



# Afghan Media in 2010

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## Priority District Report Kabul City (Kabul)

**October 13, 2010**

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## 1 Methodology

In Kabul city, the team conducted key informant interviews (KIIs) with managers of the following outlets: BBC radio; Killid radio; Azadi radio; Voice of America (VOA) radio; Yak TV (1TV); Ariana TV and radio; Ayna TV; Kabul Radio Television Afghanistan (RTA); Shamshad TV; Saba TV; Afghan TV; Noorin TV and radio; Noor TV and radio; Negaah TV; Rah-e-Farda TV and radio; Sada-e-Azadi radio (Combined Joint Psychological Operations Task Force (CJPOTEF)); Watandar radio; Kabul Weekly; Hasht-e-Subh Daily; Daily Outlook; and Daily Afghanistan.

KIIs were also conducted with: Pajhwok Afghan News (PAN) and Bakhtar News Agency (BNA); a number of media non-governmental organizations (NGOs) (Internews, Equal Access, Mediothek, Nai Supporting Open Media in Afghanistan, Institute for War and Peace Reporting (IWPR)); the advertising sector (Sayara, MediaCom, Kabul Bank, Azizi Bank); producers (Awaz, AwaNama); government officials (Ministry of Information and Culture (MoIC), Afghan Telecommunications Regulatory Authority (ATRA)); international donors and organizations (United Nations Educational, Scientific and Cultural Organization (UNESCO), European Commission (EC), UN Assistance Mission in Afghanistan (UNAMA); US embassy); the Government Media and Information Center (GMIC); the head of the Faculty of Journalism in Kabul; suppliers of broadcast equipment (Afghanistan Broadcasting Engineering (ABE) and Emerge Media Communications (EMC)); the Association of Cable Networks (Itihadia-e-Cable Ha-e-Afghanistan); and Nye Express.

The team also conducted a total of 190 close-ended interviews with an equal number of men and women. Fieldwork took place in April and May 2010.

Additionally, the team collected audience data for 61 individuals living in Kabul province by means of a phone survey, which took place from July 9 to 23 and from August 22 to 28, 2010. See the general methodology of the project research for more details on sampling and survey methods.

## 2 Media landscape

Kabul is unsurprisingly the liveliest district in the country in terms of media landscape. Its richness relates in part to the number of outlets present: the country's capital receives 42 radio stations and 30 TV channels. There are more and more of the latter all the time. Indeed, respondents suggested that radio stations are losing their audience because there are more TV options: *"The number of people turning from radio to TV (not just because of increased electricity coverage) is a challenge for radio stations ... people have started to borrow money to buy fuel to run generators to be able to watch TV ... in the morning, people tend to listen to the radio but in the evening they watch TV"* (radio outlet manager, Kabul).

Contributing to the liveliness of the media scene is a vibrant media community at large, made up of journalists and a wide range of media organizations, including members of the international development community.

Besides media outlets and organizations, there are also a great many media-related services, including: Public Call Offices (PCOs), offering calling services and selling scratch cards and mobile phones; public spaces such as *chaikanas*, showing cable TV; and DVD/video shops, satellite shops, bookstores, and newspaper stalls. The team found that a video shop in the city center generates revenue of \$10-20 a day, by selling 70-80 CDs/DVDs and 70-80 video/audio cassettes. An average satellite/TV retail shop in the center of Kabul sells two or three TV sets daily (at \$40-100), two or three satellite dishes (\$40-70), and one decoder (\$100).

Kiosks in the city center, some of which are under MoIC supervision, sell 30-40 newspapers, magazines, and small books per day. Respondents from one well-established kiosk in the bazaar reported that the most popular newspapers are Hasht-e-Subh, Mandegar, Payam-e-Mujahed, and Anis (frequently purchased of late, as it has job and company advertisements). Popular magazines include Killid, Mursal, Roz, and Payam-e-Roz.

### 2.1 Media outlets

The population in Kabul currently has access to 30 terrestrial TV channels (over 10 of which are available also on satellite) and 42 radio stations (five of which do not broadcast from Kabul)<sup>1</sup>. A sound calculation of the number of newspapers and magazines distributed in Kabul is a challenging task, for a number of reasons, including: the dynamic pace at which new outlets are emerging and others are interrupting activities; the irregularity of printing, with outlets often breaking their own publication schedules (which can put into question whether an outlet is still active or not); and the

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<sup>1</sup>Ashna/VOA, BBC, Azadi, Deutsche Welle, and Turkey Radio.

incomplete list of supposedly active outlets at MoIC, which cannot keep pace with the development of the media sector. The fact that print outlets are often not registered further contributes to the difficulty involved in calculating an exact number.

### 2.1.1 Television

Besides satellite channels, 30 TV channels are currently available in Kabul through terrestrial antennas:

Name	Ownership	Broadcast radius (km)
Bakhtar (BTN)	Private	-
Shahr TV	Private	130
Dawat TV	Private	50
Azizi TV	Private	-
ERTV	Government	60
Sepehr TV	Private	75
Kawsar TV	Private	55-60
Negaah TV	Private	-
Emroz TV	Private	-
Noor TV	Private	25-30
Tamadon TV	Private	55-60
Afghan TV	Private	45-50
Yