all.

Interviewers in several of these districts reported having been kept and questioned by the Taliban. In a few cases, villagers reported the presence of the interviewers to the Taliban, who threatened to kill field staff because they were working with foreigners: this happened, for example, in Kharwar district (Logar). In Pushrod district (Farah), the interviewer was rescued by the police after being arrested by the Taliban, and in Kunduz the police freed another interviewer from “house arrest” imposed by the locals. A Paktika interviewer’s relative was arrested by the Taliban while he was transporting questionnaires to Kabul. He was released safely only after his family paid a ransom – but questionnaires were lost and interviews had to be redone.

In two districts where it had been thought that interviewers could work safely, Muqur (Ghazni), and Jawand (Badghis), the security situation disintegrated enough that it was impossible to find anyone from the district who would work there. Fortunately, interviewers working on the project in neighboring provinces agreed to perform the work there as well.

Overall, work went on as planned, except in three districts:

[3] These estimates consider a confidence level of 95% and a standard deviation of answers of 50% of the variable mean (worst case scenario).

- Tarnak-wa-Jaldak(Zabul), where the 35 planned interviews were actually carried out in Qalat district;
- Baghlan-e-Jadid (Baghlan), where only 11 interviews out of the 30 planned were carried out (the rest were carried out in Puli Khumri district);
- Kharwar (Logar), where only 37 out of 70 interviews were carried out, replaced by 26 interviews in Mohammad Agha, six in Puli Alam and two in Khushi.

Section I - MEDIA LANDSCAPE

Introduction

Afghanistan represents a unique case of media sector development. It is a country where, under Taliban rule, television was prohibited, antennas and transmitters were destroyed and the only radio station allowed was Shariat. Since broadcasting in the capital restarted (November 2001), the media landscape has experienced incredible growth; from one non-governmental radio station in 2002 (Sulh) to over 75 terrestrial television channels, 175 FM radio stations and 800 publications as of September 2010[4].The Afghan Telecommunications Regulatory Authority (ATRA), in charge of issuing frequency permits to radio and television stations, has recently run out of licenses issuable for Kabul. Market forces, which explain to some extent the mushrooming of all these outlets in the country (even a national bank, Azizi Bank, has established its own radio station and television channel), also seem to be driving a significant amount of competition in the media job market, making retention of trained personnel a challenge for a number of outlet managers.

The pace of development within other communication sectors is not lagging. Our study suggests that mobile phone penetration has reached 61% and has started to impact the ways in which media are consumed (offering, for example, the chance to vote for a favorite television star through text messages). This is also leading to rather fierce competition among the four mobile operators that use GSM technology. Finalization of construction of a fiber optics-based internet network is being hampered by increasing insecurity around the country. That said, Afghanistan does not represent a particular case of digital isolation when compared with other countries in the Indian subcontinent; for instance, Nepal, Bangladesh and Bhutan have set up their first cable links only in the past three years.

Afghan media outlets have also been receiving increased attention at both national and international levels. A nationwide seminar took place in Kabul in April 2010, with over 300 journalists from all around the country invited to take part in a two-day discussion (on licensing, security and taxation, among other topics), and ultimately to present their key recommendations to President Karzai[5]. The 2010 Asia Media Summit that took place in Beijing, China (May 25-26, 2010) saw the Afghan Minister of Communication and Culture take part and engage in media issues[6].Media as a growing sector, with key constraints to address, is also a regular topic at conferences organized by NGOs[7].On the international state, the pressure exerted by the government on journalists has been put in the spotlight a few times in recent years.

While offering an increasingly vibrant and “conscious” media sector, Afghanistan is also a country where the government will shut down a private television channel, for example, charging it with inciting sectarian tensions and threatening national unity (as was the case with Emroz TV on July 27, 2010): pressure, self-censorship and insecurity are part of the daily lives of media actors.

[4] These figures consider a Kabul-based outlet and its local branch with localized content as two different outlets (e.g. Killid and Killid Khost; RTA Kabul and RTA Balkh). Numbers are constantly changing, so exact figures are not reported. More precisely, Radio Sulh was on the frontline in Jabal-e-Saraj (Parwan) in September 2001.

[5] Nationwide Media Seminar: Challenges and Solutions; Kabul, April 5-6, 2010.

[6] The summit was organized by the Asia-Pacific Institute for Broadcasting Development (AIBD), headquartered in Kuala Lumpur, Malaysia.

[7] Press Now organized the Balkh Professional Journalism Development Conference in August 2010 in Mazar-e-Sharif; Mediothek organized Future of Afghan Media in January 2010 in Kabul.

This report examines the development and contradictions of Afghan media outlets. It is organized as follows: Section A (Environment) addresses the key factors underlying the development of the media in Afghanistan; Section B (The Media Industry) adopts a value chain approach to investigating key subsectors of the media industry; and Section C (Content) conducts an analysis of major programs and messaging conveyed by outlets.

A. Environment

The following sections address a number of key environmental factors that have influenced the development of media in Afghanistan. In particular, we examine: media legislation; transformation of the state-run RTA; political affiliations; the evolving role of the international community; and other variables, including terrain issues and levels of insecurity around the country.

1. Regulatory environment

The creation of a regulatory environment to shape the workings of the media is an ongoing process, which has so far produced some concrete results in specific areas, for example in the Media Law. Other processes, including the transformation of RTA, seem to be taking more time. This section specifically examines the status of media legislation and the plan to transform the governmental outlet into an independent entity.

1.1. The Media Law in context: a successful work in progress

The media regulatory environment includes different pieces of legislation. The Constitution, approved by a constitutional *Loya Jirga* (Grand Assembly) in January 2004, states that the Media Law is to be regulated by separate legislation, but itself comprises a number of articles that are relevant: inviolable freedom of expression and the right to print or publish topics without prior submission to the state authorities (Art. 34); abidance by international conventions such as the Universal Declaration of Human Rights (Art. 7); no promotion of values that are contrary to the beliefs and provisions of the sacred religion of Islam (Art. 3); etc. Furthermore, the Telecommunications Law, Copyright Law, Labor Law, Criminal Law and Commercial Law also organize many aspects of the sector and, although details on these are beyond the scope of this study, they should not be sidelined in a full evaluation of the legislative framework in relation to media.

In only eight years since the establishment of the interim government, a total of four Media Laws have been approved (March 2002, April 2004, June 2006 and August 2008 by the *Wolesi Jirga* (Lower House of Parliament)). There was some confusion among outlet managers and journalists interviewed as to whether the current version had in fact been officially published or not.

Local media stakeholders are still actively engaged in lobbying at policy level within the numerous review processes to which this legislation is subject. A Media Law Reviewing Committee, including, among others, the Afghanistan Independent Journalists Association (AIJA),the Afghan National Journalists Union (ANJU), the Ministry of Information and Culture (MoIC),the UN Assistance Mission in Afghanistan (UNAMA) and the UN Educational, Scientific and Cultural Organization (UNESCO), has been formed and has met regularly since June 2010 to prepare another version of this piece of legislation, which will presumably be submitted to Parliament after the September 2010 parliamentary elections.

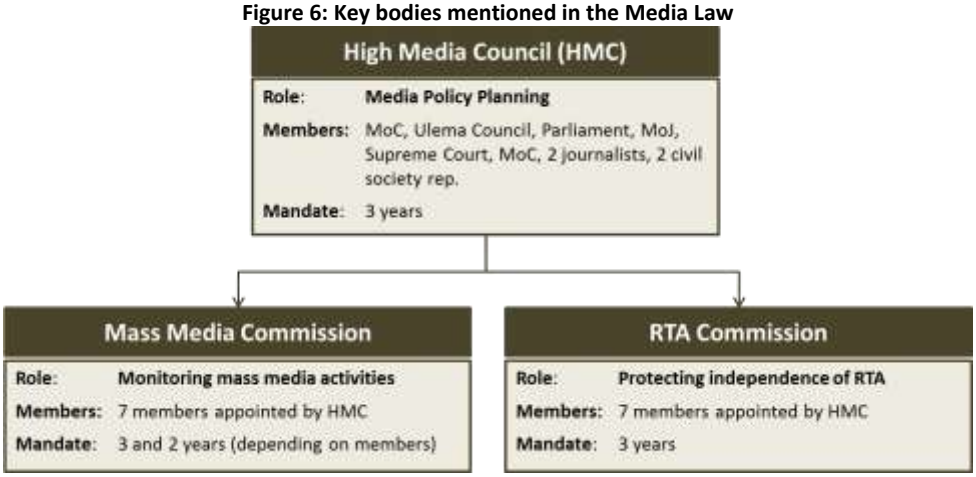
This legislative work in progress comprises over 50 articles spread across more than 10 Chapters[8], and was mentioned by outlet managers as a generally positive piece of legislation, especially when compared

[8] General Provisions; Rights and Obligations; Establishment of Print Media; Establishment of Electronic Mass Media; Financial Sources of Mass Media; Proprietors' Qualifications and Obligations; Qualifications and Obligations of Editors-in-Chief; High Media Council; Works and Materials Prohibited to be Produced, Printed and Published/ Broadcast; Miscellaneous Provisions. See: http://gfmd.info/images/uploads/English-Media_Law_2009.pdf.

with other media laws: *"Afghanistan has the best media freedom of all neighboring countries (Iran, Uzbekistan, Tajikistan, Pakistan)"* (Daily Outlook, Azadi). Major remaining areas of concern include two articles that together create a number of "gray areas" which are very much open to interpretation, compromising the freedom of the media. First, there are eight "prohibited items" (Art. 45), which set the boundaries of what can be produced, printed and published/broadcast. These include content and work that: are contrary to the principles of Islam; are offensive to other religions; are defamatory/insulting and offensive; cause damage to personality and credibility; are contrary to the Constitution and Criminal Law, as per the Penal Code; promote religions other than Islam; disclose pictures of victims of violence which damage social dignity; or harm psychological security and moral well-being.

Second, Article 5 stipulates that the government must provide access to information unless this information is confidential, endangers the security, national interests and/or territorial integrity of the country or damages the rights of other people.

Figure 6: Key bodies mentioned in the Media Law



Government advisers have underlined the need for a more balanced Afghan Media Law, one which reflects the mixed system of Islam, tradition and secularism and that is not a copy of Western laws, encouraged, at least in part, by the role that the British Broadcasting Corporation (BBC) World Service Trust, Deutsche Welle and Canal France International have played in supporting the draft legislation. Even so, a number of outlet managers and journalists conceived of the review process overall as a successful case of bottom-up advocacy efforts. Approximately 80% of what the reviewing committees have suggested, including those made up of actors in the Afghan media community, has reportedly been included in the law. The High Media Council (HMC), the body in charge of, among other things, selecting a Mass Media Commission and a National RTA Commission, now comprises journalists and civil society representatives in addition to Members of Parliament, the judiciary, the government and the Ulema Council. The inclusion of by-laws, such as on copyright, the activities of the Mass Media Commission and RTA rules, have also been advocated for through these efforts. The inclusion of more journalists (increasing the amount from two to six) in the HMC is a current priority of the journalistic community.

1.2. Reforming the national broadcaster: a slow process

The transformation of RTA is addressed in the Media Law, according to which RTA belongs to the Afghan nation and performs as an independent directorate. The corporatization plan, which was initially meant to include only the government news agency, Bakhtar News Agency (BNA), has since 2004 entailed joint

efforts by the international community (UNESCO, German aid agencies, the BBC, Deutsche Welle and Canal France Internationale) and RTA senior management. However, certain dynamics, including obstacles thrown up by former Ministers of Information and Culture, have left the process on hold for some years.

For example, there remain conflicting ideas as to what RTA should ultimately become: a *national* broadcaster which is fully independent from MoIC yet remains under the control of the government (a model that the government seems more supportive of); or a *public* broadcaster governed by an independent commission, more similar to a European model of broadcasting, as in the case of the BBC (a model more supported by the international community). A recent ruling of the High Council of the Supreme Court illustrates the divergent take on this role: in 2009, the proposed Media Law text stated that the "Director of RTA shall be appointed by the President and approved by Lower House of parliament." The High Council considered this to be "inconsistent with the Afghan Constitution." The text now reads that RTA "shall perform, as an independent directorate, within the framework of the Executive Branch," which leaves room for a broad interpretation.

2. Political environment

The media landscape reflects the intricate dynamics of Afghan society, and is thus exposed to multiple political forces, which can create tension among media actors and lead them to be significantly constrained in their work. This section addresses the major constraints that power dynamics can impose on the media, and the risks that these can entail.

2.1. Multiple influences and pressure

> ***"There is a huge conflict among outlets: free versus conservative media, ethnic-aligned media, religious media … All this confrontation needs to come down to an acceptable level, hatred-driven media should come to a halt"*** (AwaNama/Channel 7)

Although a number of media outlets and personnel comply with professional and ethical standards, and thus should not be ignored in an evaluation of Afghan media, the interviewed community at large, including outlet managers and journalists, seemed to have a very clear understanding of the wide affiliations among outlets across the country. Political parties, ethnic groups, the military and neighboring countries, as well as international donors, are all repeatedly mentioned as being major source of funds (either through core funding or through advertising) of most outlets in the country, turning "independent media" into a somewhat ambiguous term.

Outlet managers used strong terms such as "gang media" to identify outlets that allegedly serve the personal interests of former warlords or adapt to tacit rules of engagement and reportedly are playing a significant role in the country's media landscape. This term captures the detrimental effects that these outlets can generate, not least the confusion they can create for the audience in terms of the independent/watchdog role that the media should ultimately play.

Ethnicity can also be a major driver of outlet creation: some outlets have been established with explicit ethnically driven goals: "*We want to fight existing discrimination against Pashtun communities, which are often associated with insurgents"* (Shamshad TV). But affiliations can be taken too far and can foster confrontation and tension that cannot be underestimated. *"No matter which voice we use to record,*

there is always someone who says 'I don't want to hear that accent'." (Combined Joint Psychological Operations Task Force (CJPOTF), International Security Assistance Force (ISAF)). Some referred to a "media war," whereby "poison" is being used against one tribe or another (Institute for War and Peace Reporting, IWPR), with the risk of not only deepening the existing ethnic divide but also creating new tensions currently not felt in Afghanistan, such as a Shia-Sunni divide.

> ***"Afghanistan has always been a fertile ground for weapon supply, and the media have now become part of this provision…they are nothing but an alternative tool to weapons used by warlords"*** (IWPR)
>
> ***"The media have grown a lot thanks to the support of 'big guns' across time"*** (Killid)

2.2. Censorship and self-censorship

> ***"Journalists know far more than they would ever want to write down"*** (Mediothek)

With the media being instrumental to different causes and personal interests and agendas, it is unsurprising that the large majority of outlets interviewed had anecdotes relating to pressure, or even physical violence, by the government, insurgents and other stakeholders. Indeed, only very few outlet managers and journalists interviewed reported not experiencing pressure of any kind (RTA, the BBC, Shamshad TV and Killid were among the few that did not acknowledge any pressure). The government's recent decision (July 2010) to shut down a television channel, Emroz TV, according to some exemplifies a case of interference with freedom of speech. Another view is that the charges of inciting sectarian tensions and threatening national unity are an example of the government's attempt to sanction ethnic violence in the media. This remains an open debate, but government pressure can of course take less visible forms. An outlet manager in Kandahar, for instance, reported how government authorities, after being interviewed by journalists, asked them not to report on specific issues. Another outlet manager, in Mazar-e-Sharif, claimed the following: *"Once, we broadcast on the failures of the Directorates of Electricity and Agriculture… the following day we received an official warning not to do so in the future."* Herat had similar anecdotes: *"When you address gaps in the government, as we did two years ago by addressing electricity issues in the country, we had our power supply cut off for one week."*

"Afghan Model," model casting show on Emroz TV

The large majority of outlet managers interviewed also reported being contacted regularly by insurgents through press releases, emails and phone calls. This especially occurs when insurgents feel that they are pictured as the weak part of the story. Given that influence from neighboring countries is strongly felt in Afghanistan, pressure on journalists can also come from broader sources. An outlet manager in Herat, for instance, reported receiving objection letters from the Iranian government. Another outlet manager, in Kabul, reported receiving threats from Iran following the release of a report on the effects of a polio campaign which allegedly actually produced the deadly disease in children.

Despite this anecdotal evidence that pressure and influence are embedded in the Afghan media, our research did not convey a sense that most outlets are fully ruled by fear. Although the role of the media as an effective watchdog is perhaps far from being realized, talking openly about cases of experienced censorship can in itself be considered a first move towards counteracting pressure.

Furthermore, examples of investigative journalism denouncing or discussing power dynamics do arise, albeit rarely. Throughout 2009 and 2010, for instance, Pajhwok Afghan News (PAN) has been upfront in reporting cases of power abuse by a judge in Daykundi province and misconduct by a police chief in Jawzjan province. Despite heavy institutional condemnation in 2006 across Afghanistan of the conversion to Christianity of an Afghan citizen (Mr. Abdul Rahman), invoking his arrest and death penalty threats, some outlets, including Daily Outlook, nonetheless reportedly supported his cause.

Danish Karokhel, Director of Pajhwok, Committee to Project Journalists (CPJ) International Press Freedom Award laureate

Afghan media are also much warier than international media in terms of reporting on insurgent communications or news, always using quotes and including disclaimers relating to the impossibility of independently confirming events. In the recent killings of 10 international and Afghan eye camp workers (Badakhshan, August 2010), the international press quickly attributed the event to the Taliban, despite the fact that analysts have questioned the Taliban's degree of control in the areas in question. Meanwhile, local media were more likely to ignore the Taliban: "*When we are approached by insurgents, there is a procedure that we follow before releasing information, since we are far from serving them and giving them visibility"* (Azadi); "*We try to avoid publicizing information about the Taliban, since they are a terrorist group. We rarely have interviews with them and, if we do, we do not publish it*" (Hasht-e-Sobh).

All in all, in a society where religion plays a major role and cultural sensitivities are high, there seems to be a clear consciousness as to what the media can and cannot talk about. These limits are to some extent required under the Media Law and the Constitution, as mentioned in the section above, but are more generally applied personally by practicing journalists.

Self-censorship hence plays a seemingly greater role than (outside) censorship in driving the information that outlets release, for reasons that pertain to appropriateness with respect to the local culture, as well as to personal and general security. An outlet manager mentioned that, *"by working in an insecure environment, we impose some form of censorship ourselves… It is not necessarily imposed on us by others … We do so for our own protection"* (Voice of America (VOA)/Ashna*).* Another claimed that, *"Some issues, such as very religious or ethnic news, are not good for the reconstruction of Afghanistan so we restrict these kinds of messages"* (Daily Outlook, Daily Afghanistan).

Box 1: Media managers' take on censorship

- *"A good television channel is one that tries to foster a culture of solving problems, not create further ones…Globalization creates a dissonance between one's own culture and the international culture. It's not that we block foreign culture, we believe in cultural exchanges, but across similar cultures"* (Noor TV)
- *"Media should have freedom, but this freedom should not be against our religion, tradition and culture. We want real democracy, not only freedom which is against our religion and culture. This is not acceptable for Afghans*" (Ayna TV)
- "*We do not practice censorship or believe in it, but we do want to respect the law and are sensitive to cultural and national security interests*" (Salam Watandar)

- "*Some media outlets forget Islamic rules and culture and think they are living in a foreign country, not in Afghanistan"*(Baghrey Magazine, Lashkar Gah)

3. Assistance to media

International assistance to the media in Afghanistan has been considerable, and has been implemented using a number of different approaches. This section gives a brief history of donor support to help contextualize the current state of the nature of this support.

3.1. History of media assistance: key actors, achievements and approaches (2002-2006)

The international community has been actively engaged in assisting the Afghan media sector since 2002. Media support has involved a complex web of vertical and horizontal relationships among media players, including donors, NGOs and international organizations. These actors, along with the numerous independent Afghan journalists ready to get on board, have proved critical in shaping the media environment.

Key donors involved since the early days include USAID/OTI, the European Commission (EC), the United Kingdom Department for International Development (UK DFID) and, to a lesser extent, some European embassies and national aid agencies and smaller institutes (Goethe, CAF/SCO, Heinrich Boll). Funding from donors has in many cases been channeled through international NGOs (INGOs) acting as implementing agencies of pioneering projects. The first private radio station broadcasting after the fall of the Taliban in September 2001 was established by the French NGO Droit de Parole. Within the first few months of 2002, several media NGOs established a presence in Kabul, including the newly formed French NGO Aïna and the British "veteran" BBC World Trust, quickly followed in Spring 2002 by Internews (US), IWPR (UK), Media Action International (MAI, Switzerland) and the Baltic Media Center (BMC, Denmark). In other cases, donor funding has been targeted to private media (e.g. USAID to VOA; EC to the BBC and Killid; DFID to the BBC) or other service providers (e.g. USAID to Afghan entrepreneurs, such as Moby Group)[9]. Besides donors, international organizations, including mainly UNESCO and UNAMA, have played a (more limited) part in strengthening Afghan media since 2003 and 2001, respectively.

The first years of media assistance must be analyzed along with an understanding that the priority was to fill in the "basic needs" of the Afghan media landscape. Some institutions had been destroyed under Taliban rule; others had never existed. Programs and achievements in the first five years of media assistance thus involved infrastructure rebuilding, public broadcasting support, training, advisory services and content building. Media spending by donors also played a significant role.

a. Infrastructure

Infrastructure (re)building has included financial and technical assistance to establish new media actors or to restructure pre-existing institutions that were destroyed by years of war. From USAID/OTI's initial grant in 2003, Internews was active in establishing a network of independent community radio stations across the country, which by 2006 had reached a total of 31 stations. UNESCO supported print media, including Kabul Weekly and Roz magazine, as well as a range of other media activities, through its support to the Afghan Media and Culture Center established by Aïna in 2002. In the first two years of Afghan media development, a total of over 200 newspapers and magazines, as well as more than 30

[9] USAID invested $228,000 in building the infrastructure of Arman FM in 2003 and granted $2.5 million for transmitters and infrastructure to Tolo TV in 2004.

radio stations and four TV channels, were created *ex nihilo*. Besides outlets, infrastructure achievements have encompassed the creation of private news agencies (such as PAN with the support of IWPR), press distribution networks (such as Nye Express with support from local NGO Development and Humanitarian Services for Afghanistan (DHSA)), radio distribution networks (such as Tanin, supported by Internews/USAID and the EC) and journalist associations (Article 19, Reporters Sans Frontières). Infrastructure support has also been targeted at government broadcasters through the reconstruction of destroyed premises (Educational Radio and Television (ERTV)) and other infrastructure support (BNA and Kabul University) (UNESCO). Donations of broadcast equipment have been common (RTA transmitters, for instance, have been given significant support over the past four years by a range of donors, including Japan, India, USAID and France).

Regarding the regulatory infrastructure, Media Law advisory services (including drafting and reviewing legislation) and the corporatization plan of the RTA as supported by international outlets, see Sections A. 1.1 and 1.2.

b. Content

The interaction of a new generation of Afghan journalists (some of them returnees from the Diaspora) with relatively young international media NGOs has led to interesting developments in terms of content in a country which had lost the concept of independent journalism. A number of locally produced programs could be mentioned here, including nationwide news ("Good Morning Afghanistan" supported by the EC/BMC; *Salam Watandar* by Internews), feature programs (e.g. "New Home, New Life" supported by the EC), political and social debates (e.g. "You Are the Judge" produced by Awaz in 2004-2005), talk shows, locally produced series and even "Afghan Star."

c. Capacity building

Short-term training programs on basic journalism skills have also been a key focus of most NGOs mentioned above, as well as others which have focused on more specific aspects, such as women journalists' training (Institute for Media, Policy and Civil Society (IMPACS)) or building human resources for media through long-term support to universities (Sayara, through the Novice Journalism Training Program in 2003-2007).

d. Advertising and campaigns

The sector's economy has been sustained in great measure by public outreach and information campaigns, particularly in relation to voters' registration and the presidential (2004) and parliamentary (2005) elections, as well as through campaigns on disarmament, demobilization and rehabilitation (DDR), vaccination and counter-narcotics, among many others – to name only the civilian efforts. Donor media spending definitely had a major role to play in the survival of many small local media outlets during the initial period.

e. Trends and lessons learned

Given that assistance in Afghanistan targets both independent and governmental media, interesting trends and lessons have emerged. First, with a focus on independent media, volume, flexibility of funding and consistency over several years, USAID/OTI turned into the leading donor to independent media development in Afghanistan in 2002-2006. OTI's flexible funding, handled by the International Organization for Migration (IOM), has been revealed as one of the most efficient mechanisms of funding to media development in Afghanistan. Key strategic advantages here lay in maintaining close contact

with key media stakeholders through regular meetings and roundtables, offering grants to local private media and ensuring timely money transfers.

However, not all donors demonstrated such flexibility, and not all had the same potential for innovation or the same ability to react. As an example, a massive amount of equipment was donated by the Japanese government to the Afghan RTA ($17 million in digital equipment), but human resources challenges, in relation to dealing with several hundred government employees, as well as limitations in the resources dedicated to training Afghan journalists to operate these sophisticated studios, somewhat hindered the potential for improvements in program quality. Meanwhile, initiatives by numerous foreign embassies to support RTA, through limited training and support programs, were rarely coordinated and contributed very little to changes in public programs.

3.2. A turning point in supporting Afghan media: where do we stand?

a. From basic needs of media development to the advent of StratComs and PsyOps

There is general agreement that media assistance in the country has been a significant development success story, especially when seen in comparative perspective. This has reportedly been achieved by a larger number of donors engaged in supporting the sector than, for instance, in Iraq; by using less than 10% of the money spent in Iraq on media since 2002; and by a wise policy decision to invest in independent media as opposed to concentrating efforts exclusively on reforming state-run media . The idea of "starving" outlets from the beginning, as a condition for making them sustainable in the long run (John West, former Director of Internews), has resulted in success, considering that a number of small radio stations created with very small amounts (less than $20,000 in start-up costs) are still broadcasting today.

Yet the current feeling, observed across a number of Afghan stakeholders working in media (including representatives from Killid, Nai Supporting Open Media, AwaNama/Channel 7), is that a visible change has occurred in the assistance provided by the international community, including a general decrease in financial support and a move away from core funding to independent media towards a form of assistance that entails support to media components of other projects. It was claimed that, following the presidential and parliamentary elections in 2004 and 2005, the Afghan media saw a more than 60% decrease in the cumulative budget from the two main media development actors supporting independent media (from a total of $30 million earmarked by the EC and USAID over the years 2002-2006 down to $11 million from USAID over 2007-2013). Unsurprisingly, since the presidential elections, funding for public outreach has also decreased massively. This has left the impression among medium-sized independent media that international funding to the Afghan media is only a short-term and agenda-driven effort, therefore is not really reliable for them to build on.

Assessing actual changes in donors' financial commitments to the media is difficult, owing to limited access to information. However, it is clear that, since the early days of media assistance, changes have occurred to the pool of actors involved and the functions covered: the media had different needs initially, but the donors had different interests as well.

Actors involved

On the donor side, USAID is still leading efforts, with renewed commitments of a total of $22 million in 2010-2011 (see following section). The EC seems to have reduced its contribution significantly: the EC operations section was actively involved in monitoring and supporting educational aspects of the BBC's

New Home, New Life and RTA's initial transformation process and news programs, but its Country Strategy Paper (CSP) currently has no specific focus on media. Its approach since 2007 has been to remove its support to the sector at large, instead integrating it into individual projects (using approximately 1-5% of the projects' total funds) as part of its so-called "communication visibility." Examples of such projects include Security Sector Reform, Human Rights, Elections and Agriculture.

On the INGO side, a large number of actors involved since 2002 have continued to support media (e.g. Internews with Nai Supporting Open Media, Mediothek, IWPR).Additional NGOs supporting media have stepped in (e.g. Equal Access, the International Foundation for Electoral Systems (IFES), International Media Support (IMS), Media Support Solutions (MSS), Press Now).A few organizations (such as IMPACS, BMC, Sayara) have interrupted their media development activities. The approach is still focused largely on building the capacities of local media.

Besides numerous trainings programs on a range of topics (see Section B.2.3), NGO support has expanded towards the creation of "media centers" for journalists, offering free internet access and working and networking space, following a model initially set by Aïna in 2002 in Kabul and eight regional centers. IWPR, for instance, established a number of such facilities in Helmand, Herat and Mazar; Mediothek did so in Kunduz, Jalalabad, Khost, Peshawar, Kabul and recently Mazar. These hubs represent an innovative initiative in places like Helmand, where there used to be no alternative voice to those of international journalists embedded in the military.

Some NGOs reported that security efforts for journalists have become an increasingly important aspect of their work. IWPR is currently involved in launching a text messaging project, which allows journalists and partner civil society organizations that have received threats or experienced trouble to connect through frontline text messages to a centralized hub of news.

Box 2: NGOs supporting media

IWPR office in Mazar-e-Sharif

IWPR has been operating in Afghanistan since 2002 and is funded by a number of donors, including Norway (approximately 60-70% of funds), Sweden, the US State Department and IMS (for the Helmand Media Center).Through approximately 25 staff members, plus a number of freelance journalists spread around the country, the NGO aims at supporting the professionalization of the media, including the creation of critical and responsible journalism: *"We support local media outlets until they can stand up on their own feet"* (Manager at IWPR). The establishment of PAN, the first independent news agency in the country, has been among its past achievements (see Section B.3.1).

In the course of the past five years, major changes have occurred in its activities. The media center project started in 2008 and has seen the establishment of three centers, in Helmand, Herat and Mazar (with a plan to establish more in Kapisa, Farah, Nangarhar and Khost). The NGO has also seen a shift in the focus of its training components, from a universal approach (including government representatives) to one that is targeted more towards university students. IWPR is currently securing funds for new media centers and is discussing the future of existing ones, including whether they should be handed over to an Afghan entity or universities so as to increase their sustainability.

Among UN agencies, UNESCO is still involved in supporting media, both as an implementing agency of extra-budgetary funds from smaller donors and through its regular budget targeted to ERTV and RTA. Italy is currently the main contributor to UNESCO's extra-budgetary funds, having provided a €700,000 grant contribution for support to ERTV in 2010-2011.

UNAMA's involvement in media has not varied significantly across the years, and is currently limited to the airing of its program on RTA and some advocacy efforts (e.g. International Day of Peace), to a total of $20,000 per year. Other UN agencies are engaged in providing support through informational campaigns on specific issues (e.g. gender and elections).

Additionally, a number of international journalists and project managers who played a key role in the first years of Afghan media development have remained in Afghanistan and are still contributing today in different ways to the development of local media sustainability (namely, Awaz, Sayara).

Key functions covered

Infrastructural support is still provided, although it now encompasses to a greater extent donations for the upgrading of equipment, such as more powerful antennas and transmitters (e.g. ISAF, USAID, Internews)[10]. Internews is still involved in providing its network of over 40 radio stations with at least three hours of Salam Watandar every day[11], but in many cases content building seems to have shifted towards co-production between international donors and single private outlets. As of August 2010, for instance, a number of donors, including the EC, are jointly involved in producing 15 to 20 episodes for television on the role of policemen in Afghanistan. With respect to state outlets, initiatives are in place for developing the production capacities of ERTV and producing audiovisual content for training teachers on crosscutting themes such as peace and literacy. Training has experienced a move towards mentoring and in-house coaching, as well as a search for a more targeted audience (see Section B.2.3). Lastly, given the evolving regulatory framework, advocacy still plays a significant role across the Media Law review process and RTA's transformation, and public outreach and information campaigns continue to take up a large proportion of donor spending.

Alongside media development across these categories, international efforts supporting media seem more to have recently moved towards Strategic Communications ("StratComs") and Psychological Operations ("PsyOps").

Conscious that "*the government needs the media perhaps more than the media needs the government,*" (Public Information Officer at an international organization), since 2008[12] embassies of a number of countries, including the US, the UK, the Netherlands and Canada, as well as ISAF, have been involved in building the capacity of media spokespersons within the Afghan government through the Government Media and Information Center (GMIC). GMIC is an Afghan-led organization which was established by a decree of President Karzai. The aim of this body is, with the close support of advisers from the

[10] Specific cases of infrastructural support can be found in the provinces. In Mazar-e-Sharif, for instance, the UN Development Programme (UNDP) has recently (April 2010) supported the Department of Women's Affairs (DOWA) with equipment (camera, recorders, computers, DVD players) to strengthen its capacities with respect to its weekly television program broadcast through RTA (Women and Society).

[11] Salam Watandar (Hello Countryman) is a radio station broadcasting and transmitting from Kabul. Internews-supported stations must broadcast at least three hours of this outlet's content every day. See Section B.3.

[12] Embassies are generally more involved in short-term/*ad hoc* support to media than respective aid agencies and, and also in StratComs activities.

international community (e.g. US embassy representatives), to fill in the gaps between the government and the public by providing media and communication services to the government, so as to ensure the release of professional information. The US State Department has reportedly committed $72 million to communications and public diplomacy in Afghanistan in 2010.

Box 3: The Government Media and Information Center

GMIC was established in 2008 and works across four focus areas:
1. Media Relations and Coordination Unit: *inter alia* organizes conferences between MoIC spokespersons, international embassy representatives and ISAF on different topics, e.g. how to present DDR to the media;
2. Public Outreach Unit: works on traditional means of communication to convey messages to the population through billboards, newsletters or small *shura*, i.e. tribal elder gatherings;
3. Media Monitoring and Analysis: prepares bulletins and reports for the President and senior management officials;
4. Capacity Building and Training: trains government spokespersons and press officers to respond in a timely and professional way to media inquiries. Government media staff members (press officers and spokespersons) are the primary focus of this unit, but non-governmental outlets are also trained. See Section B.2.3 for further details on GMIC's training activities.

PsyOps refers to strategic communications activities aimed exclusively at Afghans, as opposed to media effort aimed at the international community. This terminology is essentially used by the military. The foreign military PsyOps effort includes funding of programming and public service announcements with the aim of fighting insurgents, as well as information campaigns on a range of issues (e.g. how to behave around checkpoints and convoys, counter-narcotics campaigning).

> ***"Our enemy is the insurgency, the prize is the people"*** (Public Affairs Office for Reintegration, Resources and Detainee Operations, ISAF)

b. A new batch of media support: USAID's future programs

In June 2010, USAID's DG called for applications for the Afghanistan Media Development and Empowerment Project (AMDEP). This is a one-year project with a budget of $22 million that aims at addressing key gaps in Afghanistan's media development. Specific components of the project include: support to regional broadcast media through the creation of stations and training centers; the establishment of multimedia production centers to foster access to regional information and training; support to media advocacy and literacy through the consolidation of existing associations and the creation of new networks; assistance to broadcasters through further expansion of capacities; assistance to ministries in the regulation of the media sector; and expansion of mobile phones services for news and information (Mobile Khabar). The closing date for applications was July 2010 and the project is expected to commence in October 2010.

4. Other factors: geography and security

Besides political, legislative and donor-related factors affecting the media landscape in the country, an additional set of variables must be considered.

Broadcast media have rather fragmented coverage owing to the country's terrain, its patchy electricity supply, the urban-rural divide and the security situation in specific areas. Mountainous areas represent a considerable barrier to the outreach of terrestrial antennas. Apart from a few radio stations that can be

heard on AM across the country (e.g. Radio Afghanistan, the BBC), the broadcast coverage of radio stations varies considerably depending on the nature of the terrain. Although limited electricity is of course a key constraint in penetration of television, it can also represent a barrier to the regular operation of outlets, affecting their listenership/viewership levels and, in the long run, the maintenance of their equipment (see Section B.2.1). Insecurity also can affect the development of the media landscape, leaving rural, remote and insecure areas in particular without coverage: some districts receive only local military radio and very limited or no terrestrial television coverage (e.g. Garmser (Helmand), Sorubi (Kabul), Sarkani (Kunar) and Saydabad (Wardak).

The development of print media is extensively hindered by demand-side constraints, including very low literacy rates (approximately 30% of men and 15% of women), especially in provinces such as Nuristan, Farah and Ghor. Other factors that must be borne in mind are: the limited profits that can be made from selling newspapers and magazines ("*Selling a pen generates more income than a newspaper … selling print is more a way to advertise the other products that we sell in our shops since the press tends to attract customers on a regular basis,"* bookstore owner in Khost province); the scarce incentives for distributors of printed press to reach more remote areas; and insecurity, which makes distribution to southern and southeast provinces particularly constrained and makes the population uncomfortable holding a newspaper.

Similar challenges affect the full development of the information and communications technology (ICT) sector and therefore internet[13]. An insecure environment is especially hampering the optic fiber plan to ensure quick ICT services at low prices, limiting internet users at 1 million, according to ATRA. The project was expected to be completed in two years (having started in 2006), but the optic cables are currently in place in some areas only, with significant sections incomplete, owing to regional fighting (e.g. Ghazni and Kandahar – see Section B.1. below)

The environment (regulatory, political, donor related) shapes the media landscape and the role that media outlets have in Afghanistan. Although efforts are currently in place towards producing a sound piece of media legislation, the issue is inevitably also a judicial one. Strengthening the independence of media relies not only on an effective law but also on the willingness to apply it. A functionally conducive media environment hence entails an infrastructure of impartial courts, legislatures and regulators to enforce violations: "*it can be the best Media Law if the government is fair or the worst if the government is very conservative. It's a matter of interpretation and a committed government in place in the country"* (AwaNama/Channel 7).

Lack of independence, the different forms of pressure this can entail and increased insecurity levels across the country are factors that seem to be hampering considerably the role of media as an effective counter power. At the donor level, there also seems to be a need for focusing on outcomes of projects (i.e. assessing the extent to which the standard of journalism and the fairness of regulatory decisions are improved), as opposed to mere outputs (such as number of trainings conducted, broadcast equipment donated or number of laws reviewed).

[13] The telecommunications sector has experienced important achievements. Mobile phone operators cover 80% of residential areas and the remaining 20% are currently the object of ATRA's efforts, which include the establishment of new towers and "tele-centers" in remote areas (providing internet, public phone and satellite phone access). As of July 2010, there was an open bidding process for the setup of 103 towers, in addition to the current 3,600. Remaining challenges include: limited incentives for mobile phone operators to reach poor areas owing to poor revenues; lack of good roads; a mountainous and landlocked terrain; irregular power supply; harsh weather conditions in winter and in specific areas of the country; and insecurity.

B. The media industry

This section addresses the media as an industry. A value-chain approach that investigates key subsectors (infrastructure and equipment, human capacity, content provision, media outlets and advertising) allows for a comprehensive examination of the sector and an estimation of its size.

1. Infrastructure and equipment

Infrastructure is both shared with other outlets and tailored to outlets' specific needs. This section runs through the types of resources that are commonly used and the basic equipment outlets rely on.

1.1. Common infrastructure and resources

Outlets share a number of "hard" and "soft" resources. Hard components include electricity, internet, broadcast antennas and frequency space for broadcast media. Soft factors are related to the outlet-level regulatory framework.

a. Electricity

Despite existing efforts to address gaps (including imports from Uzbekistan and neighboring countries, construction of power plants with help from the international community), electricity remains inconsistent across the country (less than 15% of the total population has access to grid electricity) and operating generators inevitably make up a considerable part of an outlet's expenditures.

b. Internet

The location of an outlet generally determines the presence of internet facilities. Internet in Afghanistan is currently provided by over 20 small and medium size internet service providers (ISPs) connecting to expensive satellite links from other countries. Remote areas generally have an access point to the District Communication Network (DCN), which provides communication facilities (including internet as well as telephone connections) to government representatives and the general public for a small fee. The optic fiber project, which includes a plan to set up a 3,200km-long internet backbone across the country (on the route past Kabul, Kandahar, Herat and Mazar and then off to Tajikistan, Uzbekistan and Pakistan) is moving slower than expected and is so far connecting only Kabul, Parwan, Mazar, Faryab and Badghis (see Section A.4). With this in place, providers will supposedly lease the optic cables and the speed and price of the connection will reduce considerably (ATRA reports that the cost has already halved where this is in place, from $0.12 per second to $0.06). As of July 2010, a tender process was being prepared for issuing WIMAX licenses, which is expected to pave the way for more comprehensive internet provision.

Barat Building, Mazar-e-Sharif

c. Location of broadcast antenna repeaters

Specific locations are prioritized spots for placing antennas. TV Hill in Kabul and Matun Hill in Khost are the favored spots for the location of terrestrial antennas in these cities, shared by almost all broadcasters. The Barat Building in Mazar-e-Sharif is favored by a large number of local outlet managers,

given the height of the building and the availability of a regular electricity supply. Furthermore, pooling of resources has become a common strategy, with new towers built on Television Hill in Kabul shared among three different outlets.

d. Frequency space

Frequencies are a scarce resource. In June 2010, ATRA, the independent authority within the Ministry of Communications and Information Technology (MCIT), which is also in charge of issuing frequency permits to radio and television stations, officially ran out of frequencies to assign to newly established outlets in Kabul. As of July 2010, it had reportedly issued 60 television frequencies and 41 FM radio frequencies. This implies that anyone who is planning to set up a new broadcasting outlet in the country's capital will have to wait for a revoke or redistribution of another outlet's license. Unlike countries in the West, there is currently no plan in place to put in place digital television, a trend which could have increased the limited terrestrial spectrum available. The spectrum of frequencies is also limited at listener level. The most common band used is 87.5-108.0 MHz: in Japan it is 76-90 MHz, so Japanese receivers (present in some cars imported directly from Japan) do not have access to frequencies above 90 MHz.

e. Satellite and cable

All large television networks in Afghanistan now broadcast on satellite. Eutelsat is a proven satellite transponder for the Afghan market: Tolo TV, for instance, transmits on Eutelsat SESAT 2. This makes it possible to transmit television (and radio) channels from the uplink to the surface of the earth, and is leased from the administrator of the satellite. Our research suggests that satellite is more common than cable television (18% versus 3%), although in major cities this trend does not always hold true. Since 2004, Kabul has been home to the Association of Cable Networks (Itihadia-e-Cable Ha-e-Afghanistan), which gathers a total of 118 cable providers in the country. Only 90 of them are reportedly currently active[14]. Besides Kabul, which has 21 providers[15], cable providers are present in Herat, Mazar-e-Sharif, Jalalabad, Badakhshan, Kunduz, Faryab, Puli Khumri and Badghis. Increased insecurity has led to the closure of cable providers in Khost, Ghazni, Nimroz and Baghlan, and limited capacity has led to the closure of cable providers in Takhar province.

f. Printing presses

Government newspapers and magazines generally use their own printing presses. Azadi Printing Press (in Microrayan area of Kabul) serves the needs of the four major government newspapers (Anis, Islah, Hewad and The Kabul Times). Private outlets generally outsource printing services and rely on several presses located in cities (e.g. Sultani, Bahir, Ahamdi, Nebraska and Fajer in Kabul). Pursuing lower printing prices can some lead local newspaper and magazines to print in neighboring countries. For Jalalabad, for instance, printing often takes place across the border in Pakistan, where unit costs are $0.30 per copy against $0.50, and color printing presses are also more common. The cost effectiveness of this is reduced by the need to pay charges ($0.02 per copy) to customs on the copies shipped back from Pakistan.

[14] The government has not provided networks with a license to operate, although they are registered at the Ministry of Justice.

[15] For a total of 87,100 active connections (covering an estimated 435,500 people).

g. Distribution facilities for print

Nye Express office in Herat

Public press is distributed by an office within the MoIC, whereas large-scale distribution of private print takes place through one distributor, Nye Express. This is an organization that falls under the administration of the NGO DHSA, and mainly ships printed press from Kabul to all provinces through its nine zonal offices (Kabul, Herat, Bamyan, Kandahar, Mazar-e-Sharif, Khost, Jalalabad, Ghazni and Puli Khumri). It used to distribute only two magazines back in 2002 (Killid and Mursal), but has now reached a total of 50, including non-state publications outside the DHSA group (e.g. Sada-e-Azadi newspaper). Along with other products such as mobile phone recharge cards and media content (audio-video), this initially challenging initiative has turned into a sustainable activity. Within each province, districts are then covered through informal networks of distributors, stalls (*ghorfas*), carts (*karachis*), and local shops. In some cities, the municipality has imposed the reduction of the number of *ghorfas* and *karachis* owing to traffic obstruction. So, with the exceptions of Zurmat (Paktya), Kishim (Badakhshan), Chak (Wardak), where kiosks and *karachis* are used, within most districts Nye generally operates only through local shops. Contractual arrangements regulating unsold copies between outlets and Nye differ; no financial information was disclosed in this respect.

For financial and monitoring reasons, some outlets do not rely on Nye Express and set up their own informal distribution network of hawkers and acquaintances. In these cases, distribution makes up for a minor part of an outlet's total expenditures (as opposed to printing, which can represent 25-50% of an outlet's budget).

h. The licensing process

MoIC and ATRA are key bodies in the process of setting up a new outlet. The rapid growth in the number of media suggests no major regulatory constraints. Yet outlet managers reported that setting up a radio or a television station in Afghanistan remains difficult and time consuming. Connection to power circles represents a key "oiling mechanism" throughout the lengthy procedure, which includes obtaining a broadcasting license from the Broadcasting Committee for Radio and Television within MoIC[16] and a frequency assignment from ATRA. One outlet manager in Kabul reported it had taken him three years to set up his newly established television channel (Channel 7/Haft TV), with an additional barrier being the risk of losing the frequency license from ATRA if the broadcast license is not obtained quickly enough.

Besides lengthy procedures, costs can represent a significant barrier to the establishment of an outlet. The cost of starting a radio station can range from approximately $1,000 (for third degree provinces), to $2,000 (second degree provinces), to $3,000 (first degree provinces), to be paid to MCIT. Similarly, television channels also pay according to the position of the province within a classification in degrees, with a television station in a first degree province paying roughly $5,000. Additionally, frequency licenses and taxation must be paid on a yearly basis to MCIT and the Afghanistan Investment Support Agency (AISA) (if the outlet is a private company), depending on the degree of the province, thus basically regardless of the outlet's specific location, size or revenue (an average $3,000 per year). This was

[16] Its release is conditional on at least three years of work experience and a university degree for the outlet manager and proof of sources of funding.

frequently mentioned as a significant barrier to the sustainability of local outlets and an issue that the central government seems to neglect.

Print outlets also require registration at MoIC. Fees are much lower, but there are also generally fewer incentives for the owner of a newspaper or a magazine to register than for broadcast media.

Box 4: The Ministry of Information and Culture

MoIC has a broad mandate, which includes 10 directorates in charge of media, and employs approximately 4,500 staff (approximately half of whom are employed in these directorates). It controls the government-run RTA, four major newspapers in Kabul (Anis, Islah, Hewad and The Kabul Times) and over 70 smaller publications across the country, one news agency (BNA) and one directorate with the responsibility of publishing books.

It is also responsible for issuing broadcasting licenses to radio and television stations. Interestingly, our figures on existing outlets in Afghanistan do not match with the official list of outlets registered at MoIC, which indicates 31 television channels and 80 radio stations. MoIC's list includes only private outlets; however, even taking RTA into consideration (hence an additional 34 television channels and 34 radio stations), the MoIC total is a significant underestimation of the total number of Afghan media. Reasons for this include difficulties in keeping up with the development of the sector on the government's side, as well as cases of limited incentives to register on the outlet's side.

1.2. Equipment

This section looks into the equipment needs of outlets and the main actors involved in addressing them.

a. Supply of equipment and services

The broadcasting engineering sector in Afghanistan is concentrated. Two companies serve the needs of broadcast media (as authorized dealers of over 20 foreign companies): Emerge Media Communication (EMC) created in 2005 and owned by Mr. Fahim Atal; and Afghanistan Broadcasting Engineering (ABE), established in 2006 by Mr. Nasir Totakhil[17]. Emerge and ABE provide a full range of services to radio stations and television channels, including support throughout the legal registration of outlets, supply of equipment and technical assistance. The former currently serves 30 FM radio stations and three television channels, whereas the latter has a larger pool of clients, including over 100 local/community-based radio stations from all over the country (90% from outside Kabul) and five to six television stations, mostly based in Kabul[18].

Television studio (Arezo TV)

In addition to these companies, there is a very small and new network of resellers. The Indian company Bisail and the Iranian

[17] These are companies authorized by MCIT and AISA. Emerge is the authorized dealer of CTE Digital Broadcasting (Bologna, Italy) and BW UK (London, UK); ABE is the authorized dealer of over 23 foreign companies (such as BW UK, Elenos Italy, ABE Italy, BE USA, etc).

[18] Until 2009, ABE's clients were mainly radio stations (70% of ABE's total income); the company's source of income is currently more balanced between radio stations and television channels.

Takta used to be involved in this business, but are no longer operating in the country, reportedly for financial reasons. Moby Group has its own supplier of broadcast products (Afghan ITT), which serves the needs of Tolo TV and Lemar and Arman FM, while offering services to other outlets as well.

Some outlets (a few in Herat, for example) prefer purchasing broadcast equipment in other ways, for instance online from the UK or by arranging shipment of a transmitter from Germany.

Radio station studio (Barat)

Suppliers of broadcast equipment also provide technical assistance, which is not limited to the provision of service maintenance on items purchased by clients. ABE offers technical insurance packages in the form of "12 hours on air service contracts," guaranteeing the quick repair of broken equipment. Emerge offers technical assistance to Internews-supported radio stations.

Suppliers of printing presses do not represent a significant business in the country (from a media sector standpoint), and a few print media outlets have their own printing facilities.

b. Equipment needs

A transmitter for a television channel (Herai TV)

Broadcast equipment can generally be classified into three categories: construction material (e.g. design and building of television studio, sound proofing, etc.); production technology (e.g. computers, servers, editing rooms, news rooms, etc.); and broadcast operation technology (i.e. technology for going on air).

The most pressing of needs includes production and broadcast operation packages (e.g. transmitters, cables, antennas). Equipping a radio station or a television channel in Afghanistan can cost anything from $5,000 to $10 million, and prices of single pieces can vary significantly. An average 300W transmitter, for instance, costs $6,000; these can generally be found in stock in the country, as with almost any other item below $20,000. An average AM transmitter costs approximately $500,000 and, as with television transmitters, requires *ad hoc* orders, since these need in-factory configuration. A satellite TV feasibility study in southern Afghanistan conducted in 2008 (by MSS) suggested that investments in satellite equipment to allow for a TV channel to go on satellite can easily reach $600,000.This figure would include satellite transponder and engineering costs, to a total of $400,000 per year, and uplink-downlink equipment (e.g. uplink and downlink dishes, a satellite encoder and decoder, demodulators and amplifiers), to a total of $235,000.

Construction and design of studios (e.g. portable studios that can be dismantled when the outlet changes location) are less commonly provided, and are generally limited to television channels, since radio stations are usually established in a more informal manner. Studio equipment (i.e. cameras, video mixers, audio mixers, videotape recorders, play out stations) is also generally available on the local market or bought by outlets in Dubai.

Basic printing needs for a print outlet that does not outsource printing include a single and double color press, an image setter and a cutting machine. The price of this equipment costs approximately $100,000 (in Pakistan, where prices are reportedly relatively cheaper).

> ***"The market is poor…We struggle to find a balance between cheap equipment and quality"*** (ABE)

2. Human capacity/resources

The media is a very young industry in Afghanistan. Workers are in a sector with no institutional knowledge passed on from the previous generation, so the boosted capacities of media actors must be considered an accomplishment. Yet there is a consensus among outlet managers on the existence of major gaps that need to be filled.

2.1. Technicians and managers

Some media stakeholders referred to an increasingly skilled media workforce, comprising a generation of technicians and broadcasters which was not present in 2005 (*"The roster of employable camera operators and editors is significantly better trained than before,"* Awaz). However, technical capacity in the country is still very low, with a significant lack of professionally trained employees in broadcast engineering. This is an issue, as broadcast outlets regularly face maintenance problems and damage: "*Technical problems with broadcast equipment are recurrent, yet there seems to be no solidarity among outlets in terms of addressing them. It is as if we all have to go through the same experience and make our own mistakes. Nor is there government support provided in this respect" (*AwaNama/Channel 7*).*

The relatively poor market helps explain such problems, but so do frequent power cuts and instability of electricity, which damage equipment (mostly transmitters), alongside lack of knowledge on how to correctly operate equipment ("*Most technicians do not speak or read English and this can lead to the obsolescence of the equipment,*" CEO). Technical infrastructure is bought abroad and requires configuration to work in Afghanistan, which represents an additional need for technical assistance.

With some exceptions, outlets do not generally have the capacity to address equipment dysfunctions: often, technicians are called from outside, even abroad. Alternatively, damaged equipment may be sent abroad, with detrimental effects for broadcasting if delays occur in returning the repaired equipment.

To a more limited degree, skills in financial management (e.g. QuickBooks, early audits), marketing, human resources (for a greater focus on job descriptions, standard employment contracts) and proposal writing and development of business plans were mentioned as limits for the current media workforce

2.2. Journalists

a. A lively and competitive market

> ***"Journalism is now a profession that people want to do. People are proud to be journalists. Previously, poets were very respected, now it's journalists"*** (Kabul Weekly)

Journalism has gained in popularity across the country, and its social position has been raised considerably. Estimating the total number of journalists in Afghanistan is a challenge, given that most of

them work for a number of outlets or organizations simultaneously; even when they are employed full-time by one outlet, they do not necessarily work full-time in these capacities. International outlets such as Azadi or VOA seem to employ mainly freelancers (the BBC employs 35 full-time journalists only). The importance that journalism has acquired as a profession is, however, visible through the number of journalists who are reportedly hired as such by single outlets across the country. RTA, for instance, employs as many as 140 full-time journalists; single television channels such as Yak TV or Ariana may employ between 40 and 60; private provincial television and radio networks such as Sharq in Jalalabad number 25. The PAN news agency employs 45 full-time journalists (in Kabul and in the provinces) and 15 freelancers in Afghanistan and abroad. .

The number of journalism students enrolled in universities represents further evidence of this growing popularity. There are an estimated 2,000 journalism students enrolled in the cities of Kabul, Herat, Mazar-e-Sharif, Khost and Kapisa. Kabul and Khost are the only universities in the country with a Faculty of Journalism; the three other universities mentioned offer journalism courses within their respective Departments of Journalism (which belong to the Faculty of Literature).

Departments of Journalism offer less extensive coverage and practical experience than Faculties of Journalism: Departments of Journalism do not usually offer the possibility of specializing in radio/TV/print, and do not often offer the opportunity or require their students to perform internships for practical experience at media outlets. Additionally, a few private universities offer journalism studies.

Students at the Department of Journalism, University of Mazar-e-Sharif

Box 5: The Faculty of Journalism in Kabul

The Faculty of Journalism at Kabul University was established in 1985 and is currently headed by Mr. Waheed Gharmal. The faculty enrolls 500 students (30% of whom are female) following a very competitive selection process. The number of students trying to enroll increases every year yet, owing to a shortage of funds and facilities, no more than the current number can be accepted.

University library

A total of 19 professors teach over a four-year program, which includes general subjects in the first two years and a more specialized track starting from the third year (with the option of specializing in radio, television or print). Radio and television are more popular specializations, although there is reportedly no significant imbalance with print. During their fourth year, students intern over a three-month period to gain practical experience.

A library with approximately 3,000 books in Dari, Pashto and English serves the needs of the Faculties of Literature and of Journalism. However, the use of textbooks is not as common as lecture notes prepared by professors. Occasionally, books (from Iran) are used to back up lectures. Supervising the curriculum and the materials used are priorities for the Head of the Faculty of Journalism, who reports that *"After 30 years of war, it is crucial to check the extent to which the materials are up to date."* The Faculty of Journalism plans to partner with a foreign university to assess and update both curriculum and printed materials.

Sada-e-Pohantun (Voice of the University) is a radio station that was established by the French Cultural Center. Broadcasting was interrupted after only one year of activity but it is expected to start broadcasting again soon, with support from the German Development Service (DED). DED has also been involved in a six-month project to support a university magazine. These represent complementary options for students to gain practical experience. There are currently no exchange programs in place that allow for students to study abroad.

The increasing popularity of the profession within Afghan society and the steady increase in the number of outlets and training opportunities for those in the field have contributed towards generating a considerable amount of internal competition. "*The market is working; people leave their jobs to move from one outlet to another"* (Public Information Officer at an international organization). Indeed, retaining human resources was mentioned by a number of outlets as one of the biggest challenges they face: "*There is no labor law, implying no protection for either the employee or the employer: an employee can be fired for no reason and a trained employee can leave and work for competitors easily"* (Noor TV). "W*ith so many people starting a television station, salaries are more and more competitive and many employees who have been trained by us leave to work for our competitors"* (Negah TV).

Sada-e-Jawan studio

As in any other sector, higher salaries are a strong incentive for movement across outlets, sometimes leading to high staff turnover. At one end of the spectrum, Kabul-based, international outlets such as the BBC can pay a few thousand dollars per month for very experienced and fluent English-speaking journalists. At the other end, the weakest local outlets, which are often struggling to survive (mostly newspapers and magazines, some community radio stations), might pay $50-60 per month or employ trainees, university students or voluntary staff. Salaries in governmental outlets are also generally not competitive, with journalists earning only $50 per month. In between these two extremes, journalists can be paid anything from $400 to $1,200 per month.

b. Journalistic challenges

Despite a growing and competitive environment, journalism is affected by a number of constraints. Journalists interviewed conveyed similar frustrations when asked about the key challenges they faced. Lack of independence, censorship and insecurity (mentioned above in Section A), but also a still rather limited set of skills and limited solidarity, were pointed out as among the most important obstacles to their profession and to the role the media is expected to play.

Reporting is currently focused mostly on numbers of casualties, with journalists prioritizing these numbers as opposed to engaging proactively in investigative research: "*Basic reporting is good, what is poor is the capacity to produce quality feature stories on corruption, economic, banking or agricultural investigation"* (PAN); *"Journalists just wait for accidents to happen and report on them…there is not much research going on"* (IWPR, Herat).

There are networking opportunities in the journalism community. There are a number of journalists' associations in Afghanistan, with branches in major cities across the country, among which are the already mentioned AIJA, ANJU and the South Asian Free Media Association (SAFMA)[19]. Additionally, NGOs supporting media offer alternative platforms to interact, including media centers and press clubs, such as the ones organized by Nai Supporting Open Media and the Human Rights Independent Commission. However, these seem to struggle to provide incentives for journalists to gather together, reflecting the rather limited unity that exists within the journalism community at large. Indeed, on only rare occasions have media outlets spoken up as one voice. This occurred, for example, when the government decided (after the Shahr-e-Naw blasts in Kabul in February 2010) to limit the live broadcast of an attack and kidnappings of journalists.

Strong political and ethnic affiliations account at least in part for this limited journalist solidarity, without which the media is very vulnerable to external influences: "*Journalists all have different political affiliations and do not feel free to talk openly about matters affecting them*" (Hewad TV/Azad Afghan).

> ***"The media have still not turned into an institution in the country… They are still not contributing to the values of democracy and freedom of expression; the media could all vanish overnight if the political situation turns upside down"*** (AwaNama/Channel 7)

[19] On September 6, 2010, the Deputy of ANJU, MrSayed Hamid Noori, was killed in Kabul. At the time of writing, investigations into the incident were ongoing.

2.3. Training centers and institutions

> ***"Afghanistan is one of the most trained countries as far as media is concerned"*** (Internews)

Training opportunities for media outlets in Afghanistan abound, and NGO training programs in particular outnumber the rest. Nai Supporting Open Media, Mediothek, IWPR, Equal Access, IMS, MSS, IFES and Press Now are among those currently involved in this field. Courses generally target journalists much more than non-editorial staff and are short in term (one to two weeks).Topics cover anything from principles of journalism to peace and war reporting, investigative journalism, safety training, election reporting, media law training and video journalism.

Curricula are generally both theoretical and practical and, in some cases, the mentoring process that accompanies them can lead to a published report and national or international syndication (e.g. IWPR). Training programs are also organized by international outlets such as the BBC and Deutsche Welle, or are conducted in-house. Individual outlets have started to realize the importance of investing in capacity building, and some also have set up their own internal training facilities (Shamshad TV, Setara-e-Sahar radio).

A training session organized by Nai Supporting Open Media

Recently, GMIC started holding a wide range of regular courses which also target non-government media actors (see Box 6). Private journalism centers have also been created in major cities, offering long-term courses that have started to compete with universities.

Box 6: The Training Unit at the Government Media and Information Center

GMIC's Capacity Building and Training Unit has since 2009 been training government spokespersons and press officers to respond in a timely and professional way to media inquiries. GMIC has also rapidly stepped beyond this role and started training journalists as well. Dealing with the two objectives in one place, that is, achieving better government communication and improving journalism capacity, strikes many observers as inappropriate.

Afghan and international trainers have trained a total of 600 people so far, including at least one government spokespersons from each province, ministerial staff and journalists from independent media outlets as well (e.g. BBC, PAN, Tolo, Ariana, etc., which make up approximately 20% of the total number of trainees).

Courses include media legislation, ethics, press conferences, interviewing and being interviewed, press releases, constitutional law, theory of communication, photography, videography, editing, etc. The idea is also to establish courses that can create new interest among journalists, not exclusively war related, for example courses on environmental issues.

Training includes short courses (for government spokespersons) or longer-term courses (six to eight weeks) for journalists and press officers. The selection process is very transparent; invitations are sent out to all outlets, and the selection criteria are generally consistent with the background and experience of the potential trainee and the courses offered.

The training is currently aimed at professional journalism staff, but GMIC plans to target

inexperienced trainees in the near future and eventually to establish a mass communication institute so as to create a certificate program, a diploma program and possibly a Bachelor program as well.

Although they have until now focused on working professionals, training centers have started to realize the need to target inexperienced students as well. IWPR, for instance, has recently launched trainings for university journalism students in Kabul and will shortly launch sessions in Mazar. Nai Supporting Open Media is planning to set up institutes for professional journalism. As seen in Box 6 above, GMIC is working on this as well. Some NGOs have also recently been pushing traditional training boundaries even further. Internews and Nai have been involved since 2010 in organizing web blogging training for youth, even in remote areas like Badakhshan. Through a mobile radio station in Bamyan province[20], Press Now has been training students from Bamyan University's Department of Journalism and increasing the capacity of communities to make their voices heard. Training centers are now considering broadening the topics they cover, to include how to report on food security, environment, good governance, human rights, basic health messages, education, family conflict and gender-based violence.

Journalists make up a significant part of the human resources of the industry (research indicates around 50% of total staff at radio stations and 30% at television stations and print outlets). Although more focused journalism training is necessary, technical and managerial training is also important, training efforts seem to have neglected this. There are no professional courses at higher educational level, and only Internews appears to be regularly engaged in providing technical courses (covering equipment installation, maintenance and mentoring) across the 42 radio stations within its network.

Table 1: Key actors conducting trainings for media in Afghanistan

NGOs	Equal Access
	Mediothek
	International Foundation for Electoral Systems
	International Media Support
	Internews/Nai Supporting Open Media
	Institute for War and Peace Reporting
	Media Support Solution
	Press Now
Other	BBC
	Deutsche Welle
	Government Media and Information Center
	In-house mentoring/coaching
	Journalism centers

3. Content production and distribution

Content production for media outlets includes three main functions: news feeds, radio and TV program production and production for communication/advertising. Although a growing number of specialized companies fulfill these functions, there is a common tendency to integrate them within the media outlet or the advertiser: whereas news agencies typically generate newsfeeds, media outlets create their own; the majority of programs broadcast on radio and television are produced in-house by the channels, which often create their own production company ((e.g. AwaNama for GMA/Channel 7, Kaboora for

[20] "Truck Radio Bamyan" is a station installed in a Swiss army truck, created as a joint project of the University of Bamyan Foundation and the Dutch media NGO Press Now.

Moby Group); despite a good number of communication agencies (see section 5 below), many advertisers produce their own spots (e.g. Etisalat, MTN, Maiwand Bank, Kabul Bank).

3.1. News agencies

There are over 11 news agencies in the country, most of them based in Kabul: the government agency, Bakhtar, and private ones, such as PAN, Roz, Hindu Kush, Wact and Afghan Islamic Press (based in Pakistan).

Provincial office of BNA

BNA plays a narrow role in the country news feeds. With its main office located within MoIC in Kabul, BNA is currently directed by Mr. Nabi Pakteen, a former presenter on RTA (since June 2010), and employs approximately 150 people across Kabul and the provinces. Provincial offices generally employ four people, including one manager, two journalists and one technician. Through different sources of information (e.g. the MoIC office, police contacts, education and development departments, general events taking place in each city), the role of provincial offices is to provide information to headquarters and local government outlets. Interaction with private local outlets is minimal.

Independent news agencies should be of great value to media outlets that have limited human and financial resources, for which security, journalism skills, travelling costs and equipment can be important challenges. However, with the exception of PAN (see Box 7), few outlets acknowledge they are actually using news agencies' feeds. Whether this lack of interest relates to the perceived quality or orientation of the newsfeeds, the topics covered or the lack of a habit of working with news agencies is unclear.

News in the country seems to be fed largely by reprocessing information found on various websites (outlets do not necessarily try to access the initial source of news) and generated by an outlet's network of local reporters and contacts spread across the country. The use of foreign news agencies (e.g. Reuters, AP, Shinhwa) is generally limited.

Box 7: Pajhwok Afghan News

Pajhwok ("Echo" or "Reflection" in English) Afghan News is the leading news agency in Afghanistan. It was established in 2004 as a project of IWPR supported by USAID, with the aim of providing Afghans with access to information and awareness on their rights after over 30 years of war. It is funded partly by the Open Society Institute (OSI) (20%) and USAID (18%); news selling, subscriptions and advertising cover the rest of the costs, which account for approximately $60,000 per month.

Under the current direction of Mr. Aziz Danish, it is engaged in reporting and photo/audio/video production in Dari and Pashto languages equally (approximately half of the information is also translated into English). There is no other news agency with such extensive news coverage. News is provided by a network of 45 reporters spread across the country and 15 freelance journalists working abroad (out of a total of 122 people employed, including 13 editors covering different desks and 37 monitors). Even international news agencies reportedly pick up a considerable amount of information from PAN. International news is covered if it is related to Afghanistan, e.g. Afghan refugees in Pakistan, Al Qaeda, President Karzai in the US, etc.

PAN subscribers include 13 national and 10 international newspapers (print is equivalent to approximately 40% of all subscriptions), 60 national and 10 international radio stations (representing 30% of the total), 17 television channels (15% of the total) and websites (15% of the total). The price of one subscription amounts to $300-400 per month. Alongside subscriptions of media outlets, PAN has over 90,000 readers per month and sends out press releases to 50 clients in Kabul (including embassies, NGOs and research organizations).

PAN article

PAN was a pioneer in developing policy for media coverage during the presidential elections (producing over 600 balanced reports on elections) and has stood out for its investigative journalism capacity, which led to it denouncing cases of mistreatment of children (in Kunduz in 2009) and power abuse (in Daykundi in 2010).

3.2. Production companies

Radio and television production is a concentrated and highly integrated sector. Besides media outlets, there are only a handful of radio and television producers in the country, with some being spin-offs/annexes of outlets and very few cases of established autonomous producers. Indeed, radio and television stations seem to produce a relatively large proportion of content internally. This does not imply that outlets themselves are necessarily extensively involved in producing high quality and innovative programming (see Section C). With some exceptions, outlets do not generally have very strong capacities in this regard.

Kaboora (Moby Group) represents a case of diversification of an outlet's activities into the largest television production house in Afghanistan. Initially focused on producing content for Arman FM in 2003, through a pool of over 200 personnel it now features programs such as Afghan Star and the first ever Afghan soap opera (Secrets of this House) among its successes, all produced for the whole of Moby Group (Tolo TV, Lemar and Arman FM). Given Kaboora's expertise and technical know-how, it is also involved in producing television commercials for private and governmental clients and music videos, as well as renting staging equipment.

AwaNama is another production house that is integrated into an outlet. In this case, the outlet (Channel 7) was created after years of successful production: "*We are a proper production company that started producing for different clients, got experienced and decided to set up a television channel.*" Founded in 2002, with support from BMC, following a few changes in its legislative form and name it is now defined by its owner as a "full media company," involved in all stages of media campaigns (planning/concept development, production, dissemination and media buying, monitoring and impact assessment) for a range of clients, including the government (with different ministries and the Afghan National Police (ANP)), ISAF and the US government. Since 2005, the biggest changes experienced have been shifting from radio production (e.g. Good Morning Afghanistan and programming for Peace Radio) to television production (e.g. documentaries and feature films such as Truth and Evil Seed, produced and distributed on Ariana, Tolo and RTA).

Awaz is a strategic communication agency with integrated production facilities. Established in 2004 by former Aïna and Internews employee Ms. Hamida Aman, it produces news and documentaries on Afghan development success stories and social issues, television and radio programming as well as communication campaigns that are designed and produced internally. The agency aims at producing creative programs and content that raise awareness across a diverse population.

Among numerous examples of popular programs, Facing the Nation is a political talk show produced for three years by Awaz and broadcast by RTA, promoting political leaders' accountability (they face people's questions), while offering a platform to these leaders to better explain their role and responsibilities and defend their policies.

Another recent example of Awaz's production includes a weekly business program aimed at encouraging private initiatives and investment in Afghanistan, through the example of business success stories throughout the provinces of Afghanistan. In order to better appeal to all segments of the Afghan population, the programs largely highlight agribusiness projects, showing farmers the possibility of growing different products and finding a market. The program also includes basic business training modules for women.

Awaz also recently started production on a series on ANP for the national TV station.

The agency works with international donors and with national media outlets (Ariana TV, RTA, Lemar and Shamshad and, to a lesser extent, Tolo TV). Reportedly, the selection of broadcasts is driven by the content of the production: targeting the countryside, the provinces and conservative segments of the population means that Awaz collaborates more with RTA, Lemar and Shamshad and to a lesser extent with channels like Tolo or Ariana.

3.3. Content distribution

The limited number of content distribution entities is reflective of a landscape where media outlets are the major providers of content. Dramas and series (e.g. soap operas) represent a big part of broadcast programming, but their purchase and distribution is not handled through proper distribution companies (either national or foreign), which are missing in Afghanistan.

Such content is generally bought at the bazaar; when bought abroad, it is often transported by the outlet managers or their network of acquaintances. This supply method does apply not only to local/provincial outlets but also to more established television channels in Kabul (e.g. Shamshad TV, Noorin TV). Outlets unsurprisingly rarely pay copyright; in very few cases (of larger television networks) do copyright or broadcasting fees make up part of the outlet's expenditures. No content fairs or expos have reportedly been organized to date by foreign companies.

Indian DVDs at the bazaar

Cable providers are to some extent distributors of content. In large cities, primary providers supply a "cable package" to local networks operating in small geographic areas. For example, Star Fiber Cable Network and Kabul Zarnigar Fiber Cable Network are primary providers in Kabul. Star Fiber package includes 72 channels, most of which are international (e.g.

Star Plus, ZTV and sports-related channels).Three are Afghan (i.e. Ariana, Yak and RTA) and, interestingly, another three are provided by the network itself: Star Cinema and Z Choice offer dramas, films (mainly foreign/Indian) and sport (cricket); Z Cartoon offers cartoons for children.

A significant supply of radio programs is distributed by Tanin, the Internews-founded network that has been distributing Internews-produced programs to radio broadcast outlets in the network since 2003. Additionally, Nye Express is involved in distributing CDs of content that Tanin shares with provincial and local radio stations, as well as commercial advertising and information campaigns/public service announcements.

Box 8: *Salam Watandar*

Salam Watandar ("Hello Countryman") was initially a program that Internews produced in Kabul and broadcast through the network of stations it had created or assisted (through a USAID-funded program). Internews contracted local stations to broadcast three hours of programs in two sessions (morning and evening). The program was partly produced by local journalists contracted in the provinces broadcasting the program (often journalists working for the stations actually broadcasting the program), and partly in Kabul, and transmitted via satellite to affiliated stations.

This system continues to work with success and has extended to a network of more than 40 outlets, covering 27 of the 34 provinces in the country. Now more than 14 hours of programs are produced daily and available for free through satellite feed. The mix of content produced in the provinces and in Kabul gives it a unique and appreciated "national" scope. It is popular enough that in the audience survey, interviewees often mentioned they had listened to *Salam Watandar station* – they had actually listened to a local station broadcasting *Salam Watandar program*.

Beyond the program itself, *Salam Watandar* has become a full-fledged, autonomous radio station broadcasting 24 hours in Kabul (98.9 FM) and on satellite.

It should not be confused with Watandar (87.5 FM), an outlet that does not broadcast *Salam Watandar* programming. See Section B.4.2.

4. Media outlets

4.1. Rapid growth of the sector

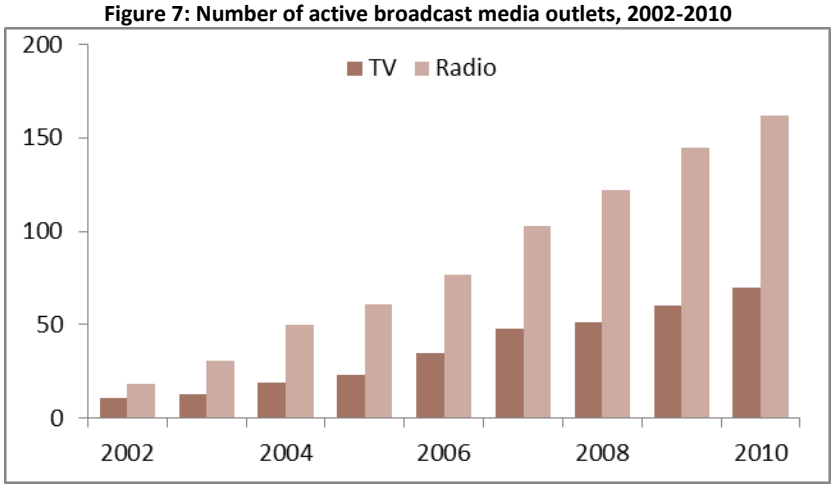
The number of outlets in Afghanistan represents a visible indicator of the development that the sector has experienced. As of September 2010, over 75 television channels, 175 radio stations and 800 publications can be counted in the country[21]. Radio stations outnumber television channels, but the pace at which the latter are appearing is remarkable.

On average, nine television channels and 20 radio stations have been created *each year* between January 2006 and September 2010, to a total of 47 new TV channels and 101 new radio stations. This is an annual

[21] National figures in terms of total number of outlets to be used as a benchmark for this study are not available. Not even Aïna's report (Afghanistan's Media Landscape, published in 2004) included complete enough information to use as a benchmark. With such regular and steady growth in this sector, these numbers should be read with some caution.

growth of more than 20% in the number of channels, in a period during which international support to the media has not been focused on creating new outlets.

Figure 7: Number of active broadcast media outlets, 2002-2010



In Kabul, the landscape is very dense: a total of 30 terrestrial television channels and 42FM radio stations are received in the city. The landscape in the other four major cities is also flourishing, with an average of three television channels and seven radio stations created in each of these cities in the past four to five years[22]. Interestingly, some cities have experienced particularly high growth; during the six-month time span of our research in Herat, for instance, two new television channels were created.

> ***"Establishing a television station nowadays is as popular as starting an NGO a few years ago"*** (Sabz Radio)

> ***"The number of people switching from radio to TV is a challenge for radio stations… people have started to borrow money to buy fuel to run generators to be able to watch television"*** (Ashna/VOA Radio)

Watching TV at the bazaar

The media landscape is changing rapidly from a political perspective as well. Until a few years ago, broadcast media were more or less reserved for people and parties supportive of the international community and sharing in values such as secularism, human rights and democracy. Islamist and ethno-centered rhetoric (most of which stems from the Jihadist parties of the 1980s and 1990s), was expressed through newspapers. Over the past three years, such

[22] Television channels established in Mazar since 2006: Arezo (2007), Setara-e-Sahar (2010). Radio stations established in Mazar since 2006: Nehad and Omid-e-Jawan (2006), Killid and Arezo (2007), Lahza (2008), Shahar (2009), Sabz, Mehraban and Band (2010). Television channels established in Kandahar since 2006: Hewad TV (2006). Radio stations established in Kandahar since 2006: Killid (2007), Talimul Islam and Wranga (2009). Television channels established in Jalalabad since 2006: Nangarhar RTA (2006), Sharq TV (2008). Radio stations established in Jalalabad since 2006: Muram (2008), Abasin, Safa, Narghes and Killid (2009), Menbar (2010) Television channels established in Herat since 2006: Herai (2007), Taban (2008), Asia and Mayhan (2010). Radio stations established in Herat since 2006: Faryad (2006), Watandar Herat (2007), Shindand, Baran and Zohal (2008), Muzhda (2009), Zindaghiand Sada-e-Azadi West (2010).

rhetoric has made the jump to radio and television, i.e. these groups have resorted to using the very means that they previously rejected. Overall, the media landscape and corresponding audience shares still mostly comprise outlets established during the first wave, which focus on national unity and do not affiliate themselves with any particular political group. However, the situation is changing fast; already, mouthpieces of more narrowly focused and conservative segments are becoming stronger players.

Their increasing proliferation is made easier by two main flaws in the existing media landscape: the staggeringly high amount of foreign content (often perceived as un-Islamic, un-Afghan) and the weakness of the state-run media. Currently, nearly all political groups have their own broadcast outlet, with an overrepresentation of Northern Alliance tendencies and an absence of Hezb-e-Islami (and obviously the Taliban, which focuses its communication efforts on narrowcast and internet (Section C)).

The following sections break down outlets into a series of categories that can help generate an understanding of the richness of the landscape in terms of business models and content. A quick snapshot of outlets within each category is provided. (For more extensive information on each outlet, the media outlet database can be consulted.)

4.2. Television

Afghanistan's television channels (over 75 as of September 2010) can be classified into six categories (some of which overlap). Private television channels with a generalist profile (e.g. Ariana, Yak TV) cover significant parts of their costs (over $400,000 per month) through commercial advertising and employ over 250 staff members (Tolo belongs to this category, but it distinguishes itself from other channels by having more staff and a much higher budget). Channels targeted at a specific audience (e.g. Shamshad, Lemar) may also lie in this category of commercial television, albeit on the lower end of costs ($100,000 per month) and with less human resource employment. Private television also includes regional/provincial channels and religious and party-backed channels, generally operating through non-commercial sources of funding. Lastly, governmental television is represented by RTA, which has among the highest amounts of human resources employed and has costs that are comparable with those of private generalist channels.

Private generalist channels

Ariana is one of the best established private channels, with the strongest coverage throughout Afghanistan (around 75% of districts, 33 out of 34 provinces and planning to cover even Nuristan in the near future). It employs almost 300 people, including over 50 journalists, and airs programs in Dari (45%), Pashto (35%), English (5%) and Uzbek (15%). It has adopted a centrist stance, with regard to both the overall tone (neither overtly conservative/religious nor very liberal entertainment) and to the political line (the channel is not affiliated with any particular group or party but is generally supportive of President Karzai and the Afghan administration). News flashes focus on the President's speeches, trips and statements, whereas reports often underline efforts made by the local Afghan authorities in solving problems. Compared with other channels, it usually refrains from entering controversies (e.g. fraud during the last presidential election, dismissal of Amrullah Saleh and Hanif Atmar, allegations of corruption). It is owned by Engineer Bayat, who also founded the Afghan

Wireless Communication Company (AWCC) and the Bayat Foundation charity, whose activities are covered extensively. It reaches a peak audience share of around 25% during the evening news (8pm).

> ***"The station has no political direction; it is an independent media outlet which follows the Afghan Constitution, with a mission to educate and teach people about their rights"*** (Ariana TV)

The most watched channel, **Tolo**, is certainly also the most innovative Afghan channel. It belongs to the Moby Group, which employs 700 people in the country and 40 abroad (Dubai), with yearly revenues of $20 million, currently growing at a rate of 50-70% every year. Besides Tolo, Moby Group includes a radio station (Arman FM), another TV network (Lemar), a very recently established 24-hour satellite news channel (Tolo News), a satellite network targeted at Farsi speakers (Farsi1), a television and movie production company (Kaboora), an advertising agency (Lapis), one magazine (Afghan Scene), a music recording company and two internet cafés. Tolo has been a "first mover" in many fields, such as investigative journalism and entertainment. It continues to run ahead of other channels in terms of ideas, for instance in producing Afghan soap operas (*Raz Ha e Een Khana* – "Secrets of This House" – see Section C). As a result of this proactive approach, the channel has found itself several times at the center of controversies revolving around the freedom of media, Afghan culture and government control. It is probably, both at the same time, the most criticized and the most loved channel in Afghanistan, depending on the segment of society and on how particular programs are perceived. Its audience share reaches a peak of over 60% during the evening news (6-7 pm), and its total audience reaches 1.5-2 million Afghans on Sunday evenings.

Yak TV, the most recent of the private channels, aims at competing with the leading channels. It appears to possess the necessary assets to do so, in terms of resources (reported monthly expenditures currently amount to $400,000, almost half already covered by commercial advertising and paid programming), competencies (the 320-strong staff includes five international specialists) and coverage (it is already on satellite and the goal is to reach 16 terrestrial antennas in the near future). Although it is still too early to assess its political line, the station's news flashes seem generally supportive of North Atlantic Treaty Organization (NATO) activities and rather critical of the performance of the Afghan authorities (poor governance, corruption). The channel ranked fifth most preferred television channel in the audience survey and sixth best known, which is a good result given its recent start.

> ***"We want to counterinfluence warlords and fundamentalists. We are a television station that is not afraid, whereas most channels in the country are ruled by fear…. We go by the law; we are not trying to show a Western standard of women who is not dressed appropriately. We're pro-Western but we're not pushing the West in Afghanistan"*** (Yak TV)

Saba is a two-channel television station that has not yet reached a significant audience. With 84 people on its staff (including 40 journalists), one channel is a 24-hour channel broadcasting in nine provinces, and the second is a six-hour channel broadcasting from Kabul only for Uruzgan province. Its costs are covered mainly by its production unit (Gandahara) and advertising. Interestingly, its focus is on human

rights and educational programs. A part of the staff is actually part of the Afghan Independent Human Rights Commission. Saba Group also includes a radio station (Nawa), which is mainly pedagogical (programs targeting particular groups, such as teachers or farmers, with detailed advice and technical information), its production company (mentioned above), Fajer Printing Press and Saba Magazine (which reportedly stopped publication owing to financial problems as of May 2010).

Governmental outlets

The government **RTA** consists of television and radio, at the national level and in each province. It relies on a monthly subsidy of $408,000 from MoIC, which is augmented by: advertising and paid programming at the national and local levels; taxes levied on other channels' antennas; and rental income from surplus facilities and staff, i.e., buildings, equipment and production crew. It is the only Afghan channel that operates as a network of local teams, with branches in almost all provinces. Provincial branches typically spend between $7,000 and $10,000 a month and employ a staff of around 30 (total staff at national level is 1,600). The local branches are required to broadcast Kabul RTA from 7-9pm, and also to produce local content adapted to the local environment (in terms of language, for instance).

RTA does rather well in the audience survey (ranking third), although it compares rather poorly in terms of perceived quality. The outlet's intended goals are often constructive (i.e. strengthen national unity, promote a sense of civic responsibility, encourage youth, promote sports, etc.), and programs try to instill a sense of optimism, with programs such as *Dast Award* ("Achievement"), *Ayenda Sazan* ("Future Makers") and *Rahi Be Suye Khushbakhti* ("Way Towards Happiness"). That said, the average quality of what is produced still lags behind the best private channels. As a result, the audience share never exceeds 10%, and even falls to 5% during Tolo's news flashes at 6pm, at which time Ashna TV, produced by VOA (see below) is broadcast on RTA.

However, the qualitative research suggested criticism of private channels and increased expectations regarding government outlets (e.g. more serious programs that reflect the national interest are desired, rather than partisan or short-sighted content driven by profitability). It appears that any significant improvement on the part of RTA would be highly welcomed by the audience.

ERTV is an outlet managed by the Ministry of Education. Established in 1969, it has been re-launched in recent years. Limited coverage and programming prevented audience measuring during this survey. But qualitative research showed that many Afghans, especially youth, would be receptive to a good-quality educational channel, especially if it could achieve some kind of recreational style of teaching (as opposed to the rather dry format exhibited until now).

Language specialists

The respective proportion of programming in the Dari and Pashto languages is a sensitive issue (not to mention debates on a Farsi versus a Dari accent, or on various kinds of Pashto accents, as well as on minority languages such as Uzbek). The ways of mixing languages are varied and debatable (combining the two languages in one program, using separate programs from the same outlet or using different outlets). Some TV channels have positioned themselves to address specific audiences based on a unique language. A few of them are described below.

Shamshad has been set up as an almost purely Pashto channel. A significant proportion of programs are bought from Pakistan and the Middle East (approximately 15%, which is then translated and dubbed), including many series and comedy shows. The overall tone is rather liberal, and the political line appears close to the Pashto nationalist movement. With antennas in 15 provinces, the channel spends around $100,000 per month (main costs include buying content abroad), reportedly entirely covered by revenues from advertising and information campaigns. Shamshad employs around 60 people.

> ***"Our vision is to fight existing discrimination against Pashtun communities, which are often associated with the Taliban, address human rights violations that have occurred in the past 30 years and knock down communication barriers, distance and cultural differences"*** (Shamshad TV)

Lemar is the Pashto channel of the Moby Group (see also Tolo TV above). It is the third channel nationwide in terms of audience share, and the first among Pashto language channels.

A detailed audience analysis shows that Shamshad comes first in eastern provinces (Nangarhar, Logar, Laghman), whereas Lemar is preferred in southern provinces (Kandahar, Helmand, Daykundi, Farah, Uruzgan). Interviewees reported that the kind of Pashto spoken on Shamshad is closer to the eastern/Pakistani variety, whereas Lemar's Pashto is closer to the southern accent.

Religious channels

At least three of the channels which appeared between 2007 and 2009 are openly religious: a Shia outlet, **Kawsar**, (title of the 108th Sura of the Quran), **Tamaddon** (Civilization) and **Da'wat** (Predication). Their business model is quite different: they do not depend on advertising revenue, thanks to other financial sources (personal, party, neighboring countries, etc.). The little amount of advertising they broadcast is usually very specific (they usually do not accept government or international community announcements, for instance, but do display advertising for pilgrimage tours to Iraq, Iran and Syria).

Currently, the most significant in terms of audience and programming is **Tamaddon**. Under the slogan "The Silent Majority's Ideal," it was launched by Shia Ayatollah Asef Mohseni, former leader of the Harakat-e-Islami movement and founder of the religious university Khatem al-Nabiin (Seal of the Prophets) in Kabul. A large part of its programming comes from Iran, but it also produces quite a lot of educational and religious content internally. The channel strives to give a good image of political Islam, with a high proportion of female presenters (of course fully respecting Islamic dress codes), while displaying a rather moderate tone on religion and politics. The foreign news coverage is generally favorable to Iran (e.g. positive reports on the execution of Baluch rebel leader Abdul Malek Rigi, on Iranian aid to Gaza, etc.). With no real advertising, the budget is obviously secured through other means. The channel comes in ninth position in terms of audience share.

Box 9: Media and religion

Ayatollah Taqadossi's sermon in Madrasa Madinat al-Alam (Kabul) on May 12, 2006: *"Kawsar television channel will soon be launched in Kabul, in order to oppose the Western cultural invasion and teach the principles and commandments of the sacred religion, Islam"* (www.afghanistan.fi)

In 2008, Ayatollah Mohseni and Member of Parliament Najibullah Kabuli entered into a fierce controversy that lasted several months, through their respective channels, Tamaddon and Emroz. They exchanged accusations of spying, working against Islam and being bought and paid by foreigners (the Iranian Revolutionary Guard and the Central Intelligence Agency (CIA), respectively).

One might expect, in the near future, the establishment of Sunni channels trying to compete with these Shia outlets. Former leader of Ittehad-e-Islami, Abd-al Rab Rasool Sayaf, has already launched Da'wat, with an entirely religious line-up (recitation of the Quran, interpretation, sermons, roundtables, etc.). Other channels may soon follow suit.

Emroz TV used to belong to this category but is no longer active, as of July 2010. This was the first television channel to be shut down by the government of Afghanistan, accused of representing a threat to national unity by inciting sectarian tensions.

Party-backed channels

Several of the most recently founded channels are linked to specific personalities or political parties. Managers were generally reluctant to disclose precise financial information but, for example, Noorin reported monthly operating costs of $70,000, so the range in this category could be estimated at between $50,000 and $150,000. A part of the initial investments and regular expenses is covered by the party or the party leader (and possibly by neighboring countries). Advertising is also welcomed and can cover around a third of the costs, but official announcements by the government or the international community are not always accepted (as expressed by Noor and Noorin, for instance).

Although the journalists generally enjoy a certain freedom in their daily work, the overall political orientation is obviously in accordance to that of the founder.

Noor (Light) was created in 2008 to represent the interests of Jamiat-e-Islami, the party of former President Burhanuddin Rabbani. With 180 employees, antennas in eight provinces and construction of others in progress and a diversified, professional-looking grid, it is currently the most important party-backed channel. Announcements with jingles include images of Burhanuddin Rabbani, Abdullah Abdullah, Ahmad Shah Massoud and the bombing of Bamyan Buddhas by the Taliban. The news briefs tend to be quite critical of Pakistan and, conversely, positive in relation to Iran and the Iranians' role in the stabilization of Afghanistan.

Other, smaller partisan channels include **Rah-e-Farda** (created by Mohammed Mohaqiq, the leader of Hezb-e-Wahdat, employing 100), **Negah** (managed by the son of Vice-President Karim Khalili, employing 200) and **Noorin** (which is said to be close to Vice-President Marshal Fahim and employs 130). **Ayna TV** (indirectly controlled by General Dostom, leader of Jumbesh-e-Milli) has existed since 2004, but has remained relatively small (with $40,000 in monthly operational costs).

As might be expected, the staff at these channels were not usually forthcoming about ownership and the political line: "*There are generally two categories of media outlets, those with business goals and those with national goals. Ayna TV is in the second category, working towards the aim of serving the Afghan nation and communities without any discrimination*" (Manager of Ayna).

Regional channels

In addition to RTA's local branches and repeaters of Kabul-based networks, every major city now has at least one significant private channel (generally part of a group including a radio station and/or a newspaper). These are usually funded by local businessmen and sometimes indirectly influenced by political figures. They manage to get hold of most of the local advertising market (plus national advertisers targeting the area). They are much smaller than national channels, with monthly operating costs amounting to less than $50,000 and with a staff generally not exceeding 80 people. Their programming tends to be limited to local news, a handful of roundtables and interactive shows. Any other time is taken up with musical performances, series and movies (mostly bought abroad).

In Jalalabad, **Sharq** was established in 2008 by Engineer Shaiq, a local businessman involved in construction and imports. It is part of a media network that includes three radio stations (Nargis, Sharq and Mumbar), one newspaper (Shaiq) and a production company and training center for journalists. The Sharq TV channel broadcasts for18 hours a day and has monthly operating costs amounting to $20,000. The station employs 64 staff members.

Arezo, in Mazar-e-Sharif, was established in 2007 by local businessman Kamal Nabizade, and broadcasts mostly music videos and movies (some from Tajikistan). Besides satellite coverage, it also reaches three provinces and Uzbekistan through terrestrial antennas. Financial information was not disclosed, but the channel reportedly covers a significant part of its costs through advertising.

Hewad, in Kandahar, was started in 2006 by Mr. Qazi Mohammad Omar (who also owns the local radio station, Afghan Azad). It is a mainly a Pashto language channel, employing almost 80 people, with limited coverage in rural areas owing to security constraints.

In Herat, the **Taban** TV channel has been owned by a local businessman since 2008 (Abdul Karim Sadiqi) and is located in a property owned by former Governor (current Minister of Energy) Ismael Khan. Its coverage extends to eight districts surrounding Herat city. The television station employs a staff of 28; monthly costs amount to about $30,000 and are covered partly by advertising revenues ($17,000).

Below are attempts at a visual representation of categories of television channels in Afghanistan (bearing in mind that classification is subject to debate and some channels transform their profile over time).

Figure 8: Orientation of Kabul-based TV channels

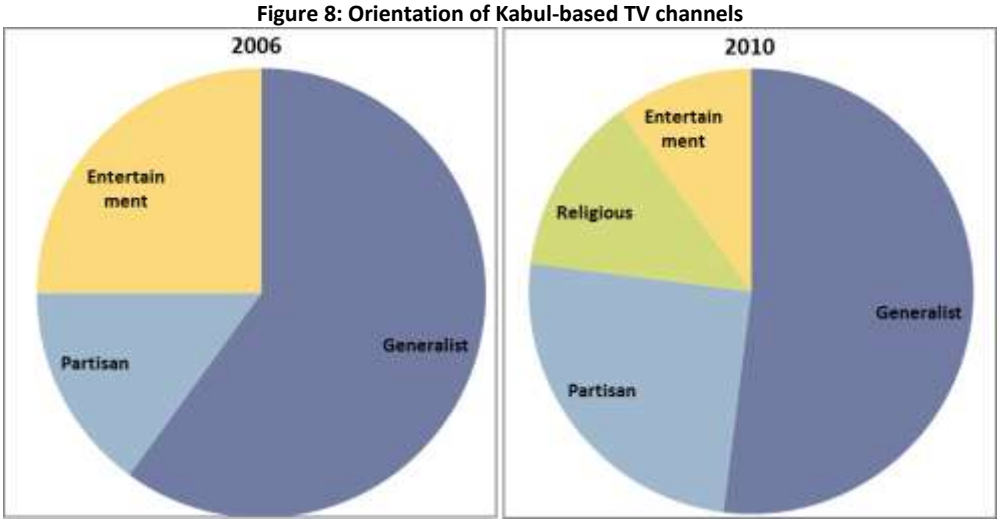
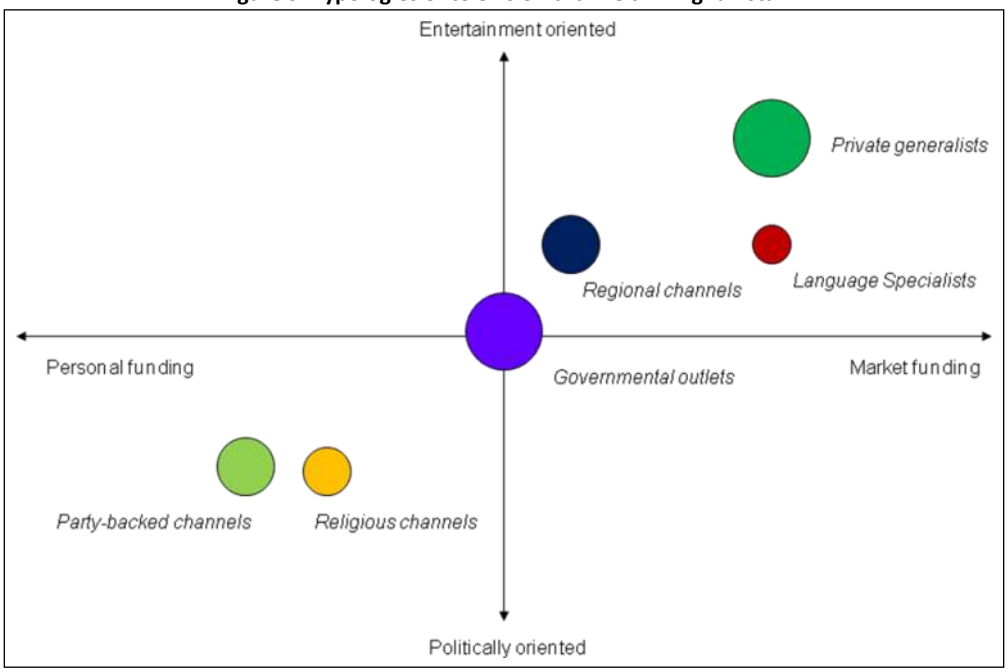


Figure 9: Typologies of television channels in Afghanistan



4.3. Radio

Until recently, radio was the only broadcast media available to most Afghans. The number of radio stations is incredibly high (over 175 as of September 2010), with these figures partly driven by the growth of television, since almost all television channels have an associated radio station. We can identify four categories for the radio stations in the country. These include international outlets (e.g. BBC, VOA, Azadi, Sada-e-Azadi) with the common characteristic of not accepting commercial advertising or, in most cases, public service announcements; self-sustainable national and regional stations (e.g. Arman, Killid, Sharq, Sol-e-Paygham); community radio stations, which generally employ fewer than 25 staff members and cover their costs ($3,000-5,000) from a range of sources; and small-scale stations that generally encompass PRT outlets ("radios in a box," (RIABs)).

International stations

The BBC service in Pashto/Dari, Azadi (Freedom, the Afghan version of Radio Free Europe) and Ashna (Familiar, the Afghan version of VOA) are the most significant players in this category. The degree of centralization versus autonomy granted to the Afghan branch in terms of programming varies. The stations rely fully on taxpayers' money from their respective countries (no advertising revenues) and their size is comparable (average of $100,000 monthly operating costs and 80 staff members).

Paradoxically, they seem to be fostering Afghan culture even more than Afghan stations. They are particularly successful in areas with little FM coverage, since they also broadcast via shortwave (though less in cities where the FM choice is widely available).

Azadi, created in 2003, airs 12 hours a day (7am-7pm) and shares the same frequency as Ashna/VOA (which covers the rest of the day (7pm-7am)). It has an FM station in each of the five major cities (Kabul, Jalalabad, Mazar-e-Sharif, Kandahar and Herat) and is also listened to on AM in Pulichiri (close to Kabul). It comes first in this group, with an average audience share of 15%. The general tone of the speakers is serious and informative (compared with the more relaxed Arman FM, for instance), using language that is always formal but not complex and, when needed, even pedagogical. The station strives to foster Afghan culture and identity: it broadcasts preferably Afghan music, interviews with Afghan artists and reports on Afghan customs and traditions (documentaries about bird breeding, local musical styles, etc.). Around 40% of the content is produced at the headquarters in Prague.

The **BBC** started airing in Afghanistan in the 1980s and currently has 20 FM stations across Afghanistan (it is accessible on AM across most of the country, yet the plan is to set up an additional 20 FM stations in the next few years to address the limits of shortwave). It is more of a regional station compared with the other radio stations in this category, with programming designed for Afghanistan but also segments targeting Iran (and therefore in Farsi rather than Dari) and time slots in English about international news. It also has programs especially designed for a rural Afghan audience (using simple words in a popular accent), such as *Kaka pardadar* ("Uncle Confidant," a grandfather character who answers naïve questions, for instance on the feeling of thirst, on sap circulation in trees, etc.) or New Home, New Life. Generally speaking, the station specializes in short dramas illustrating a social issue (girls' education, dowry payments, etc.) through an entertaining dialogue in colloquial Dari or Pashto. This leads to a peculiar combination of programs tailored for uneducated people and news or reports which use a much more sophisticated level of language. International news comes from the London headquarters, and the rest of the programming is produced in Afghanistan. It reportedly has monthly costs amounting to $100,000 and employs 35 full-time journalists

Ashna/VOA shares the same frequency as Azadi and airs for 12 hours a day (7pm-7am). It has five FM stations across five provinces (Kabul, Jalalabad, Mazar-e-Sharif, Kandahar and Herat). It is also highly accessible via AM and can even be heard in neighboring countries. It is a Pashto and Dari language station which is said to lag behind Azadi in terms of content quality. The elocution is claimed by many to be sometimes shaky and often too slow. In addition, some feel that its programming schedule is not clear enough. Moreover, the focus of the news and the reports is less on Afghanistan itself and more on

NATO activities, American strategies, number of troops deployed and casualties among the coalition forces, etc. Content such as Bloomberg economic news and detailed reports on the security situation in Iraq or on the Iranian nuclear program generally give the impression of a station that is not yet fully adapted to its Afghan audience. Indeed, the manager reported that 100% of programming is decided in Washington, DC.

Sada-e-Azadi (The Voice of Freedom) is ISAF's main radio station, a Dari and Pashto language radio station that relies on 34 FM repeaters spread across the country, broadcasting on 88.5 FM with a government-approved radio license. As with the newspaper sharing its name, Sada-e-Azadi Radio is controlled by CJPOTF, which is subordinate to the ISAF's Joint Command. As a part of ISAF's media operations, it employs over 100 staff members, approximately half of whom are Afghan, including journalists (70), technicians (10) and camera operations and editors (20).

Programming mostly includes "infotainment" (i.e. 70% of airtime is music, call-in shows, cooking shows). News is broadcast to a lesser extent, generally fed from ISAF's informational channels as well as from open media sources, such as PAN, ISAF Joint Commander press releases and Ministry of Interior/Ministry of Defense statements.

National stations

The state radio station fares relatively better than the state television channel and was ranked first in terms of average audience share in the survey. It offers detailed news focusing mostly on Afghanistan, underlining positive developments and government activities (inauguration of hospitals, opening of schools, etc.), as well as Afghan music. The language mix is well balanced between Dari and Pashto, in addition to having a few time slots for languages otherwise absent from the media landscape (Pashaïe, for instance). Programming also includes in-depth explanations of the Constitution (for example the separation of the executive, legislative and judicial branches), long-term development plans for the country, etc.

Killid markets itself as the main Afghan cultural station. After a few years of broadcasting only in Kabul, it has now structured itself as a network, with semi-independent stations based in the main cities (Herat, Mazar-e-Sharif, Kandahar, Jalalabad) employing a total staff of 300. On average, these local stations employ 25 people and operate on $6,000 a month. Approximately a quarter of programs are common to all Killid stations, and the rest are produced locally. Furthermore, content is regularly distributed to around 30 other local radio stations, which are then free to choose what they want to broadcast.

It offers long, in-depth programs on cultural topics, with efforts to promote or revive Afghan heritage, biographies of historical Afghan poets and writers and reports on traditional music. The station favors classic songs (mostly Afghan, Pakistani and Indian) and traditional pop singers (usually using local tones and asymmetrical rhythms but simplified to match the song format). It is also one of the few stations to explore other musical genres (jazz, reggae and Western classical music, for instance). News briefs are much more detailed than on other stations. Generally speaking, the vocabulary is sophisticated and the language formal. The amount of advertising is low compared with on other Afghan private stations.

Given this cultural focus, its position as seventh best-known radio station (after RTA, Azadi, BBC, VOA, Arman FM and Ariana) and seventh most preferred (after Azadi, RTA, BBC, Arman FM, Ashna and Ariana) should be viewed as a success. It seems that the creation of branches in the main cities has boosted the

nationwide success of Killid when compared with previous surveys. Feedback from the qualitative research was extremely positive, with a broad range of listeners across the country praising the station's programs.

Arman quickly became the fastest growing radio station after it was created, and was credited with the largest audience share in its broadcast area. However, the station now scores rather low in this regard. It has adopted a style that is diametrically opposed to that of the other national stations: the station airs mostly modern pop music (both Eastern and Western), relaxed and trendy presenters using informal language and, above all, a format consisting essentially of music, small talk with listeners who call to request songs, short news flashes and a great many advertisements. It is the sixth station in terms of audience share.

Successful community stations

A number of cities, not just large ones like Mazar-e-Sharif and Herat but also Khost and Lashkar Gah, feature community radio stations with a significant audience size that have managed to reach or approach sustainability. They employ around 30 people and their monthly expenses are around $3,000, which they can often cover through a combination of advertising revenue and regular paid programming, which often includes *Salam Watandar*. **Rabia Balkhi** in Mazar and **Sada-e-Jawan** in Herat are examples that pertain to this category.

In Khost, **Sol-e-Paigham** was created with the assistance of USAID and Internews, and is currently managed by a local businessman (Mr. Zaid Shah Angaar). It has managed to reach a large audience among Pashtuns. It broadcasts 14 hours per day, including music, local programs and paid programming such as advertising and development project announcements (PRT, *Salam Watandar*, NGOs, local traders, etc.). The station employs a staff of 32, plus journalism students on a voluntary basis. Monthly costs amount to around $5,000.

In Lashkar Gah, **Sabawoon** was established in 2004. The radio station broadcasts 18 hours a day, including music, interactive programs, religious programs, health programs, political debates, local news and Salam Watandar. Advertising, including obituaries and public service announcements, is broadcast for seven hours per week. The station employs around 25 people and generates about $2,000 per month in advertising revenues, which roughly covers the operational costs.

Watandar Radio, not to be mistaken with *Salam Watandar*, which supplies content to over 40 radio stations of the Internews network, currently airs in Kabul and Herat. It is a music radio station that also broadcasts *Persupal*, a successful call-in show on which listeners can ask general knowledge questions. Its monthly costs of $2,000 are covered by commercial advertising. The station is run by a company which also manages four other radio stations (Qadimi, Rumi, Beltune and Alexis) and it is headed by Mr. Mirwais Social.

Ultra-local stations

At the most local of levels are small radio stations transmitting in FM over a district center or a valley, with a typical broadcast range of less than 20km. These stations can be the smallest among RTA stations or independent community stations, but many of them are military created, operated from a PRT or FOB. Such small areas mean coverage of few people and often very small bazaars, which limits greatly the advertising market and makes it difficult for private stations to operate. There are still a few exceptions,

which can carry on mostly because of paid programming. They go on air for a limited amount of hours every day, employ approximately five people and have very low operating costs.

Military-operated stations do not face such sustainability problems. Operating a station from a military base is often the only way to do so in areas which have little to no access to infrastructure (electricity can become an important issue) and in very insecure areas. Operating from a military base creates new challenges, however: journalists working for the stations often cannot even leave the base, for security reasons, which limits the capacity of the station to interact with its audience.

In Wardak (Saydabad district), **Yawali Ghag** (Voice of Unity) functions with an extremely low budget ($600), mostly covered by paid programming from the Afghan National Army (ANA) and ANP. Only seven hours of programs per week are produced locally; the rest is taken from Salam Watandar, the BBC and the NGO Afghan Support Education (which represent additional sources of funding). The station employs six staff members.

In Paktika, **Urgun Ghag** is a local military radio station (a RIAB) and the only station in Urgun district. It was established in 2009 with an antenna located on the military base. The radio station broadcasts 10 hours per day, irregularly, in three shifts (7am-12pm; 2-5pm; 7-10pm). The content of the radio is prepared exclusively by local staff, which include two journalists originally from Jalalabad and Khost. Daily programming largely includes music and interactive programming, such as *Sandarghalow seyali* ("Singer's Competition") and *Nalai Ajayeb* ("Amazing Things"), which are broadcast every night. On Friday nights, *Lawango Amil* broadcasts poems, letters and requested songs.

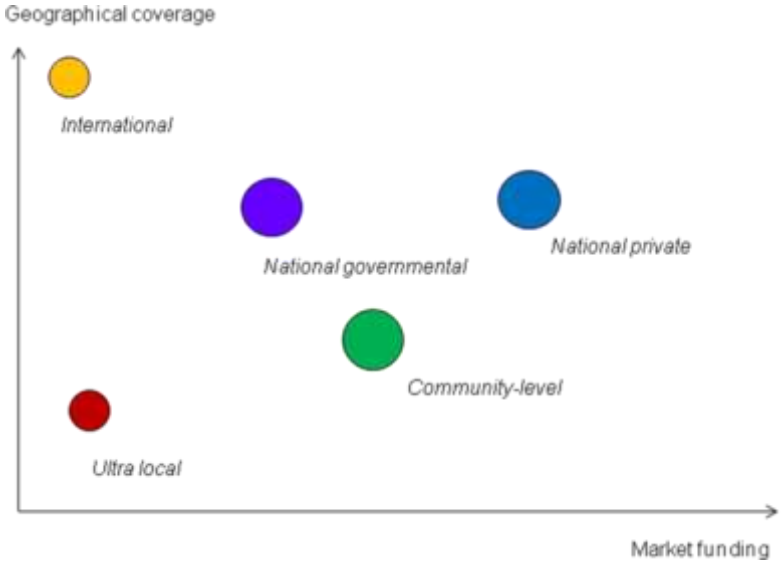
Box 10: Radios in a box

Many military bases have radio stations: there are possibly more than 100 RIABs spread across the country. These are simple radio transmitters that can broadcast up to 30-40km and that are not part of the Sada-e-Azadi network. CJPOTF has limited control over their content, which is totally localized and decentralized. RIABs are typically under the control of the Combined Joined Special Operations Task Force (CJSOTF) and are operated by base commanders. *"Our relationship with radios in a box is theoretically that of a long-lost uncle"* (CJPOTF). Taskforce Helmand's RIABs in Garmser, for instance, are UK led and may elect to play Sada-e-Azadi's radio wheel where internet connection allows it.

> ***"Once, a Taliban commander was captured and asked what radio stations he listened to. He said not Sada-e-Azadi because it belongs to ISAF. Then he mentioned three frequencies all operated by CJSOTF. The Special Forces are the best at this"*** (CJPOTF, ISAF)

Below is an attempt at a visual representation of categories of radio stations in Afghanistan (bearing in mind that classification is subject to debate and some channels transform their profile over time).

Figure 10: Typologies of radio stations in Afghanistan



4.4. Print media

Despite an incredible number of publications, outnumbering radio stations and television channels by far, print media plays a limited role in Afghanistan, as measured on all possible variables (circulation, readership, impact). The outlook of a standard Afghan city, contrary to equivalents in neighboring Pakistan or Iran, does not include kiosks as a usual feature. The over 800 print outlets in Afghanistan are classified here into government, private, small party backed and magazines. From a financial point of view, the large majority are struggling to become self-sustainable ("*It's impossible for print in Afghanistan to survive without subsidies,*" Killid).

The single exception is **Sada-e-Azadi** Newspaper, published every two weeks by ISAF and distributed by local companies to a total of nearly half a million copies throughout the country – a figure incomparable with circulations reached by Afghan papers. There is no charge for the newspaper. Content is produced by ISAF's CJPOTF and is presented in Dari, Pashto and English.

Government press

Government dailies are a historical institution in Afghanistan: **Anis** was created as early as 1927, **Hewad** in 1949 and **The Kabul Times** in 1962. Government newspapers are also published in most provincial centers, but with lower circulation numbers and usually with longer periods between issues (weekly, monthly).

Government newspapers reportedly strive to be neutral and their front page articles usually reflect the administrative agenda (events attended by the President, presidential travels and visits, announcements by ministers, etc.), with pictures showing official meetings, inaugurations, etc. Most of the information is provided by BNA. Editorials develop argumentations in favor of the government's agenda ("Kabul Conference, A Ray of Hope in the Direction of Peace and Reconstruction," "Parliamentary Elections, A Repeated Experience, A Historical Test"), whereas inside articles sometimes give the impression of being a random choice of subjects from the international media, designed to fill the space ("Groups of Fish Fleeing the Gulf of Mexico," "Stress and Ways to Resist It," etc.). This, combined with the absence of color and sometimes full pages filled only with text, leads to a rather unexciting layout.

Towards popular private newspapers?

In the general context, the role of national dailies is limited. Even in the bigger cities, most publications reach their small number of readers with a delay. Moreover, most of the titles that actually exist are of rather poor quality (i.e. a non-professional layout, articles copied and pasted from websites such as BBC Farsi or Pashto, etc.), extremely low circulation (below 5,000) and limited size (four to eight pages). Dailies published outside Kabul are rare and even smaller; 1,000 copies for Tolo-e-Afghan in Kandahar, 2,000 for Mutakhasesan in Herat, for instance.

This survey identified two main exceptions: Mandegar and Hasht Sobh.

Mandegar (Permanent) was created in 2009, during the presidential election campaign. It is generally supportive of Abdullah Abdullah and his party Etelaf taghir wa omid (Coalition for Change and Hope), and is said to be controlled by Ahmad Zia Massoud. Its formula is quite effective: eight pages of a rather small format, short articles (compared with the quasi-essays published in Anis, for instance), catchy headlines ("World Cup in AIDS Country," "Pakistan Extending Its Influence in the Afghan Army," etc.) and generally a quite critical tone (against President Karzai, the international community and Pakistan, for instance). Its reported circulation is 12,000 copies and qualitative research showed it was read and enjoyed especially by students on campuses.

"Afghanistan Is Not an Experiment Ground for American Officers Mr. Petraeus! Succeed, or Go!"

"Karzai's Peace is the Continuation of War!"

In the same format, **Hasht Sobh** (8am), created in 2006, has also adopted a layout based on rather short articles, currently in 10 pages. Its circulation averages at 15,000 copies an issue. It runs on a budget of around $70,000 (only a third of which is covered by advertising, subscriptions and sales, with the rest coming from international community funding). It employs a staff of 65 employees in various offices located in the main cities. It leans towards the views of the Afghan Independent Human Rights Commission and shows a constant interest in this theme, as well as a particular concern for ethnic minorities in Afghanistan. Compared with Mandegar, its tone is far less critical (on General Petraeus' arrival, June 5, 2010, for instance, its headline simply read "Beginning of a Difficult Mission").

Kabul Weekly was initially started in 1991 but publication was interrupted between 1994 and 2002. It was the first independent newspaper to hit the streets of Kabul after the Taliban regime withdrawal (January 2002), with original funding from UNESCO. It since then has developed a network of regional correspondents and a circulation of 10,000-15,000 copies per issue. The weekly includes articles in English, Dari and Pashto and covers political news, culture and sport, as well as the country's development. It is an example of the struggle to run a print outlet in Afghanistan: its publication has been interrupted twice, for political and financial reasons, and, despite decent advertising revenues which made it the first sustainable weekly newspaper in 2005, it had to rely on some support from the international community later in 2006 (OSI, Reporters Sans Frontières). Kabul Weekly hopes to become a daily with an even higher circulation. The newspaper also launched an online version in 2008, available at www.kw.af.

Small, party-backed newspapers

Even though their influence is negligible in the country (around 5,000 copies), it is still interesting to look at the category of small but regular newspapers, because they reflect the diversity of organized political tendencies existing in Afghanistan.

The following list is not exhaustive, since new titles appear regularly, but gives an idea of the political spectrum: **Cheragh** (The Lamp) leans towards Jamiat Islami (the party of Professor Burhanuddin Rabbani); **Mardom** (People) is the official publication of Harakat Elami (the party of Ayatollah Assef Mohseni); **Rah-e-Nejat** (Salvation's Way) expresses the concerns of the Shia community (it is led by Kabuli Member of Parliament Alemi Balkhi); **Weesa** represents cross-border Pashtun nationalist feelings; Afghanistan (and its English version **Outlook**) are linked to Wahdat Islami (the party of Mohammad Mohaqiq).

Since news is disseminated almost exclusively by television channels and radio stations, these newspapers focus mostly on opinion and analysis. Although belonging, directly or indirectly, to conflicting political parties, they generally follow some guidelines: no explicit attacks on particular ethnic groups or religious denominations, no explicit insulting of oppositional political figures, etc. But inaccurate or biased information, conspiracy theories and implicit defamation are rather common. It should also be noted that diatribes against the presence of foreigners, civilian and military, their cultural influence and their hidden purposes can be quite vicious. At the regional level, the main discriminating factor is the stance towards neighboring countries with, generally speaking, one group favorable to Iran and critical of Pakistan and another group displaying opposed affinities.

A few magazines clearly stand out

Circulations of around 20,000 and regular distribution in all provinces distinguish the magazines published by the Killid Group:

Killid, by far the most popular and best distributed magazine in Afghanistan, offers each week around 40 pages of articles in Dari, Pashto and English, on current Afghan politics, local and international news, sports and cinema. It also includes poems, jokes, crosswords, recipes and horoscopes. The reading level is adapted to be accessible by high-school pupils and, actually, the magazine is highly read and exchanged in schools. **Morsal** is similar, although shorter (around 30 pages), targeting girls and focusing more on social, health and family issues.

Other publications: a chaotic landscape

Weeklies, monthlies and irregular publications constitute the bulk of what is printed in Afghanistan. A comprehensive description is impossible, since the total number is estimated at 800,000, with new titles appearing and disappearing at short intervals, and innumerable local initiatives.

Motivations to create small-scale publications (reflecting circulations of around 1,000 per issue, with budgets of a few hundred dollars and no permanent salaried journalists), which have founders with extremely varied profiles, can still be classified in a few standard cases:

- Papers set up to accompany the activities of particular Afghan organizations, such as local NGOs or youth associations. In Mazar-e-Sharif, **Aeran-e-Balkh** is affiliated with the Balkh Youth Association and written by its members (four pages, 1,500 copies, running on $600 a month);
- Papers created by local businesspersons, essentially to be advertising support for their products and services. In Jalalabad, **Gulab** magazine is run by the owner of an electrical equipment company and is printed at 500 copies per issue;
  Papers created by journalists who hold salaried jobs at large media outlets (RTA, international radio stations, television channels), but who feel the need to express more freely their opinions and tastes through an outlet of their own;
- Papers related to the educational sector, including training centers, language institutes, computer courses, etc. In Kandahar, **Tatobay** is run by the President of the Youth Educational Center and written mostly by students enrolled at the center;
- More generally, groups of “intellectuals” (doctors, teachers, etc.) in smaller towns, who describe themselves as roshanfekr (“enlightened”), are conscious of their specific role in a “backward,” illiterate environment, and therefore decide to start some periodical, generally based on an ideology combining progress and Islam. In Jaghuri (Ghazni), for instance, no less than five papers have been created in recent years, by people who have come back to work as professionals in their birthplace after studying at Kabul University.

5. Advertising sub-sector

Over the past few years, investments in commercial advertising have increased, as has the proportion of corporate versus social advertising, including campaigns that the government, UN agencies, the military and development-oriented organizations conduct to raise awareness on specific issues (e.g. health, good governance, counter-narcotics) (Sayara)[23]. Overall, this has potential benefits for the development of an independent media, which by nature depends on a functioning economy and its advertising markets.

Advertising voice SMS services

However, the current actors within the Afghan media landscape are far from fully benefiting from this growth, which seems to be constrained by a rather static scenario affecting both the industry and the market. Indeed, the still recovering economy in Afghanistan has generated a highly concentrated commercial sector, with overall a small number of companies investing significantly in advertising. These companies have increased their advertising budgets compared with a few years ago, but it is basically the same companies that initiated the development of the industry. In other words, lack of an advertising culture combined with the general sense of insecurity appears to discourage local companies from engaging more extensively in media spending (this applies even in the larger cities of Mazar and Herat, despite their vibrancy, which stems from their proximity to bordering countries). Furthermore, the informal way of managing the whole process, based on negotiations and personal contact rather than on an institutionalized media placement process with rate cards that reflect actual prices at which media space is sold and bought, contributes further to a stunted industry. Currently, there is no transparency in rates: only direct clients or media placement agencies have an idea as to what usual rates are.

The market remains rather unsophisticated, and is further constrained by high illiteracy rates and strong adherence to tradition and religion, which prevent advertising companies from fully leveraging their production potential. Cases of complaints, or even threats, in relation to the content of advertising are not so uncommon (a print outlet in Kabul reported having received threats from the National Directorate for Security for including a mobile phone advertisement with a picture showing a Kobe pilgrimage; an advertising agency received complaints for reproducing the Saudi Arabian flag, which includes citations from the Quran on ISAF soccer balls). Product advertising and promotions, as opposed to more widespread branding communication, as well as emotionally driven messages, often in the form of dramas involving family and friends, are the general trends of commercial advertising in Afghanistan.

> ***"You have to turn your outlet into a successful one to be sustainable through advertising"*** (Watandar radio)

[23] Commercial advertising on broadcast media generally includes spots and blocking of media airtime during programs. Some companies push this further and decide to block off large amounts of space on specific outlets.

5.1. Advertising channels

A reasonable estimate would suggest that approximately 80% of above-the-line marketing (which includes advertising investments in radio, television, print and outdoors, such as billboards and flyers) is absorbed by broadcast media. With few exceptions, the amount of advertising money received by the main outlets seems reasonably correlated with their audience share. Most advertisers seem to maximize impact over the largest population while limiting the number of outlets they advertise on. This is an efficient practice – as keeping commercial relationships with over 250 media outlets, some of which in remote areas can be challenging and costly – but creates a natural bias towards urban outlets. As of January 2010, for instance, MTN's advertising investments contracted only 16 radio stations (out of over 175 existing stations), including only three regional ones.

With the exception of Tolo, which generates at least twice the revenues of other commercial channels, television channels based in Kabul can generate as much as $100,000-200,000 every month (e.g. Yak TV; Shamshad TV); provincial channels can reach $12,000-17,000 per month (e.g. Hewad TV in Kandahar; Taban in Herat); and a provincial branch of RTA can make up to $4,000.Local outlets might earn as little as $1,500 (e.g. Herai TV in Herat) or even make no advertising revenues at all (e.g. Saqi TV in Herat)[24]. Our research suggests that a sound estimate of the aggregated spending on television advertising totals $30 million per year.

During 12 days of media monitoring of the seven main television channels, the following breakdown between actual programs, sponsored programs, commercial ads and public service announcements was observed.

Table 2: Broadcast time breakdown on main TV channels

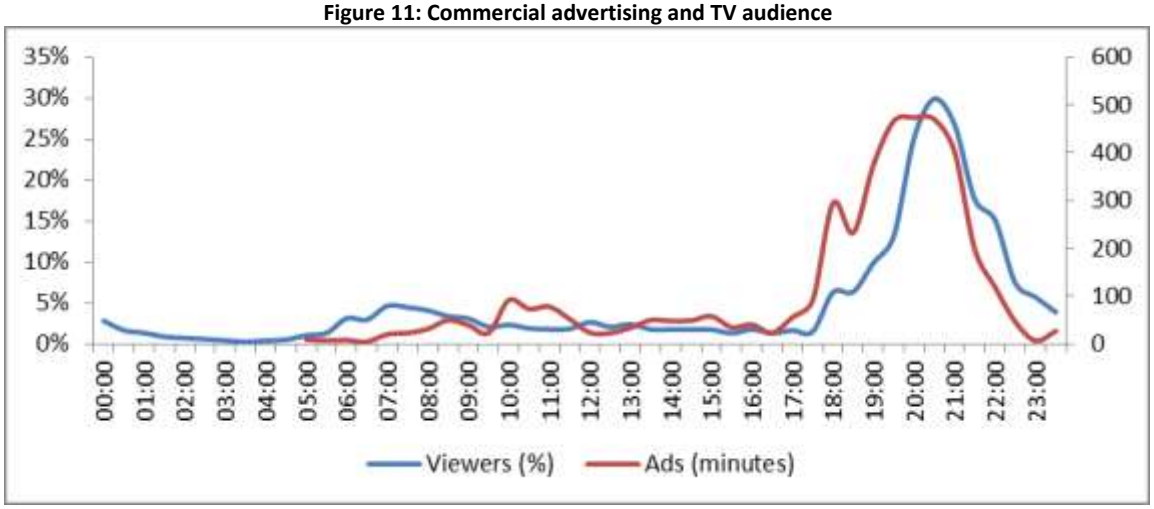
Outlet	Program	Sponsored program	Commercial	Public service announcements
Ariana	60%	32%	4%	4%
Lemar	84%	12%	2%	1%
Noor	51%	43%	6%	0%
Yak TV	64%	31%	4%	0%
RTA	65%	32%	3%	0%
Shamshad	74%	21%	5%	0%
Tamaddon	93%	6%	1%	0%
Tolo	51%	42%	7%	1%

On average, Tolo sold 72 minutes of commercial ads per day, not counting the sponsored programs. Tamaddon, which is at the lower end of the spectrum among the observed media, sold on average 14 minutes per day.

The preferred time slots for advertisers via these media outlets were observed as being during peak evening hours, with a slighter preference in the morning as well. This trend closely matches the observed television consumption patterns observed during the same period.

[24] Some outlets do not accept advertisement from the Afghan government (e.g. Noor TV); others do not receive advertisement from specific companies. Noorin TV, for instance, has reportedly been excluded from advertisement by telecoms companies after having broadcast a program on the negative effects that mobile phone antennas have on the health of pregnant women.

Figure 11: Commercial advertising and TV audience



Advertising revenues from radio stations are also diversified, yet the range is less wide than for television channels. At the top end, there are stations earning a few hundred thousand dollars monthly (e.g. Arman); at the lower end, there are stations that can earn as little as $500-700 per month (e.g. Baran in Herat) and outlets with specific policies in place not to sell air time for advertising (e.g. BBC, Ashna, Azadi).In the middle are stations that can earn anything between $10,000 and $15,000 per month (e.g. Radio-e-Farda; AIR; Killid, Rabia-e-Balkhi in Mazar); $2,000-6,000 (e.g. Sada-e-Jawan; Faryad in Herat) and $1,000 (Abasin in Jalalabad). With only a few national radio stations selling advertising airtime, and rates generally being much cheaper than on television, advertising revenues for radio stations in Afghanistan can be estimated at $6 million per year. Advertisers on the radio largely encompass NGOs and international organizations that buy airtime for information campaigns.

Finally, print outlets can earn between $300 and $800 from selling advertising space on a monthly basis (e.g. Tolo-e-Afghan, Kandahar; Daily Outlook and Daily Afghanistan), or more significant revenues of a few thousand dollars monthly (e.g. Hasht-e-Sobh). Revenues generated by print media outlets represent a small part of total advertising revenues; an estimate of the aggregated yearly spending on print advertising is less than $1 million[25].

For the sake of clarity, it is worth mentioning that billboards, flyers and mobile loudspeaker announcements are also examples of above-the-line marketing (outdoors). In addition, investments in advertising include under-the-line marketing activities (e.g. sponsoring an event or building a mosque).

5.2. Advertisers

a. Commercial advertising

The four mobile phone companies competing on GSM technology, along with six Afghan banks, are the biggest commercial advertisers in Afghanistan. A conservative estimate suggests that these two categories alone make up over 50% of all advertising investments, followed by the Afghan government (10-12%) and a mixture of consumer goods/products, airlines, NGOs and job announcements. On the top

[25]The role of advertising in the financial structure of outlets turned out to be a sensitive piece of information, one which outlet managers were not always keen on disclosing. Furthermore, the likelihood of arbitrary measuring calls for caution when reading these figures.

six television channels, our research suggests that advertising investments from the financial services sector are slightly ahead of those from telecoms sector (34% versus 20%).

The main advertising sectors, as observed during 12 days of media monitoring (number of spots during the observed period) are indicated in Table 3. The very high amount of spots for banks translates into two spots per hour and per media over 20 hours per day across seven media outlets.

Table 3: Main advertising sectors

Advertiser type	Duration
Banking	3,441
Telecommunications	2,315
Government	565
Airline	509
Energy drink	452
Construction	385
Engine oil	314
Public service	178
Cold drink	170

The total number of advertisements observed during this period was above 10,000. Taking an estimated average of $180 per minute ($3 per second), and 30 spots (which leads to an average advertising time of 2.5 minutes per hour, consistent with the figure of4% of the total programming time found above), this leads to an average revenue of $320,000 per month per medium, or a total for these seven channels of only about $27 million per year.

Interviews suggested that the mobile telecommunications company Etisalat was leading media spending in Afghanistan, followed by the government, MTN, Azizi Bank and Roshan. Consistent with this, our 12-day media monitoring showed the weight of banks as slightly higher than that of telecoms companies.

Many of the drivers that determine media spending are informal. There is a general absence of viewer and listener data, with audience surveys on media consumption patterns conducted only occasionally and a very limited number of companies actively and regularly engaging with sound media placement instruments, such as Gross Rating Point (GRP) and socio-demographic targeting (e.g. Roshan)[26].

Advertisers base their investment decisions on a range of tools, which in the best case scenario include recommendations from internal sales departments (e.g. MTN conducts quarterly focus groups on media preferences, Azizi Bank asks local branches to conduct *ad hoc* investigations on media consumption trends, Kabul Bank includes media-related questions in forms to fill in to open new bank accounts), but often encompass observation ("*When you drive around Kabul on a Thursday night and you see nobody around, you know that Tolo TV is broadcasting Afghan Star,*" international media expert) and personal contact between advertisers and outlets' boards.

[26] The irregularity of audience surveys was specifically mentioned as a key issue: "*UNDP drew on an outdated survey to conduct election announcements, hence a large chunk of radio listeners were excluded*" (Yak TV).

b. Information campaigns

Major advertisers in social advertising include the Afghan government (especially the Ministries of Defense and Health), the UN, NGOs, and ISAF's CJPOTF. CJPOTF operates an in-house media production company, which designs content on security, governance and development to produce behavioral, attitude and perception change (e.g. support the government, reject insurgents, stop cultivation of poppies). It conducts such campaigns through its radio and newspaper outlets and on a number of television channels.

As mentioned in earlier sections of the report, through information campaigns, the international community provided outlets with a large source of funding in the initial phase of the establishment of the media sector (e.g. for the presidential and parliamentary elections in 2004 and 2005), which helped many of these outlets survive and in some cases may have also created a side effect whereby media outlets have become dependent on such funding.

> ***"We believe we do have an impact. We know we perform very well in this respect. Every person can recall the CJPOTF counter-narcotics spots easily. The problem comes when people are asked how they feel changed with respect to drugs. Answers never refer to the potential Afghanistan has to become an agricultural country. People give the response they think they should be giving"*** (CJPOTF, ISAF)

5.3. Advertising agencies, media placement and monitoring companies

> ***"There is an awkward advertising sector in Afghanistan, whereby we are all doing the same things: market analysis, production, media buying and some actors are also media providers. We should be pushing instead for proper independent buyers, separated from media providers"*** (Sayara)

The advertising sector in Afghanistan is largely integrated, with a number of companies simultaneously involved across the different functions of production, buying media space, monitoring and also broadcasting. Advertising agencies in the country include Cetena, MediaCom, Sayara, Wise Communications and Lapis; media placement companies include Cetena, MediaCom, Reach and Lapis as well as Internews's business development unit, which acts as a media buying network, selling ads on behalf of the 42 radio stations that broadcast Salam Watandar.

Because the industry is relatively small and informal, these functions are usually not outsourced by commercial advertisers. Although telecom companies generally reflect international standards and are thus outsourcing these functions (e.g. MTN through Manhattan in Karachi, Roshan through Grey/MediaCom Worldwide, Etisalat through Piranha and Severnart), a large proportion of advertisers, including banks, tend to have internal production and informal media placement strategies[27]. "*In a country like Afghanistan, where business is a friendly matter, personal networks are still very important and outlets contact us directly, we do not feel the urgency to use media planning houses"* (Kabul Bank)[28]. The businesses of leading advertising agencies in the country (Sayara, Cetena and Wise Communications) are thus unsurprisingly skewed towards informational campaigns (conducted on behalf of governmental,

[27] Advertisement at Kabul Bank, for instance, is placed internally through a network of approximately 30 people working in marketing, and has relied on media planning houses only once, when advertising abroad (India).
[28] Its recent crisis exposed Kabul Bank's ties with Afghan political circles and irregular business practices.

military and international organizations). ANA and ANP are among the major clients of Lapis (Moby Group).

Box 11: Example of a communication agency – Sayara Media and Communication

Extensively involved in partnering with Afghan institutions to support media between 2003 and 2007, Sayara is one of the leading communication agencies in Afghanistan, now fully involved in social marketing and public awareness campaigns. It develops, designs and implements campaigns on socio-political issues (e.g. elections, police reform, rule of law, governance, tuberculosis, condoms and gender issues) for a full range of development agencies, including the UN, donors and the Afghan government. A more limited part of the company's business (approximately 20%) is focused on advertising for corporate clients (e.g. Safi Airways and Insurance Company of Afghanistan).

The company employs approximately 50 people, and media buying for television and radio represents its greatest cost. Since 2008, the company has reported a significant change in the respective proportion of social and corporate advertising, in favor of the latter (banking and mobile phones).

Monitoring of media space has started to take place but is rarely being used. This is a source of concern, considering that most outlets have no automated system to insert advertising in their programs, but have to do it manually, which causes delays in broadcasting of spots or limited compliance with advertising contracts. There are reportedly only two radio stations (Arman FM and Shahar) with automated systems in place for programming commercials.[29] Some outlets occasionally rely on companies such as Media Com and FKH to monitor advertising space (occasional monitoring is also conducted by companies abroad, e.g. Media Track in Pakistan).

Box 12: Example of a media planning and buying agency – MediaCom Afghanistan

MediaCom Afghanistan is a media planning and buying house established in Afghanistan in 2008 as part of Global Operations of Grey and MediaCom Worldwide. Media monitoring and placement represent the largest segment of the company's activities, which are supported by the use of high-quality software such as media optimizing tools. Production of commercials is a more limited part of its business.

The company currently employs 10-12 staff and major clients include Roshan and Coca-Cola. As opposed to other agencies in the country, oriented towards information campaigns and public service announcements, MediaCom's business is focused exclusively on the private sector.

Thanks to its activities it is also encouraging global commercial private firms to invest in Afghanistan, contributing to the further development of the country's private sector.

5.4. Tools and needs

The rather limited development of private sector in Afghanistan – slower than the growth in media outlets – is currently constraining the full establishment of the advertising industry. This is still holding back the creation of independent media production, placement and monitoring companies.

The informal nature of the industry, whereby personal contacts and negotiations weigh considerably more, and without clear rationales for advertising prices, seems to be retarding the development of

[29] ABE is working on starting a computer-based monitoring system for advertisers, allowing themto connect to a specific server in a province and monitor the placement of ads.

other modern advertising tools such as reliable audience surveys, diary data, establishment surveys, target indexes, optimizers, national leadership surveys and census. The absence of these tools contributes to the industry being particularly vulnerable to kickbacks and generally heavily politicized. Interviews with both outlet managers and key stakeholders in the advertising sector suggested that the system has developed in such a way that "rules of engagement," which specifically include commissions and bribes, are rather common.

> ***"There are few opportunities to demonstrate our creativity, we are constrained by requests for proposals…When we do have more room for maneuver, we depend on any available survey but there are not that many, and they are not that good."***(Sayara)

6. Other services

A healthy media sector relies on a set of complementary services that support the industry. Some of these, including media monitoring, advocacy and, to some extent, legal advisory services, have started developing in Afghanistan.

Monitoring of media for advertising purposes, as mentioned earlier, is still not perceived as a priority by media actors, who are still engaged in informal negotiations and rely on subjective perceptions of what a successful outlet ultimately is. Through their business, however, a few companies are contributing towards raising awareness of the importance of this function (see Section B.5.3). Nonetheless, media audience surveys remain rare, and no independent body is engaging regularly in such activities. Interestingly, such a scenario is not reflective of weak capacities in this regard: qualitative and quantitative research is not new to the country. InterMedia, The Asia Foundation, the International Republican Institute (IRI), the Afghan Center for Socio-Economic and Opinion Research (ACSOR), Integrity Watch Afghanistan (IWA) and the Afghanistan Research and Evaluation Unit (AREU) are a few examples of organizations that have engaged in surveys and monitoring. Some of these have also had the media among their key areas of focus. Hence, commitment to regularly engage in these activities, rather than existing capacities, is what is ultimately missing in the country.

Advocacy services for media at the local level are generally channeled through ANJU and AIJA, two bodies that on a few occasions have protested and called on the Afghan and foreign governments to follow up on specific issues (e.g. on occasion of the government's ban on Indian television series and the death sentence given to a journalist who was allegedly distributing articles against Islam in 2008)[30]. ANJU and AIJA representatives have also engaged with NGOs supporting media (e.g. Internews), international organizations (e.g. UNESCO) and international outlets (e.g. the BBC, Deutsche Welle) to advocate for the Media Law, its review and the inclusion of specific by-laws such as on copyright (see Section A.1).

Legal advice on the process of establishing a new outlet is currently being provided by suppliers of broadcast equipment, such as EMC (see Section B.1). Specialized legal firms are lacking in the country, but some advisers to journalists encountering legal problems can be found. Media Watch, the monthly report published by Nai Supporting Open Media, represents a valuable informational hub in this sense. By monitoring and reporting on violations against journalists and media, it provides journalists with a platform and contacts for directly denouncing cases of abuse.

[30] http://afp.google.com/article/ALeqM5h-Psa2VekiEuEPTX6D6i04Wi5VQA.

A number of marketing services, which are complementary, though not exclusive, to the media industry, have also started in Afghanistan. Besides the advertising agencies mentioned in Section B.5.3, which may be involved in providing such services, public relations activities, website development and web hosting services are fledgling, mainly through foreign companies. TriVision, for instance, is a US-based company involved in supporting the branding needs of newly established companies in Afghanistan[31]; the Afghan Marketing Company (AMC) is specialized in marketing, web development and graphic design[32]; Muzhda is a UK-based website development company working in the country[33]; Hilal Network Afghanistan is an Afghan company involved in web hosting and website building[34].

An additional set of services, slightly detached from the media (strictly speaking) and with a limited role to play, given the high level of illiteracy in the country, is nonetheless of interest in a full evaluation of the sector. Publishing houses do exist in Afghanistan, Maiwand being the best known. A number of smaller ones are Saeedi, Balkh, Baihaqi and Parneyan, although most have limited in-house printing facilities. A few public libraries can be found in major cities. Kabul, for instance, besides the university libraries, features a library in Malik Asghar Square and a religious one in Karte Se (Dar al Quran). Interestingly, our research also pointed to the existence of public libraries funded by foreign governments. In Mazar-e-Sharif, for instance, an Iranian-funded library was very recently established (2010), offering a selection of 20,000 up-to-date books, published exclusively in Iran and covering a range of disciplines.

The Iranian Library in Mazar-e-Sharif

A bookseller in Herat

7. Specific actors involved in the media sector

The government of Afghanistan, the foreign military, insurgents and the aid and development community are involved in the media industry, as various sections of the report have already noted. The aim of this section is to consolidate this information, with a specific focus on the ways in which these stakeholders engage with the media.

[31] www.trivision.tv/news_index.html; http://www.amckabul.com/index.php.
[32] www.amckabul.com/index.php.
[33] http://muzhda.com/.
[34] www.hilalnetwork.com/.

7.1. Government

The government controls the state-run radio and television station (RTA), a number of publications (four major newspapers in Kabul, plus approximately 100 small publications throughout the country) and BNA. It has started to realize how critical the media is, even for its own legitimacy, hence its engagement over the past couple of years in media relations, public outreach, media monitoring and capacity building of government spokespersons through GMIC (see Section A.3.2).

Besides running outlets and supporting its own capacity, the government also interacts considerably with private outlets, as one of the major advertisers on broadcast media in Afghanistan. Approximately 10-12% of total advertising investments come from the government through a range of information campaigns (e.g. discouraging poppy cultivation, supporting educational enrollment, promoting recruitment for ANA and ANP).

7.2. Foreign forces

The foreign military encompasses Operation Enduring Freedom (OEF) troops, ISAF troops, Special Operation Troops under non-ISAF command structures, the PRTs and the District Stability Teams (DSTs). There is no especially effective coordination mechanism in place between these when it comes to the use of the media. The PRTs, Special Forces and DSTs run over 100 RIABs across the country's provinces (see Section B.4.2)[35]; ISAF's CJPOTF runs Sada-e-Azadi radio and newspaper (ISAF/CJPOTF) and is also a major advertiser on broadcast media – it has its own TV production capability and operates a tri-lingual website at www.sada-e-azadi.net. All engage extensively in public outreach and information campaigns (e.g. counter-narcotics; road behavior in proximity to a military convoy; messaging promoting counter-insurgency). As such, they are also among the major clients of advertising companies in Afghanistan. Foreign forces also occasionally support the infrastructure of radio stations and television channels by donating broadcast equipment.

7.3. Insurgents' communication strategy

> ***"The Taliban seem to be using the media more than they ever did"*** (international media expert, Kabul)

It has become increasingly clear that insurgents cannot ignore the richness of the Afghan media landscape and are thus forced to engage in rather regular communication with media actors, using a variety of means.

General press releases, phone calls to journalists and outlet managers, emails asking for follow-up and even open threats were mentioned by managers as recurrent events. Casualty numbers in fighting generally represent a controversial issue, one which exposes journalists to frequent complaints from insurgents: "*Insurgents approach journalists when they reckon they have been portrayed as the weak part of the story*" (Hewad TV/Azad Afghan radio journalist); "*The most experienced journalists are generally approached by insurgents through phone calls. Letters are more rarely received*" (Tolo-e-Afghan journalist); "*Journalists have contact details of fewer insurgents than insurgents have of journalists*" (outlet manager, Kandahar).

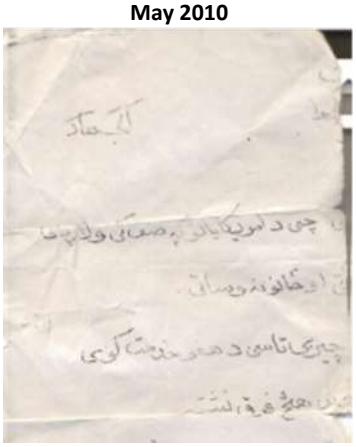
[35] Not all PRTs have a radio station: "*We don't need our own radio station, we work with the Governor; his coverage is our coverage on local news*" (Italian PRT, Herat).

Despite rather regular communication exchanges, our research suggests a generally higher level of disregard and suspicion by local media vis-à-vis insurgent statements, in sharp contrast with international outlets, which reportedly tend to give more credit to such news (see Section A.2.2)

In settings where the media landscape is not as rich as it is in urban areas, insurgent adapt their communication methods. Cutting mobile phone connections, obstructing specific segments of the fiber optics-based internet network and intimidating those among the rural population that use mobile phones (e.g. as occurred in Nad Ali district, Helmand) or households owning a satellite dish (e.g. Kunar district, Sarkani) are all a part of the insurgents' communication strategy.

In remote districts, where outlets and the presence of journalists are rare or significantly constrained by high levels of insecurity, night letters (*shabnama*) are commonly distributed to inhabitants. These typically consist of threats against people working with international organizations/NGOs, the government, ANA and ANP. Approaching individuals on a personal basis also takes place in such settings, especially when individuals are perceived as being wealthy ("*When they know that a person is rich, they ask him to buy a car… during the poppy season they know who owns more land and easily ask for money,*" interviewee in Garmser, Helmand).

Fragment of a night letter from "Al Jihad" received by the chief of education of Spin Boldak district, May 2010



Furthermore, away from the urban centers, our research also found the existence of radio stations that were openly run by insurgents (e.g. Shariat Ghag in Kunar district, Sarkani) or reportedly run by them (e.g. Amarat in Lashkar Gah, Helmand; mobile radio stations broadcasting from cars in Bak and Tanai, Khost).

Box 13: Case of an insurgent radio station and the Taliban movement website

Shariat Ghag (Voice of Sharia) is a radio station that is owned and run by insurgents and broadcasts from Ganjga, a mountainous village in Sarkani, 6km west of the district center. The station was established in 2008 and broadcasts local news, including negative propaganda about the government. It broadcasts from 6-8am and 2-4pm every day in Pashto. There is no live or interactive programming and the recitation of the Quran forms a large part of the content. Owing to the position and strength of the antenna, it is not received across the whole district. Villages in the south and east of the district have limited reception of Shariat Ghag because of the low power of transmission and the mountainous landscape.

The Taliban website is, interestingly, regularly updated on ongoing conflicts, and includes articles on various themes (colonialism, NATO strategy, civilian victims, etc.), in elaborate English. Versions in Pashto, Dari, Urdu and Arabic are much harder to find on a search engine.

7.4. Aid and the development community

Donors, INGOs and international organizations have been an active part of the media landscape, as supporters of the development and professionalization of the field (see Section A.3). Infrastructure, content, capacities and advocacy have been, and still are, important areas of focus.

Besides being a supporter of the sector at large, the international community is also an active user of the media in many ways. The most apparent is the funding of information and public outreach campaigns on topics such as health, education, counter-narcotics or the democratic process. This takes the form of public service announcements or the production of longer programs pushing specific development or security perspectives. Campaigns ranging from communication oriented towards relief (often by INGOs, UN agencies) to more complex efforts broadly referred to as Strategic Communication[36] generate an important part of media outlets' revenue.

[36] The US Department of Defense defines Strategic Communication as "Focused United States Government efforts to understand and engage key audiences to create, strengthen, or preserve conditions favorable for the advancement of United States Government interests, policies, and objectives through the use of coordinated programs, plans, themes, messages, and products."

8. Estimating the size of the Afghan media sector

This section aims at providing a rough estimate of the size of the media sector in Afghanistan, including aggregate expenditures, revenues and profits of outlets. The key categories of the media landscape, analyzed earlier, are quantified using a value chain approach (e.g. equipment, content).

8.1. Expenditures

We estimate that total expenditures of the media sector for 2010 add up to approximately $45 million, spread across the following components: content, equipment, human resources and general costs.

Content makes up the largest proportion of the cost structure of outlets ($23 million, approximately 50% of the total). This includes mainly production costs (40% of the total), with the purchase of content less of a factor. As mentioned in earlier sections of the report, this can be explained by the still limited role played by production companies, with just a few outlets actually purchasing programs from them. Furthermore, informal arrangements prevail across externally supplied content, and copyright spending, for instance, is still not a significant cost for outlets.

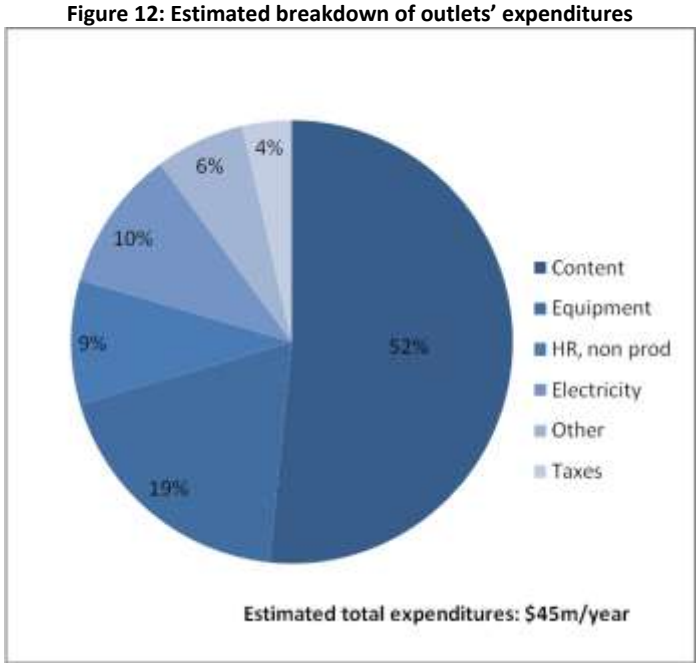
Investment, maintenance and replacement of equipment represent the second most significant category of costs, adding up to approximately 20% of outlets' total expenditures ($9 million). The overall weight of expenditures on maintenance and replacement of equipment is less than actual investments in equipment, although in the Afghan context of potentially damaging power cuts and the generally limited capacity of technicians, these expenditures realistically compete with each other.

Human resources (e.g. salaries to staff) represent considerable expenditures for outlets. Since a big part of human resources expenditures are absorbed by content production (over 75% of human resources expenses), the remaining costs (i.e. excluding production staff) make up less than 10% of the total ($4.5 million).

General costs, including electricity and fuel for generators (10%) and other expenses such as rental of office space, locations for antennas and satellite fees (if any) (6%), make up the rest of the cost structure ($7 million). Finally, taxes (e.g. business receipts tax) play the smallest role (4% of total expenditures).

The following pie chart shows a rough breakdown of the expenditures of the media sector.

Figure 12: Estimated breakdown of outlets' expenditures



8.2. Revenues

We estimate that revenues of Afghan outlets in 2010 range between $75 million and $95 million. These funds derive from a number of sources: advertising, neighboring countries, the foreign military and other sources (e.g. self-funding). Assuming that advertising income (including commercial spots, information campaigns and paid/sponsored programming) represents approximately 60% of outlets' total revenues, $45 million makes a conservative estimate of the revenues that outlets in Afghanistan can make from advertising ($57 million in a more optimistic scenario). This is consistent with the assumption that broadcast media absorb approximately 80% of all above-the-line advertising investments, which we estimate as adding up to $55-70 million per year. Apart from advertising, revenues are generated from alternative sources (the political affiliations of outlets are pointed out throughout the report). Funding from neighboring countries adds up to $14-18million (19%); military funding can account for $10m-12 million (13%); and funding from the owner of the outlet can reach $6m-7.5 million (8%).

The following two graphs highlight the breakdown of revenues generated by the media sector and the role that different media outlets (television, radio and print) play as targets of advertisers' investments.

Figure 13: Above-the-line marketing investments

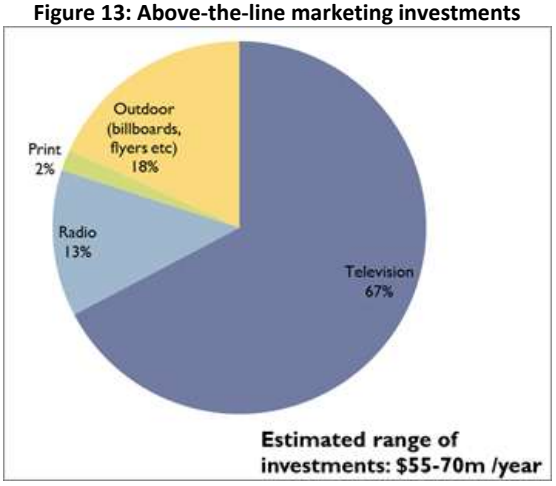
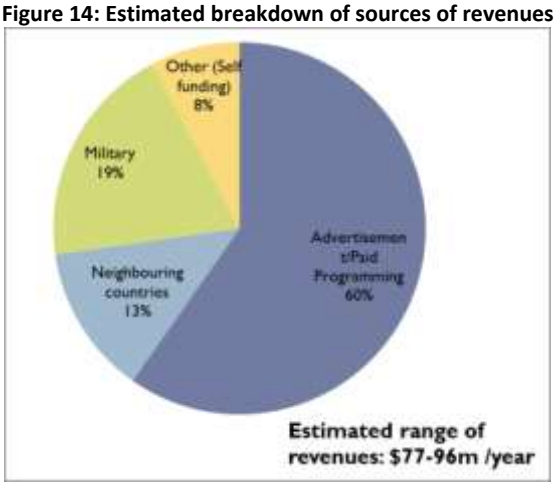


Figure 14: Estimated breakdown of sources of revenues



8.3. Profits

With total annual expenditures of $45 million and revenues in the range of $75-95 million, we estimate that the Afghan media sector generates profits of $30-50 million per year. It is worth pointing out that the capacity of the Afghan media sector to be financially sustainable exclusively through advertising is considerably reduced (generating less than $13 million in profits per year).

The following two graphs show a conservative (minimum) estimate and an optimistic (maximum) estimate of the profits generated by the media sector in Afghanistan. The first is built on the assumption that revenues are generated by a number of sources; the second takes into account revenues from advertising only.

Figure 15: Estimated profits generated by the media

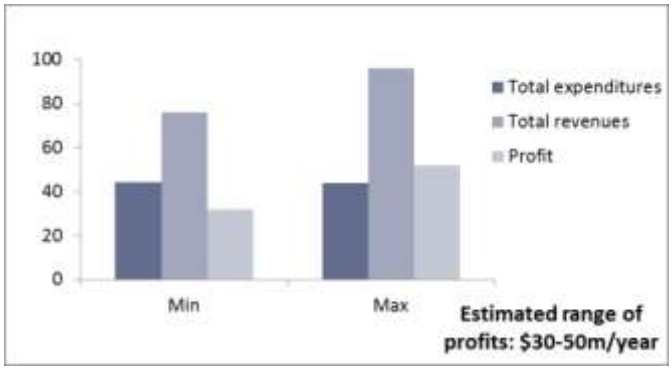
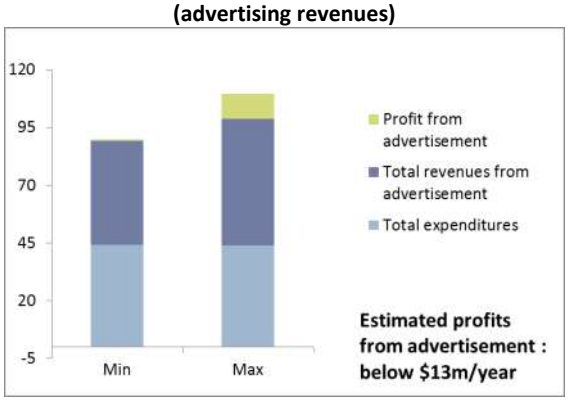


Figure 16: Estimated profits generated by the media (advertising revenues)



C. Analysis of content

Serials have a special place in Afghan television: this category of programs singlehandedly captures nearly half the audience share (see below, audience section).

1. Serials

The first private television channels established in Afghanistan rapidly attracted a large audience by broadcasting numerous series, most of them produced in India and dubbed into Dari. Tolo paved the way with its immensely popular ***Zaman, Khushu Ham Arus Bud*** ("Once Upon a Time the Stepmother Was Also the Bride"), an Indian family drama whose broadcast has come under criticism for showing Hindu rituals and for including in the plot several illegitimate births.

The Young Bride, on Yak TV, one of the many Indian dramas broadcast on Afghan private channels

Although Indian series are still dominant on Afghan television channels (three of the six most popular programs on Tolo, the second most popular program on Ariana), what is on offer has diversified. The rise of Turkish serials might be interpreted as a way to avoid criticism of non-Islamic content, whereas Iranian serials are broadcast on channels that are close to Iran for political reasons (Tamaddon, Noor, Kawsar, Rah-e-Farda). Other countries of origin include, for instance, the US (24, House), South Korea and Syria (a high-end cultural serial on the life of poet Nizar Qabbani, on Saba).

Dunya-e-Asrar (World of Secrets), prime-time Turkish serial on Tolo, gathering an over 50% audience share

Qualitative interviews showed that Turkish series tend to be less criticized than their Indian counterparts. Afghans often feel closer to the culture and tradition of these programs, notably because they are set in a Muslim environment. ***Dunya-e-Asrar***, broadcast by Tolo, is often quoted as a good example of a serial adapted to Afghanistan's identity.

Iranian serials have not yet reached a high level of popularity, and were rarely mentioned during qualitative research, except in the Herat region, where returnees enjoy them and even watch them directly on Iranian channels. Proximity with Afghan culture, a common language (despite differences in accent and vocabulary) and adequate technical quality (acting, shooting, etc.) could trigger larger success in the future. Being produced in Iran, those series are rather conservative, in terms of plot and female dress codes.

Iranian dramas (here, Four Walls, on Tamaddon)

A few South Korean serials are also broadcast. The manager of Rah-e-Farda, as well as some interviewees in the qualitative research, reported that members of the Hazara community could identify with their characters through physical resemblance.

The most interesting development of recent years is the unprecedented appearance of Afghan serials. ***Raz Ha e Een Khana*** ("Secrets of this House"), on Tolo, written and filmed by Afghans in Afghanistan, reflects current issues (return of formerly exiled Afghans, contrast between generations, debates on marriage and engagement, kidnappings). It is difficult to compare its audience share with that of Indian serials because the latter are broadcast daily whereas *Raz Ha e Een Khana* is scheduled only once a week. But at the time it is broadcast, Friday afternoons, it is the most watched program across channels.

Eshq-e-Piri ("Love in Old Age") is an Afghan-produced series broadcasted on RTA, with a plot set in a rural environment, among "humble" people. It has only a limited audience share.

Rah-e-Farda has also produced several series, such as ***Nawa-e-Nay*** ("Sound of the Flute") and ***Aseman-e-Abi*** ("Blue Sky"), although with fewer resources and less-experienced professionals. The stories are set up to depict mostly working-class Hazara in Kabul.

Movies are, as of yet, not a very important programming category on the main Afghan channels. Most of them are broadcast outside of peak times (after 10.30pm on Yak TV, in the mornings on Shamshad, once a week after 10pm on Tolo, after 10pm on Saba, etc.). Channels that broadcast more movies (Aïna, Afghan TV and, previously, Emroz) generally do so for lack of other content, rather than as a deliberate policy. As a whole, Bollywood films come first, followed by Hollywood ones (mainly action movies; other genres are virtually absent, which does not help give a good image of Western production). Afghan movies, even very old ones or those shown at recent international festivals, are extremely rare.

2. Religion, politics and news

2.1. Religious programs range from radicalism to more moderate views

Virtually all television channels and radio stations feature at least one religious program, in addition to prayer calls and recitations of the Quran. In addition, recently established religious television channels offer a wider variety of programs (including interactive programs, discussions of specific points of doctrine, comparison of Islam with other religions, etc.) Although most interviewees stated that they would like to hear more religious programs, in the audience share charts religious content came way below series, news, political programs, games and comedy shows.

Cheragh hedayat ("Beacon of Guidance"), on Ariana, is among of the best religious programs in terms of quality and variety, and is the first of its category in terms of audience share. A female presenter introduces various quotes by Islamic scholars, extracts of sermons and chants. The general stress is put on personal morals, mutual love between human beings and the use of God-given reason.

Farhang wa Tamaddon-e-Islam ("Culture and Civilization of Islam"), on Tolo, stands out because, unlike other religious programs, it does not restrict itself to the holy texts but encompasses Islamic arts, architecture and history. Some episodes, for instance, recounted the history of Kaa'ba from the pre-Islamic era to today, with its successive renovations under Ottoman sultans and Saudi kings.

On the other hand, ***Pasakh-e-Noor*** ("Noor's Answer") can be quite radical, for instance by denouncing a "plot to convert Afghanistan to Christianity" and insisting that freedom of speech does not include freedom of religion. The host describes infidels as "pagans," "corrupted," etc. On one occasion, he stated that the Islamic "Allah" had nothing to do with the Christian "God," the latter being an anagram of "dog."

***Pasakh-e-Noor*, episode dedicated to "the culture and beliefs of the infidels"**

Generally speaking, programs on Noor can be quite aggressive. An episode of "It Happened on That Date," for instance, stated that "*Mein Kampf* still has readers in the world" and that Hitler, having uncovered the "Jewish plot to dominate the world," decided to resist "Zionism." It also underlines that Aryans include peoples inhabiting in the region of Afghanistan, but says nothing about the Holocaust.

Religious choir on Tamaddon

Tamaddon takes advantage of its proximity to the Islamic University Khatem al-Nabiin to show activities of the students and to advertise for enrollment.

Religious program on RTA

With virtually no knowledge of Arabic among ordinary Afghans, an important proportion of religious programs is dedicated to the translation and explanation of words. On RTA, religious programs include a full Arabic lesson, with a teacher explaining the correct accentuation and pronunciation of Quranic text.

Pronouncing religious formulas in vernacular languages (for instance *be nam-e-khada-e-yakta wa bi hamta* – "in the name of God, the unique, the unmatched") is generally a sign of openness, whereas sticking to complex Arabic formulas, not understood by the majority, tends to reveal more radical tendencies and sometimes proximity to Wahhabism (for instance on Da'wat, the channel set up by Abdel Rab Rasool Sayaf).

2.2. Political talk shows are rather quiet

Most channels have one or more political talk shows, and regularly invite Members of Parliament, experts, officials or former officials to debate on particular topics related to current events. Although the overall presentation is generally good and the questions are generally pertinent, what is lacking is real debate, or even discussion, between the guests: the program usually consists of successive monologues, because neither the presenter nor the guests dare contradict or interrupt the speaker to follow up on a particular point. One of the major reasons is that the guests rarely include people holding contrary views.

On ***Spini Khabari***, on Afghan TV, for example, despite the shrewdness of the questions raised by the presenter, fails to really ignite a dialogue between the two invitees, who actually interact exclusively with the presenter. This tends to give a slow pace to the show.

Akher-e-Khat ("The End of the Line"), Noor's flagship program, fares relatively better, thanks to a wider variety of elements: the debate in itself is complemented by a reading of newspaper editorials and viewers' emails. The general tone is quite free, and can be critical both of the Afghan regime and of the international community. One of the invited guests, for instance, compared Karzai's rule to a monarchy, because of its tendency towards nepotism; another felt that the presence of recently revealed lithium resources was the real reason for the foreign military presence in Afghanistan.

Gofteman ("Forum") is a quality talk show on Tolo, gathering five politicians (often Members of Parliament) or experts to discuss a particular issue (the Kabul conference, for example). It was often quoted during the qualitative research as a serious and useful program, but it nevertheless suffers from the same drawbacks as comparable programs, with dialogues taking place mostly between the presenter and each of the invitees successively.

2.3. Themes and technicalities of news

All broadcast outlets now have news flashes, or news briefs, of variable length, from the rapid headlines on Arman to long and detailed programs on RTA, Azadi and Killid. Some outlets also offer specialized bulletins on international, economic, cultural or scientific news.

A striking fact is the heavy reliance on foreign sources. The weakness of the local news agencies and the important role played by the international community in Afghanistan do not completely account for this.

There is a lack of self-confidence within Afghan journalism which leads most of the outlets to consider a piece of domestic news as important and confirmed only if it is brought up by a Western institution or medium (preferably British or American). During this study, examples of main headlines (sometimes for several days) were a study by the London School of Economics on Pakistani support to the Taliban, an article on mining opportunities in Afghanistan published by the New York Times, comments by Amurallah Saleh in the same newspaper, etc.

Although focus and orientation vary according to political orientation, a few common themes can be observed. Distrust of Pakistan, sometimes quite virulent, is nearly universal (including on state-run outlets). The suspected "double game" and hostility towards Afghanistan are discussed on a daily basis. Among the important outlets, Shamshad and Sharq are probably the only exceptions to this.

Attitudes towards Iran vary, ranging from sympathetic (Tamaddon, Kawsar and Noor television channels) to critical (Afghan TV, Shamshad). However, attitudes are mostly rather neutral, for example considering that the row over the Iranian nuclear program does not concern Afghanistan.

Technically speaking, news flashes are good in terms of sound but poor in terms of images. Field reports often use the same image (a street in Kandahar, a tank passing by, etc.) many times for different news items. The video component tends to be static, for instance showing the building of an organization or its entrance door when mentioning a related press release. In international news, the vast majority of the outlets depend on images gathered on the internet or from foreign channels.

From an editorial point of view, the production of news is still rather passive for the most part. Journalists collect statements from officials and tend to automatically consider press conferences, seminars, etc., to be "events," whether or not they bring something new. Conflicts are generally reported in a very factual manner, focusing on the body count. Tolo is more proactive, but sometimes at the expense of accuracy, with catchy headlines ("US Accused in rocket Shooting on Peace *Jirga*," for instance) that are watered down or poorly argued in the subsequent reports.

Box 14: Visual identity

There used to be a clear-cut difference between professional-looking channels, with modern jingles and graphics, and more rudimentary-looking channels that could not afford those. Nowadays, nearly all outlets have upgraded, and the difference is marginal, for instance between Tolo and RTA. Even recently created outlets, such as Noor or Tamaddon, have created a modern visual identity in terms of logos, graphics, etc.

At the same time, the sophistication of leading channels in terms of branding is increasing. In September 2010, Tolo announced its rebranding strategy: "TOLO's new look reflects the growing sophistication of our audiences, who are increasingly demanding of a contemporary look from the organizations they engage with. It also resonates with the attitudes that will take our country forward – healing, hope, re-growth and regeneration."

However, a gap remains in terms of program identification. Some channels (e.g. Tolo, Yak TV) have understood the benefit of clearly identifying flagship programs with an appealing title and a distinctive visual and audio identity, as well as of announcing them regularly with teasers. Others, such as RTA, still display a confusing grid where the main contents are not obvious to the viewers. Indeed, during qualitative research, interviewees could quote only a handful of programs by their names (*Banu*, *Zang-e-Khatar*, *Gozaresh Shish-o-Nim* on Tolo, *Hamsinfi* on Tamaddon, *Gozaresh-e-Yak* on Yak TV); others were only somewhat remembered ("a health program" or "a political program" on that channel, or even general statements: "entertainment programs," "educational programs," etc.).

2.4. Still a lack of thorough investigation

Most investigative programs rely excessively on unquestioned/unchallenged official statements (from either Afghan or foreign authorities), fall short of pressing to obtain precise answers and tend to be satisfied with general denunciations ("corruption is a plague", "good governance should be promoted" etc.), rather than digging for facts and mentioning names.

That having been said, a handful of real, aggressive investigative programs stick out and really contribute to holding the powers that be accountable, which is all the more important given that the qualitative research revealed high expectations among the public on that matter, along with hopes that media (watchdog) pressure could help reduce corruption.

Gozaresh Yak ("One Report"), on Yak TV, is quite punchy in its inquiries, focusing mostly on corruption. The interviewer, documents in hand, does not hesitate to contradict officials, and the presenter recounts

the whole history of a specific case (overpriced fuel supplies to Ariana Airlines, for instance), giving the amounts at stake to the near dollar, reading out administrative documents and pointing out conflicts of interest. The program also tries hard to put pressure on the government by specifically underlining which ministries or bodies "refused to comment."

Edalat bara-e-Hamme ("Justice for All"), on Saba, is relentless in following up unsolved criminal affairs. In a case of rape in Imam Saheb (Kunduz), the victim and her husband gave their statements directly, accusing four local strongmen and giving their names. Interviews with the local representative of the Afghan Independent Human Rights Commission underlined the lack of response from the judicial authorities when the family tried to go to court.

Some programs, although not investigative *per se,* help create an atmosphere of accountability, by gathering prerecorded interviews of various personalities who hold conflicting views on a particular topic. The best-known is ***Gozaresh Shish-o-Nim*** ("6.30 Report"), on Tolo, which combines such interventions in a rapid rhythm, with short and effective introductions by the presenter. The program can be harshly critical of the highest Afghan authorities. Commenting on Atmar and Saleh's dismissal, for instance, an invited analyst asked: "How can Karzai be so sure that the attack on the Peace *Jirga* was not conducted by the Taliban? Does that mean he is a Taleb himself?"

2.5. Are press reviews an opportunity?

***Harf-e-Chahrom*, on Tamaddon**

The rapid growth and success of television is yet another disincentive to newspaper reading, but paradoxically could have some beneficial effects too. Most television channels now feature press reviews that comment on both foreign newspapers (mostly printed in the US and UK) and Afghan publications. These programs are either included in morning shows or exist as a standalone item. ***Harf-e-Chahrom*** ("The Fourth Letter"), on Tamaddon, is one example.

However, since most of the titles commented on in these press reviews are not easily available to the average Afghan, the impact will be limited unless distribution of these publications is enhanced.

3. Entertainment and culture

3.1. Comedy and satire

The Afghan press has a lively tradition of cartoonists (although no significant satirical newspaper exists), but quality comedy shows are scarce in the broadcast landscape.

The now well-established ***Zang-e-Khatar*** ("Warning Alarm") is far ahead in terms of humor and political boldness. It was

the first show that came to interviewees' minds when they were asked about "critical programs" during the qualitative research. Depending on the weekday, it can gather up to 23% of the audience share. One of the episodes, following the dismissal of Atmar and Saleh, suggested that likewise each and every Afghan should be dismissed if he/she failed to "convince the President." Another suggested that the Taliban bomb American tanks rather than wedding parties.

In comparison, the more recent **Injection**, on Yak TV, is less crisp, although it does focus on a burning social issue, narcotics and addiction. Although featuring "Mr. Powderi" and a fake, ridiculous general speaking in a mixture of English and Dari, the program would benefit from more political lampooning to really make any point.

Hechland, a very popular[37] comedy produced and broadcast by Tolo, shows the life of the "Ministry of So and So" in the "Republic of Nothing." Civil servants employed by this fictional ministry sit in a little, overcrowded office next to the ministry office. One computer is forgotten in a corner, while the agents chat, prepare tea, comb their hair, eat chocolate, etc. This clever program is in the same vein as Western programs parodying dysfunctional administrations and focusing on inefficiency and corruption habits, and generates the same enthusiasm.

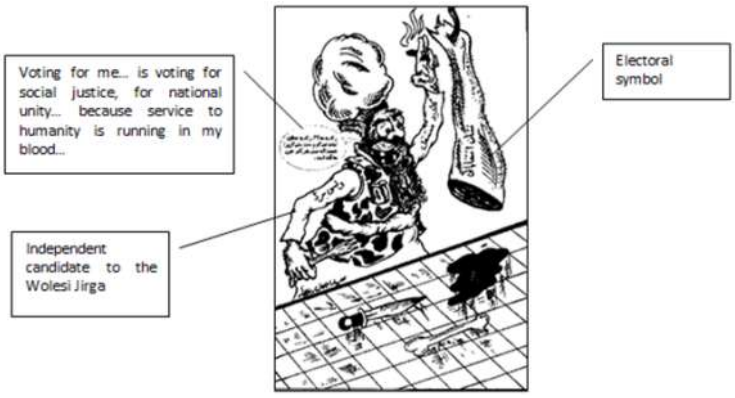
A very few examples of cartoons, from the immense range, are shown here, to reflect the most common themes and the variety of styles.

Water bottle fight in Parliament, Killid Magazine, July 3, 2010

First results of the Peace *Jirga* (jumping: Saleh and Atmar)

[37] The program was not broadcast at the time of audience research. However, qualitative interviews showed the program was very generally well received.

Parliamentary election campaign, Mandegar, July 5, 2010

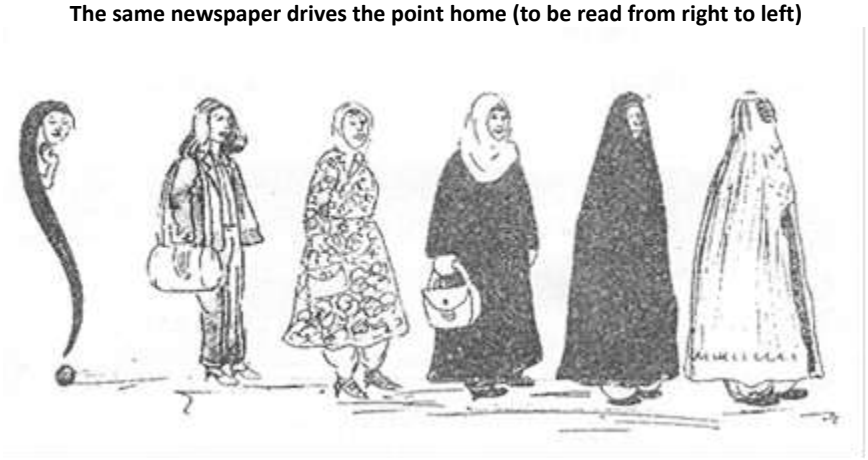


From right to left, Pedro before the elections, Pedro after the elections" (Kabul magazine, August 10, 2010)

Only a handful of newspapers, usually with limited circulation, identify themselves as satirical. This is the case for **Kal-e-Chortgooy** (Bald, Talking Nonsense), self-described as "sometimely, social, comical, critical, free and closed." One of the issues features an article about a (fictional) international seminar on TV series knowledge, including an imitation of official, boring speeches. The issue also lists the "biggest" in all fields: "the biggest profit: doing business with the government," "the biggest mistake: Ustad Atta" (it seems that this newspaper is close to General Dostom), "the biggest pride: a high-end mobile," etc.

"Towards democracy," says this cartoon published in Kal-e-Chortgooy

The same newspaper drives the point home (to be read from right to left)



3.2. Games for knowledge, games for money

***Zehni Azmoyono*, on RTA**

Raz-e-Taswir

***Sad Dar Sad*, on Ariana**

Zehni Azmoyono ("Mind's Test") on RTA includes not only questions but also stories, jokes and verses told by the various participants. As is often the case on RTA, the program mixes Dari and Pashto, with roughly every other question in each language. ***Raz-e-Taswir*** ("Secret of the Picture") and ***Sad Dar Sad*** ("100%") on Ariana are two interactive games, with viewers calling to answer questions about geography, history and literature, with a special focus on Afghan heritage. Both are among the most popular programs on Ariana, in terms of audience share.

Ki mikhohad dowlat mand shawad? **(Shamshad)**

***Del Na Del* (Yak TV)**

***Deal or No Deal* (Tolo)**

Programs such as ***Ki Mikhohad Dowlat Mand Shawad?*** ("Who Wants to Be a Millionaire?") on Shamshad, ***Del Na Del*** on Yak TV and ***Deal or No Deal*** on Tolo illustrate a quite different category, with the focus being put on monetary gains. In the latter two, the game consists of opening boxes and discovering the amounts of money that they contain, without any questions posed.

Box 15: Governmental control of the media

During the course of this study, the Afghan government showed its determination to put some limits on media activities. It shut down the television channel Emroz on July 27, 2010 for "fomenting religious differences and disrupting national unity" (some programs were considered insulting to the Shia-Hazara community). It also banned the television game shows Del Na Del and Deal or No Deal, respectively broadcast by Yak TV and Tolo, for practicing gambling (*qemar*), which is forbidden in Islam. Deal or No Deal was the second most popular program on Tolo before the ban.

The famous singing competition "**Afghan Star**," on Tolo, was not on air at the time of the survey, but was still cited by many interviewees, with varying opinions. Many enjoyed the show, but many criticized its superficiality, arguing that it does not encourage genuine Afghan culture and that it represents a disincentive with regard to education and effort in studies. Various students and professors, for instance, considered that "Afghanistan rather needs Pupil Star or Knowledge Star."

"Afghan Star" on Tolo

3.3. Cultural programs

With an extremely rich literary heritage, with various civilizations having left their historical mark, Afghanistan offers an infinite source of material for cultural programs. Their quality is generally excellent, but cultural programs are broadcast outside peak hours and therefore reach a rather small audience (which is not a problem specific to Afghanistan).

Kakh-e-Boland ("High Castle," a name extracted from Ferdowsi's Book of the Kings: "I built a high citadel of verses/preserved from wind and rain"), on Tolo, is a high-end program on literature (as well as theory, history, translation, academic study, etc.). The presenter explains prosody of classical and modern Persian poetry and introduces interviews with contemporary Afghan poets in eloquent Persian, avoiding, as far as possible, Arabic and English words. The only drawback is that the program is broadcast after 10:45pm.

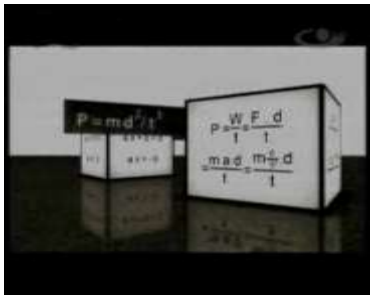
Sokhan wa Andisha ("Speech and Thought"), on RTA, broaches issues related to literature, culture and civilization. One episode, for example, discusses the preservation of the Dari and Pashto languages, compares Afghan Dari and Iranian Farsi and explores the linguistic origins of the vocabulary and grammar used in Afghanistan.

Jahan-e-Honar ("World of Art"), on Azadi, gives the floor to Afghan artists living either in Afghanistan or abroad, to present a sense of Afghan cultural identity and traditions. Reports may include discussions on the influence of Indian modes and rhythms on Afghan musical tradition and explorations of the various local musical styles inside Afghanistan (Logar, Badakhshan, etc.)

4. Education and society

4.1. Can the media educate people?

The qualitative research showed tremendous expectations on this topic: not only students, pupils and teachers but also a high proportion of other Afghans would like the media to play a more active role in this field. "Instead of Afghan Star, we should have Pupil Star, Student Star, Teacher Star," said an Engineering student at Balkh University. "This is no time for dancing and singing and entertaining! Have you seen the state of Afghanistan? It is time for studying hard and pulling through," insisted a school teacher from Haji Kot, close to Mazar-e-Sharif.



Hamsinfi

Alefba-e-Zindegi

Among the private channels, Tamaddon has clearly chosen to focus on education, with two major programs often mentioned by pupils, students and teachers interviewed: ***Hamsinfi*** ("Classmate," teaching the whole high-school program in sciences and used by pupils preparing for the university entrance examination) and ***Alefba-e-Zindegi*** ("Life's Alphabet," a literacy course).

In addition to these, Tamaddon offers two specialized programs: ***Khabarha-e-Elimiwa Farhangi*** ("Cultural and Scientific News," which presents in an eye-catching, well-illustrated way recent discoveries in various fields such as medicine, astrophysics, aeronautics, etc) and ***Danestaniha*** ("Pieces of Knowledge"). The latter is provided by Iran and broaches various issues, from technology to history, with an efficient mix of visual and verbal explanations.

ERTV, a channel managed by the Ministry of Education, has only limited coverage area and a negligible audience share. The few interviewees who knew about it showed a high level of interest in a fully educational governmental channel. However, so far, the programs have not been visually appealing. With more of a graphic style (by using all of television's possibilities, rather than simply filming a teacher) and a real coverage area, ERTV could rapidly become popular, especially among youth. It could play an important role in complementing schools, universities and remedial courses, and beyond this raise the informational and educational levels of its viewers.

Among radio stations, **Nawa** has chosen to specialize on educational content. It features, for instance, ***Talimwa Tarbie*** ("Pedagogy"), targeted at teachers, giving them advice on how to manage a class, how to adopt the right tone with pupils, how to address psychological problems, etc. The program mixes "model dialogues" between teacher and pupils and a roundtable gathering teachers and education specialists.

Two different programs of Yak TV were mentioned as useful with regard to general information and studies: "**Gadget**," which focuses on the latest and most impressive technological innovations (robots, new models of cars, tactile computers) and also presents tips to viewers on internet usage (interesting sites, how to alter pictures, how to manage your blog); and ***Kar o Bar*** ("Affairs"), which discusses recent developments in the Afghan and world economies.

4.2. Health programs

The vast majority of the population has access to radio, and a significant proportion has access to television, which means that the media can play an important role in preventive public health.

Dabestan Bu Ali ("At the School of Avicenna") is a health program broadcast by Tolo and highly appreciated by medical students and doctors interviewed during the case studies. It focuses not only on specific medical topics from a scientific point of view, but also on controversial public health issues (non-respect of hygienic norms regarding food products, delays in opening of the Jomhuriat Hospital, etc). The mix of interviews with specialists and investigative-style, camera-on-shoulder reporting gives a good tempo to the program, although it could be enhanced by the use of anatomical sketches to facilitate understanding of the phenomena discussed.

Darmalana was the second-most mentioned health program among interviewed medical students and professionals. Unlike *Dabestan Bu Ali*, it does not investigate public health issues, but rather focuses on specialized discussion of medical facts, with a specialist, generally a doctor, presenting the topic and answering questions asked over the phone by viewers. Unfortunately, the use of sketches is very limited in the program, which makes the presentation rather monotonous.

On radio, the ***Sihat*** ("Health"), broadcast by Azadi, is adapted to an audience without higher education. Medical words are explained in everyday vocabulary and the themes chosen reflect real priorities in rural public health, in their socioeconomic context. For instance, one episode broached the issue of sterility, in the form of a dialogue between a female doctor and listeners asking questions over the phone. The discussion covered contraceptives, birth spacing, sterility, blame often being put on the woman (e.g. for the sex of the newborn) as well as social perceptions of couples without children in the first year of marriage.

Box 16: Interactivity

Interactivity is widespread in nearly all broadcast outlets. Apart from song requests, which constitute the main programming on some radio stations, listeners or viewers are encouraged to call in during the course of various programs to give their opinions, share their experiences or ask questions. Talk shows, morning programs and thematic programs (on health, women, etc)

very often include interactivity, not only through phone calls but also through SMS texts and sometimes emails; generally, an expert (doctor, psychologist, etc) answers questions or testimonies. A few programs, such as *Nazar e Shoma* ("Your Opinion"), on Afghan TV, are purely interactive: a question (generally political) is displayed at the bottom of the screen and the presenter takes calls, answers and comments and contrasts various opinions.

Technology is a limiting factor: connections are very often cut, sound quality is poor, including Larsen effects (audio feedback), and usually only one call at a time is broadcast, which prevents real live debate. As a result, thematic programs including some interactivity flow better than purely interactive programs.

4.3. Women and social issues

Banu ("Lady"), on Tolo, is one of the best-known women's programs, quite often quoted during the qualitative research. The key to this popularity is the program's durability and its regular broadcast (every afternoon). The female presenter and the male psychologist who answer viewers' questions have become familiar faces in the media landscape. In an unassuming and progressive way, the program speaks about engagement, forced and arranged marriage, family pressure, girls' education, sterility and female suicide.

Zan Wa Zindagi ("Woman and Life"), on Azadi, is a program based on current Afghan news that tries to underline the role of women and the difficulties involved in achieving equality. It discusses various issues (the Peace *Jirga*, the parliamentary elections, etc), presents the activities of women NGOs, reports on seminars discussing women's rights in Afghanistan or according to Islam, etc.

Koranai Zhuand, on RTA, is an interactive program debating Afghan social issues, such as exaggerated expenses for wedding ceremonies, arranged marriages, the influence of wealth levels on choice of a spouse, etc. It is built on a series of interviews.

Khane Now, Zindegi Now ("New Home, New Life"), on the BBC, is a program consisting mainly of short dramas in informal Dari or Pashto, targeting a rural audience and staging Afghan daily issues (conflicts related to land/property, bombings, women's domestic work, local commanders possessing weapons, etc.) It is very popular in rural areas.

4.4. Youth programs

Dunyae-e-Jawanan ("World of Youth"), on RTA, reports on various issues such as graduation ceremonies, vocational training centers, private universities, etc. It also collects opinions of young people on themes such as unemployment, cost of studies, peace in Afghanistan, etc.

A few channels have proved quite innovative in letting children present whole programs. ***Akobako***, on Saba, features an excellent teenage presenter, able to give a snapshot on Pythagoras' life and works and to moderate a debate on children's rights. The teenagers poke fun at politicians and ministers and end up suggesting that they should be given deadlines, like they are at school for their homework.

4.5. Life and development in the provinces

Zangari Report, broadcast during prime time on RTA, and the second most popular program on the channel in terms of audience share, offers reports on reconstruction in various provinces, through interviews with local inhabitants and officials. It underlines both the efforts of the Afghan government and the financial contributions of the international community on various projects such as roads, schools, hospitals, etc.

Rostaye Man, Khaneye Man ("My Village, My Home"), on Azadi, presents in each episode a particular village of Afghanistan. The sound techniques of radio reporting are well mastered, which allows for a pleasant mix of natural sounds, local music, villagers' voices, echoes from a wedding party, etc. The presenter informs listeners about the geography, landscape and climate of the chosen place, going into some detail about the plants, animals, local crops and cultural traditions. The general tone is positive and always tries to give an encouraging image of Afghanistan.

5. A handful of Afghan websites offer interesting, up-to-date content

There are very few significant, regularly updated, informative Afghan websites. Those of pertinence are presented here.

Benawa (www.benawa.com), self-described as an "online Pashto world," is an important informative and cultural website, entirely in Pashto, created in 2004. It claims 1 million visitors per month. The content, ranging from domestic and international news to more cultural or informative articles, is provided by a network of volunteers scattered throughout Afghanistan, Pakistan, Iran and the West. The general political tone is close to the spirit of cross-border Pashto nationalism. The front page shown here, posted in August 2010, denounces Iranian pressures leading to the closure of Emroz TV: "Where is our media freedom? Condemnation of Emroz TV: Save the Afghan media from Iranian hegemony."

Payam-e-Aftab (Sun's Message, www.payam-aftab.com) is a mostly Persian website (but also includes sections in Pashto and English) founded by Engineer Seyed Mohammad Baqer Mesbahzadeh. It features national and international news, in addition to short essays on religion, politics, ethics and culture. The site displays an interest in moderate Islamist movements in the Arabic world (Muslim Brotherhood, Turkish AKP, etc). It claims around 35,000 visitors per month.

Sada-e-Afghan (Afghan Voice) is another information and news website, mostly in Persian, managed by Sayied Issa Husseini Mazari, with representatives in Afghanistan and Iran.

As can be seen on its homepage here, **Kabul Press** (www.kabulpress.org) stands out with its punchy, strongly opinionated style. The site says that it has been censored in Afghanistan (after several scandals, among them announcing Zahir Shah's death several weeks in advance) and proposes technical solutions to get around this obstacle (the editor lived for several years in Iran and learnt there from fellow bloggers how to get around internet censorship)[38]. The general tone is extremely critical of the Afghan government, which is considered pro-Pashtun, secretly linked with the Taliban, profiting from narcotics money and unwilling to be fair or balanced towards the Hazara minority (notably regarding attacks on Hazara communities by Kuchi nomads, who are also Pashtun).

Daneshnameh's home page, with sections on Islamic, Human, Experimental and Mathematical Sciences, Health and Arts & Entertainment

The Afghan blog "Kankar"

[38] As of the time of writing this report, the site seems to be accessible from within Afghanistan.

Wikipedia Farsi (fa.wikipedia.org) has around 40,000 articles, according to Wikipedia's statistics. It is the main site used by students for academic research. Some also mentioned Daneshnameh, a website edited by the Network of Iranian Schools and teachers, offering pedagogical content on high-school programs, and Kankar, an Afghan blog offering resources to prepare for the university entrance examination.

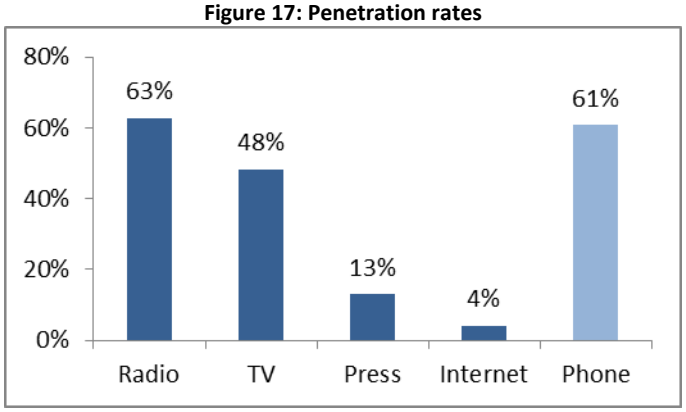
Section II - AUDIENCE AND PERCEPTIONS

A. Equipment, usage, habits and behaviors

1. Equipment and usage

Media consumption has evolved considerably since 2005: radio consumption is decreasing significantly whereas TV is growing slowly. The dominant media in the country is still the radio: as of June 2010, 63% of Afghans listened to the radio on a more or less regular basis; 48% watched TV, slightly more than the number of equipped household (some watch outside their home). Print media is read by only a minority (13%) of Afghans, which is significantly lower than 2005 figures. Mobile phone usage in the meantime has reached a major portion of Afghan households, with a 61% penetration rate.

Figure 17: Penetration rates



1.1. National figures

A total of 84% of the population reported using radio, television, the press or the internet, at least from time to time. The remaining 16% non-media users can be split in two groups:

- The poorest of households, earning less than $10 per month per person, who mentioned cost as the main reason for not having a radio set;
- The comparatively well-off, earning more than $1000 per month (26% non-users among them), who claimed are that they were not interested, or that they had no time to use the media.

We see below that drivers for equipment ownership and usage vary for different media types: for the most part, usage (along with interest) drives ownership of radio sets, whereas ownership drives usage of TV; obviously, coverage is a driver for both.

a. Radio

Ownership

Radio ownership is still ahead of TV ownership by far, with a penetration rate of 68%. However, it has declined significantly from its 2005 level of 83%. Although radio ownership is slightly lower in urban areas than in peri-urban or rural ones, the discriminant variable seems to be TV ownership. There is an already significant inverse correlation between radio and TV ownership: 58% of radio owners have no TV set and 58% of TV owners have no radio set. This is a first hint that, in some areas, TV has started replacing the radio. This will be confirmed in the next sections.

Usage

Reasons proposed as explaining non-listenership differ slightly between social groups: lack of time is a more important reason for men than for women, as men more often have to be outside the household at work than women do. Youth show a much stronger preference for TV. Language and cultural issues – although minor in general terms – are much less often a barrier for this group than for elders.

The main reasons for not listening to the radio are split between not having time, having a preference for TV and having no interest (about a quarter of the sample). These three reasons explain why, contrary to the situation with television sets, some radio set owners do not actually listen to the radio.

Price of radio equipment was advanced by 25% of non-radio users as a hindering factor – although this reason was often coupled with another, as multiple answers were allowed for this question. Poor coverage or quality of reception was not a major issue across the whole population (4%), but was still mentioned three times more frequently by rural inhabitants than by urban ones.

Figure 18: Reasons not to listen to the radio

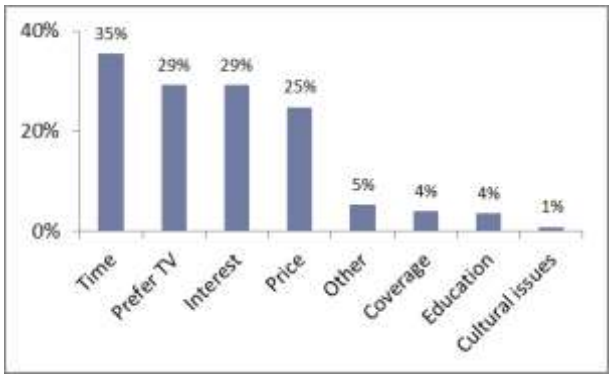
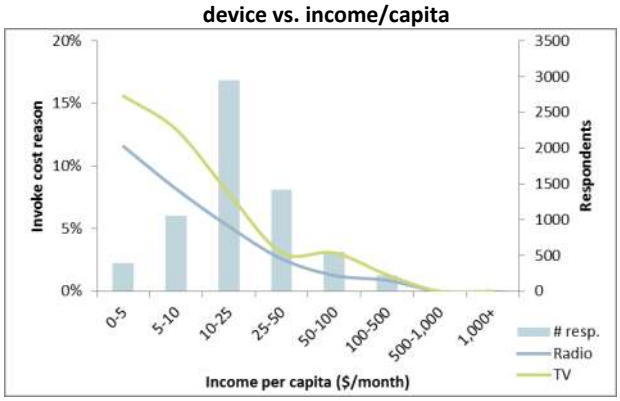


Figure 19: Cost as the main reason not to own a media device vs. income/capita

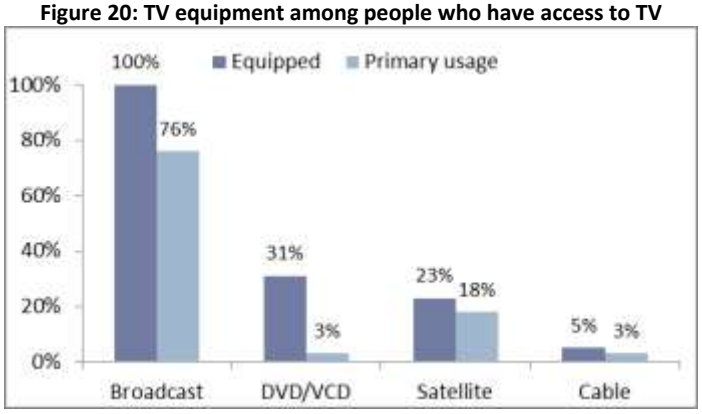


b. Television

Television ownership, contrary to radio set ownership, has been growing slowly over time. In 2010, almost half (47%) of Afghans have a TV set at home. Household expenditures also show a higher amount dedicated to television purchases: in 2005, a color TV set cost $70 on average; five years later, the average TV-equipped household spent $113 on its last set (less than half the average household income ,of $252). A total of 82% of the population has had their current television set for three years or longer. A third of TV owners have two sets or more, and almost a third have a DVD player.

Less than a quarter of the population has satellite TV equipment. Usage patterns suggest that the majority of satellite TV users do not use aerial TV much, which suggests that they do not have access to many over-the-air channels. Cable TV, relying on fixed infrastructure, is essentially an urban phenomenon, restricted to certain areas of the main cities (with rare exceptions): this explains the low penetration rate (5%).

Figure 20: TV equipment among people who have access to TV



Usage

Contrary to the situation with radio consumption, cost is a major factor limiting TV viewership: 61% of those who do not watch reported that the cost of TV equipment was the main factor behind their not watching. However, the price of a set alone cannot explain low television ownership: in Badghis, the average price for a TV set is higher than the monthly income and usage is low; the cost relative to income is similar in Badakhshan, and yet this province shows one of the highest TV penetration rates. As noted in earlier reports on media consumption, usage of a TV set is dependent on an external power source, and there is a strong correlation between lack of access to electricity and a low TV ownership/usage rate.

Figure 21: Reasons not to watch TV

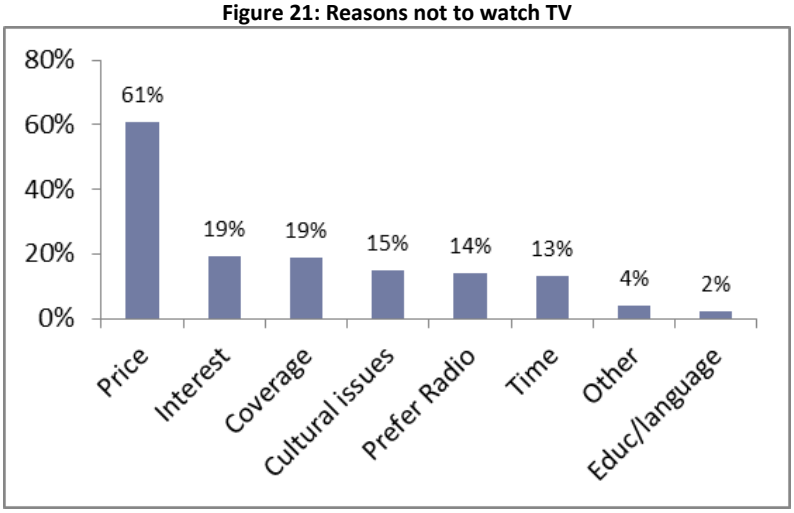


Figure 22: Relative price for a TV set compared with penetration rate, by province

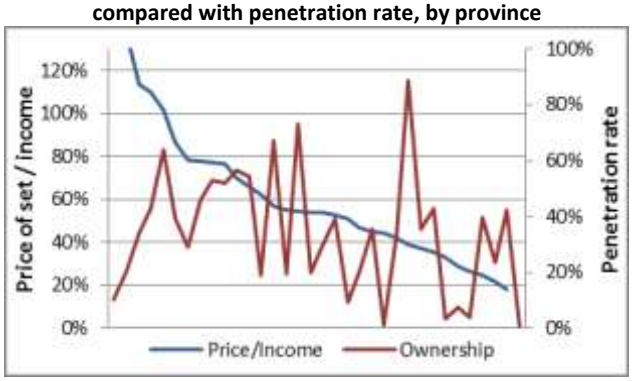
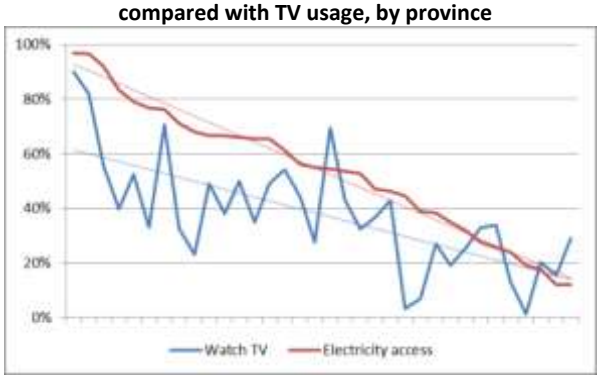


Figure 23: Electricity access compared with TV usage, by province



Although radio and mobile ownership do not depend significantly on location type, more TV owners are observed in urban areas (55%) in comparison with rural areas (39%): a household is more likely to have a TV set where it has access to grid electricity, which is mostly found in the cities and towns.

When it comes to poor coverage or quality of reception, this is much more an issue for would-be TV viewers than for would-be radio listeners: many rural areas do not have access to any over-the-air channels and have to rely on satellite TV signals.

Cultural issues

Cultural issues – related to the notion that TV is *haram*, or against religious beliefs and practices – are much less mentioned compared with five years ago as a valid reason for not watching television. It might be argued that areas which have (at least some) access to television slowly warm up to accepting and watching it, if not outright: when there is electricity and coverage, people watch TV, even in areas that can be described as quite conservative.

As an example, people living in the rather conservative districts of Khogyani (Nangarhar) or in Arghandab (Kandahar), where the equipment rate is well under the national average (about 30%),were found to have high usage of television, and cultural issues were not mentioned more than the national average.

Conversely, areas which have the lowest television penetration rates are among those where the cultural issue is the most prevalent: no television usage was reported in Garmser district (Helmand), and nearly all interviewees mentioned cultural objections to watching television, along with equipment price.

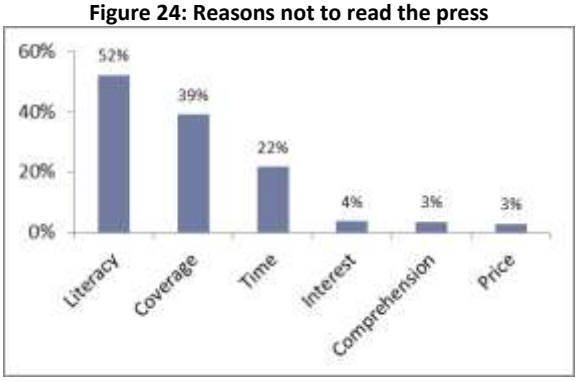
Cultural issues therefore rarely serve as a reason to refuse to watch television altogether. However, all content that is broadcast on television is not blindly accepted by all. A broader knowledge and usage of television among the Afghan population have sparked a more general discussion about the cultural relevance and acceptance of this media, its purpose and its effectiveness. This is explained to a larger extent in the section on perceptions below.

c. Press

Only 13% of Afghans read the press, and those who do read are apparently doing so less and less. Illiteracy is obviously the main factor hindering print media consumption: total illiteracy was reported by 42% of respondents and 60% of women respondents. Many of those who are “literate” have just barely functional literacy, allowing them to read a sentence aloud but not to understand a paragraph. Access to

the press is far less problematic for the younger generation than for older adults: young people read the press twice as often, although illiteracy is still the second most important factor preventing access to the press among youth.

Figure 24: Reasons not to read the press



Poor distribution was another commonly cited factor hindering press consumption: 39% mentioned that they could not get access to the press on a regular basis, which prevented them from reading magazines and newspapers. Price was an issue for only 3% of non-press readers: a newspaper or magazine issue is relatively inexpensive, and a few of them are distributed for free (see below, on preferences).

Out of 6,648 interviewees, only 12 (0.18%) admitted that someone read the newspapers to them, whereas 71% of press readers claimed that they read for others who were not able to read themselves: it is possible that admitting that someone reads the press to you is difficult, but it is more probable that adults are reading the press to children, who were not interviewed in this sample.

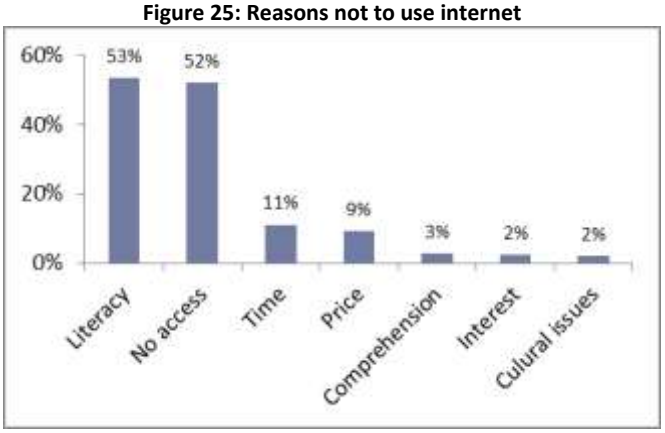
d. Internet

The percentage of households connected to the internet is still quite low, at 1.5%, although it has grown slowly since 2005. That said, 8% of the surveyed population declared there were internet access points in their vicinity. In most cases, a domestic internet connection is correlated with presence of a fixed phone connection (either landline or CDMA connection), which is common in only some cities. Internet usage has not increased by much in the past five years, reaching barely 4%[39].

Inadequate literacy and, furthermore, limited computer literacy are obviously the main factors hindering internet usage. Despite the establishment of internet cafés in every major city and, to a limited extent, the setup of District Communication Network access points, serving as internet cafés and Public Call Office (PCOs) in district centers, lack of access was still a quite important issue for the majority of respondents.

[39]The Afghanistan National Development Strategy (ANDS) baseline figure for 2007 mentioned 500,000 internet users in the country (less than 2% of the total population) and the International Telecommunication Union (ITU) gives an estimate of 1million users for June 2010 – close to our figure.

Figure 25: Reasons not to use internet



Although price does not figure among the main factors preventing usage, it becomes an issue for people connecting at internet cafés with a low bandwidth/bad quality connection: downloading a single email can take several minutes; opening a webpage can seem to take ages. In such situations, otherwise reasonable connection fees add up rapidly and price does become an issue.

Internet is used by predominantly youth and people who have access through their job. Qualitative research shows that, among youth, the internet is seen more as something for boys. In several groups of students interviewed, young men connected two to three times a week; young women in the same group did not access the internet at all, as it is viewed as inappropriate for girls to attend internet cafés. In Herat city, a great many youths interviewed had internet access at home: internet is available through DSL in that city, and many of them had developed the habit of using it while exiled in Iran.

For other groups, the word "internet" was generally known and perceived positively, but knowledge of it did not extend much beyond "it's a means to connect and communicate with the rest of the world."

e. Mobile phone

Not really media devices, but capable of being used as such, mobile phones had a very high penetration rate in our sample: 61% reported that their household had a phone, and in almost all cases this meant access to a mobile phone (only 1% of the surveyed population had a landline installed).

1.2. Regional variations

The trend observed nationally was confirmed at the provincial level: generally, provinces which have the highest radio equipment ownership rates also have the lowest TV ownership rates (Wardak, Paktya, Kunar, Samangan, Helmand). Moreover, the lowest radio penetration rates were observed in those provinces that have the highest TV ownership rates (Badakhshan, Herat).

Table 4: Ownership rate

	High	Low
Radio	Khost, Wardak, Paktia, Kunar, Samangan, Helmand, Kandahar, Paktika (>90%)	Badakhshan, Herat (<30%)
TV	Kabul, Badakhshan, Faryab, Herat (>60%)	Wardak, Laghman, Kunar, Samangan, Badghis, Farah, Paktya, Helmand, Zabul, Uruzgan (<20%)
Mobile	Wardak, Kandahar, Paktika (>90%)	Jawzjan, Badghis, Nuristan, Sari Pul, Daykundi (<20%)

Provinces with higher radio set ownership rates are almost entirely Pashto-speaking areas: Khost, Uruzgan, Zabul, Helmand, Paktika, Wardak, Paktya, Kunar and Nangarhar all have radio penetration rates above 90%.

Satellite TV is used mostly in relatively remote areas with limited to no access to over-the-air channels: in Faryab, Samangan, Helmand and Badghis, 40-50% of the TV user population accesses satellite TV; in Panjshir, Sari Pul, Baghlan, Daykundi and Farah it is 70-84%; and the rate rises to 95% in Bamyan.

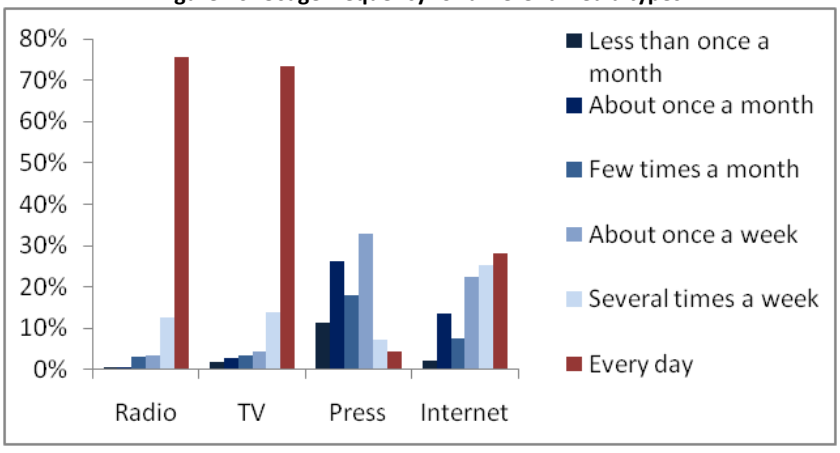
Internet access is much easier in some provinces. For example, in Kabul province, one third of respondents claimed that internet access was available within their neighborhood; 8% of Baghlan households are equipped with internet access (compared with 5% in Kabul); but Badakhshan, Takhar, Badghis, Farah, Uruzgan, Bamyan and Paktya are virtually internet free.

2. Consumption habits and behaviors

2.1. Broadcast media

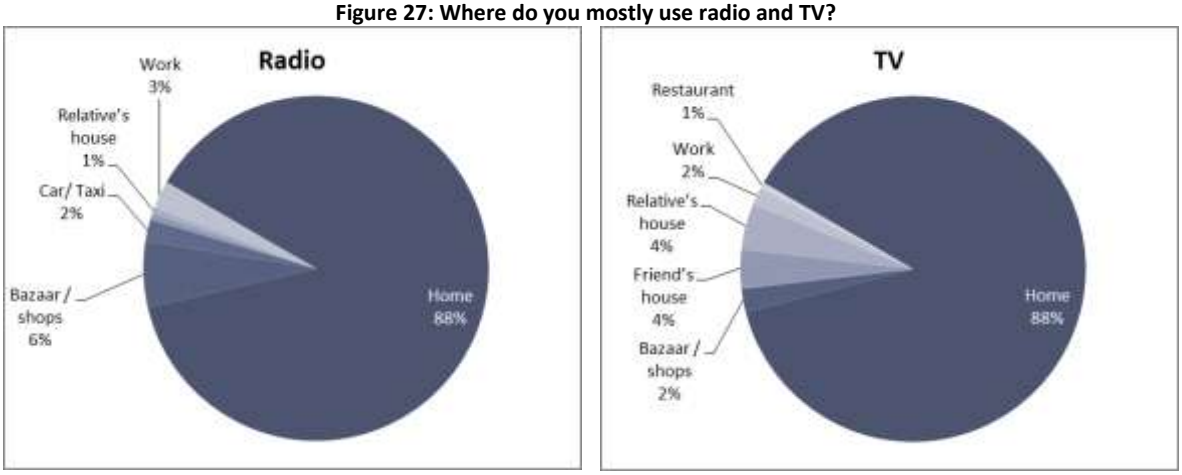
Radio and television are used on a very regular basis: the majority of their respective users listen to the radio or watch television every day.

Figure 26: Usage frequency for different media types



Broadcast media are essentially used at home (87%), and this has not changed much since 2005. Women watch TV and listen to the radio almost exclusively at home (96% and 97%, respectively).

Figure 27: Where do you mostly use radio and TV?

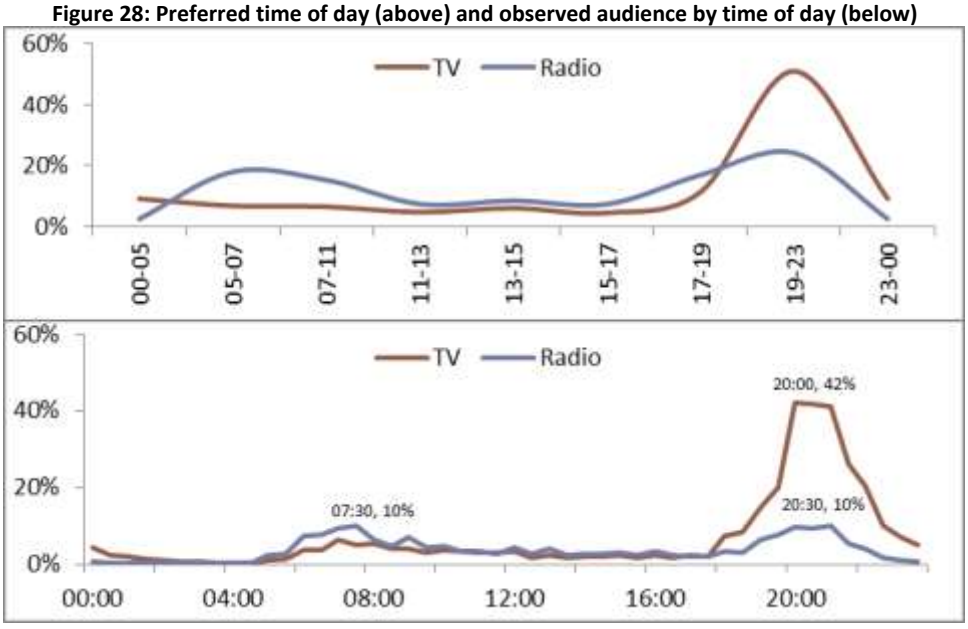


Radio is sometimes listened to at the bazaar and in shops (6%), and television may be watched at friends' and relatives' houses (both 4%), essentially for people who do not own a set. This is especially the case among rural inhabitants.

a. Preferred times of the day

When asked what their *preferred* time of the day was for listening to the radio and watching television, the majority of Afghans mentioned evening hours (7-11pm).This "prime time" captures both radio and TV. However, radio users are to an extent more inclined to listen throughout the day – until 5pm.

Figure 28: Preferred time of day (above) and observed audience by time of day (below)



Results from actual audience observations show similar results, with more detail. The peak time for television is between 7pm and 10pm, with the highest level of viewership between 8pm and 9pm, when 42% of TV users are in front of their set. During the rest of the day, nearly no TV usage was recorded (the "peak" at 7am represents only 6% of TV users). As shown above, this is explained by times of access to electricity and, to some extent, by family members' schedules. In many places in the country, electricity

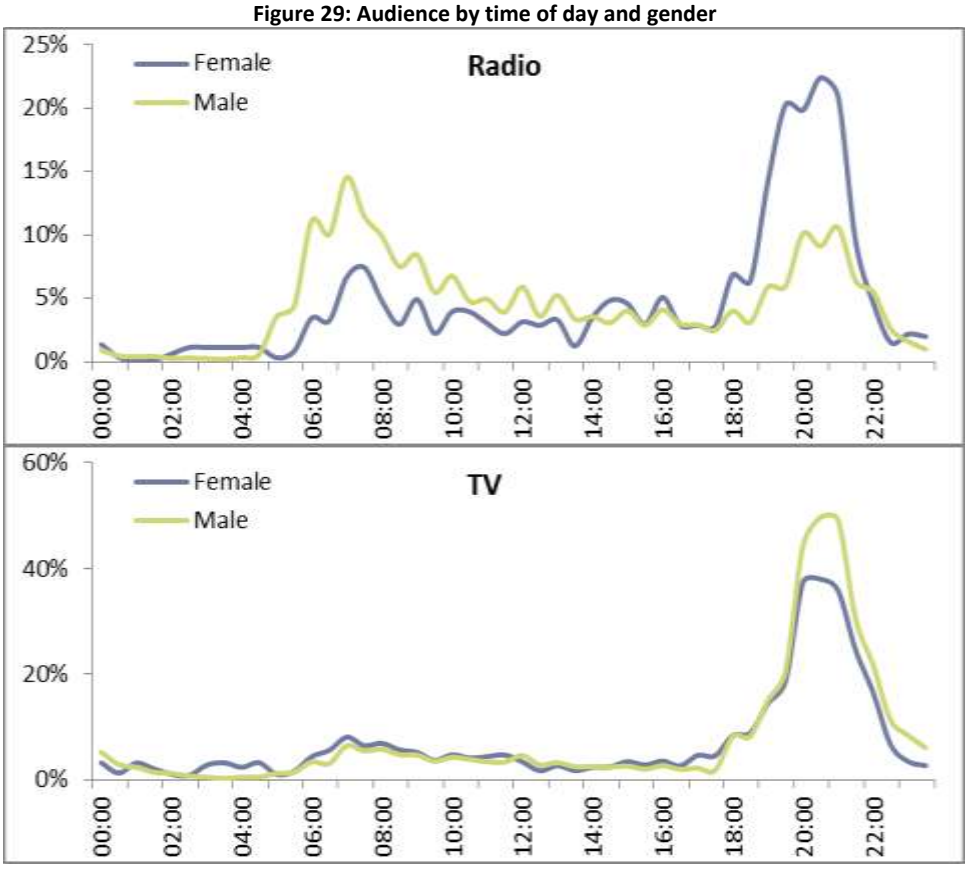
is provided only at night (at the time of the survey, sunset was around 7.10pm and twilight around 7.35pm).

Radio usage shows two equivalent audience peaks: the first in the morning, between 6am and 9am, with a peak at 7am, (10% of radio users); and a second at 8-9pm (10%). Usage during these two periods is stable and not negligible, at between 4% and 6% of users. An interesting finding is that, at any given time, less than 10% of self-declared radio users are actually listening to the radio. However, the radio user base is generally very high, with 63% self-declared radio users in the country. This translates into a total population listening to the radio at 7am of about 1.2 million.

Women and men show relatively similar audience patterns. Values are only indicative, owing to the low representation of rural female interviewees in the sample (see methodology). This discrepancy may account for relatively surprising results on radio usage (previous research showed a peak of radio audience for women in the afternoon as well).

Evenings are a family time, for both radio and TV consumption, with a slightly higher audience for men than for women: in some families, the only TV set is located in the guest-receiving room, to which women may not have access if male guests from outside the close family are invited.

Figure 29: Audience by time of day and gender



b. Duration

Whereas frequency of use is similar for radio and television, more time is spent watching television among viewers than listening to the radio among listeners. Average consumption duration can be

calculated in two different ways: counting days where people do not watch television or listen to the radio, thus getting an average for a longer period; or focusing on when people do watch or listen.

- Using the first method, TV viewers reported watching television for on average 1 hour and 6 minutes per day over the period July 10-18. During the same period, radio listeners listened to the radio for 49 minutes per day.
- Using the second method, people who watch TV on a particular day were found to watch it for on average 1 hour and 46 minutes; the average duration for radio listeners was 1 hour 34 minutes. See the two charts below for variations in the period.

Figure 30: Average duration, TV

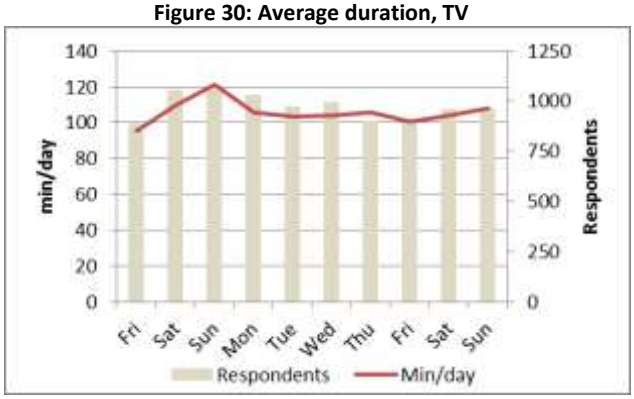
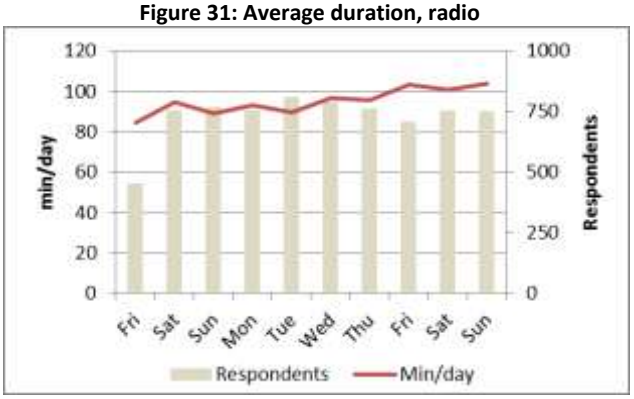


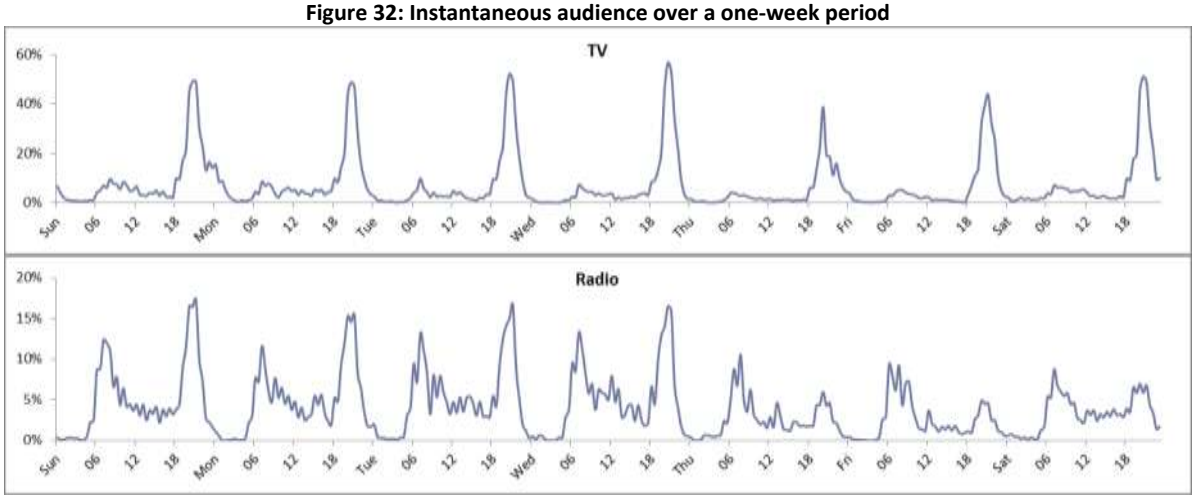
Figure 31: Average duration, radio



c. Across the week

Audience peaks for radio or television consumption were observed each day, with slight variations according to the day of the week. In our sample, the peak time for television was every day between 8pm and 9.30pm, with 50-60% of TV users actually watching, with slightly lower audiences for Thursday and Friday evenings.

Figure 32: Instantaneous audience over a one-week period



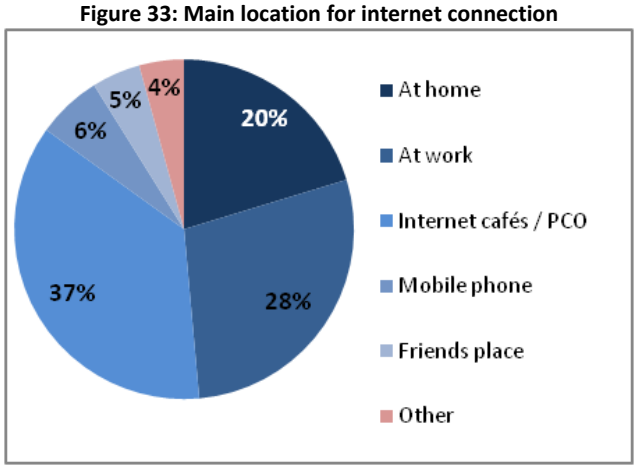
Of course, audiences vary greatly depending on the media outlet and the program. This is shown in the following section.

2.2. Internet

The majority of internet users connect several times a week or more (72%). The population of internet users is split into two main categories: youth, usually university students, who connect several times a week, usually from internet cafés and more rarely at home; and adults who work in organizations connected to the internet, who thus connect at work. At the junction of these two groups are young private school students, working during the day and studying in the evenings: these are connected to the internet almost 24 hours a day, often also through their mobile phones. They are the most active internet users.

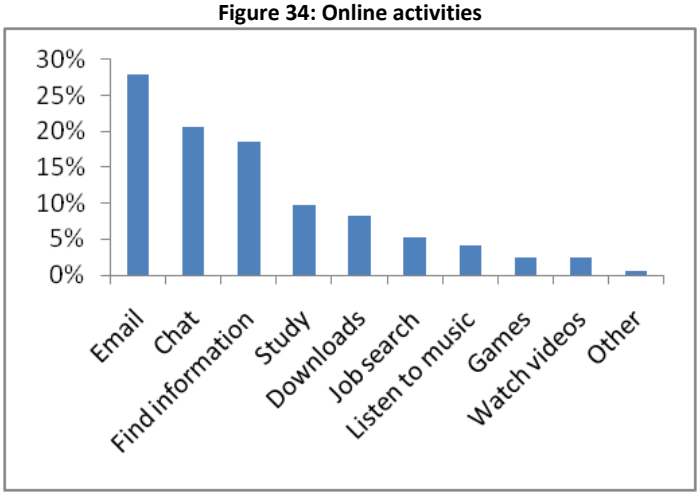
Generally speaking, only 20% of internet users connect at home. Most connect at internet cafés (37%) or at their workplace (28%). Connecting through mobiles is still rare, but the proportion is not insignificant (6%). As for other media, women connect more often at home, although some internet cafés offer them the needed privacy (e.g. with areas apart from those for men).

Figure 33: Main location for internet connection



Among the variety of online activities, emailing is by far the most popular (used for professional as well as personal reasons), followed by chatting and finding information. University students typically study or find information from the internet: professors often mention websites and encourage students to self-study on the internet, because of the poor quality of textbooks. One student mentioned that his economics textbook gave the value for 1981 as the gross domestic product (GDP) figure for Afghanistan.

Figure 34: Online activities



The average young user spends a great deal of time chatting with friends or family overseas, or meeting friends or strangers on chat. More sophisticated usage is exemplified by Herat youth (see Box 17).

2.3. Print media

Print media are less often used: the majority of respondents read a newspaper or a magazine once a week or less.

Given the poor level of distribution across the country, it is not surprising that one copy of a newspaper may be shared by as many as 45 people.

2.4. Mobile phones

Data gathered show that mobile phones are seldom used as a content exchange platform: less than 12% of mobile owners (or 7% of Afghans) have ever viewed or received video on their mobile. Ringtone exchange is slightly more popular, especially within the female population.

Box 17: Community case study insight – educated youth and the internet

Several groups of youth were interviewed for community case studies, in Kabul, Herat and Mazar-e-Sharif. Although the internet usage of youth in Afghanistan is much more sophisticated than for other groups in the country, it generally revolves around email, chatting services, some social networking and the acquisition of news and information from specific sites.

Chatting is very popular among youth, with the most popular services being Yahoo Messenger, Google Talk, Skype, Facebook chat and MSN Messenger. Many youth log on simultaneously to a few, if not all, of these. Most youth use these services to keep in touch with friends, but sometimes meet new people in other parts of the world. Many youth find that they lose their inhibitions online and are able to relate to others more easily. For example, some opposite gender classmates who would never speak to each other in person have very deep connections and conversations online.

Social networking has started to become popular, almost exclusively through Facebook, and has been going for a little over a year now. Although Facebook is still used predominantly for entertainment purposes (posting pictures, keeping connected), there seems to be a new trend developing of youths utilizing it as a means of self-expression and to share opinions on the

world. This is still in its early stages, but it is definitely on an upward trend. It was observed that Facebook also seems to have an effect of causing youth to shed their inhibitions and express themselves in a way that they would not feel comfortable doing offline. One Computer Science major at Herat University said that around 80% of his classmates were using Facebook.

Wikipedia is also very popular, and most youth see it as an information source and often use it as a means of supplementing what they are taught at university. This has been facilitated by the Farsi version of the site: thanks to Iranian students, this version of the site is quite well developed.

Other internet uses include reading the news, with the main sites being the BBC and www.pajwak.com (see Box 7, p. 47). However, this use of the internet is common only among those who have daily access to the net, and is restricted generally to those who are working and have internet at the office. Many youth also reported using the internet to keep abreast of sport news and to learn about their favorite sporting personalities.

It is interesting to note that, although uncommon among youth in Kabul, many youth in Herat are using the internet to keep abreast of the latest trends in terms of fashion and hairstyles. This is done in a number of ways, including through blogs, fashion sites and pictures of celebrities. For most Heratis, this information comes from Iranian sites about Iranian celebrities, and also some American ones.

B. Preferences and audience

This section is based on two sets of data: the general survey of 6,648 respondents interviewed in the field; and the audience phone survey including 12,944 interviews of 1,705individual respondents (each respondent answered an interview per day for 8.8 days on average). A third of audience survey interviewees were also interviewed in the general survey. General preference data are extracted from the first set, whereas actual audience data come from the second set.

The following indicators are used in audience analysis:

- **Total audience:** the amount of individuals in our sample (weighted) listening to/watching a media type (radio, television), a media outlet or a show for a given period of time. The actual audience number taken is irrelevant, but is useful to order and compare outlets and programs.
- **Cumulative audience share:** the percentage of people (weighted) in our sample having declared listening to/watching a media outlet or a show at any given moment, for any duration of time and any number of times, for an extended period of time (typically, one particular day, one weekday or one week), relative to the total number of people having declared listening to/watching any outlet or show during the same period.
- **Instantaneous audience share:** the percentage of people (weighted) in our sample having declared listening to/watching for any duration of time within a short period of time (most commonly in this report: half an hour), relative to the total number of people having declared listening to/watching any outlet or show during the same period.
- **Audience share:** the audience percentage of a specific outlet, calculated by means of the ratio of the average listening/viewing time of interviewees for a specific outlet to the average listening/viewing time of individuals for the whole media type.

1. Preferred media

1.1. Television

a. National level

When asked what television station they knew[40], the majority of interviewees mentioned the largest networks in the country: Tolo TV, broadcast in the main cities; Ariana, broadcast in 33 provinces; and the government RTA network. As can be seen in Figure 35, people systematically mentioned the channels they watched the most, and the order of preference closely matched the order in which stations were remembered.

[40] *"What are the television channels you know?"* (5 choices); *"What are your three preferred channels?"*(3 choices). Unprompted answers, asked only to people who declared watching television (3,169 respondents).

Figure 35: Most known and preferred television channels

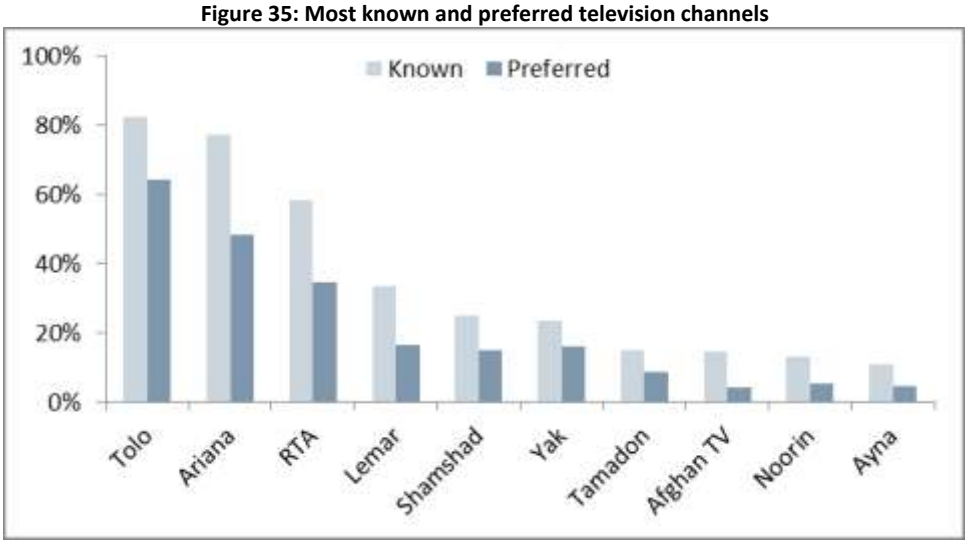


Figure 36 shows cumulative audience on an average day averaged over the whole period, as observed in the audience survey[41]. Figures for individual channels closely match those of self-expressed preferred channels.

Figure 36: Cumulative audience, TV

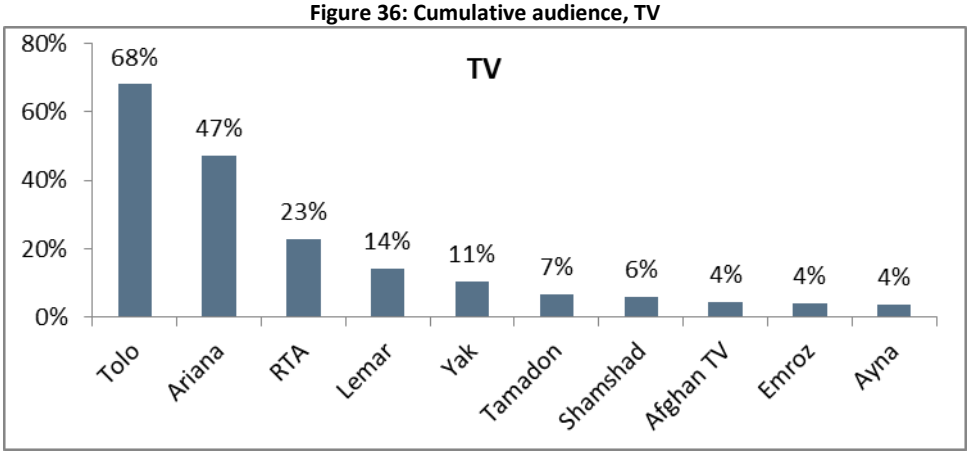
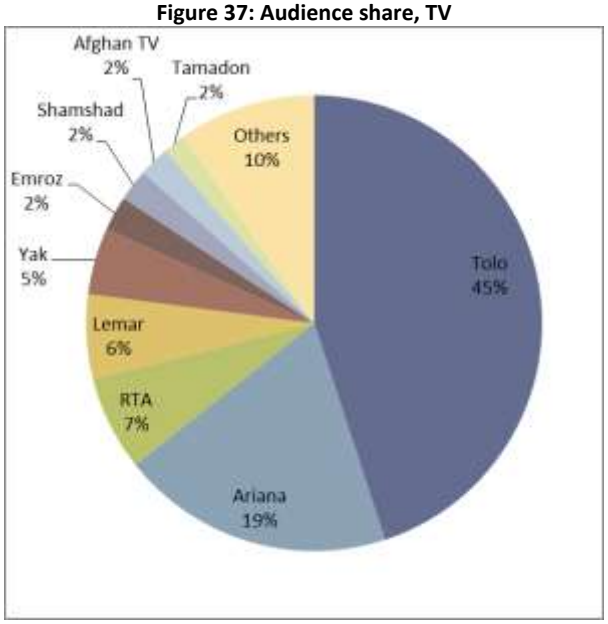


Figure 37 shows audience shares for the main television networks in the country, as observed during the audience research. Following closely the knowledge and preferences order, the audience is essentially concentrated among nine actors with more than a 1% audience share (among the 45 channels watched during the period – both national and international accessed through satellite). Of these nine, the first four share 76% of the national audience.

[41] *"What channel did you watch yesterday; at what time; for how long?"* Answers unprompted, through phone interviews (see methodology section on the audience survey).

Figure 37: Audience share, TV

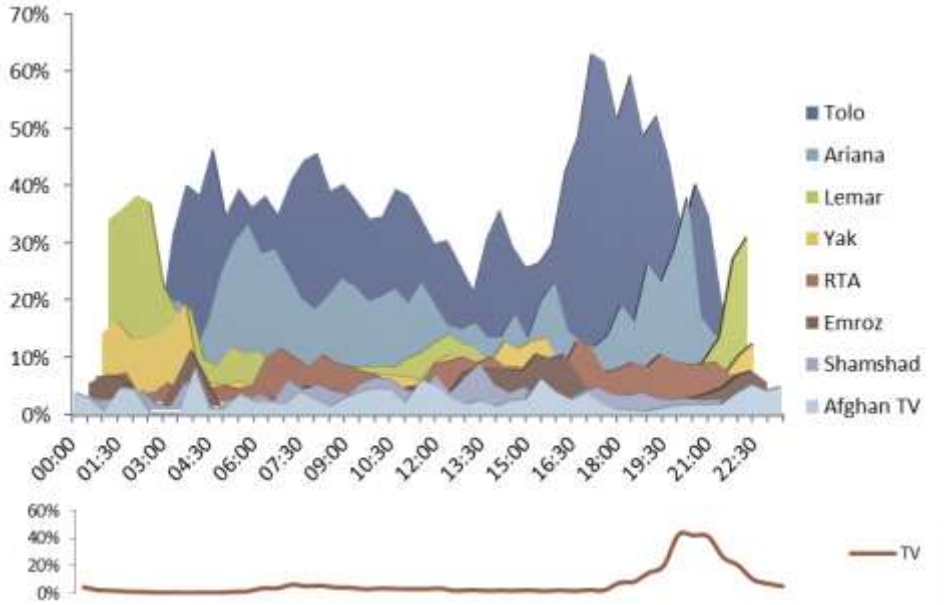


With 45% of the audience share, Tolo TV comes in a clear first position, well ahead of Ariana TV and the public RTA network, despite its smaller coverage area. In fact, Tolo is broadcast in and around the main cities, covering a large portion of the population, and the interest of broadcasting to all provinces is marginal when compared with the predominant usage of Tolo in the cities it covers. If the audience of Lemar, Tolo's Pashto-speaking sister station, is added to Tolo's, the two main channels of Moby Group possess half the national audience share.

Minor channels, Emroz, Shamshad, Afghan TV and Tamaddon share 8% of the audience. Most surprising is the position of Yak TV (1TV), in fifth position among the most watched channels, since it started broadcasting only in February 2010. This certainly owes in part to aggressive regional outreach and catchy programming.

The audience share of each station varies slightly during the day. Shown below are instantaneous audience shares for the six main stations (the line at the bottom represents the portion of TV users in the sample who were actually watching TV at that time).

Figure 38: Instantaneous audience share, national average, TV



As expected, Tolo dominates the media landscape for most of the day, with a peak at 6pm, when it takes nearly 70% of the audience share, translating into nearly half a million users[42]. The actual peak in terms of viewers is at 8.30pm, when 42% watch TV and Tolo has an audience share of 55%, translating into more than 2 million users.

The main notable exception is Ariana's better audience share (38% vs. 31%) between 9.30pm and 10.00pm, still a time at which about 26% of all TV users are watching. At this time, about 1 million users watch this channel, when the channel broadcasts *Dulhan* (a popular Indian serial) and the Afghan version of Who Wants To Be a Millionaire?

b. Regional variations

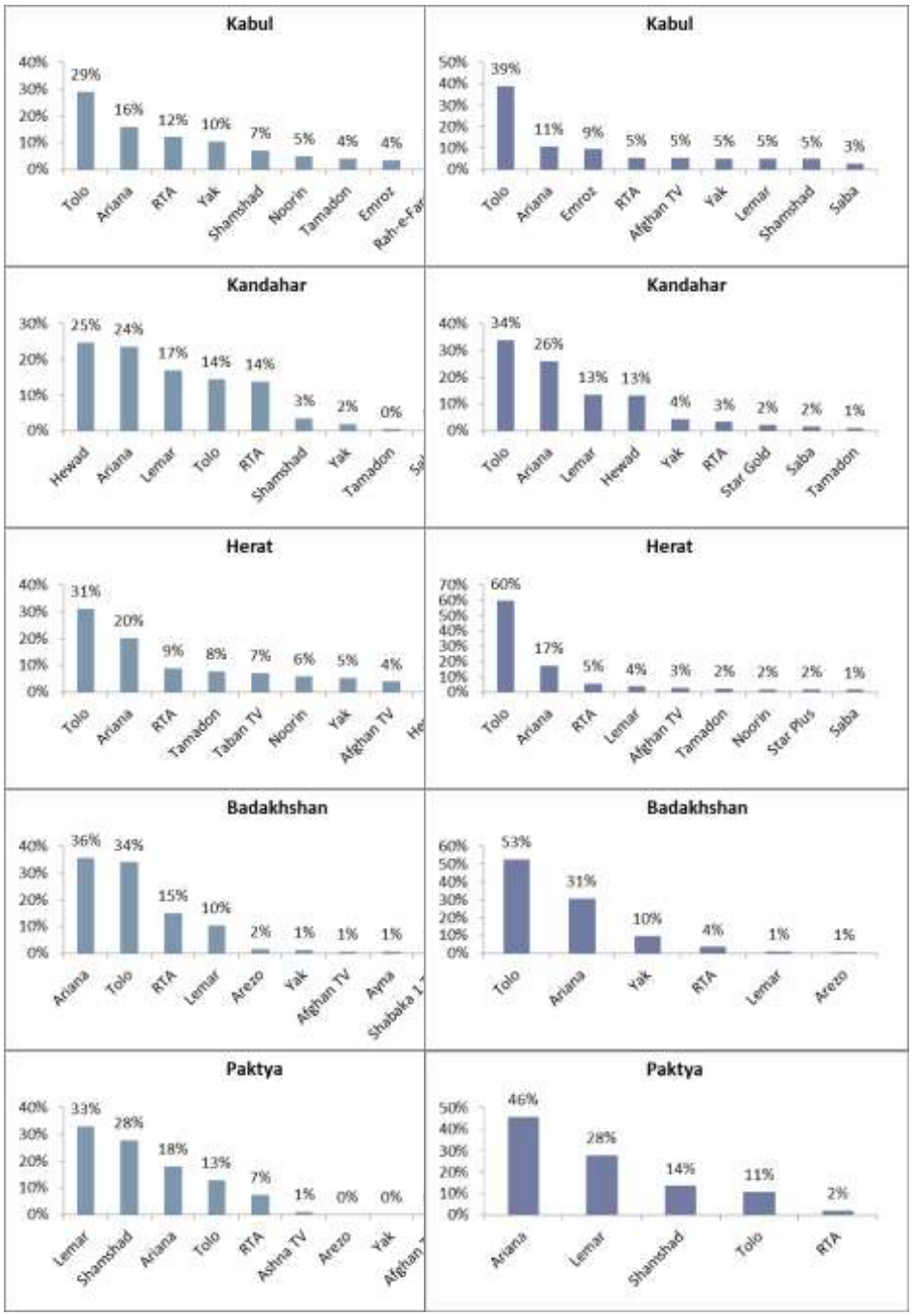
At the regional and provincial levels, the chaotic coverage situation and fragmented media landscape starts showing its impact, and particular sensitivities emerge as well.

Tolo ranks first in 23 provinces of the 33 for which we have audience data (excluding Nuristan), and second in four provinces. It is dominated by its sister station, Lemar, in six Pashtun provinces (Helmand, Khost, Paktika, Paktya, Uruzgan and Zabul). Ariana comes in first position in nine provinces: Helmand, Laghman, Paktika, Paktya, Samangan, Sari Pul, Takhar, Uruzgan and Zabul, all but one being mostly Pashto-speaking provinces. RTA stations usually rank in fourth position.

It would be too lengthy to describe in detail the variations across the Afghan territory, but several interesting situations are worth describing here.

[42] Calculations in terms of number of users are carried out according to the following formula: total population (29million) x population aged 15 and above (65%) x population using TV (48%, 63% for radio) x population watching at this precise moment (e.g. 8% at 6pm) x audience share (e.g. 68% for Tolo at 6pm). The result for this particular example is 460,179.

Figure 39: Preferred TV channels compared with audience share



The two competing Pashto language channels, Lemar and Shamshad, fare differently in the Pashto-dominated areas in the east, southeast and south. Lemar is clearly preferred over Shamshad in the southeast and the south. Although Shamshad does not reach the first position in any province, it has a strong user base in the east; it comes ahead of Lemar only in Wardak, Laghman, Logar and Nangarhar. This, as explained earlier (on the media landscape), owes to the strong Pakistani influence on both political orientation and language: Lemar's language is closer to southern Pashto.

Tamaddon, the Shia religious channel, is the favorite station in Ghazni province and comes in second position in Bamyan, thanks to the large population of Shias in these provinces.

With a minor part of the audience share even in these provinces, Ayna receives its primary audience from the Uzbek communities of Faryab, Sari Pul and Takhar.

The successful newcomer, Yak TV, is already in good position in many of the places it broadcasts, particularly in Parwan, Badakhshan and Baghlan, as well as in places where it is received through satellite, such as Panjshir and Daykundi.

Independent local channels can reach a significant audience share in their city, such as Hewad (15% in Kandahar), Noor (11% in Ghazni), Arezo (9% in Balkh), Sharq (6% in Nangarhar) and Sima-e-Mehr (6% in Takhar). Others perform poorly in their own province, such as Saqi (0.65% in Herat), Herai (2% in Herat) and Khawar (2% in Kunduz).

c. Socio-demographic variations

There is generally no strong variation in audience across age groups: the audience of Tolo and Ariana closely matches the distribution of the Afghan population. The only notable exceptions are RTA channels and Tamaddon, for which the audience is significantly older than the average; Emroz, which seems to enjoy a larger share of the younger audience (15-20 years old); and Lemar, which has a higher success among young adults (20-30).

Table 5: Variation in audience share compared with the average, by age group

Age	Tolo	Ariana	RTA	Lemar	Yak	Emroz	Shamshad	Afghan TV
15-20	-1.5%	0.2%	-6.1%	1.9%	-3.9%	29.1%	12.2%	11.0%
20-30	1.6%	0.1%	-8.9%	3.2%	6.6%	-13.8%	-2.5%	-12.8%
30-40	-0.2%	-1.0%	6.6%	0.3%	3.9%	-7.6%	-5.4%	-2.4%
40-50	-0.8%	0.7%	7.9%	-3.0%	-5.0%	-3.9%	-0.7%	7.9%
50+	1.0%	-0.1%	0.5%	-2.4%	-1.5%	-3.9%	-3.6%	-3.8%

Table 6 some strong differences by gender, but these should be interpreted with caution, as nearly no women were interviewed in many conservative Pashtun provinces. This would explain the large difference in Lemar's audience, essentially male, but probably not that of Emroz, which remains bewildering. The slight overrepresentation of female users for Tolo and male users for RTA seems consistent with the types of programs preferred by both groups (see below, on content); entertainment and music seem more important to women.

Table 6: Variation in audience share compared with average, by gender

Gender	Tolo	Ariana	RTA	Lemar	Yak	Emroz	Shamshad	Afghan TV
Female	4.66%	-1.56%	-4.01%	-17.96%	10.77%	-18.04%	-8.18%	6.57%
Male	-4.66%	1.56%	4.01%	17.96%	-10.77%	18.04%	8.18%	-6.57%

Audiences of Tolo and Ariana are not very different from the national average, when looking at levels of literacy and education – Ariana has a slightly less educated population, very probably because of its larger reach in small towns and isolated provinces. Coherent with its target age group, Emroz has a larger audience share among high-school students, whereas Yak TV seems to be preferred by university students.

Tamaddon has less uneducated listeners than the average, which is understandable given both its focus on education and its target Shia audience, mostly in the Hazara community, which seemingly puts a larger emphasis on education. However, it does not find a large audience among the most educated, probably because its educational programs are mostly at a high-school level, in addition to its large emphasis on religious content rather than entertainment.

Table 7: Variation in audience share compared with average, by literacy and education level

Literacy	Tolo	Ariana	RTA	Lemar	Yak	Emroz	Shamshad	Afghan TV
Low	-1.85%	3.09%	6.02%	-4.27%	5.18%	-13.11%	4.49%	3.71%
High	1.85%	-3.09%	-6.02%	4.27%	-5.18%	13.11%	-4.49%	-3.71%
Education	**Tolo**	**Ariana**	**RTA**	**Lemar**	**Yak**	**Emroz**	**Shamshad**	**Afghan TV**
None	-0.58%	1.87%	0.54%	-2.74%	1.51%	-2.22%	-2.88%	8.30%
Primary	-1.37%	-0.25%	5.75%	0.12%	4.43%	-9.42%	9.42%	-1.90%
Secondary	0.59%	0.33%	-3.88%	3.05%	-12.20%	15.07%	-4.94%	1.93%
University	1.16%	-2.07%	-2.13%	0.18%	6.50%	-2.77%	-1.00%	-7.95%

There are generally no significant variations among income groups: Ariana, RTA and Afghan TV are slightly more used by poorer people; Yak, Emroz and Shamshad have a greater part of the middle-class audience share.

Table 8: Variation in audience share compared with average, by household income ($/month)

Income	Tolo	Ariana	RTA	Lemar	Yak	Emroz	Shamshad	Afghan TV
0-100	-0.33%	2.14%	-0.98%	-4.93%	3.28%	-2.04%	-6.19%	7.76%
100-250	-2.62%	4.84%	6.94%	-5.13%	2.81%	-6.36%	-3.76%	3.31%
250-500	1.22%	-5.08%	-2.66%	-1.83%	0.92%	20.49%	16.43%	-1.61%
500-1000	1.18%	-1.08%	-4.13%	2.88%	-0.71%	-7.41%	-4.07%	-0.80%
1,000-1,500	0.86%	-1.29%	2.00%	1.94%	-3.67%	-4.80%	-0.41%	-5.48%
1,500+	-0.31%	0.46%	-1.16%	7.06%	-2.64%	0.13%	-2.00%	-3.18%

1.2. Radio

The audience share for radio stations is much more fragmented than it is in the TV landscape: out of 112 stations listened to during the period, 105 were sharing about 40% of the listening audience. Unlike television, the major part of the audience is served by non-commercial outlets, either international or government.

a. National level

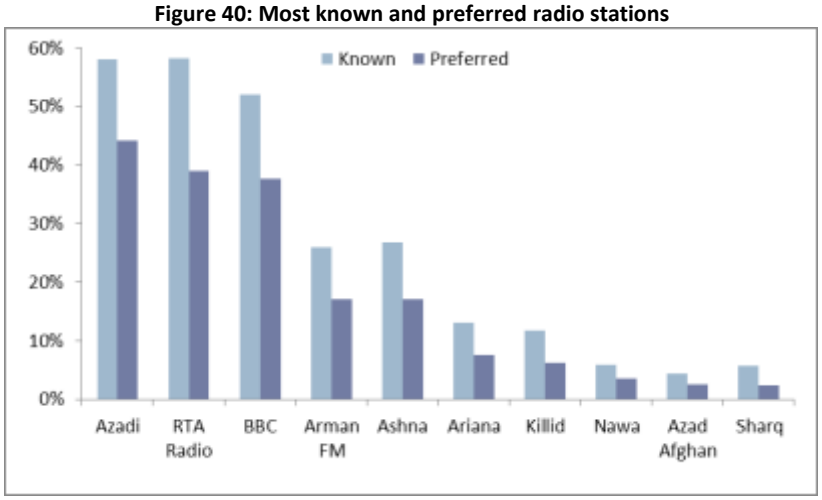
At the national level, of course, only some stations stand out: RTA with its presence in all provinces, Azadi, the BBC and Ashna, with their FM relays and their truly national middle wave coverage, as well as Arman and Killid, which are present in all the main cities. At this level, we chose to regroup stations which have some degree of independence as far as programming and content production are concerned but which also belong to broader networks: this is the case for government RTA stations and Killid.

When asked what radio station they knew[43], a majority of respondents answered Azadi, either Radio Afghanistan or their local RTA station (58%) and the BBC (52%), often called “the radio from England.”

[43] “What are the radio stations you know?” (5 choices); “What are your three preferred radio stations?”(3 choices). Unprompted answers, asked only to people who declared listening the radio (4,571 respondents).

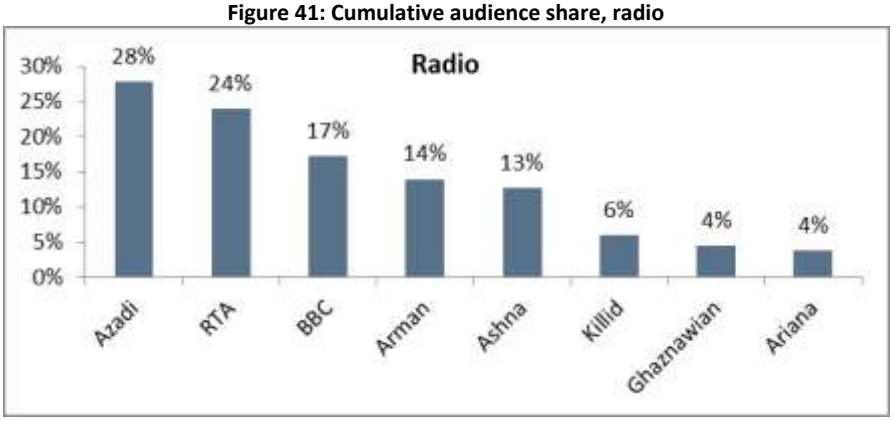
Arman FM and Ashna are known or remembered by a quarter of the population; and Ariana and Killid by 12% of the population. As can be seen in Figure 40 below, people usually mention the stations they prefer, and the order of preference closely matches the order in which stations are remembered.

Figure 40: Most known and preferred radio stations



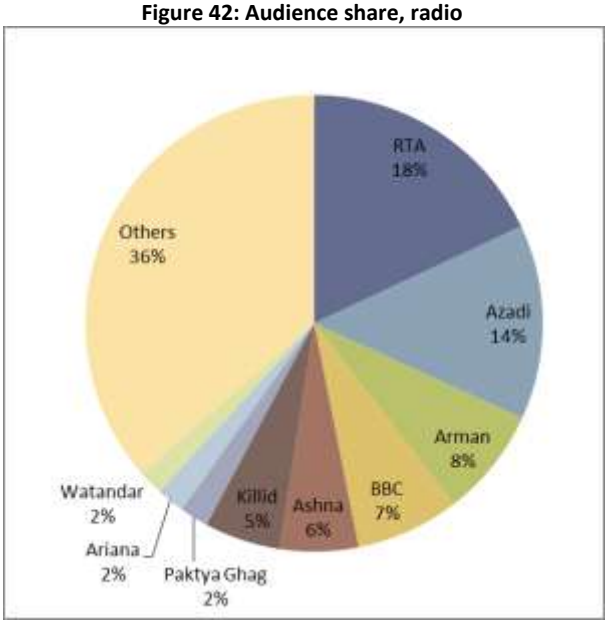
These preferences are confirmed in actual audience data[44], as can be seen in Figure 41. In terms of audience share at the national level (Figure 42), two stations constitute the leading group: RTA, the network of public radio stations (18% share), and Azadi, the Afghan version of Radio Free Europe (14%).

Figure 41: Cumulative audience share, radio



[44] "What radio station did you listen to yesterday; at what time; for how long?" Answers unprompted, through phone interviews (see methodology section on the audience survey).

Figure 42: Audience share, radio



The second group contains about a quarter of the national audience: this group is shared by two "international" stations (the BBC and Ashna, 7% and 6%, respectively), and two private, "national" radio stations: Arman (8%) and Killid (5%). Naturally, these last two stations, as well as Watandar, have larger audience shares in the areas they actually broadcast in: Arman ranks first and reaches 23% in Kabul; Killid ranks second in Kabul, with 22%, and fourth in Nangarhar (12%). Watandar is in first position in Herat with a 29% share (see next section for more details).

The presence of Paktya Ghag in this list is surprising, but is an effect of the results presentation: its audience share of 2.0% is not well above that of other local stations such as Sharq (1.5%), Arezo (1.4%) or Baharak (1.4%).All these stations are quite popular in their area (and Paktya Ghag has also a small audience in neighboring provinces); an intense listenership in their own province translates into a non-negligible national figure.

Box 18: Note on Ashna, Azadi and Sada-e-Azadi figures

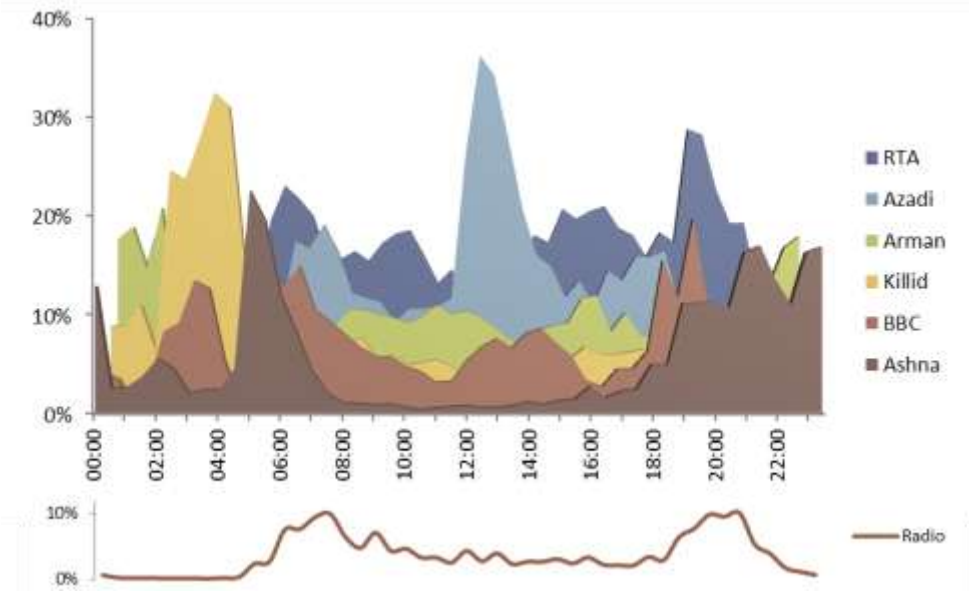
Ashna and Azadi, the Afghan versions of VOA and Radio Free Europe, respectively, share the same broadcast frequencies (100.5 MHz, 1296 kHz). One of their names is often mentioned by interviewees for the other: people mentioned that they were listening to Ashna at a time when Azadi was broadcasting.

Furthermore, it is possible that a number of interviewees confuse "Azadi" with "Sada-e-Azadi," or just use the former as a shorter name for the latter. Sada-e-Azadi is the ISAF-controlled station broadcasting to the main pockets of population in the country through 34 FM transmitters. This is a well-known issue in media polling in Afghanistan: despite the care with which interviewers try to differentiate the two, the confusion still exists to an extent, although specific testing on this consistently suggests a minor audience for Sada-e-Azadi. At national level, the audience share strictly identified as belonging to Sada-e-Azadi is 0.5%, in spite of its extensive coverage: this might be under-evaluated, but probably not by much.

To add to the confusion, the channels share the same broadcast frequency (100.5 MHz) with their Pakistani border area siblings – Dewa (credited with a 1.8% share) and Mashaal (0.6%) – the signal of which extends to some extent to Afghan districts bordering Pakistan.

The audience shares of each station vary importantly during the day. Shown below are instantaneous audience shares for the six main stations (the line at the bottom represents the portion of radio users in the sample who actually were listening to radio at that time).

Figure 43: Instantaneous audience share, national average, radio



Government RTA radio stations, aggregated, dominate in terms of audience share in the morning, afternoon and evening, with the most important notable peaks at 6am (22% share = 320,000 listeners) and 8pm (30% share = 550,000 listeners)

Azadi's peak in audience share is around lunchtime, between 12pm and 2pm, with a 38% audience share between 12.30pm and 1.30pm (200,000 listeners). A second peak is more interesting, as it is during the peak time for radio in general: a 19% audience share at 7am translates into about 340,000 listeners.

b. Regional variations

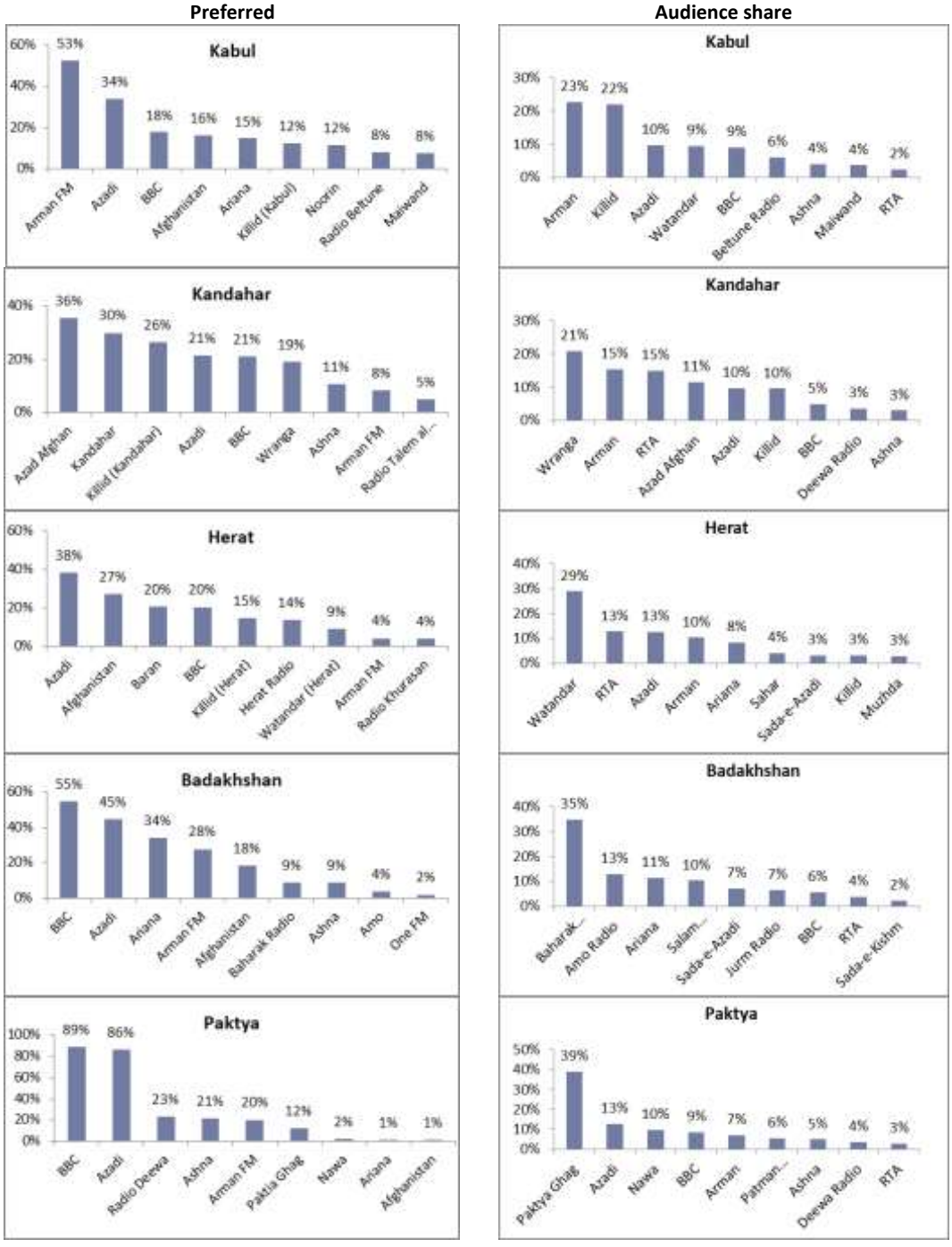
Only at regional and provincial levels do local stations appear to have any degree of significance. There again, there are as many individual cases as there are districts in the country: in some areas, very local stations are extremely successful compared with national stations available on AM; in similar areas, as far as geography, socio-demographics and coverage are similar, these stations are nearly never known or used; in areas where there is an abundance of stations, "foreign" stations may fare surprisingly well. It can be difficult to make sense of such diversity[45].

Figure 44 below summarizes the stations that respondents declared as their favorite in five provinces – the ones they listened to the most often – and the relative audience shares in the same province. Important differences appear between the two sets of values, most of which have good explanations: the two sets answer two different questions.

[45] See 16 priority district reports for a series of case studies.

For example, in Kabul, Arman was mentioned by interviewees as the station they listened to the most (53%); Killid is ranked sixth among the preferred radio stations. In terms of audience share, Arman does rank first, but Killid ranks second in Kabul (22%), far ahead of Azadi. Actually, over the period, Azadi was indeed listened to *more often* than Killid (44 times for Azadi, 37 times for Killid) but this was for a *shorter duration* each time (35 minutes for Azadi, 77 minutes for Killid).

Figure 44: Preferred station compared with audience share



More striking is the difference between ratings for the BBC in Badakhshan and Paktya: in the latter, for example, the BBC comes out far ahead in terms of preference (89% of interviewees mentioned it among their top three) of the amount it is actually listened to (9% audience share). During the audience survey, the BBC was listened to 71 times (coming in fourth position after Paktya Ghag, Ariana and Azadi), and for 46 minutes each time (10th position): the BBC is not the station listened to the most in any way. Rather, we might suppose that interviewees *like* the BBC, or feel that it has a good reputation, and that it is reflects well on them when they say they listen to it – but in fact they do not listen to it that much. On the other hand, people may not much like mentioning Paktya Ghag, but they do listen to it a great deal.

Arman, the fastest growing station in 2005, suffers from an inverse situation to that of the BBC: not many people cited it in their list of favorites, except in Kabul, where it ranked first, but it is still in a relatively good position in large cities. However, it does not fare as well as generally expected. Its main user base is in Ghazni (41%), and the station has significant audience share in Nimroz (30%), Kunduz (35%), Kabul (23%) and Balkh (19%).

In terms of audience share, a few general issues emerge from the picture at the provincial level. The multiplicity of stations in provincial capitals often leads to the audience being split up into however many stations there are: see, for example, the six stations with a between 10% and 21% audience share in Kandahar, and the four stations with a between 8% and 13% audience share in Herat.

Ariana has a surprisingly poor score in most provinces compared with its position for television: it reaches a significant market share only in Faryab (25%) and Sari Pul (21%).

Local (often independent) radio stations are plebiscitary in small towns and rural areas: they are often the only ones to transmit on FM, with a signal quality that is better than AM stations when in the province or district center, and they provide local content in the local Dari or Pashto accent. The local station with the largest audience share in its province is Khurasan in Panjshir (54%). Other successful ones are Zeenat in Logar, Ayna in Jawzjan, Rustam in Samangan (all 38%), Pashtun Ghag in Paktika (35%), Baharak in Badakhshan (34%), Sada-e-Nilli in Daykundi (29%) and Wolas Ghag in Khost (29%).

Local stations rarely have significant success outside their province, even when they broadcast on AM and their signal reaches other provinces. Similarly, stations transmitting from neighboring countries (Iran, Pakistan) do not have a large audience share in border provinces, except Dewa in Kunar (19%).

Local RTA stations have very varied success rates in their own provinces: they are very strong in Laghman (55%), Parwan (47%), Kapisa (43%), Badghis (38%) and Nangarhar (32%); and very weak in Jawzjan, Faryab, Paktika (the local branch was closed, leaving only Radio Afghanistan on AM), Paktya, Samangan, Kabul, Badakhshan and Ghazni, all below 5% audience share.

c. Socio-demographic variations

Among the radio stations that are the most listened to, several profiles can be drawn.

- International stations (BBC, Ashna and Azadi) share similar audiences: male, highly literate, rather more educated than the sample average, hence with a better income but not as high as Arman's, certainly because they have a larger proportion of rural audience (owing to their national coverage).
- Arman's users are women, slightly more literate and educated than the average but more rarely involved in higher education. They have a higher income than the rest of the population, probably because they live in major urban centers.

- Killid's audience has a higher representation among the middle classes, low literacy and low education populations, women and high-school students.
- RTA's audience is closer to reflecting the average middle-class Afghan.

Table 9: Variation in audience share compared with average (radio)

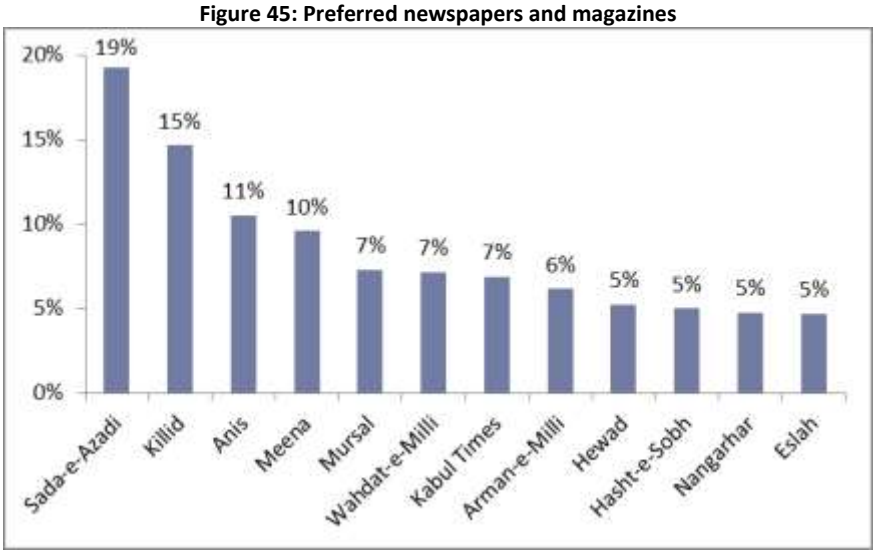
Age group	RTA	Azadi	Arman	BBC	Ashna	Killid
15-20	-1.3%	-9.1%	5.9%	-6.0%	-10.6%	16.1%
20-30	-2.0%	-0.2%	12.2%	7.6%	-0.9%	-19.5%
30-40	0.4%	1.8%	-5.5%	0.4%	6.1%	1.6%
40-50	3.8%	2.3%	-10.0%	-2.1%	1.1%	5.7%
50+	-0.9%	5.2%	-2.6%	0.0%	4.2%	-3.9%
Gender	**RTA**	**Azadi**	**Arman**	**BBC**	**Ashna**	**Killid**
Female	2.30%	-9.06%	11.79%	-0.14%	-14.75%	18.14%
Male	-2.30%	9.06%	-11.79%	0.14%	14.75%	-18.14%
Literacy	**RTA**	**Azadi**	**Arman**	**BBC**	**Ashna**	**Killid**
Low	0.69%	-4.30%	2.55%	-14.89%	-7.33%	12.97%
High	-0.69%	4.30%	-2.55%	14.89%	7.33%	-12.97%
Education	**RTA**	**Azadi**	**Arman**	**BBC**	**Ashna**	**Killid**
None	5.36%	-1.49%	4.25%	-8.77%	-3.79%	-5.84%
Primary	-5.09%	-2.07%	-0.16%	-8.76%	-2.88%	19.56%
Secondary	5.02%	-0.98%	4.31%	4.29%	-10.02%	-9.54%
University	-6.03%	4.69%	-8.11%	13.46%	16.87%	-3.66%
Income	**RTA**	**Azadi**	**BBC**	**Ashna**	**Arman**	**Killid**
0-100	1.68%	5.86%	-4.95%	3.25%	-9.39%	-2.68%
100-250	8.63%	3.61%	-2.62%	-2.84%	-9.58%	-16.11%
250-500	-7.42%	-5.85%	-0.51%	-4.57%	4.46%	25.08%
500-1,000	-2.77%	-2.93%	7.44%	6.99%	5.52%	-3.52%
1,000-1,500	-0.19%	-0.78%	0.12%	-1.89%	7.41%	0.05%
1500+	0.08%	0.09%	0.50%	-0.93%	1.58%	-2.81%

1.3. Press

Even more than radio, the print media landscape is characterized by high diversity. Very few publications are distributed widely in the country, and many of them have low circulation and are issued irregularly. The "serious" press is often a reflection of political tendencies or intellectual affiliations, which further fragments an already small readership.

The most read newspaper, according to the general survey (989 respondents) is ISAF's Sada-e-Azadi – by far the most printed and best distributed newspaper in the country (500,000 copies, bi-weekly, distributed in all provinces where there is a PRT). Sada-e-Azadi reaches a reported 19% of the readership. Taking into account a 13% press readership of an estimated 65% of Afghans who are above 15 years old, this suggests a total readership of over 450,000. Sada-e-Azadi was often mentioned in qualitative interviews as being the most read, for three main reasons: it is available everywhere; it is free; and it is in Dari, Pashto and English, so it helps readers practice Afghanistan's three languages.

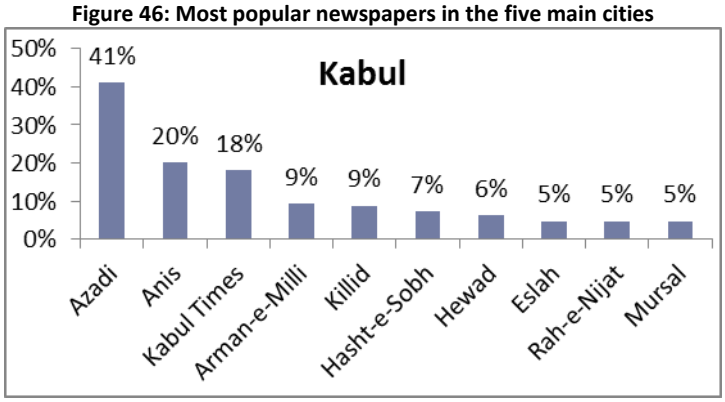
Figure 45: Preferred newspapers and magazines

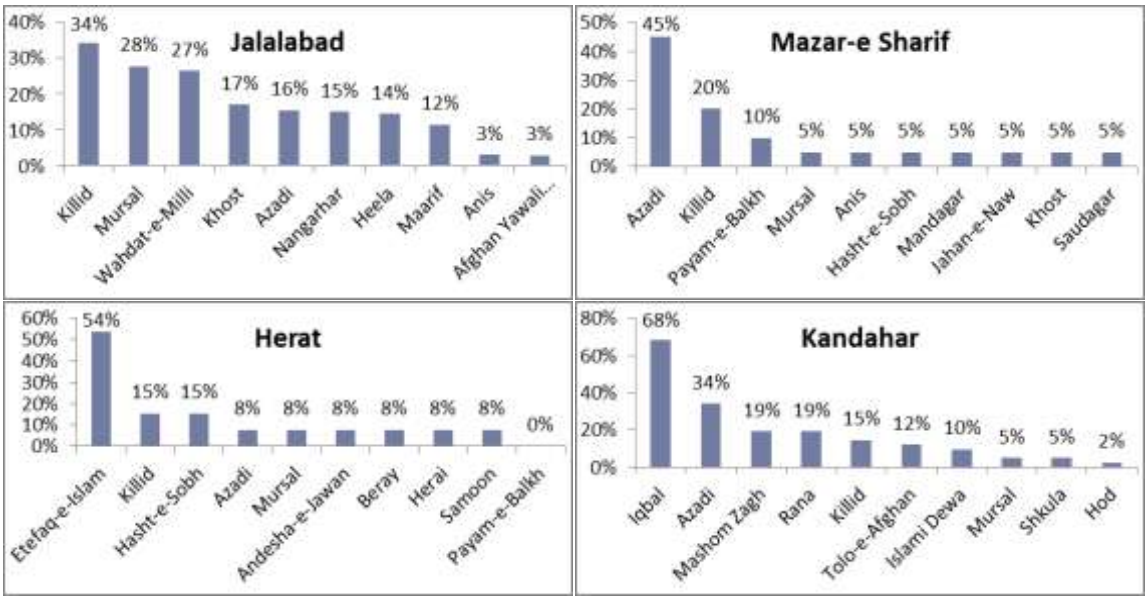


Killid Weekly magazine comes second (15%, suggesting a total user base of over 300,000). The circulation of the magazine is around 20,000, and it is rather well distributed to urban centers through Killid Group's own distribution network. Despite a long-standing good effort in relation to quality, some newspapers struggle to find an audience, as with Kabul Weekly, mentioned by only 2% of interviewees.

Among the top five most read publications, three are magazines: Killid, Meena and Mursal. Meena and Mursal are particularly targeted towards female audiences; Mursaltar gets youth. Other publications (outside the top five) are newspapers produced in Kabul. Eponym is the government newspaper of Nangarhar province. The government newspapers Hewad, Anis and The Kabul Times are more popular among mature audiences (above 40 years old). The more recent independent daily Hasht-e-Sobh is faring well, essentially in Kabul and Herat and among an educated readership.

Figure 46: Most popular newspapers in the five main cities





1.4. Internet and mobile content

Only 244 respondents (4%) declared connecting to the internet from time to time. The two favorite websites are the Google and Yahoo search engines. The BBC's website is rather popular for its Farsi and Pashto services, including news. www.benawa.com is a Pashto community website popular with a few users in Nangarhar.

Figure 47: Most accessed websites

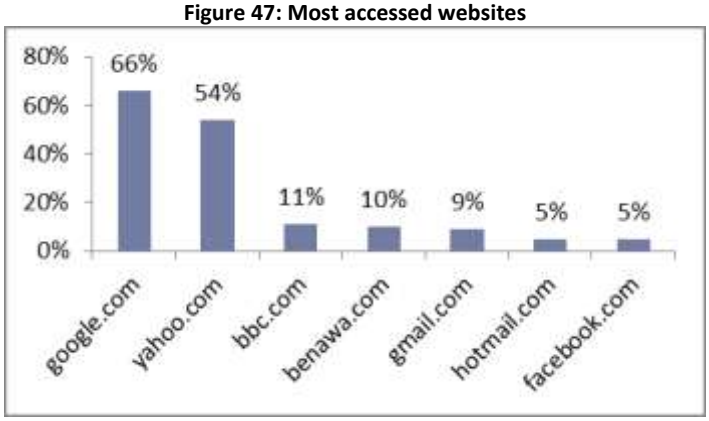


Table 10: Most searched keywords on Google, originating from Afghanistan, 2009-2010

	Web	Image	News
1	Afghanistan	Girls	Afghanistan
2	Yahoo	Afghanistan	News
3	Facebook	Hot	Kabul
4	Google	Girl	Afghan
5	Kabul	Pictures	Afghanistan news
6	Mail	Logo	Kandahar
7	News	Love	Karzai
8	(Afghanistan) افغانستان	Wallpaper	Bagram
9	Ako	(picture) عکس	
10	Girls	Picture	

Box 19: Community case study – a community using Maloomat mobile service

Dasht-e-Ofian is an area of Parwan province approximately 3km from the provincial center, Charikar. It comprises10 villages, one of which is Qala-e-Mullah, which is a farming community. The farmers of Qala-e-Mullah have found themselves unable to respond to market pressures, in terms of deciding what to grow, what to sell and how much to price their goods, mainly because of a lack of information. At present, the main ways in which farmers receive agricultural information is through the Ministry of Agriculture and its provincial offices; from other farmers who come back from market and relay information to the rest of the village; through NGOs and other international agencies which hold training programs in their villages; and through the Maloomat service.

Maloomat is a service (funded by USAID and implemented by Mercy Corps, Roshan and Development Alternatives Inc.) that disseminates market-pricing information via mobile phones. Farmers said they had had no problems using the service, and observations proved that the technology was not a huge issue for farmers (especially when they were using the interactive voice response (IVR) service). However, where they experienced difficulty was in their interpretation of the information and the level of trust they placed in it.

The level of trust placed in the information varied. Most farmers seemed to use the service as a secondary source of information to verify the pricing information they received from other sources, and those that used it as a primary source largely still verified it through other sources before acting on it. This was mainly because farmers felt that the prices provided by Maloomat were not accurate, owing to experiences where traders had offered them significantly less when they took their commodities to market.

Another interesting observation was that some farmers felt that agricultural information should be available to all farmers without discrimination. Some farmers said “via the telephone, only some of us can access agricultural information, but if you put it on the television, then all farmers will have access to it. We need to help the whole country develop, not just parts of the country.” It became apparent that mobile phones were a good medium to distribute information on demand, whereas other traditional media were ideal for distributing general information. Some farmers indicated that they would like to receive more information on their mobile phones about weather, transportation of crops and some specific agricultural issues. They were not interested in receiving general content, like news, via their mobile phones, largely because gathering together to watch/listen to news was seen as a social activity integral to their everyday lives: there would be no interest in listening to it by yourself over your phone.

2. Preferred programs and content

As seen on content in Section I, a wealth of new content has emerged in recent years. The first Indian TV serials immediately gathered a large following: even in 2006, it was not rare to hear people say that, when *Toolsie* was airing, all activities in the village stopped and you would have a hard time finding someone outside their house. Indian dramas created as much controversy as they attracted audiences; even though the debate is still going on (see below, on perceptions), dramas and serials are still quite commonly watched.

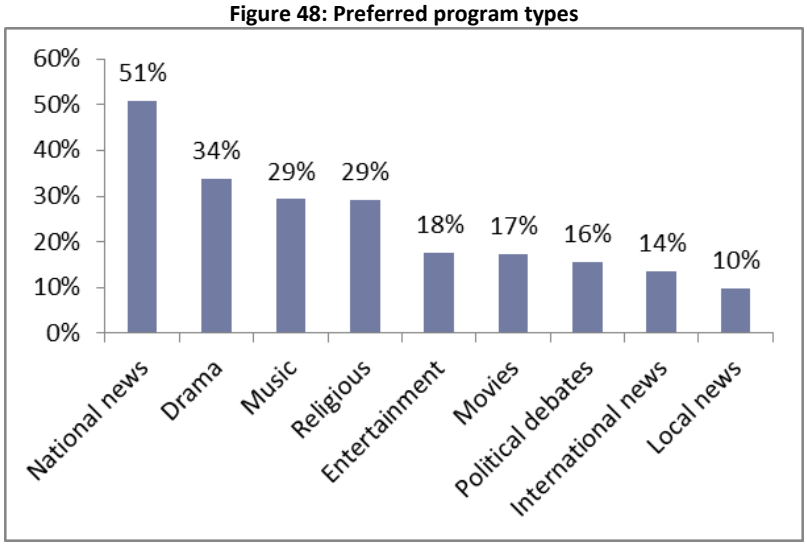
To obtain a more precise idea of television programs preferred by Afghans, we again have two sources of data. In the general survey, respondents were asked to cite their three preferred types of programs. In the audience survey, interviewees just mentioned at what time they watched which channel. Matching this with the exact program schedule for the period when the audience survey was carried out allows us to pinpoint particular program names and types. However, the program schedule is available for only seven of the most popular channels, which means we can generate a good level of information on a national basis but this does not really reflect local peculiarities.

2.1. Television

a. National level

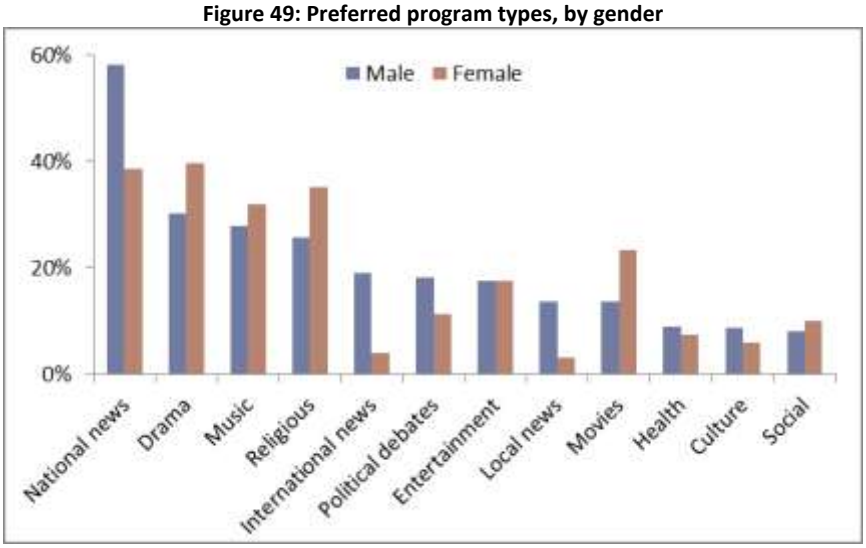
Preferences expressed in the general survey were for national news: a majority of respondents put news among the three program types they watched the most often on television. Dramas and serials came second, mentioned by a third of TV viewers. Music shows and religious programs shared third place.

Figure 48: Preferred program types



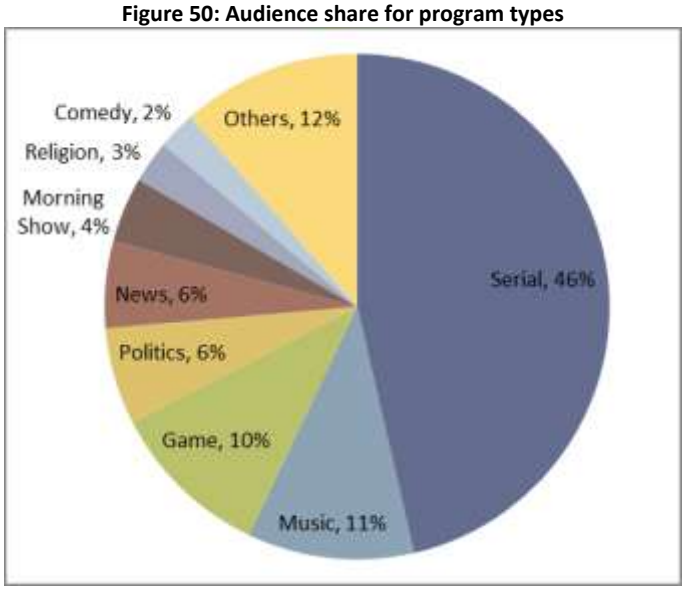
As is seen for radio programs later, women tended to claim greater preference for entertainment programs (dramas, serials, music, movies) and for religious programs than men did. Men claimed to be more interested by news, essentially national news, but to an extent international news also, as well as political debate shows.

Figure 49: Preferred program types, by gender



However, actual audience data suggest a very different picture: among the types of programs identified[46], the most successful are by far entertainment programs. Serials gather a 46% audience share, music 11% and game shows 10%, totaling two-thirds of the audience share.

Figure 50: Audience share for program types



Part of this discrepancy can be explained by the length of the program: a typically short program type (call to prayer, news) is naturally less represented in this mode of calculation of audience share than a longer program (serial, movie), as audience share takes into account the amount of time spent watching a particular program type.

[46] This is rather restrictive: as said earlier, we have precise schedule data for seven television channels, so not all these programs are classified.

In addition, nearly all viewership is concentrated during the evenings, and programs at this time of the day are essentially entertainment shows. This suggests that what people actually watch the most is not necessarily what they want to watch.

The eight preferred shows are spread between Ariana and Tolo TV. On average, during the observed period, the preferred show was Deal or No Deal, a game show on Tolo, followed by *Kyunki* and *Kasauti*, two serials also broadcast by Tolo[47]. The first news program came in only seventh position.

Table 11: Preferred shows (average of period)

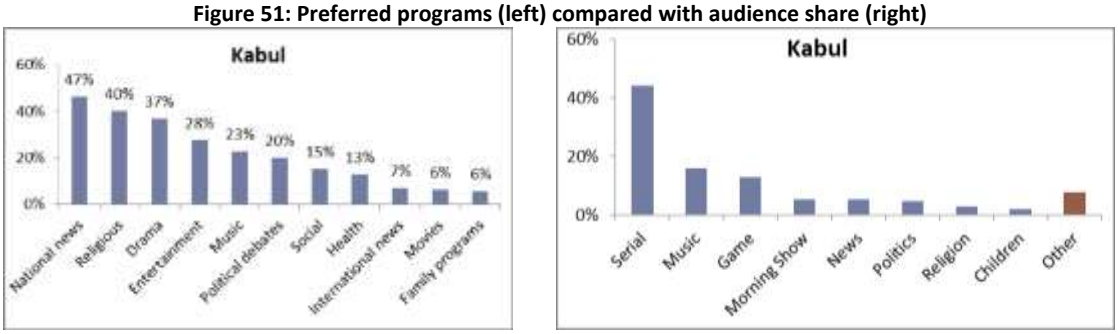
Show	Type	Channel	Index[48]
Deal or No Deal	Tolo	Game	866.9
Kyunki	Tolo	Serial	844.9
Kasauti	Tolo	Serial	737.6
Setara Haye Rangin	Ariana	Music	541.5
Dunyae Asrar	Tolo	Serial	522.2
Dolhan	Ariana	Serial	508.0
Dari News 20	Ariana	News	507.4
Music	Ariana	Music	93.7
Music	Kabul RTA	Music	66.2
Music	Lemar	Music	60.1

On a day-by-day basis, this list is consistent with preferred shows. The shows that generate the higher total audiences during the week go to *Kyunki*, "Deal or No Deal" and *Kasauti* when broadcast by Tolo on Sunday evenings.

a. Regional variations

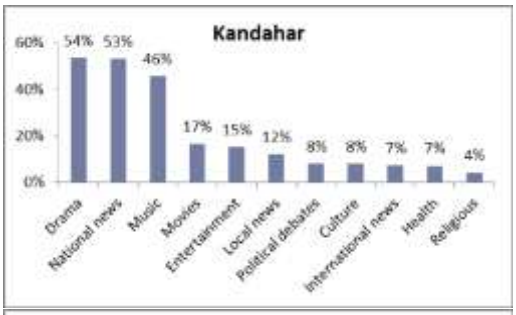
At the provincial level, significant differences appear: besides national news, which is popular across the board, serials and music are extremely popular among Kandahar TV users, whereas religious programs are barely watched. Conversely, religious programs were ranked highly by Kabul and Herat interviewees. At this level, audience data make less sense, as they are not capturing local programs but only the main programs of the seven most watched channels.

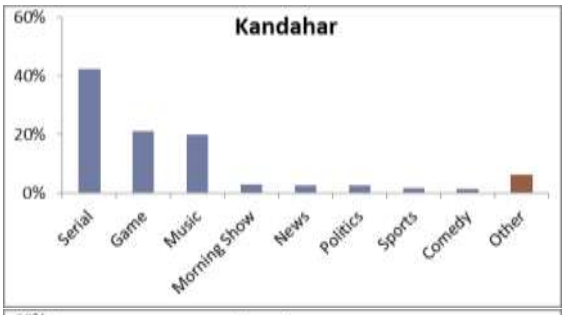
Figure 51: Preferred programs (left) compared with audience share (right)

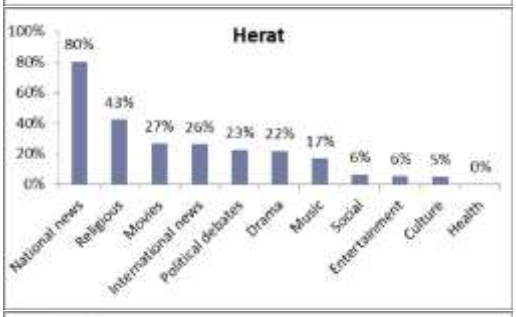


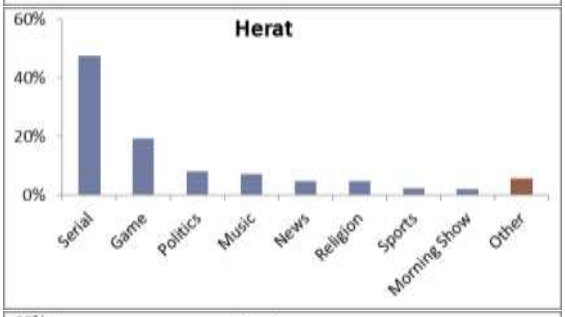
[47] The index is an indication of relative weights of the shows in terms of audience (to be replaced with proper audience shares when final audience data are available). See the media landscape section for more details on particular shows.

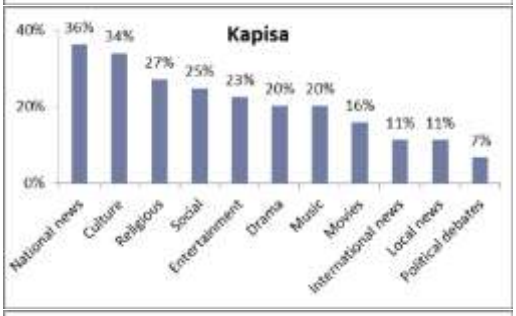
[48] The absolute value of this index does not have any meaning, but the relative values show relative audience share.

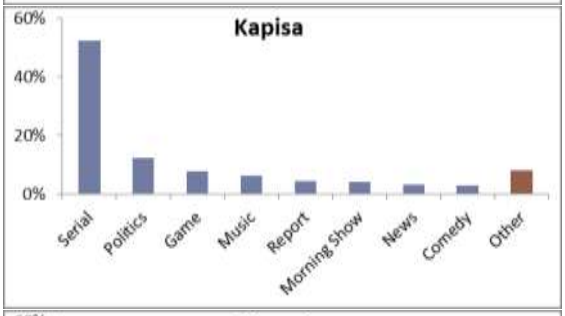


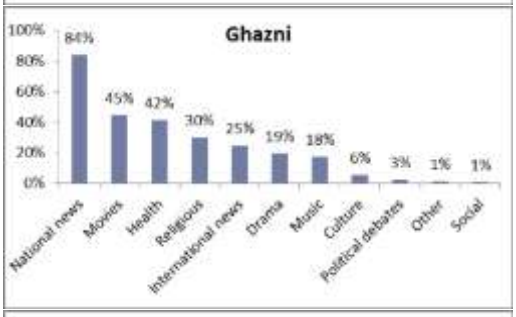


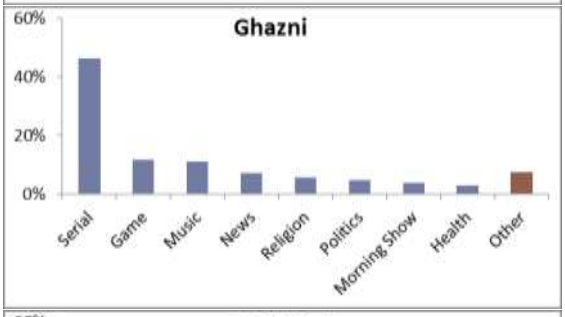


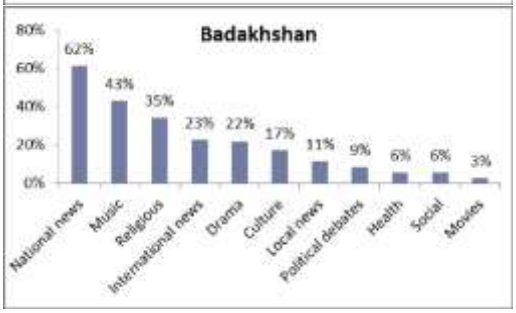


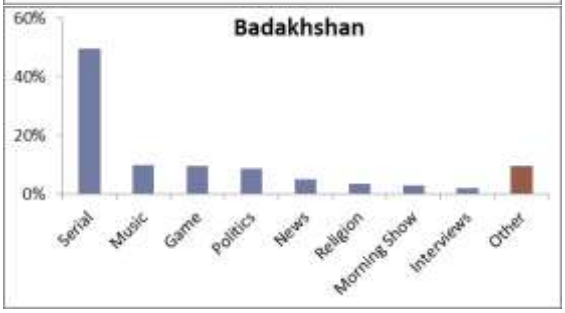












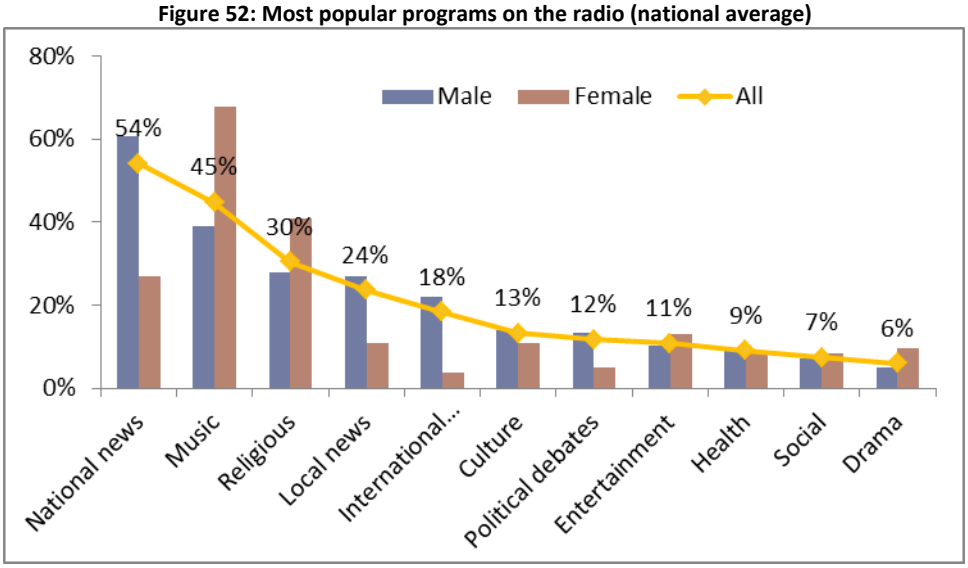
To understand these differences in greater detail would require a closer look at programs watched in these provinces. In turn, this would mean closely analyzing the program schedules of all local channels, which is beyond the scope of this study (for 10 days, over 300 programs were identified on 7 channels only).

2.2. Radio

Unlike television, we do not have a simple way to match audience data on the radio with program names or types. We have to rely here on declarations of radio users interviewed in the general survey.

Afghans, both male and female, use the radio to be informed on what happens in the country. National news (54%) and music (45%) are the two most popular program types across the country and for both genders, with a strong preference among women for music.

Figure 52: Most popular programs on the radio (national average)



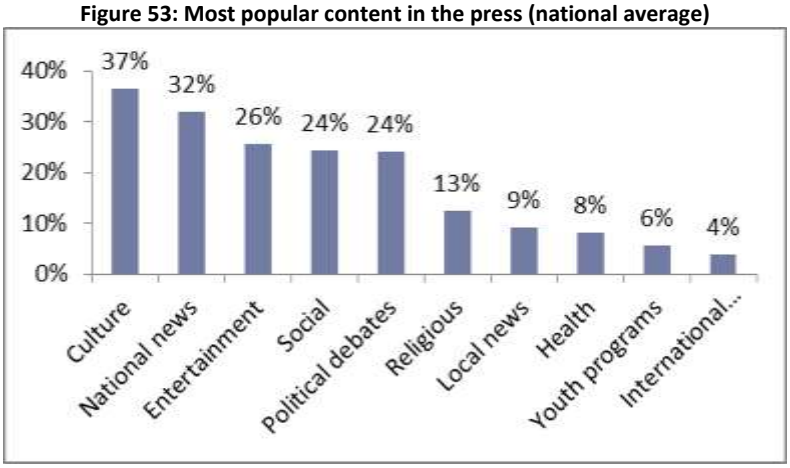
Religious programs come third, driven by female demand: women do not have access to the *mullah*, and radio is one of the few ways they can access information about religion. In turn, women are not particularly interested by local or international news, or by political debates. Regarding other topics, men and women share their preferences.

Although proximity to urban centers and education do not matter much, age does in terms of preferences, at least on a small number of topics: youth prefer music (56%) and are more interested than their elders in political debates (18% vs. 5%); elders are more interested in religious topics (50% vs. 35% for youth), programs for women (17% vs. 1%) and prayer (16% vs. 0%).

2.3. Press

Popular content in the press is coherent with the most read newspapers and magazines: culture, entertainment and social issues are the focus of magazines like Morsal, Meena and, to an extent, Killid Weekly. The latter also covers Afghan news, as does Sada-e-Azadi. Political debate also scored relatively highly in terms of preference, showing the interest of another type of reader, one mostly involved in or interested by the political life of the country. This kind of content can be found in newspapers such as Anis, Hewad and Hasht-e-Sobh, which have timely information about the latest developments in the country's affairs.

Figure 53: Most popular content in the press (national average)



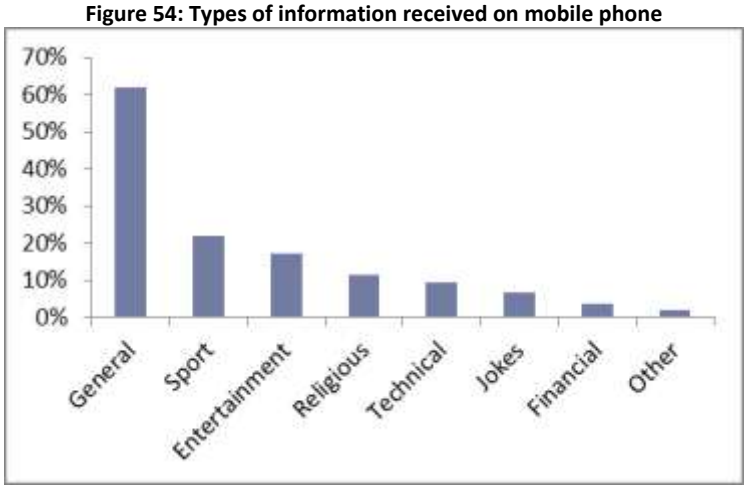
2.4. Mobile content

Mobile phone

Questions about mobile content were asked only to people who use their phone for anything other than making or receiving calls: these represent only 19% of mobile telephone users (or 11% of the total sample).

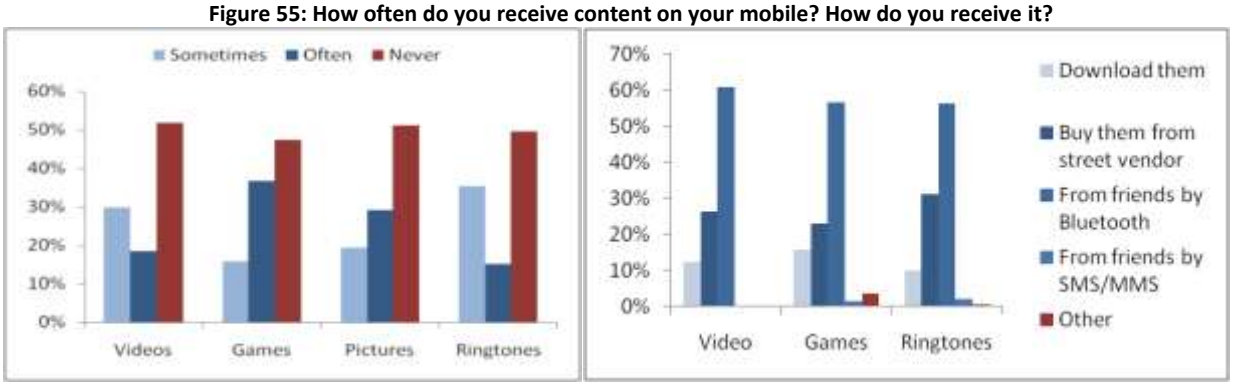
Not many (only 11%) receive news or editorial content. When they do, this information is in the form of SMS texts (64%). Information received is mainly general news. Sport and entertainment news come in second and third. Most of these users (59%) were satisfied with the mobile news service, despite its relatively high costs: the average cost of receiving a news text on one's mobile is $0.21.

Figure 54: Types of information received on mobile phone



Other forms of mobile transfers are much more popular: between 48% and 52% of mobile phone users who receive content receive videos, games, pictures and/or ringtones, usually from friends on Bluetooth and sometimes through street vendors. Not surprisingly, youth send and receive information through their mobile phones more than other generations.

Figure 55: How often do you receive content on your mobile? How do you receive it?



People are generally happy with the mobile services provided by their operators. Only 10% said they would like to see other content than that which is currently available. Among the desired services are: ringtones, internet, games, radio, more music and news.

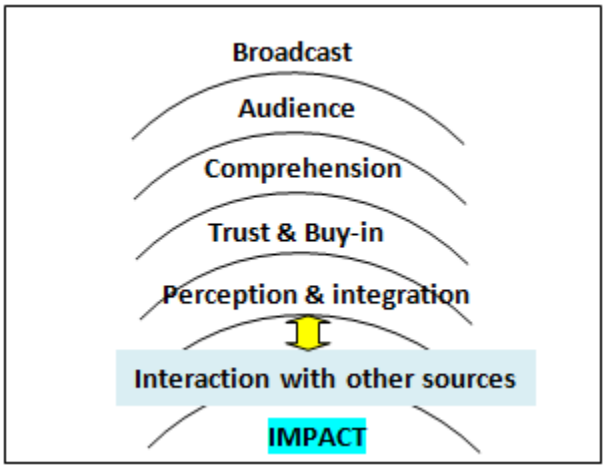
C. Impact and role of the media in 2010 Afghanistan

1. From broadcast to impact: understanding the layers of media penetration

A key aspect of the Altai 2005 study on the Afghan media was the introduction of a multilayered approach to analyzing the potential impact of the media in an environment where natural barriers, limited literacy and local resistance to information can be strong obstacles to media penetration.

The study showed how, in some parts of the country, isolation or – in cases of good media coverage – limitations in terms of comprehension of media content, lack of trust and negative perceptions of the media in general were serious obstacles to the impact of some programs and communication campaigns.

Figure 56: From broadcast to impact, a multilayered approach[49]



However, it was shown that a well-designed program, using locally trusted experts and placed on the right local media, was likely to obtain good local buy-in and to have some impact in communities, on individual opinions and sometimes on collective decision-making processes.

It was observed in this early phase of media development that Afghans, being granted access to multiple sources of information for the first time after years of media ban, were significantly influenced by media in relation to their individual opinions and sometimes collective decisions at community level. Sending daughters to school, allowing women to vote or accepting a vaccination campaign was often driven by a debate at the community level, initially triggered by the media.

Five years later, the media has become an inherent part of most Afghans' lives. How has this affected the role of the media and its position in family lives, social debate, forming of opinions and decision making?

Has the frenetic development of radio and TV stations around the country generated counter effects or rejections? What do Afghans trust in the existing media landscape, and what role do they expect the media to play? Understanding the role and impact of the media in today's Afghanistan is the major objective of this section.

[49] Afghan Media, Three Years After: Media and Alternative Sources of Information in Afghan Society, Altai Consulting, March 2005; www.atlaiconsulting.com/docs/media/2005.

2. Comprehension, perception and trust in the media

2.1. Comprehension

A vast majority of Afghans do not have any problems understanding media content. Surprisingly, TV is more challenging than other media, with 26% of viewers experiencing some kind of problems; for press, 20% of those who read expressed having some difficulties. The situation has not changed much since 2005. A major source of problems is the terminology used in broadcast programs, which can arise on both radio and TV (for half of the interviewees expressing difficulties).Pronunciation is the second most important obstacle, much more important for TV viewers (34% of interviewees expressed difficulties).

Internet is distinctive, as it is the newest media and because equipment is much more complicated to manipulate than radio or TV sets. A total of 55% of internet users admitted having some difficulties using or understanding the media in this way.

Figure 57: Do you have difficulty understanding any programs?

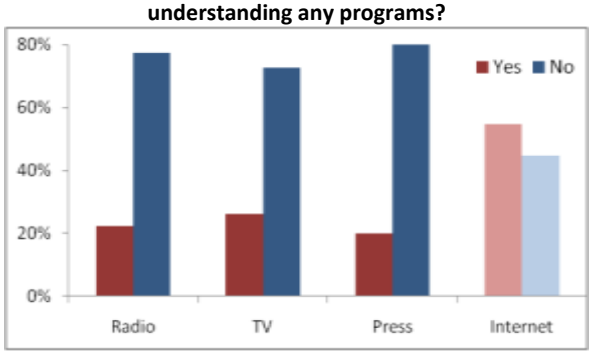
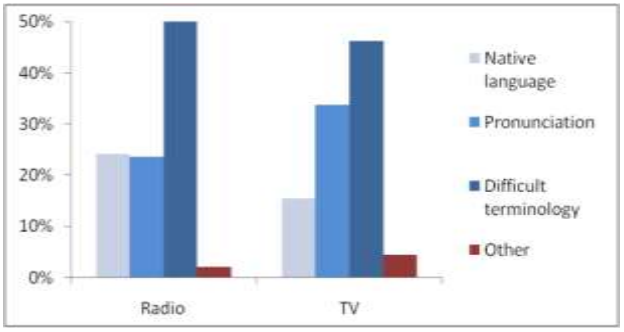
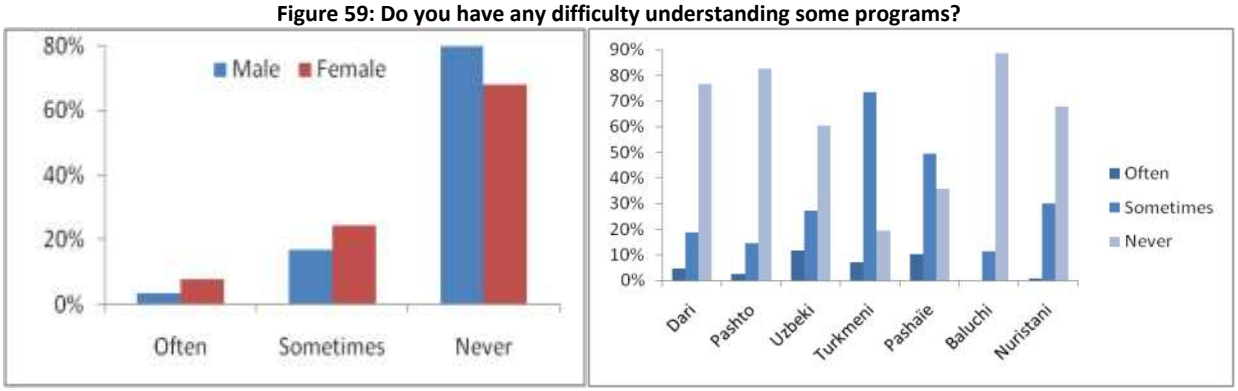


Figure 58: If yes, what kind of difficulties?



Although rural populations did not express more difficulties understanding media programs than urban dwellers, some variations can be observed across gender and ethnic groups. Women have slightly more difficulty than men, and Turkmen and Pashaïe speakers expressed some real issues relation to understanding the media. It is to be noticed that RTA TV has a weekly regional program (Program Haye Mahali) with a news bulletin in Pashaïe which is dedicated to trying to close this gap.

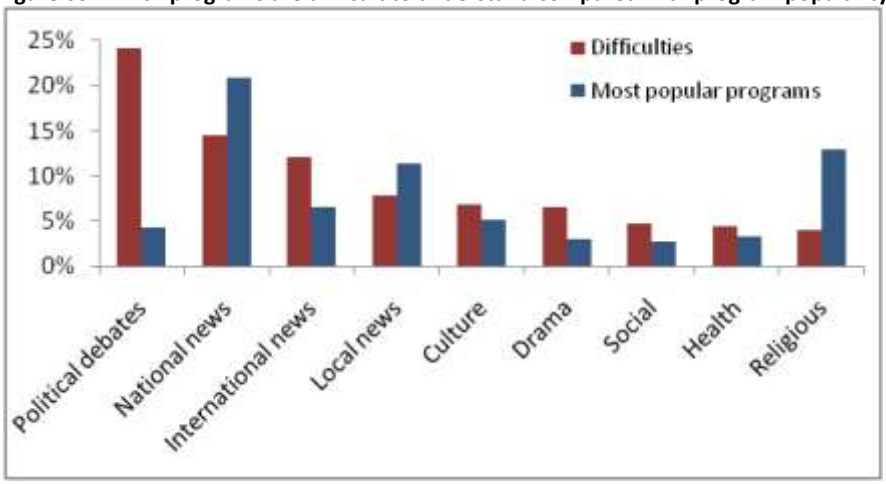
Figure 59: Do you have any difficulty understanding some programs?



Interestingly enough, the most difficult program type, political debates, is also among the least popular. A number of qualitative interviewees confirmed that they had difficulties understanding these debates.

National news, although the most popular content, generates some issues of understanding (for 14% of interviewees), whereas religious programs, also very popular, are the easiest to understand.

Figure 60: Which programs are difficult to understand compared with program popularity



2.2. Perceptions

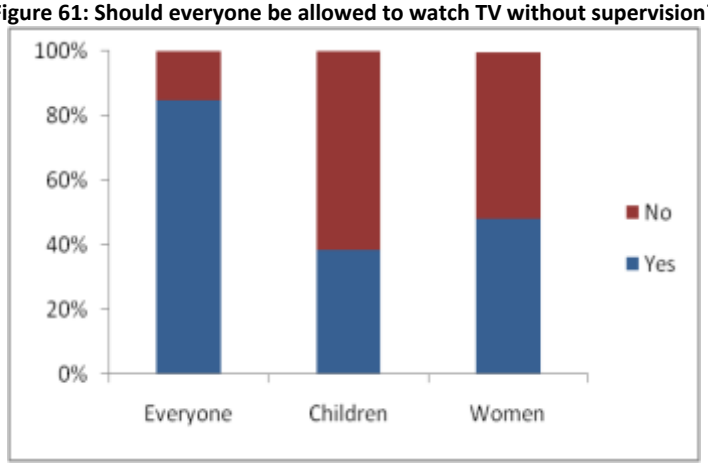
a. Is media suitable for all? Women and access to media

The research conducted in 2005 showed that cultural objections to using the media were not as strong as had initially been thought: radio was universally adopted and television was quite well accepted in the places where it was most common, although it was still considered "evil" in very conservative areas not exposed much to television. However, television was perceived by some as potentially dangerous for those considered as "without sufficient clarity of mind to make informed choices on what to watch, what to trust and the extent to which programs should guide their own way of life." Many examples were given (by men) of "wrong behaviors" among women that had come from ideas broadcast on television.

A similar pattern as observed in 2005 can be observed in this research: 85% of Afghans agreed that television was theoretically suitable for everyone, and no significant difference was observed in female and male media consumption patterns. As seen in the television usage section (see p. 101), more areas have now adopted television on a broad scale, among which are very conservative locations. As such, the cultural rejection of television as a whole is becoming an even more marginal perspective. In conservative areas, elders tend to think that television does not bring much good, but their reticence is becoming weaker and has a lesser impact.

Nevertheless, when asked specifically about women and children, important issues emerged: only 38% of the population allows children to watch TV without supervision and only half of interviewees (37% of men, 68% of women) thought women should be allowed to watch TV without supervision.

Figure 61: Should everyone be allowed to watch TV without supervision?



This trend was confirmed by the qualitative research, which generated a variety of opinions about women and access to media across the country:

> *"All people should have access to the media so all people will increase their knowledge, men and women"* (Hazara male teacher, Shulgara, Balkh)

> *"Our women have access to the radio as we have, they listen to it all the time because they are at home"* (Illiterate Pashto male farmers, Surkhrod, Nangarhar)

> *"Women should ask for authorization to watch TV. All the more often in our area the TV is located in the guest room"* (Illiterate Pashto male farmers, Daman, Kandahar)

Several years of media development and the evolution of women's roles in Afghan society have also led to some reaction in more conservative areas of the country, where the media is sometimes attributed a negative influence on women:

> *"Women are now talking back to men – this is one negative effect of the Indian serials"* (Male daily laborer, Kunduz)

> *"They make lots of demands now and not in a constructive way. They ask their husbands for money to buy the Indian-style fashion they see on serials"* (Male student, Kishim, Badakhshan)

This research did not encounter any situation where women were completely forbidden access to radio or television. Their access is sometimes limited by the location of the television set – if the set is in the public part of the house, women often cannot watch television when guests are present – but this does not mean they are forbidden to watch television when they are alone or with the close family.

However, two symptoms show that women's access to the media may not be totally free: men's suspicion that television content can potentially be harmful to women; and the fact that women, like children, are sometimes considered unable to make an informed judgment on what they see or hear on the media. To what extent this control is actually exerted is unclear but, as television is most often watched with the whole family, it is likely that the decision on what to watch, however it is taken, integrates a notion of risk mitigation, as it often does in Western culture (see notions of "family-safe programs" and "parental guidance").

"In our society, the media is powerless to change the role of women – they are still ignorant and still in the control of their husbands" (Female civil servant, Kabul)

Communities with the highest proportions of their populations disagreeing that everyone should be allowed to watch TV were found in Jawzjan (65%), Faryab (64%), Baghlan (50%), Kunduz (46%) and Daykundi (49%).Surprisingly, this means not in the supposedly conservative southern provinces, but instead in areas of the country where the strong Taliban influence has recently reemerged, or where they are exerting palpable pressure on predominantly non-Pashtun local populations.

b. Should the media be independent and free?

The position of most Afghans interviewed on this topic is reflected by the Media Law (see the media landscape section on legal environment), and shows the same apparent inconsistencies nationally: freedom of expression is very important and useful, but it should be limited to what is "right."

The media is seen by most as a source of information and vector of change (educational, political and social). As such, it is widely felt that the media should echo the variety of opinions and beliefs and should play a role in building a better society. For example, it should be involved in the fight against corruption. To have any impact on this matter, the media can and should criticize corrupt government members: media freedom and independence have to be preserved.

However, this freedom should not come at the price of the core values of Afghan culture and nation building. Many interviewees across the country understood the need for freedom and independence, but expressed their willingness to see some control, or some rules, applied to the media. Afghans feel more comfortable when some control guarantees family and cultural values, and consider such control a way to push media to better fulfill their core functions.

The general feeling is that a lack of unity in the country tends to encourage everyone to serve their own interests and those of their community first. The emergence of media controlled by political groups or neighboring countries in the past few years, together with greater access to Western or non-Islamic programs, seems to have led a number of Afghans to think that censorship or control can be rather positive. There is a feeling that it puts the media back in line with things that are perceived as good: Islam, Afghan culture and unity. This perspective was not witnessed in the 2005 research.

"I trust RTA Nangarhar because it is controlled so I know its shows are not in conflict with our culture" (Male doctor, Jalalabad)

"Some topics should not be discussed on the media – for example there are some family matters that are inappropriate to be discussed in our culture" (Male teacher, Bagram)

"Local matters which jeopardize national unity should be omitted from programming" (Male civil servant, Jalalabad)

In the Jibrail suburb of Herat, for example, some parents expressed a preference for their children to watch Iranian TV, which is much more subject to controls than the Afghan media:

> *"We feel comfortable when our children watch Iranian media. We don't need to supervise them because the Iranian media is controlled by the government and censored appropriately, whereas Afghan media outlets are commercially motivated so their content is not always appropriate"* (Community elders, Jibrail)

A strong majority of respondents believe that no divisive content should be permitted, and media that are clearly ethnically or politically oriented receive only minimal support. A few other media that are controlled by specific interest groups make a good effort to appear pluralistic (e.g. Tamaddon, Noor, Noorin), thus gather slightly higher audiences – but Afghans are savvy media users and will keep a critical eye out for any bias.

c. "Propaganda" media

Afghanistan is at the crossroads of many different and often opposed interests influencing its internal affairs. As seen in the media landscape section, these interests are trying to influence the Afghan mindset through the media, through the creation of very specifically oriented media outlets, transparent attempts at public opinion manipulation or more subtle messaging.

Almost all Afghans have often been exposed to propaganda, and they can easily recognize it for what it is. Afghans also love (possibly for good reason) conspiracy theories, and they often ascribe events in their country and what and how they hear about them to foreign control and influence.

Many interviewees recounted stories about how foreign governments are supporting both sides, the Taliban and the government, and how they would like to keep Afghanistan unstable and undermine the nation-building process and stabilization efforts:

> *"Afghanistan is the center of Asia: if they have Afghanistan, they have access to the whole area"* (Male student, Kabul University)

> *"We will have peace in Afghanistan when the foreign governments want it"* (Educated male, Kabul)

> *"Most of our media is foreign culture, foreign expressions, foreign clothes"* (Male farmer, Shulgara)

This contributes to a feeling that the media is a tool of foreign propaganda. However, there seems to be a feeling that propaganda comes from both sides, not just from foreign governments. For example, people explained that the news reports a certain number of casualties, then the Taliban calls and says that the figure was actually different. In general, when it comes to security reports, there is a great deal of sympathy for Afghan journalists, who are seen as being trapped between two sides.

> *"[Journalists] are really afraid of being killed. Lots of our journalists were martyred because they told the truth"* (Female teacher, Jalalabad)

At the same time, media that are perceived as being too close to the government are also seen as propagandists, and some interviewees had a negative view of any media related to the government.

> *"Radio Herat is not popular because it supports the government too much"* (Housewife, Karukh)

"They can't talk openly because they are under government control" (Male teacher, Kunduz)

"In general, we trust the mullahs because they don't speak their own opinions, they speak God's truth." (Male, students, Kishim)

This understanding of the ubiquity of propaganda was already witnessed in 2005, when it was observed that Afghans would to an extent still use media they perceived as biased. Similarly to commercial advertising, biased messaging was seen as possibly bringing some useful information, which is always good to take in, albeit with caution.

The situation is starting to change now that numerous media outlets have been created in the country, with the supply of information sometimes reaching saturation. As a result of this diversity, at least urban Afghans now not only have the choice not to watch/listen to media they see as too biased, but also have many more entertainment programs to choose from and less time to filter out the "noise" generated by this multiplicity of conflicting voices.

d. Military media

Military media could not be assessed properly in this study owing to a lack of access to their production teams. However, audience data were collected for the radio and the newspaper Sada-e-Azadi (see media landscape report and audience section in this report).A few interesting comments emerged from a few priority research districts (see dedicated reports), and a number of remarks were made by individuals in the qualitative research.

Some interviewees said they did not know of any military-supported or -run media, but then would tell us that they were listening to Sada-e-Azadi without necessarily making the association. However, many were aware that Sada-e-Azadi radio and newspaper were run by ISAF.

Some mentioned that these media were not aware, or respectful enough, of Afghan culture and elders:

"They [military media] need to respect our culture and traditions. No one trusts them because we all know they are only broadcasting for their own benefit" (Male student, Kishim)

Some people mentioned that the fact that Sada-e-Azadi newspaper is in multiple languages helps them learn language. As seen earlier, ISAF's newspaper is known and read; the radio station, however, seemingly reaches a small audience with regard to its broadcast coverage.

Smaller outlets, typically FM radio stations transmitting from PRTs and forward operating bases (FOBs) have varying success. Although they are generally well identified as military media, this does not appear to be a major issue; some fail to capture any significant share of the audience simply because of a lack of interesting programming.

"Military media don't talk about the needs of the people, they just make the program colorful by playing lots of music" (Male teacher, Kishim)

Others, such as Urgun Ghag and Pakteen Ghag (both in Paktika) have made bold editorial choices that seem to be paying off. Both stations are, along with Azadi, among the three preferred stations in Urgun,

and are appreciated for their religious and educational programs, their interactive programming and their relevant local warnings.

Overall, consumption data show that such large-scale efforts as Sada-e-Azadi do not seem to perform as well as they could. More targeted efforts (RIABs and other PRT/FOB stations) are very targeted, sometimes at the level of a valley or a district, and are difficult to assess. For lack of coverage and branding, the multiplication of small-range stations does not give the impression of concerted and efficient media development – but this might not be the goal pursued by these stations. The overall impact on the Afghan population remains *de facto* anecdotal.

e. Perception of specific content: focus on TV drama

Despite a major audience at peak hours, Indian soaps, and serials in general, are at the center of a national controversy that deserves specific attention. Afghans have a love-hate relationship with the concept of serials, with the main criticisms directed at Indian series.

> *"In Indian movies, they show people worshipping idols and stones; however, we Afghans believe in God and in His religion of Islam"* (Female teacher, Jalalabad)

Indian series are widely seen as un-Islamic and contrary to Afghan culture. Women do not wear *hijabs* but saris, they can divorce and have several husbands, girls are outspoken. There is a fear of acculturation from these series. These series also are perceived as encouraging consumerism, and are actually said to have a real impact on Afghan society:

> *"So many Afghan women are wearing saris and Punjabis now; this is an effect of the Indian serials. This is not our culture"* (Female student, Herat)

> *"I'm sure that some of these serials are funded by the international community so that they can dumb down Afghans and dominate Afghanistan better"* (Doctor, Mazar)

More generally, the concept of the serial/TV drama is perceived by some as foreign to Afghanistan's culture: it is inappropriate to be intimately involved in people's lives, thoughts and family problems. Many Afghans experience similarly mixed feelings towards these dramas as Western audiences initially experienced towards the first reality TV shows: they are both fascinated, shocked and yet unable to turn off the television. The audience is intimately involved in the life of a woman – the camera follows her from her kitchen to her bedroom, the audience witnesses intimate conversations she has with her husband –in a way that Afghan society would never permit beyond (and sometimes within) the smallest family circle. On top of this, scenarios are very dramatic, showing a picture of a society that is foreign to Afghan habits.

In this context, some interviewees expressed a preference for Iranian dramas, as their content is controlled, and seen more appropriate in an Islamic context. The approach is also more "polite" and less intrusive, as they are mostly set outside the home or in the living room.

In Jibrail, a suburb of Herat mostly populated by returnees from Iran, the *mullah* and the elders encourage people to watch Iranian serials over Indian ones:

"I prefer Iranian serials to Indian ones because they're not as dramatic and don't feel foreign" (Youth, Jibrail)

Turkish dramas, on the other hand, were seen with caution by a *shura* member in the same community:

"Turkish drama presents an Islamic way of life, but little subtle things attack our religious conviction: for example, the characters don't wear hijab. It lulls people into thinking it's Islamic, then brings in things that are not: first hijab, then it will be alcohol and so forth. This is an example of the power of the media" (*Shura* member, Jibrail)

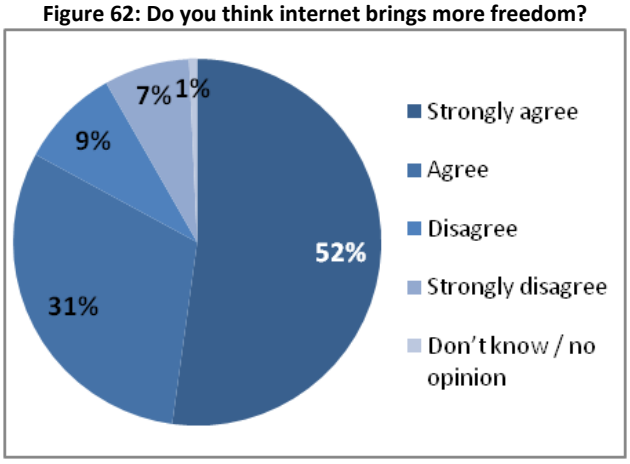
A sensitive approach to series has been developed over the years by New Home New Life, produced by the BBC World Trust production unit and broadcast on the BBC radio. This is based on stories and case studies but does not follow characters of families in their intimacy. This approach seems to be better accepted. It was conceived for conservative, rural Afghanistan, and is still a very popular program despite fierce competition in this field.

f. Internet: low usage, strong image

With a low usage rate across the country (4%), internet cannot be perceived as a preferred source of information, and many rural interviewees did not even know what internet was.

However, a vast majority of users think highly of it. For over 80% of users, internet means freedom, and to the same degree this freedom is highly regarded.

Figure 62: Do you think internet brings more freedom?



Among youth, internet has become very popular. On university campuses, professors mention websites and encourage students to self-study on the internet, because textbooks are in a bad condition and outdated.

"When we need more information for university we only go to the internet because our textbooks are useless. We are using the same books our fathers used 25 years ago. When we learn statistics, we are looking at GDP figures from 20 years ago" (Student, Herat University)

Private university students who work for international organizations during the day and study in the evenings may end up being connected to the internet 24 hours a day (at work, at university and at home), including on their phones.

Online youth can become different people and relax the otherwise strict social rules governing society and especially gender: internet allows youth to shed their inhibitions. Male students admitted they could chat online with their female classmates, even though they would not say a word to them in person.

Facebook has become a forum for discussion and debate which perhaps could not happen in person. It is still nascent but is growing: youth are posting articles, commenting on status updates and writing notes about their experiences.

> *"We don't debate much in real life, but on Facebook we get into real debates and actually talk seriously. It's the main way of debating in our lives. It's becoming a forum to express themselves"* (Student, Kabul Private School)

However, interestingly enough, many non-users also expressed an opinion on what they thought the internet was. The media benefit from this very positive opinion, across all regions and types of audience, deserves to be pointed out:

> *"Internet is information about the whole world, telling the truth in a very clear manner. But we can never use it"* (Female students, 15-20, Jalalabad)

> *"Internet is technological progress, awareness of the world. I never used it."* (Shopkeeper, Kishim, Badakhshan)

2.3. Trust

> *"The only hope of the people is the media, so they need to report truthfully because, if they lie, then what will be the reference point of the people?"* (Male farmer, Shulgara)

a. Media vs. traditional sources of information

When asked about their preferred and most trusted channel of information on different topics, Afghan unanimously expressed a preference for broadcast media, with TV having a strong edge. This is true across topics, from news to health, politics and development projects, with only one exception: on religion. *Mullahs* remain the most trusted source of religious information for 39% of interviewees, ahead of TV and the radio. *Shuras* are sometimes consulted on development projects, and the local *malik* is trusted to a certain extent (but at a very low rate) for local news and development projects.

Table 12: What source of information do you trust the most for the following topics?

Topic/most trusted source	International news	Afghan news	Local news	Health	Politics	Religion	Development projects
TV	39%	36%	33%	31%	35%	26%	27%
Radio	38%	46%	45%	33%	34%	21%	31%
Mullah, mosque	3%	1%	1%	1%	1%	39%	1%
Family, friends	1%	4%	1%	1%	0%	1%	1%
Newspapers	1%	1%	1%	0%	1%	0%	1%
Shopkeepers/bazaar	0%	0%	1%	0%	0%	0%	0%
Shura	0%	0%	0%	0%	0%	0%	9%
Khan, *malik*, commander	0%	0%	2%	0%	0%	0%	3%
Taxi drivers	0%	1%	0%	0%	1%	0%	0%
Expert	0%	0%	0%	20%	1%	0%	0%
Book	0%	0%	0%	1%	3%	6%	0%
Internet	0%	0%	0%	0%	0%	0%	0%
No interest	18%	11%	17%	11%	24%	7%	27%

This should be carefully interpreted, however: despite our efforts, the questions leading to these results were probably biased. Although asked at the beginning of interviews, before the media was introduced as a topic (interviewers were asked not to mention the media before reaching later parts of the questionnaire), the question of trust came right after a question asking "Where do you receive information from on the following topics?" In English as in Dari or Pashto, the mention of *information* leads naturally to the media.

Qualitative evidence shows that interviewed Afghans still commonly learn about topics and receive advice and factual data from non-media sources, and they value these sources. In particular, when they are looking for a particular piece of information, they do not turn to the media. Instead, the media provide valuable and trustworthy information in general but not specific answers to specific questions. Interviews with farmers involved in the Tradenet experiment showed that most Afghans are still puzzled by the possibility of getting information "on demand" from a news source.

To an extent, there is some form of competition or completion between media and traditional sources, even in relation to general news broadcast on the media. Afghans often rely on word of mouth, friends and family to filter, emphasize, confirm or obtain more details on different topics. If the topic is of direct interest to them, for example if the news is about a particular security event in their area, they try to confirm the information through phone calls to people closer to the event.

As observed in 2005, the attitude of Afghans towards the media is quite elaborate and rational. The media is a primary source of information, generally trusted, but more seen as sources of information confirming a given position or perspective.

Box 20: Community case study insight into information flows in rural Kandahar

Mand-Ab village, of Daman district, Kandahar province, is a rural community located to the south of Kandahar airport and approximately 32km from Kandahar city. The people of Mand-Ab are highly uneducated and have been the recipients of far less aid than the other case study locations in Kandahar.

Lack of education and extremely basic economic means lead to very little media consumption. There is no electricity in the village, except for a personal generator that belongs to the *malik* and serves only his home and the four mosques in the area. It is switched on between 7pm and 9pm in time for evening prayer in the mosque. During this time, the television in his home is

switched on and most of the village men gather in his home to watch TV with him. During this time, the *malik's* home becomes a hub of information exchange. Usually, the conversation revolves around daily events. If someone has been to the city during the day, they share what they saw or learned there. Other villagers share local news and talk about who got married, who got sick and so forth. In this forum, the *malik* also shares information with the villagers. This means that most of the news and information that inhabitants receive comes from word of mouth and is clothed in the bias of the deliverer.

Most families have radios, which they listen to mainly for news and sometimes for music. People do not switch the radio on when they return from work and keep it on until they sleep, as in other parts of the country, and this seems to be mainly because of economics and language. As the villagers are financially not very well off, they limit radio usage in order to save money on batteries. Also, none of the villagers speaks Dari, and many of the women speak local dialects or very colloquial village versions of Pashtun, which makes understanding the radio difficult. There are no local radio stations, and there is no broadcasting in the local dialect.

Variations across age and gender

Small variations can be observed across age groups, with young Afghans (<30) trusting the *mullah* on religious issues slightly less than the older generation (35% v. 42%) and trusting TV more (29% vs. 22%). Preference for TV vs. radio on all types of news is also more acute among young Afghans.

In general, women prefer and trust TV more than men, who have access to multiple sources of information outside of the home. This is particularly true for information related to religion, on which women prefer TV to the *mullah*, and health, on which women trust TV more than doctors, mainly because they have little choice, as they have to stay at home.

This suggests that TV is for many women the only real window to the outside world, and the main source of access to information.

Variations across locations

In Kabul, TV has an edge on other sources for all news (80-97% prefer it to other sources), whereas in more rural areas, where TV is less present, radio is preferred (Wardak, Paktya, Uruzgan).

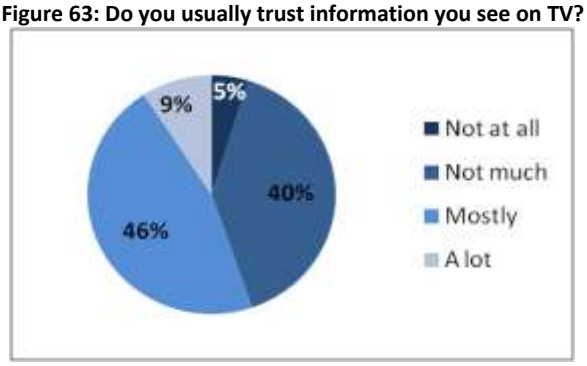
There are a few exceptions of provinces where *khans* and *maliks* are strongly trusted for Afghan news and development projects (Sari Pul), or where local experts (doctors) are far more trusted than other sources for health (80-90% in Ghazni, Helmand and Uruzgan). In Baghlan, Nimroz, Helmand, Nuristan and Sari Pul, *mullahs* dominate all other sources of information on religious issues (80-90%).

In general, and as expected, traditional sources of information tend to have a greater role in more rural areas, but as soon as media become available, this is the most spontaneous and trusted source on most issues.

b. Trust in TV and across categories of networks

Despite high audience rates, when asked specifically how much they trust what is on TV, Afghans expressed some caution, in line with qualitative comments collected around the country. Most trust the media a lot or mostly (55%), but 40% expressed doubts and 5% do not trust TV at all.

Figure 63: Do you usually trust information you see on TV?



The qualitative research shows that trust in **national TV (RTA)** tends to be higher than trust in other channels, as RTA is controlled and is the medium for all Afghans. This is a new trend, not observed in 2005 study.

At that time, RTA was liked as "the TV and radio of all Afghans" but with caution, with many thinking that government control was creating a bias. This research shows that, after five years of strong TV development, this control is somewhat appreciated, and is a way for many to avoid un-Islamic programs or profess unity among Afghans. This also explains high audience rates for the RTA network overall.

> *"Government TV is better because it belongs to all people across the country and has specific rules and regulations by which it operates. Private TV is free to do as it wishes and works only for the personal benefit of its owners"* (Female teacher, Jalalabad)

Tamaddon is highly regarded among returnees and along the Iranian border because it is close to Iranian culture they highly regard. In Jibrail, the *mullah* tells people to watch Tamaddon. In Kabul, however, people see Tamaddon as representing only some and not all Afghans: "*It's all Farsi and Iranian accents."*

Tolo was the most criticized yet the most loved and watched – it is very popular among youth. In many places, where people did not know the names of outlets or shows they still knew Tolo.

Shamshad is very popular among Pashtu speakers – it was mentioned often in Kandahar but also in other parts of the country.

> *"In my opinion, the best TV channel is Shamshad, because it broadcasts a variety of programs to suit everybody and people are properly dressed and covered, from the perspective of our culture"* (Female teacher, Bagram)

However, many non-Pashtu speakers said that this does not represent all Afghans and that it is trying too hard to promote Pashtu culture:

> *"Shamshad is popular but it's not interesting for us – it doesn't represent all of us. It's too Pashtu, and always trying to promote Pashtu culture"* (Youth, Kabul)

> *"In my opinion, some media represent specific groups only. For example, Shamshad TV is for Pashtun people and it imitates Pakistani culture. Most of its programs are broadcast from Pakistan"* (Female teachers, Bagram)

Sometimes, comparisons were made with **Lemar**: people explained that, although Lemar is also in Pashtu language, it deals with content that is good for everyone.

Ariana has a generally good and neutral reputation and is enjoyed by most people, who said that they trusted Ariana because it does not lie and it has a good track record. It was especially mentioned in Balkh province.

It seems that the founder of Ariana, Mr. Bayat, has a good reputation as the "father of the poor." People trust Ariana because of his reputation.

> *"The people trust Mr. Bayat because he is always doing good things for the poor"* (Daily laborer, Mazar-e-Sharif)

> *"Ariana TV broadcasts real news, and it shows serials where the people are dressed appropriately and our culture is respected"* (Daily laborer, Herat)

Noorin was often seen as being too sensational:

> *"They have intense debates that oppose the government and they're so sensationalist that no intelligent person believes them"* (*Shura* member, Jibrail)

c. Most trusted radio stations

Trust was measured comparatively for radio stations across the country, not by asking people to order stations by level of trust but by asking them to report the three stations they trusted the most. Most trusted stations are those on international networks. Azadi and the BBC received the highest rates, at 44% and 41%.

The RTA network also generates a high level of trust. When considered alone, the Kabul-based national broadcaster was among the most trusted radio stations for 18% of Afghans;[50] when aggregated with local RTA radio stations (Kandahar, Jalalabad, etc), the network ranked third, with 39% of trust expressed at the national level.

These three networks (BBC, Azadi and RTA) have good coverage of rural areas, and are generally the most listened to (see also audience section). Azadi and the BBC are trusted for their professionalism and their networks of journalists, as well as their access to international news, RTA occupies a different place in Afghan households: it is generally praised for being the radio of all Afghans, with national news and a sense of national unity, despite a certain government bias. Local RTA stations are also appreciated for their responsiveness and reliability in relation to local news.

> *"I listen to Azadi because it has good and informative news, the BBC because it has been in Afghanistan for a long time and has good knowledge and covers the world and RTA Kandahar because it has reliable local news."* (Professor, Kandahar city)

Ashna (VOA) and Arman FM follow, with respective 14% and 15% trust rates. Ariana and Killid networks come in sixth and seventh position.

[50] Question: *"Which are the three radio stations you trust the most?"*

Table 13: Most trusted radio stations

Station	Mentioned by
Azadi	44%
BBC	41%
RTA radio (all)	39%
Ashna	15%
Arman FM	14%
Ariana	8%
Killid (all)	6%
Nawa	4%
Sharq	2%
Sol-e-Paigham	2%
Azad Afghan	2%
Wolas Ghag	2%
Sulh	2%
Noorin	2%
Armaghan	2%

Looking more specifically at urban centers, where Azadi, the BBC and RTA are in more direct competition with other networks (Arman, Killid, Ariana) and local radio stations (Sharq, Nawa, Arezo), interesting variations are to be noticed. In Kabul and Mazar, Arman FM is by far the most trusted radio, ahead of Azadi, the BBC and RTA. In Jalalabad, RTA and the local Sharq dominate. But when Sharq is combined with its sister station, the women-focused radio Nargis, the Sharq media group is trusted by over 70% of Jalalabad's radio listeners.. In Herat, Watandar competes with Azadi, whereas in Kandahar Wranga, Azadi and Killid are the most trusted stations.

Interestingly enough, Killid obtains a very high level of trust across the board in the cities where it is broadcast, and this was confirmed many times by qualitative feedback. Many felt that it had a broad variety of programs and balanced opinions, as well as being sensitive to Afghan culture and local languages.

> *"We trust Killid because it represents the people and interests of Kandahar"* (Female doctors, Daman)

Table 14: Most trusted radio stations (urban centers)

Kabul		Jalalabad		Mazar-e-Sharif		Herat		Kandahar	
Arman FM	50%	RTA	54%	Arman FM	47%	Azadi	26%	Wranga	35%
Azadi	31%	Sharq	45%	BBC	21%	Watandar	26%	Azad Afghan	31%
RTA	23%	Azadi	32%	RTA	20%	Arman FM	22%	Killid	30%
BBC	21%	Nargis	27%	Azadi	16%	Killid	19%	RTA	26%
Ariana	20%	BBC	24%	Arezo	16%	BBC	11%	Arman FM	15%
Killid	18%	Killid	22%	Ariana	13%	RTA	11%	Azadi	10%
Noorin	10%	Arman FM	19%	Lahza	11%	Faryad	7%	BBC	8%
Rah-e-Farda	9%					Sada-e-Azadi	7%	Nawa	7%
Maiwand	7%					Ariana	7%	Talem al Islam	6%
Watandar	6%								
Ashna	6%								

Looking at provincial centers, as noticed in the 2005 study, local radio stations generally obtain a high level of trust in their specific area of coverage, often competing with broader networks, or rather complementing them. This is true, for example, for Solh in Paghman (Kabul), Amo in Badakhshan, Zohra in Kunduz, Milli e Paigham in Logar, etc. (see below section).

d. Local media: trust, proximity and limitations

The qualitative research showed that local media are appreciated and trusted for local news, as well as in reflecting local concerns and needs, in an easy to understand language (especially in the south).

> *"When there is a security incident and people's phones go out, they turn on the local radio for security news."*

> *"To the extent that local TV channels proliferate, the needs of the people will find a voice"* (Male doctor, Shulgara)

> *"Local media reflect local problems and so force the local administration to solve them"* (Male civil servant, Mazar)

> *"Local media are good for finding work"* (Female student, Mazar-e-Sharif, Balkh)

Local media sometimes allow communities to solve their problems, giving them access to broader development programs:

> *"We had issues with our water, our representative went to the local media, the problem was broadcast on the local radio and things changed"* (Paired interview, Mazar-e-Sharif)

Some interviewees in Kabul even wanted radio stations for each *nahia* (area), to detail specific local events, local announcements, etc.

In Kandahar, people feel different and separate from the rest of the country, and sometimes feel marginalized by the media, for instance that it does not necessarily represent them. In these cases, local media take on an important purpose. People said that they were more interested in local content on issues of language and cultural representation. Hewad was mentioned many times.

Farmers in Kandahar feel that local media should give specific agricultural information suited to the needs of local farmers, such as on the crops that are grown in the area (pomegranates, grapes, etc).

However, interviewees also noted the limitations of local radio stations. Their quality was perceived as inferior, and the development and quality of their programs as hampered by a lack of funding. Some feel that it is the responsibility of the government to support them financially to help build them up.

e. Main determinants of trust

In general, trust in media tends to be based on the same principles that underlie trust in an individual. One of the main drivers of trust is the character, values or perceived virtues of the individual behind the media or of people commonly seen on each medium (transfer of confidence).Often, a certain medium is preferred because people respect the person that runs it. For example, as seen earlier, some people like Ariana TV based on their respect for its founder, Mr. Bayat.

Another important value is conformity to Afghan core values, such as Islam, respect, balance in judgment, politeness and equanimity. The *way* a particular opinion or fact is expressed is often as important as the opinion or fact itself: some distance and composure are preferred to sensationalism, indignation or over-enthusiasm.

Some sections of the population said that they did not trust *eteghadi* (current affairs shows that criticize the government and expose corruption or abuse of power) because they are too dramatic and exaggerated. For example, Tolo's "6.30pm Report," exposing government abuse of power and corruption, is generally popular, as are most anti-corruption programs. However, some educated people do not like it and do not trust it much, because they consider it too catchy, dramatic, loud and fast, and is not balanced enough and does not show two sides of the story. In general, the Afghan audience is becoming more and more demanding and does not want to be abused by catchy programs or biased information.

> *"The enteghadi shows exaggerate the truth so intelligent people don't trust them"* (*Shura* member, Jibrail)

The way the media deals with people calling into stations, i.e., respectfully, politely, plays a key role in how the station is perceived. For example, people said they did not trust Noorin because the presenters do not talk politely to people who call the channel. A bad reputation is linked to bad behavior or character. Saying inappropriate things, not showing integrity and not following tradition or protocol damage the image of the speaker and the media outlet.

Another key driver of trust, not surprisingly, relates to the opinions of close referents. What the elder of the family or the patriarch listens to or watches often influences or directly drives what the rest of the family watches. At the very least, he will advise on what is considered trustworthy.

> *"When we watch something, our father tells us if it's wrong or right and we discuss it"* (Daily laborers, Mazar)

A more objective reason for trusting the media comes from being able to see or hear the event directly, or a source close to the event. The ability to *see* naturally gives a clear advantage to TV.

> *"We trust TV because it's direct reporting from the scene"* (Male doctor, Mazar-e-Sharif)

Finally, the *proximity* of the people to the issue is another important determinant. A medium may be trusted because it relates events that people know about firsthand. Although the media may not bring any additional information on the event, the mere fact that they are covering it properly creates a feedback loop that reflects the quality of the reporting, which extends to the media outlet in general.

Interestingly enough, independence and quality of journalism do not seem to be so much a determinant of trust: as seen above, opinions on journalism freedom are nuanced. People who seem to care the most about this seem to believe that journalists have very limited freedom. For them, public media are constrained by government; private media are seen as free to criticize the government, but are bound by money considerations and are rarely seen as pursuing higher purposes. Hence, a truly independent media does not really exist, so the most important role of the media is to provide raw information that has to be cross-checked and verified.

Finally, the age of a media outlet does not matter as much as one would assume. A positive reputation builds slowly and can be ruined near instantaneously; some young media outlets are regarded as highly as older ones.

3. Impact

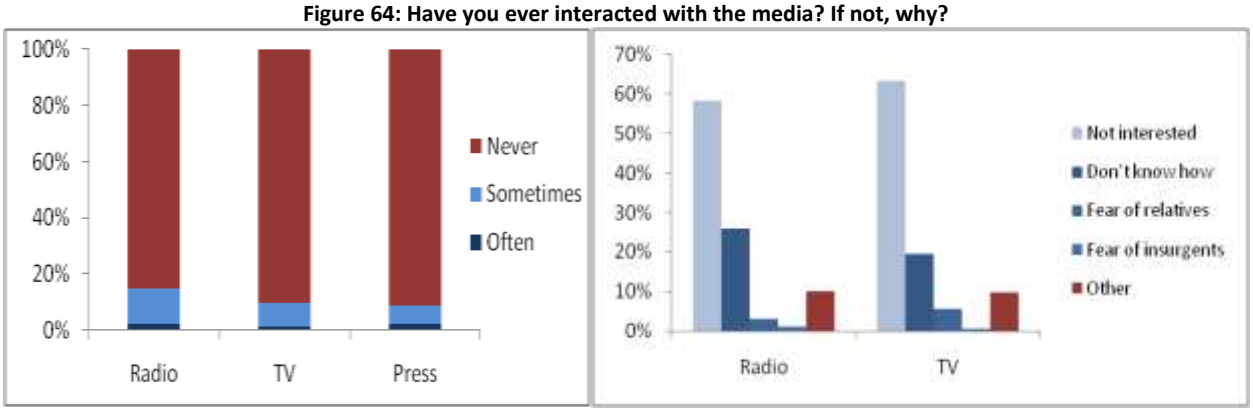
3.1. Integration within communities

Although deeply interested in media content and usually happy to share their views with their families and friends, a majority of Afghans do not feel compelled to interact with the media: 85% of listeners and 90% of TV viewers have never called, sent anything to or personally visited their media outlets.

The most important reason given for not participating was a simple lack of interest (58% of radio listeners and 63% of TV viewers). The second most important factor was lack of knowledge or lack of success in getting through (25% of radio and 20% of TV audiences). Many interviewees specified that they had attempted to call in many times without succeeding.

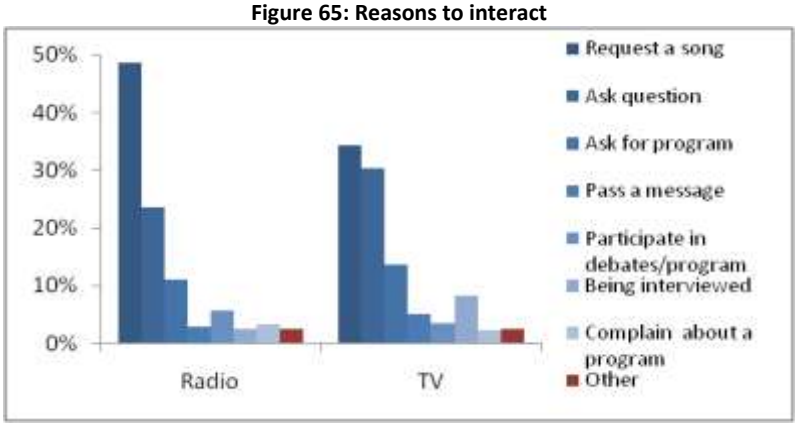
Fear of relatives (generally fear of being ashamed or blamed for bringing attention to the family) came third, with a very small percentage of cases. Fear of insurgents is anecdotal: security does not seem to be an obstacle to participation.

Figure 64: Have you ever interacted with the media? If not, why?



Among the few who interact with media outlets, most call to request a song (half of calls to radio and a third of calls to TV). A total of 30% of calls to TV and 25% of calls to radio are made with the intention of asking a question. Other interactive users call to request a program or pass on a message. A few participate in programs, are interviewed or complain about a program.

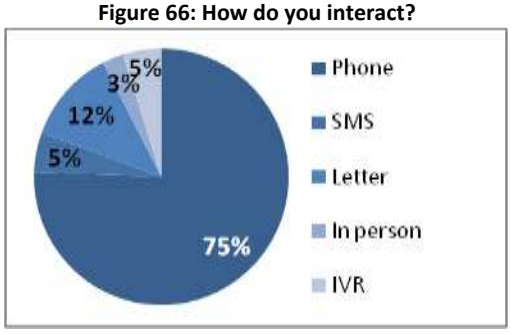
Figure 65: Reasons to interact



Youth (<30) are significantly more interested in this interaction: 22% have interacted with their radio station in comparison with 7% of the older generation (>30). In Ghazni, Zabul, Uruzgan, Bamyan, Sari Pul and Nimroz, inhabitants are particularly passive; most of these are rather isolated or conservative provinces.

A total of 75% of all contacts with radio station are made by phone. Fewer people send letters through postal mail (12%). Only 5% of interactions are conducted via SMS and IVR. Personal visits are extremely rare (3%). Interestingly, the young use traditional letters relatively often, but also call the stations more often than people over 30. Women and youth request songs more often, whereas men and older generations participate in debates over the radio more frequently.

Figure 66: How do you interact?

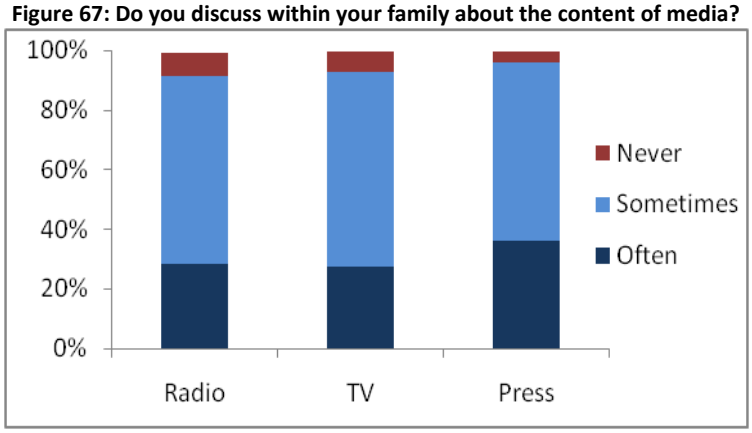


Local radio stations are contacted more often, given the certain level of proximity that national radio stations do not have. They also develop programs that incorporate live calls.

3.2. Circulation of information

Content of media outlets is discussed widely among Afghan families. A total of 91% of radio listeners, 93% of TV viewers and, interestingly, 96% of press readers exchanged their opinions on media content with their relatives and friends.

Figure 67: Do you discuss within your family about the content of media?



4. Impact on opinions and behavior

"The mullahs get annoyed, because no one is going to the mosque to pray in the evenings, because everyone is watching serials" (Male villager, Parwan)

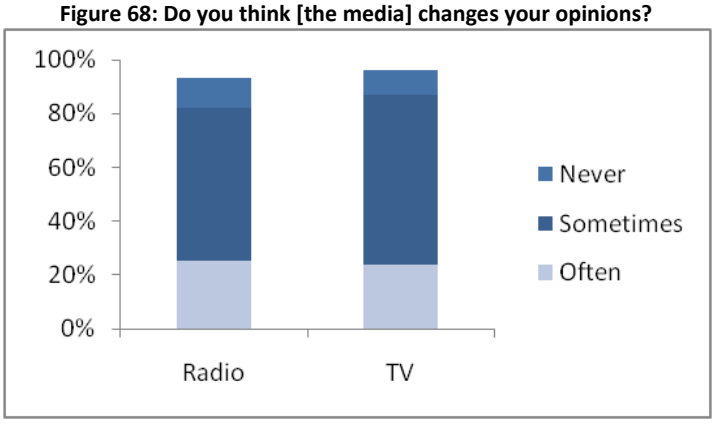
Overall, the media has taken an active role in the life of most Afghans in the past eight years, and has had a significant impact on a number of developments within Afghan society which cannot be easily measured. Societal changes are generally the result of a combination of factors, and the most important changes are probably unnoticed by Afghans themselves.

More than 90% of TV users and 89% of radio listeners admitted that the media had sometimes or often changed their opinion.

Radio is particularly influential in Paktya, Laghman, Samangan, Jawzjan, Badghis and Farah provinces, which, interestingly, are among those with the lowest literacy rates. Radio is slightly less successful in Herat and Zabul, where over 30% of listeners' opinions reportedly have never changed or been influenced by radio programs.

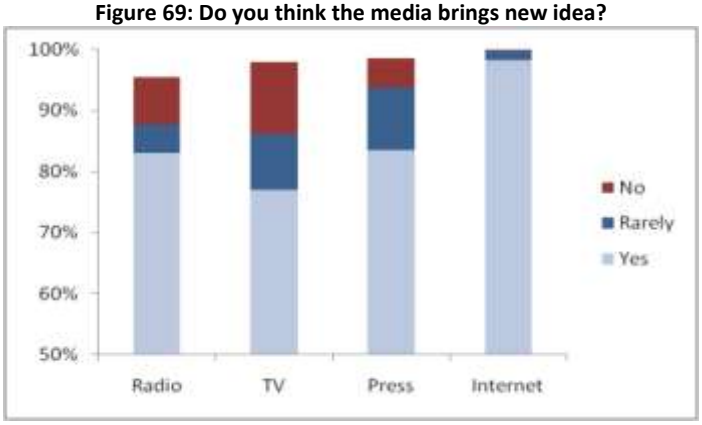
TV is particularly influential in Kapisa, Paktya, Laghman, Kunar, Samangan, Badghis, Farah and Uruzgan provinces, which are more or less the same provinces where radio has an impact. In Baghlan and Nuristan provinces, over 30% of viewers' opinions have never changed or been influenced by TV programs, but this is probably related to low consumption rates in these regions.

Figure 68: Do you think [the media] changes your opinions?



More specifically, the media is perceived as a source of new ideas. In particular, 98% of internet users perceive it as a mind-opening tool. TV comes last in this ranking, but still 77% of viewers positively assess its groundbreaking role. Not only do media bring new ideas, but these ideas are good, according to 97% of internet users, 95% of press readers, 93% of radio listeners and 91% of TV viewers.

Figure 69: Do you think the media brings new idea?



Inhabitants of rural areas are less open to the media "bringing them new ideas," and they are not so convinced of the print media's ability to bring new viewpoints. People in relatively less affluent regions (Baghlan and Herat provinces) have similar opinions, whereas those from Parwan, Paktya, Badakhshan, Takhar, Samangan, Badghis and Ghor provinces are more enthusiastic about print media bringing new ideas.

"Because of the media, our women have become open-minded and aware, to the point where they argue with us about sending our girls to school and wanting to enroll in educational courses themselves" (Male farmers, Kishim)

"I couldn't talk about social and political issues before but now I have learned the rules of discussion a bit" (Male teacher, Kunduz)

"Opinions about women's and men's roles have changed. In the past, men wanted many children but now they have gained some awareness and don't think it's such a good idea anymore" (Female teacher, Mazar)

"Personally it has had a great effect on me – before I trusted the government, but now I don't trust them at all!" (Female teacher, Herat)

"The fact that more girls are going to school owes partly to the media" (Male daily laborer, Mazar-e-Sharif, Balkh)

"The fact that the government is focusing on anti-corruption is a result of the media" (Male daily laborer, Mazar)

"Sadiq Chakari is under investigation for embezzlement now because the media exposed him" (Male doctor, Mazar)

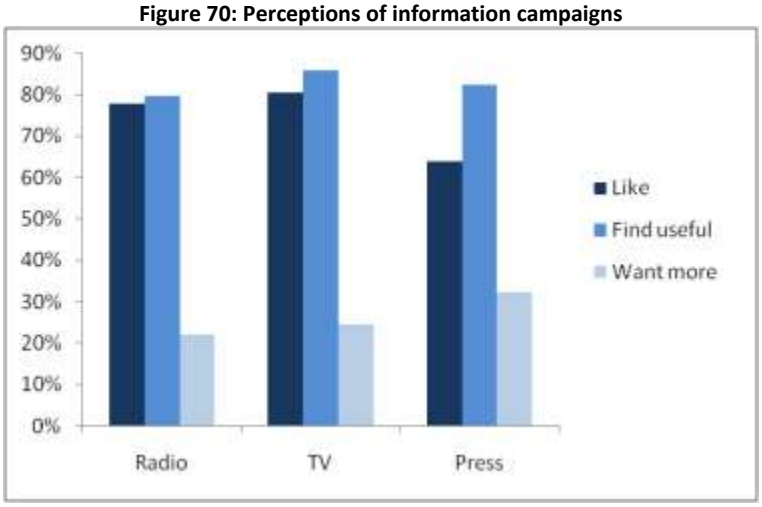
"The governor has announced the fight against corruption, and this is the result of the media"(Male doctor, Mazar)

"The media changed my opinion about migrating illegally overseas. After I watched Gochogh e Ensanha on Shamshad I changed my mind" (Female teacher, Mazar)

The media's positive role is also seen in engagement in information campaigns. One caveat should be made here: people do not always distinguish between non-commercial awareness-raising activities and commercial advertising.

Across the different types of media, people like to see informational advertising, especially on TV (81%) and radio (78%) and to a minor extent in the press (64%). More than 80% of media users (for all media) find this type of content useful, with the highest score for TV (86%). Nevertheless, half of the population thinks there are enough of these information campaigns in the media, and only 32% would like to see more in the press and 22-24% for radio and TV, respectively.

Figure 70: Perceptions of information campaigns



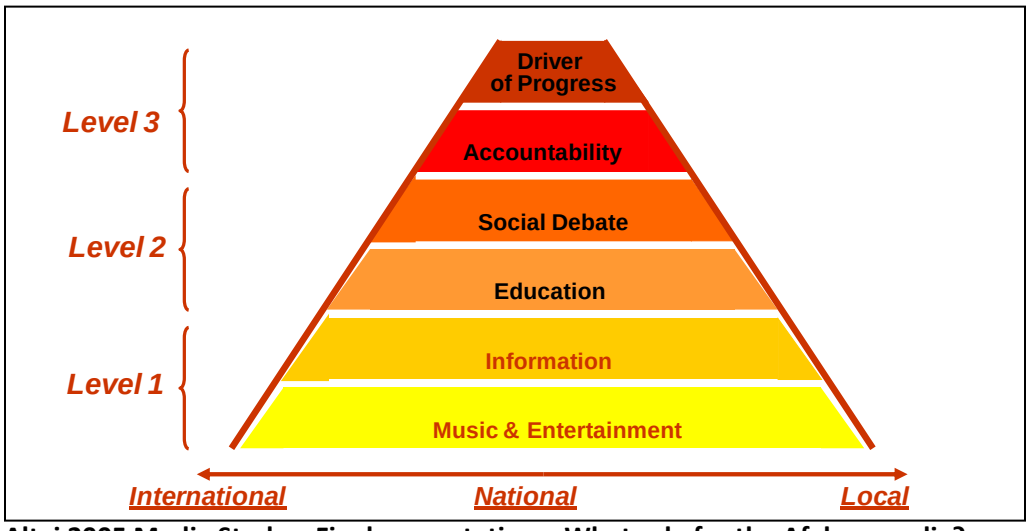
Radio information campaigns are slightly more liked within rural communities. Women find them more useful than men and prefer them to information campaigns on TV.

Section III - PERSPECTIVES: RISKS AND OPPORTUNITIES

A. The growing roles of the media in the Afghan social and political landscape

In 2005, our study of the Afghan media raised a question as to its role in a changing society. In the initial years of media development, most media were focusing on information and entertainment, although they were starting to introduce education and social debate programming. Few media were challenging the government in terms of its actions and the need for it to be accountable or trying to define more ambitious directions and models for the country's development. Audiences were generally satisfied with the content provided, although some journalists and users interviewed were already expressing an interest in seeing the media play a broader role.

The media covered the first and second levels of content in the diagram below (Entertainment and Information) relatively well. There was not much media coverage of the third level, including "Accountability" (of the government) and "Driver of Progress," with the exception of a few innovative programs on Tolo TV.



Altai 2005 Media Study – Final presentation – What role for the Afghan media?

Five years later, with a growing civic awareness and more sophistication among Afghan media users, but also in reaction to the emergence of a number of outlets with a political agenda or promoting certain ethnical groups, Afghans' expectations have increased. A large number of interviewees, from all regions and all educational backgrounds, expressed their concerns in terms of the reliability of the Afghan media and described the roles they expected the media to play. This goes beyond entertainment and information, which are now taken for granted.

> *"The only hope of the people is the media, so they need to report truthfully because if they lie, then what will be the reference point of the people?"* (Male farmer, Shulgara, Balkh)

We describe these roles and give examples around three main axes:

- **Political**: voice the diversity of thoughts, ideas and opinions and act as a counter power;
- **Educational**
- **Nation building**: build, rebuild, accompany and push cultural changes, motivate and give a higher sense of purpose to Afghan youth.

1. Political role

1.1. Media as a counter power

Expectations in relation to this role have grown among Afghans across the country, as foreseen in 2005. A number of *enteghadi* (current affairs) programs, such as *Emrooz Emshab* and *Zang e Khatar* on Tolo TV (most often quoted) are already working on holding the government and other stakeholders (international forces and donors) accountable. This, according to some interviews, has already generated some change in terms of forcing the government to act against corruption:

> *"Zang e Khatar, which most people love, monitors the government and had an effect on this tyrannical government."* (Female Doctor, Mazar)

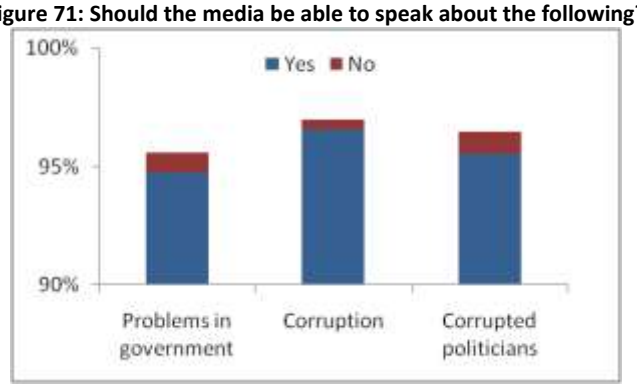
> *"We would like to know more about the transparency of government officials and the spending of provincial budget."* (Male civil servant, Jalalabad)

> *"The fact that the government is focusing on anti-corruption is a result of the media."* (Male daily laborer, Mazar)

> *"M. Sadiq Shakari is under investigation for embezzlement now, because the media exposed him."* (Male doctor, Mazar)

Across the board, Afghans are extremely keen on hearing and seeing in the media topics considered to be sensitive but of collective interest: problems in the government (95%), corruption (97%) and naming corrupt politicians (96%). This was consistent across all provinces.

Figure 71: Should the media be able to speak about the following?



However, a frequent comment was that this should be done in a more subtle and efficient manner, and with the right tone so as to really have an impact. Some interviewees felt that the really corrupt people were never spotlighted:

> *"Yes, it is important for the media to hold the government accountable, but the problem is that they are only criticizing low ranking civil servants, and never the real high authorities, and never people protected by political parties."* (Male civil servant, Nangarhar)

"My feeling is that criticism without encouragement is destroying hope and support for government." (Male farmer, Nangarhar)

Some educated people do not buy into these programs because they think they are too dramatic or sensationalist. Meanwhile, some uneducated people said that, when they hear only criticism of the government, they feel hopeless about the future. They do not have the skills to balance these criticisms with the positive things that are happening too. Others expressed their respect for the role of the government, and felt that it was necessary to challenge them but also to encourage them.

It is important for the media to monitor the government and to expose corruption and weaknesses, but also to report on its achievements in order to create a balanced sense of what is happening.

1.2. A scene for social debate

Indian soap operas are causing much debate among Afghans, not so much in terms of their content (that is, causing people to rethink previously held convictions), but in relation to the fact that they are in many ways very much at odds with the local culture. They lead people to question some of the predominant social norms: how to live, how to dress and how to relate to each other in today's Afghanistan.

More generally, the media is expanding horizons and giving the chance to many to have a better understanding of their environment and to develop a critical mindset:

"I couldn't talk about social and political issues before, but now I have learned the rules of discussion a bit." (Male teacher, Kunduz)

In some cases, the authority of the elders or *mullahs* is in question, just because people are not listening to them when they ask people to stop watching serials. The media itself then becomes a subject of debate between generations, owing to differences in program consumption habits and to the behavioral changes they generate.

"The mullah is getting annoyed because no one is going to pray is the evening, because everyone is watching serials." (Male villager, Parwan)

"Women ask their husbands for money to buy the Indian style fashion they see on the serials." (Male student, Keshem)

More importantly, the media often generates discussion about **family values and gender**, and is seen as changing mindsets across the country and giving women a better chance to have their voice heard in society. However, not everyone is accepting of this.

"Because of the media, our women have become open-minded and aware, to the point where they argue with us about sending our girls to school and wanting to enroll in educational courses themselves." (Male farmers, Keshem)

"Opinions about women's and men's roles have changed. In the past, men wanted many children but now they have gained some awareness and don't think it's such a good idea anymore." (Female teacher, Mazar)

"I think there should be more programming on domestic violence and education on family life and roles of husband and wife so that we can decrease domestic violence." (Female doctor, Mazar)

This debate on family values and the role of women in Afghan society is still wide open, and some see the media as bringing in negative ideas on the subject:

"Yes, it has changed gender roles but in a negative way. Women defend their rights without even knowing what their rights are." (Male student, Keshem)

"They are not interpreting the Quran's teachings about women properly – when they talk about women's rights, they do not discuss which kinds of rights are mentioned in the Quran. To the media, women's rights means removing the hijab." (Shopkeeper, Jalalabad)

"Women are now talking back to men, this is one negative effect of the Indian serials." (Male daily laborer, Kunduz)

However, many among the interviewees, especially women, expect the media to continue informing on women's issue and social questions that need to be debated.

"There should be a lot more programs about women's issues, such as Banu." (Female student, Jalalabad)

"They should talk about equality of men and women, from the perspective of Islam, on the media; this will benefit the whole nation." (Male daily laborer, Mazar)

2. Educational role

"You can tell from the way that the majority of the people act in our society today that they are uneducated and in need of guidance. This is a role that the media should fulfill, to enlighten and refine the masses. The majority of people can be educated via the media. Even the women, who never leave the house and go to school, can learn the same things from the privacy of their own homes, from the media." (Male farmer, Shulgara)

Across the country, all Afghans identify the media as a major opportunity to educate, ranging from basic knowledge and literacy for the most illiterate Afghans to complementing higher levels of education. This is an opportunity to create different types of formats, programs and dynamics within existing channels.

"The only thing that can increase the educational levels of this country is the media." (Student, Herat University)

"The media has the power to teach kids something they wouldn't listen to if you told them." (Shura member, Jibrail)

"Many things that I didn't learn from my local mullah, I learnt from the mullah on TV." (Male teachers, Shulgara)

Educational campaigns are also praised for their impact on opinions:

"What the media does in one day, an office cannot do in one year." (Male Doctor, Mazar)

Box 21: Community case study insight on expectations of the media among returnees in Herat

Shahrak-e-Jibrail (named after the Angel Gabriel and sometimes referred to simply as Jibrail) is a peri-urban township situated not far from the Iranian border, some 30km from Herat city. The people of Jibrail are Shia Hazara, 80% of whom are returned refugees from Iran. The inhabitants are highly educated and have quite progressive lives.

There is a strong sense of cohesion in the community, particularly in terms of their ethnic identity as Hazara. This identity separates them from the rest of Afghanistan, as they see their customs, expectations and ideas as fundamentally different from other ethnic groups in the country. They also tend to feel that the government and other Afghans marginalize and discriminate against them, which strengthens their sense of a distinct Hazara identity. Beyond this, there is a strong Iranian cultural influence on their lives. Most of the community identifies with Iranian culture and traditions much more than with Afghan ones. There is among them, however, a strong aspiration to be able to relate more to an Afghan culture yet to be defined.

In terms of media, the inhabitants feel quite strongly that there is a lack of variety on Afghan TV. The community feels that the majority of channels broadcast only news and political shows, or entertainment, but little or nothing in the way of education, culture, children's shows or sports. Among parents, school teachers and *shura* members, there is a great deal of discussion about *culture building*, and many see this as one of the roles the media should play. It was expressed that the government should invest in cultural shows and also in the general promotion of Afghan culture via the media; some even felt that a *mullah* should present such a show on TV. One *shura* member, also the principal of a private school, stated that, *"The influence from Iran is a good thing because it encourages education, but we need to build our own culture so that our youth don't attach to foreign cultures."* Culture building is seen as the primary means for the creation of national Afghan unity that could supersede any tribal/ethnic loyalties, something that is clearly very important to the Hazara community, and also as a response to extreme attachments to religious identity. The same man stated that, *"The Taliban has done so much in the way of propaganda that people are now prepared to die for them because they believe that they will go to heaven for it. The Afghan police and army need to invest in culture building and advertising so that people feel just as passionately about defending their country."*

It is not implausible to imagine that this idea has come from their time in Iran, as culture building is something that the Iranian government and media invest in greatly. Iranians have a strong sense of culture and pride in their culture that stems from an understanding of great civilization achievements that their predecessors have made, which their media constantly reminds them of. This promotes a strong sense of identity and purpose and creates national unity and a desire to contribute to the nation's "greatness." As the people of Jibrail have spent a very large portion of their lives in Iran, they feel a large cultural void in their lives on their return to Afghanistan, because of the relative vacuum that exists in this regard. On many occasions, it seemed that people's strong sense of Islamic identity stemmed from the fact that they had no cultural identity, that being Afghan had become synonymous with being Muslim.

3. Nation-building role

3.1. Reconstruction and achievements

> *"If we watch the news for 30 minutes, it's 20 minutes of killing and suffering and the other 10 minutes is about meetings that have occurred between ministers and politicians. There is no news on development, or economics, the value of our commodities, the value of our currency, things like that. For example, does anybody know anything about our progress this year? How many students went to university this year? How many graduated from high school? I don't know."* (Male, Kandahar city)

There is a widespread feeling among Afghans that the media does not put enough emphasis on achievements and progress. This would also cover better accountability of the different actors in the reconstruction (as seen in Section 4.1). Many would also like to know more about budgets and the quality of what is being delivered across the country.

> *"We would also like to know more about how NGOs spend the money and if projects are good quality or not, and how much budget of the PRT was allocated to Jalalabad and how it was spent, because we heard there were millions of dollars but the quality was very low."* (Male civil servant, Jalalabad)

3.2. Culture, unity and identity building

After eight years of intense development of the media and other sectors, with the return of 5 million Afghans from neighboring and faraway countries, there is high demand for the media to help Afghans rebuild a set of common values, foster national unity and build an Afghan identity that currently does not exist.

> *"When we talk about cultural identity, we talk about Iranian identity because we don't think there is an Afghan identity."* (Herat University)

> *"Some media have a negative impact because they bring ethnic groups against each other. Debates threatening national unity should not be allowed. Instead, there should be debates healing the wounds of the past and bringing unity."* (Male civil servant, Jalalabad)

> *"The Taliban have done so much in the way of propaganda that people are now prepared to die for them because they believe that they will go to heaven for it. The Afghan police and army need to invest in culture building and advertising so that people feel just as passionately about defending their country."* (Community elder, Jibrail)

Many of the elders in Herat (see Jibrail case study in Box 21) also attested to a need for an Afghan cultural identity among youth, through statements such as, *"The influence from Iran is a good thing because it encourages education, but we need to build our own culture so that our youth don't attach to foreign cultures."*

Some Afghans are back from exile but cannot really refer to an Afghan identity that is poorly defined:

> *"I'm happy to be back because I'm treated well. I feel very Afghan. What does it mean? I have no idea. Instead, I tried to build my identity based on Iranian academics"* (Returnee, Herat)

The cultural void makes people cling to Islam more. For many, being Afghan has become synonymous with being Muslim, often because of a lack of alternatives more than as a result of pure devotion.

In Mazar University, where we conducted a case study, students and professors particularly criticized serials, and more specifically the extensive presence of foreign serials, on the basis that this weakens Afghan culture and the Afghan national identity. Interviewees disliked Indian serials the most, and most interviewees expressed a nuanced judgment on other productions, stating that Iranian and Turkish serials (for instance *Dunya-e-Asrar*, on Tolo) were comparatively better, both quality-wise (acting, plot, etc) and because they are closer to Afghan ethics and culture. They insisted that they do not reject the serials as such, but would like to see more meaningful stories, from which common people could draw moral lessons, rather than *"repetitive stories leaving the brain empty when you turn off the television"* (Female economy student, Mazar University).

In Haji Kot, a village of Balkh province, condemnation of foreign serials was almost universal, but a former Jihad fighter and important local figure, referred to as "commandant," stated that he had a much higher opinion of *Razha-e-In Khana* ("The Secrets of This House") on Tolo, because it is produced inside Afghanistan and covers real Afghan issues in a way compatible with Afghan-Islamic culture.

3.3. Sense of purpose

An observation that emerged from some of the case studies, especially those with young Afghans (in Kabul, Mazar, Herat University and Jibrail suburb), relates to a lack of aspiration and a lack of role models for young Afghans, and the expectation that the media should play a role in this field. This role builds on the above roles, especially on the concepts of national unity and identity.

> *"The media should create purpose for youth"* (Student, Herat University)

> *"The media should teach youth problems-solving skills and ways to challenge what they are told"* (Student, Herat University)

> *"Youth want to reach out to other youth through the media, and see how youth from other country live. We need to learn from them, our facilities and knowledge are so limited."* (Female student, Kabul University)

Returnee youth often talked about their lack of aspiration. They explained that, if you ask Iranian youths what they want to do with their lives, they have big dreams and talk about, for example, wanting to be pilots or astronauts or professors. When you ask Afghan youth the same question, their responses are comparatively much simpler. They say things such as *"I want to have a job that allows me to support my family"* or nothing at all. There is an apparent lack of purpose and a lack of examples in their lives to inspire them, and a lack of role models for them to emulate. Some youth are modeling their identities on Iranian academics, whose lectures for youth are broadcast on Iranian television or on YouTube, because of the lack of local examples.

A large proportion of the youth community said that they wanted to see more sports on local media. They also explained that, often, when they have access to the internet, they search for their favorite

sporting personalities and try to find out more about their lives. Their interest is not so much in game scores or schedules, but in the personal lives of the sporting personalities. It also seems that following a competitive sport provides some kind of purpose and identity for these youth in the vacuum that exists, but in a non-threatening way. That is, following a sport does not pose any threat to their Islamic way of life.

Apparent in the case studies was this lack of identity and also the silence of the Afghan media in this regard. For youth in Herat who have spent some of their lives as refugees in Iran, this cultural vacuum is easily identifiable because they can make comparisons with Iran. The cultural void has led youth to attach themselves to Iranian or Western culture, or a combination of both; alternatively, it has led to an exaggerated attachment to religious identity (as it has become synonymous with Afghan identity).

The qualitative research revealed a need for the media to create purpose for youth, to generate a sense of Afghan culture which is separate to religion and to provide role models that youth can emulate.

B. Perspectives on media landscape changes

Afghan media are at a turning point, in that they have been largely developed and have been well integrated in society but are still being actively shaped. We have discussed the recent growth of and change in the media landscape, the way the media currently fulfills its functions and expectations that it is failing to fulfill. What will the Afghan media landscape look like in 2015? Who will be the key players? What will be their impact on Afghan society? We do not pretend to have exact answers, given that many of the recent developments in the field have come as a surprise to most observers. However, it is possible to try and predict possible future scenarios, in order to better generate potential productive interventions.

1. Possible futures

There is relatively strong evidence pointing towards a greater adoption of television, which is already replacing the radio as the favorite media source in many places. If infrastructure continues to develop and smaller cities and towns obtain more access to electricity, this development will continue in the near future.

We are presented nowadays with a dual picture of Afghan media usage. In the cities, people continue consuming less and less radio, and watch more diverse programs on television. Audiences will become more and more fragmented as channels proliferate. Eventually, advertising will lose its presently nominally beneficial luster and be seen as just marketing. In rural, remote areas, media consumption is almost (and will continue to be) the same as what it was observed in 2005: predominance of a small number of good quality, international radio stations specifically targeting Afghan audiences, approved by elders and deemed appropriate for all.

The likelihood that rural Afghanistan will have markedly better access to electricity and television signals in five years is low – the terrain alone is a major impediment. Whereas smaller urban centers are likely to be better covered, the vast majority of rural areas are likely to stay the same. It is therefore possible that the urban-rural divide will widen in the coming years.

However, it is possible that local and national radio stations will gain a better audience in these areas. Radio equipment is pervasive and electricity not an issue. Coverage can easily be increased through more powerful FM transmitters and AM transmitters. The focus has recently been more on the creation of local media outlets covering densely populated areas than on extending the reach of existing outlets to more rural areas. As with GSM coverage, the easy part has been done, and the focus may now shift to the large part of the population not yet covered.

Meanwhile, the television and radio landscape seems to be moving towards saturation in the main cities. The growth in outlets in the past five years has been phenomenal, at an annual rate of more than 20% in a number of stations, in a period when international support to the media has not focused on creating new outlets. ATRA claims that it has run out of radio and TV frequencies in Kabul – although the current frequency attribution plan could be changed to host a larger number of stations. More importantly, there are already a large number of niche media, targeting small audiences, as well as some competition among key players sharing advertising revenues that are not growing at pace. How likely is it that this continued growth of media outlets will be sustained?

On the one hand, renewed support to the media field will feed this growth for a period of time, new advertisers will emerge and more niches will be created. There is certainly the will among media owners nowadays to expand and to create new outlets to diversify. Creating and maintaining a small radio station is inexpensive, and there are virtually no barriers to entry. Recent examples in the television sector show that there is room for competitors: Tolo TV, the largest player, with nearly half the market share, is meeting aggressive competition from the younger Yak TV, which is seemingly having promising results.

On the other hand, it is likely that most players who were able to enter the sector without needing a return on investment have already done so. The main interest groups have already created their media outlets. New investors interested in the potential revenue of the sector now face a denser landscape and harder competition for audience shares and advertising revenue.

All in all, we believe that the sector growth will gradually slow down. More media will be created at a relatively fast pace in the near future, but this is going to be increasingly marginal: mostly some minor players for niche media and probably a handful of relatively large investors. It is likely that the most successful outlets will start to focus on increasing their user base, through extension of their coverage area. As said earlier, this is easier to achieve for radio than for television stations.

If the evolution of most developed countries is to be taken as an example, the tendency to focus on entertainment for the largest masses and more quality programs for smaller segments of the population is likely to be confirmed. In such a scenario, the capacity of independent media focusing on quality content to survive will depend on progress made in the advertising sector, reflecting progress in the economy in general. It is possible that the economy will not grow fast enough for sophisticated advertising targeting niche markets to allow such media to thrive. Some already struggle to find advertising revenues. If this is the case, some of these media outlets will struggle to survive, stop producing original and interesting content, run out of resources or have to be sustained in other ways.

At the same time, larger, more commercial outlets are very likely to continue professionalizing. Tougher competition will mean a larger interest in ways to capture more audience and advertising revenues. On both fronts, of content (programming and production) and marketing, current commercial outlets are improving fast and still have a significant margin for further improvement. This, in turn, will increase the need for services to media: production, content distribution, marketing and research, hardware and training will be even more needed than they are now.

2. Afghan media at risk

As seen in the previous sections, a number of media are already showing signs of weakening. Small, independent media which are not politically backed and which have a focus on delivering good quality (i.e. expensive) content are at risk.

The main issue is that they are not equipped to compete with bigger players in the advertising market, and they are not significantly funded by particular interest groups. The advertising market is skewed in two ways. First, without relevant audience data and precise targeting, advertisers turn to the largest media systematically, making it hard for emerging media to enter the market. Second, with this un-transparent and un-competitive market, advertisers develop strong financial or political relationships with the larger and perceived predominant outlets, and will focus their media spending almost exclusively to these. This is not only an issue in private, domestic businesses, as the international

community, be it civilian or military, represents a good part of advertising revenue, suffers from one or both of these issues. The multiplicity of stations is amplifying this risk.

Another risk for the media field in general is the growing weight of “gang media,” that is, media with a strong political or ethnic agenda. This generates a risk for the political landscape in general, in terms of transforming the media into a platform for political campaigns more than for debate, one for voicing resentment and partisan opposition rather than diversity and one focusing on clienteles rather than the nation at large. This is likely to artificially foster tensions that are not yet particularly strong in the country, such as the opposition between Shias and Sunnis.

C. Areas of opportunity

As explained throughout this report, the media landscape has already outgrown any possible attempt to shape it completely through funding or advocacy. The work done in the early years and more recently has borne fruit. There is still space, however, for further support to be brought to the sector, and much more improvement can be brought with regard to content, skills, infrastructure and the legal and regulatory environment. What follows are suggested areas of opportunity to be explored by media managers, policymakers, donors and other stakeholders involved in the media field. They are based on interviews with key informants, as well as on the findings of the qualitative and the quantitative research. Most require further assessment. Exploring the feasibility of these various opportunities is beyond the scope of the current study, but all recommendations correspond to needs expressed and gaps identified in the media landscape.

1. Regulatory environment

1.1. Media Law and regulation institutions

The most recent draft of the Media Law appears to be quite consistent with the expectations of Afghan media actors and the general public. The drafting and reviewing process has been, according to most stakeholders interviewed, satisfactory.

However, this process has already generated four different media laws in the past eight years, so the status of the current piece of legislation, including its content and whether an up-to date version in fact exists, is unclear to many different stakeholders. Now that the last version of the text has been drafted to the general satisfaction of most media managers, and is about to be submitted to Parliament, there is a need for rapid finalization of the text and dissemination of the law's provisions to interested parties. Then work should start on full implementation and enforcement.

In particular, continued assistance is recommended to MoIC, the HMC, the Mass Media Commission and the RTA Commission, so that they have the technical means to fulfill their purposes. Several actors have also advocated for the inclusion of by-laws connected to copyright, work and activities of the Mass Media Commission and rules for RTA; it is key that these are also finalized in the effort to achieve a fully functioning legislative framework.

1.2. Towards greater transparency

Besides requiring new media to register at MoIC and to declare capital and funding sources at the time of registration, Article 26 of the current draft law stipulates that private mass media fund their activities through advertising, services provided and private and public contributions. There is also an obligation to carry out financial reporting to the HMC and the Ministry of Finance, and to be "clear and transparent" with respect to the source and the amount.

Currently, it is clear that even MoIC does not have up-to-date and complete information on the media outlets broadcasting in the country. For example, this study has pointed out the discrepancy between the list of registered outlets provided by MoIC and the actual number of active outlets in the Afghan media landscape. Many small outlets may be registered at local level but with information not consolidated at ministerial level. It is also likely that a good number of unlicensed outlets are

broadcasting throughout the country. This situation is not so critical, in that the largest outlets are actually registered, but it does illustrate the lack of thorough enforcement of current legislation.

More importantly, in the current political context – and given the recent development of broadcast media outlets backed by political, religious or military organizations – enforcing strict transparency in relation to media funding has become a necessity. Not only should funding sources be declared to the government, but also it seems reasonable that this information be made available to the general public. This is consistent with the spirit of the law, focusing on values such as "honesty, impartiality and balance" (Art. 2), as well as being what most interviewed media actors advocate for and allowing the general public to be more clearly informed of potential biases.

1.3. Status of RTA

The role and status of the government broadcaster (RTA) has yet to be fully agreed on. Whether it should eventually stay under the tight control of the government, become a truly independent public broadcaster or be privatized is a matter of politics. However, it was recommended by many actors involved in these discussions that RTA should be more independent and impartial, less focused on purely governmental matters and more on public service. The High Council of the Supreme Court has already ruled that the proposed inclusion in the Media Law that the "Director of RTA shall be appointed by the President and approved by Lower House of Parliament," is "inconsistent with the Afghan Constitution," hinting of a greater independence from the executive branch.

As its final status is not yet determined, there is an opportunity to advocate towards a greater editorial independence for RTA, and to help the HMC define the roles, responsibilities and technical means of the future RTA (see also on sustainability, below).

2. Capacity building

Journalistic capacity has improved greatly since 2002. However, continued efforts to build capacity are needed for the further professionalization and modernization of the field, which requires a constant improvement of journalists' knowledge, skills and techniques.

Since 2005, new capacity-building needs have emerged. Although many media development projects have been thought of as journalism projects – aiming at providing more accurate, timely and independent information – now the media field is in need of projects that develop media as enterprises. Actors interviewed expressed a need for training of media managers (management and business skills) and technicians, as well as administrative, marketing and finance staff. Non-editorial skills are now needed, as much as journalism skills, if new outlets are to reach sustainability.

The urgent need for human resource capacity has driven first media assistance organizations, then the private sector, to create training facilities dedicated to media studies. These trainings have made a great contribution, albeit one focused mostly on journalism and editing skills. To address new needs for training, an option is either to create more centers dedicated to comprehensive training or to upgrade and expand existing training centers.

Capacity building in Afghanistan is often focused on short-term, specific training rather than being a form of education. Working efficiently and quickly with universities can indeed be a challenge, and it is often found to be more efficient to create independent facilities. Beyond providing training for professionals,

training centers have started specifically targeting youth. For example, GMIC is planning on establishing a diploma program and possibly a Bachelor program in the near future. The need for more journalism institutes that produce personnel who can immediately address the needs of professional media is highly desired by the media managers interviewed.

However, universities are important in the educational landscape of the country, and a long-term approach through educational institutions, both public and private, is important as well, so as to specifically target the younger generation. Both the short-term approach, through training centers preparing individuals with the skills needed in the media sector, and the long-term one, through universities, should be considered. There may be opportunities to create synergies, links or some integration between both systems. Universities can at minimum benefit from tools and curricula developed for training centers, and it is foreseeable that universities could even affiliate themselves with some of these training centers at some point, ensuring the long-term sustainability of these centers as well.

Existing initiatives trying to bridge the gap between university and the professional world could be looked into further, to benefit from lessons learned from past or current projects: IWPR, for instance, has recently launched trainings for students of Journalism at Kabul University and will shortly launch similar courses in Mazar-e-Sharif.

A more in-depth review of systems and facilities already available (at both universities and training centers), beyond the scope of this study, is needed to identify the most relevant approaches and areas of opportunity.

3. Media outlets

Another focus of media development in 2002-2006 was to help create local and national media outlets. USAID's program alone resulted in, among other actions, the creation of 42 local radio stations, all of which are still broadcasting as of the time of writing this report. Nowadays, new media outlets are being created almost every month with private funds. This development, along with public preference and audience share figures, suggests that funding the establishment of new broadcast media outlets in the most developed areas of the country is not as critical as it used to be. Helping existing outlets procure and produce good quality content and reach sustainability is, in most cases, more important. However, this research also shows[51] that there is still demand for local media to be developed in the most isolated and non-accessible areas of the country, where communities are hungry for locally relevant information and content and want to have their concerns voiced, in order to break the circle of isolation.

3.1. From very local to regional media

Most community radio stations are still running, and local media are still in high demand

Numerous small, private stations cover the provincial capital district (30-40 km coverage radius). The 2005 study noted the areas of success of these community-run, local radio stations. They were appreciated for their adaptation to local cultural specificities (e.g. for using local pronunciation or language) and for accurately reflecting local concerns and providing local news.

[51] See Priority Districts Reports for Lashkar Gah, Nad Ali and Garmser for more details and data.

Nearly all local stations established in the past eight years are still broadcasting, and some of them are listened to by a large part of the population living in their coverage area (see audience section of this report, also priority district case studies). Among local populations, there is still an expressed desire for local content (local announcements, local news, information about local development projects) and a voice for communities to express their needs. In non-permissive areas, locally relevant security reports are particularly important at the community level.

Sustainability and quality content as key challenges in a more competitive environment

However, not all community stations are successful. In Khost, only three of the nine local radio stations are within the top seven most listened to stations. In other provinces, many of these stations broadcasting on FM do not compete with AM or shortwave stations. These stations typically employ two journalists and survive on less than $1,000 in revenues per month – essentially coming from institutional communication and awareness campaigns (ANA, ANP, NGOs). Most operate over too small an area to be able to generate sufficient income from commercial advertising revenues.

This shows two things: creating small, independent media outlets works to an extent; these will most probably at least survive, and some will thrive. However, making sure that they achieve success is now more difficult in a context where there is more on offer, where institutional advertising cannot be taken for granted and where the expectations of the population, as soon as they gain access to a broader range of media, are no longer focused only on local content but also on better quality of programs and a broader scope.

Challenges to producing quality local content are numerous: limited human and financial resources, along with security, are the most commonly cited. Many of the smaller outlets do not have the capacity to overcome these challenges. Very local programming still has a market, albeit small, and local stations can certainly coexist with regional or national ones, but ways have to be found for these stations to be able to overcome some of these challenges.

Internews found an innovative way to address this issue: the Salam Watandar program, which is produced in parts in the provinces, assembled in Kabul and then rebroadcast to the provinces though a network of local community radio stations. This program is a strong asset for local stations – interviewees sometimes reported that they listened to Salam Watandar rather than using the name of the outlet broadcasting it. This effort should be sustained, because it also provides a good mix between local, regional and national content.

Local stations command a small audience, hence most advertisers do not target them primarily. However, the telecommunications sector has shown in recent years the need to expand its communication to more rural areas. Contracting with numerous, very small and unsophisticated radio stations is a still challenge for advertisers, and for the less developed advertising and media placement agencies. The development of the advertising sector should address this issue (see p. 178).

The natural emergence of regional champions

Concurrently with the strengthening of local stations, another potential strategy lies in regional stations. The most successful of provincial stations are already aspiring to be regional. We believe that a large opportunity thus lies in developing solid, well-equipped and well-funded regional broadcast media, covering several provinces and providing quality content adapted to the region. Such media are more

likely to be sustainable through advertising, as their scope will be wider than a single, very small bazaar with very few advertisers. They can benefit from a network of local correspondents in the districts they cover, while having enough technical and human resources to produce better quality shows.

The investment does not need to be large: some radio stations already have AM transmitters and installing FM relays is not very costly. Regional television stations can relatively easily cover at least the provincial centers and some of the largest district centers.

3.2. Working towards stabilization objectives: military media in a non-permissive environment

In non-permissive areas, a number of new outlets have recently been created, seemingly for political stabilization purposes, many of them by foreign military presence. In particular, these are small local radio stations. Without having been able to collect sufficient information from these stations' managers, and because most have a very small geographic reach that our methodology did not specifically target, accurate audience data are scarce for these stations. Assessing the impact of these stations on stability is outside the scope of this study. However, the series of case studies collected in the districts of particular interest have enabled some insights.

Most of these stations are not perceived as independent, and they are usually identified as military controlled. This does not seem to represent a major issue for the population. Some have apparently met a demand and have gained a significant audience; others seemingly have failed to do so. The success or failure of military stations seems to be dependent essentially on the quality of the content they broadcast, the usability of the information they disseminate and, in some cases, who endorses or participates in the programs. As seen earlier, Afghans have strong expectations of what a media outlet should provide and a deep sensitivity as to *how* a message should be broadcast, as well as what *tone* a program should adopt when dealing with sensitive issues. This has to be well understood by media managers if their broadcast is to have an impact.

Information gathered during the priority district research highlights some of the successes. Two radio stations in Paktika – Pakteen Ghag (aka Shkin) and, to an extent, Patman Paktika – are likely to provide good examples of best practices that might prove useful to improve other military stations pursuing similar goals. Key elements of success pointed out were good quality religious programs, educational programs, information about locally relevant security events and pertinent interactive programs.

3.3. Equipment and maintenance

Equipment that was either donated or purchased by outlets when they were established some years back is aging, and is in need of maintenance, repair or replacement. As new technologies are constantly emerging, media outlets want up-to-date equipment – the most common being more powerful transmitters.

Since 2002, media outlets have often found ways to have their equipment needs subsidized, and many expect the aid community to help them do so in the future. However, although most media outlet managers request this, further funding of media equipment is a quick fix, not a sustainable solution; many small outlets are already struggling to maintain the equipment they have been given.

Expanding its broadcast coverage area is a natural strategy for any broadcast media outlet. The question now is: Should the outlet be subsidized in doing so? Some outlets are backed by rather powerful

interests; others are already commercially successful. Nevertheless, subsidizing equipment may be a good option in a few cases, where such assistance could help the outlet reach sustainability, especially for those outlets that already show promise.

For all outlets though, procurement of equipment/spare parts and maintenance present an issue. In dealing with this, there is an opportunity to help local hardware retailers, as well as to set up local retail and maintenance shops. This could be an option in areas where the market is large enough; otherwise, coupling broadcast hardware maintenance with IT hardware maintenance could be a viable alternative.

3.4. New media: internet, mobile phone and others

Although mobile phone equipment rates have reached saturation in most urban areas, and in many peri-urban ones, the internet still has an extremely low usage rate. Low literacy levels, limited access to computers and slow, unreliable and costly bandwidth fees are among the main challenges. However, the population that does have access to the internet is not insignificant, and new media consumption among this group is developing quickly. On the whole, internet access and online services for Afghans still have a great deal of room for improvement.

Internet facilities on campuses and support to content development

University students are among the most connected demographic in Afghanistan. Most both are computer literate and look up information online for their studies. Many are also curious enough to find new ways to connect with each other and the rest of the world using the internet (as the levels of familiarity with various online chat rooms and Facebook show).

Still, this population of early adopters relies mostly on internet cafés; facilities on university campuses are lagging behind. There seems to be an opportunity to support internet access on most university campuses, and thereby to give equal access to female students, who do not have the same opportunity as male students to go to public internet cafés.

The internet also helps address, to an extent, the lack of proper quality textbooks. Catering to students therefore seems to be one of the major directions to take in developing online services in Afghanistan. This can range from very simple university websites offering details about curricula, lectures and exercises, records of past exams and other useful documentation, to the most sophisticated e-learning facilities. Free resources are numerous and many could be directly used, in English and Persian, adapted to local specificities at low costs or translated if need be (e.g. resources in Pashto are scarce). For example, see Moodle[52], an open-source e-learning platform, and UNESCO's Open Educational Resources[53] initiative.

To increase the breadth of Afghan content online, it could also be possible to rely on personal contributions. Although organizations like Internews and Nai have recently been involved in organizing web blogging training for youth, the public success of blogs experienced around the world has not yet reached Afghanistan. Setting up, organizing and promoting an Afghan version of blogging platforms such as Blogger, Wordpress and TypePad, or an Afghan micro-blogging platform, could be carried out with relative ease. Many very robust blogging software packages are open source, and most are translated

[52] http://moodle.org/.
[53] http://oerwiki.iiep-unesco.org/.

into Farsi. Minor work would be needed to further localize such a platform (i.e. Pashto versions) and to make it easy to use for the largest target population. More effort would be needed to promote its usage and generate seed content.

Internet as a relay of print media

The Afghan "web-ring" (websites in Dari or Pashto, dedicated or related to Afghanistan) is still rather small; there are not many successful purely Afghan websites. Newspapers have started publishing web versions of their content, and this is an interesting move to follow and support: although Afghan newspapers tend to have a diminishing audience, this may help address distribution issues. As in any other country, a successful economic model to reverse the downward consumption trend of print media has yet to be found.

Targeted mobile information

Another direction that is worth investing in involves services through the most common mobile phone providers, either through text messages or IVR systems. Such systems set up by mobile operators are starting to attract some interest among the population, as the case study on Maloomat/Tradenet demonstrates. In general, the survey revealed some interest in receiving information on mobile phones, but identifying which type of information could be designed for which audience is beyond the scope of this study. As with any other media, the technical feasibility is there and has been assessed; it is now time to focus on generating useful and well-targeted content. More than for other media, any initiative in this field will require a strong pilot phase with a limited audience, to fine tune the content and format (e.g. text vs. IVR, depending on literacy level).

4. Media content

Based on feedback received across Afghanistan from a wide range of audiences on their expectations of content, tone, and roles to be played by the media, a number of areas of opportunity for content production emerge from this study, that are summarized below. These ideas, which correspond to an expressed demand, should ideally be picked by broadcasters or content producers with sustainability as the objective. However it is likely that some content will require some type of external support, in the form of public subsidies or international support, at least in an initial phase before their popularity is proven, if not in the long run for educational programs.

Afghan first

Independent from the type of content, a strong and general request expressed by most audiences was for quality programs *made in Afghanistan*. This was specifically expressed for TV dramas, which are the programs that gather the highest audience rates but also generate the harshest criticism, mainly because of their foreign origin and perceived lack of respect for Afghan culture and religion. Tolo TV was the first channel to produce an Afghan soap opera; based on initial audience feedback, this seems to be an example to follow, for drama and other types of programs.

Unity and identity

One of the highest expectations voiced by the public across the country was that media should promote a sense of national unity, rather than trying to further divide people of different political, ethnic or

religious groups. This goal is difficult to attain, given the ethnic, religious and tribal tensions in Afghanistan, in part reflected in the diversity of media actors currently in the country. Difficult as it may be, though, it is not impossible.

One of the main ways to pursue this goal is through the public broadcaster (RTA). To this end, it would be necessary to build on RTA's relative success and significantly enhance its audience share through a lineup of more attractive programs, designed with the goal of promoting a sense of national unity. Programs focusing on positive achievements, showing the results of the nation-building effort, testimonials of conflict resolution and well-administered justice, examples of successful (and not corrupt) business ventures and clever promotion of Afghan history, culture and identity (see below) can contribute to fostering a sense of national unity – especially if these programs are not directly linked to foreign intervention or assistance but are the product of a few Afghan figures to whom the public can, without distinction of cultural background.

Another interesting finding is that many young Afghans have difficulty pointing out what Afghan culture and identity are. Years of conflict in an otherwise fast-moving world have left the young generation with outdated role models, if any. For this group, the new economic and political elite generates more of a negative portrait of what modern-day Afghans are intrinsically about. An effort could be made to promote positive role models who set good examples for youth and restore a general feeling of pride in being Afghan. Selecting potential candidates is not easy, as any list has to be as uncontroversial as possible from religious, ethnic, political and social standpoints. Below are some examples of historical Afghan figures who could have broad appeal:

- Mahmud Tarzi (1865-1933), intellectual, founder of the first Afghan newspaper, modernizer and patriot, secured Afghanistan's independence in 1919 as Foreign Affairs Minister, promoted universal education;
- Seyid Jamaluddin al Afghani (1838-1897), political militant of the renaissance of the Arabic-Islamic world in Afghanistan, Iran and the Ottoman Empire, imprisoned many times;
- Seyid Bahaoddin Majruh, one of the greatest modern Afghan poets, speaking about the sorrows of exile, assassinated in Peshawar in 1988 by extremists;
- Abdul Ahad Momand (born in 1959), exceptional pilot and cosmonaut, first Afghan in space (in 1988 on Mir space station);
- Kamaluddin Behzad (1450-1535), genius painter of miniatures from the Herati school;
- Rabia Balkhi (10th century), Afghan female poet, victim and symbol of male oppression, killed because of her love;
- Mahmud Ghaznawi (10th century), great military conqueror and enlightened ruler of the Ghaznawi dynasty, promoting the arts (notably Ferdowsi's Shahnameh);
- Al Biruni (11th century), already used on stamps in the 1970s,one of the greatest Islamic scientists (physics, astronomy, mathematics), settled in Ghazni under the protection of the Ghaznavid dynasty, computed the earth's circumference, invented a trigonometry method to measure the height of mountains, compared religions in his writings (Hinduism, Christianity, Islam) and advocated tolerance.

Positive news and reconstruction

Afghanistan's reconstruction process is still poorly perceived and understood by the majority of the population. This has been pointed out several times in recent years. Afghans' disenchantment with the progress of reconstruction efforts is at least partially the result of a general lack of knowledge and understanding if these efforts. Ill-informed, poorly engaged and insurgent-influenced media is one

contributor, but lack of international and Afghan government efforts to present stories for media coverage other than the easy issues of drug trafficking, corruption and insecurity is also to blame.

Some programs already focus on broadcasting positive news about the country, but they generally go mostly unnoticed and have low impact. More effort could be made in this direction. Media users expressed that these motivational programs should: emphasize what Afghan individuals and communities have achieved; give a broader sense of the progress made; show more detailed examples of what is achievable by small, isolated communities; and give a sense of what remains to be done and ways to achieve it.

Such shows might be considered by some as a form of propaganda aiming to portray too positive a vision of the country. Nevertheless, the public still has a desire for such programs, as was also expressed in 2005 ("Good news" was one of the most common answers to the question: "What do you want more of in the media?") Often sponsored by the international community in a broad strategic communications way, these programs are broadcast by Afghan media for a fee (paid programming). As long as media outlets themselves consider it advertising, it is likely that these programs will not be prioritized in their program scheduling and with the public.

It would therefore be interesting to consider supporting the development of feature programs focusing on reconstruction, in creative and attractive formats, which can become sustainable or sufficiently attractive to be broadcast without a fee.

Education: a wide range of opportunities

One of the main challenges in Afghan reconstruction is the low level of education, and the time it will take to rebuild an effective educational system. This is particularly problematic in areas that are outside major urban centers. Media can and are expected by the public to help in this regard. Beyond conveying information, they should be a vehicle of knowledge.

Educational programs have started to emerge on radio and television, but there is much room for improvement. As shown in the section on content in this report, most educational shows are nothing more than recorded lectures: "blackboard education TV."

This might seem an appropriate way to proceed, as it gives the feeling of actually being in a classroom. However, these shows could be of much better quality. Distance learning and video lectures have developed tremendously around the world: it would be easy to procure very good quality video lectures from well-recognized universities until the capacity is there to create purely local programs of good quality.

Meanwhile, these shows, even with a more sophisticated setup, are often considered boring. Alternative approaches should also be experimented with to create more attractive educational programs. Following the example of popular programs such as "Gadget" and *Kar o Bar* on Yak TV, local production of useful programs is possible and should be encouraged. When it comes to more sophisticated programs involving 3D imagery or specific footage, it would be worth exploring opportunities to identify, procure, translate and adapt existing educational programs from foreign networks, and to combine readymade content with comments or explanations given by an Afghan expert. This presents another good opportunity for media development organizations to assist Afghan media in these tasks.

At the lower end of formal educational content, quizzes and games appeal to the general public, while introducing the notion that education not only is beneficial but also can be fun. Few of the popular games on Afghan television nowadays involve personal skills, education or culture. The approach has been relatively successfully developed by Ariana TV with *Raz-e-Taswir* ("Secret of the Picture") and *Sad Dar Sad* ("100%"), two interactive game shows based on questions about geography, history, literature and Afghan heritage, which are among the most popular programs on Ariana.

Social and political debate

As shown earlier, the media is also expected to fulfill a greater role in organizing and echoing social and political debate. Media owners interviewed felt that, if a more solid, understandable political landscape based on stronger political parties develops, it will be important for the media to accompany and encourage this process. The public, while showing a varied level of interest in political debates, expressed a clear view on how debate should take place: with fairness, balance and respect and, most of all, in a constructive manner.

There is therefore an opportunity to test and develop new shows that would not only encourage the right level of debate but also draw more of the public's attention by demonstrating these qualities.

Another idea to give more visibility to the political process, and maybe to promote a sense of responsibility among the Afghan political class, would be to broadcast parliamentary sessions on TV, at least during the most important legislative debates, if not on a regular basis.

5. Sustainability

As we have seen, it is doubtful that media outlets created in the past years will all survive and grow steadily in the long term – this is the natural tendency of any market. Trying to counter evolutionary forces on a large scale is probably beyond reach and would not be advisable, but efforts can be made to make sure that more media outlets reach sustainability than do at present. These efforts can be organized in three main directions, the first of which has already been explained above:

- Help media outlet managers develop healthier business plans;
- Help consolidate advertising market practices;
- Organize sustainable support to otherwise unsustainable media of particular interest.

Opportunity for the development of an independent media trust fund?

Several Afghan media outlet managers expressed a need for an endogenous way to support the diversity of Afghan independent media, and more specifically medium-size independent media outlets that struggle with advertising revenue and do not benefit from politically motivated funding. Some proposed the creation of an independent trust fund, managed by trusted persons (maybe elected or chosen by media representatives), that would allocate funding based on criteria and rules it would itself design.

Whether it is a realistic option or not, this idea deserves some attention. It would not necessarily guarantee fairness, nor would it prevent collusion, but it would at least create an internal discussion on how funds should be attributed and, more importantly, what the goals are that the Afghan media should pursue, in what ways and at what cost.

Such a trust fund could also help address one of the most recurrent criticisms of media assistance: the short-term nature of interventions, driven by political agendas and the need to spend fast. This is often judged by media actors as incompatible with media development goals. Disbursing assistance money to a trust fund could allow for quick disbursement from the donor's point of view and for longer-term actions from media actors' point of view. It would also be consistent with general recommendations for better aid effectiveness (Paris Declaration), by advocating for less bilateral direct action and instead channeling more funds through country's administrative systems.

Support the professionalization of the advertising market/ratings system

The main source of income for the Afghan media is and will be advertising. The multiplicity of media outlets in recent years and, to an extent, of advertisers has complicated the media placement task on the advertising agencies' side and the preparation of credible billing rates on the media outlets' side.

Audience surveys have been performed to some extent since 2004 but, until the release of this report[54], no sufficiently exact audience data have been made publicly available. The most precise audience surveys have essentially been performed for individual advertisers. The lack of a standard estimate, based on which most players in the advertising field agree to negotiate rates and perform media placement, is hindering media development. Some outlets are favored for the wrong reasons (see p. 166), and new outlets do not benefit easily from advertising revenues. Very few advertisers and agencies have needed tools to prepare media campaigns in a rational way that would allow them to maximize their return on advertising investment (e.g. using standard metrics such as gross rating points per dollar).

A number of services to the media and to advertisers are thus needed if the sector is to professionalize fully. The first is certainly a standard, reliable and regular set of audience indicators. Such indicators should be produced by an independent organization, which could initially be funded by the international community but should ideally be made sustainable and should sell its data to stations and advertisers. It might take some time before potential clients develop a culture to value and actually purchase these data.

Other services could also be provided. A few organizations are already computing media planning based on (privately collected) audience data and negotiated rates, using software tools to maximize expected impact on advertising spending. A more generic tool could be developed, enhanced, fed with the most recent data on Afghanistan and provided to other potential advertisers. More studies on potential consumer behaviors and drivers and barriers to the impact of commercial advertising could be performed, to make such tools and practices more efficient. For example, little is known about how many times an Afghan sees or hears a typical ad before the information conveyed is registered.

With the plethora of media outlets, negotiating advertising rates is becoming more costly and difficult. If the advertising market continues to develop in the coming years, the need for advertising brokerage and wholesale services will become more important, to make the market more efficient and less dependent on personal connections as a prerequisite for a truly advanced media landscape.

[54]Audience survey in 33 provinces in July-August 2010 (see methodology section). The full dataset is public and attached to this report.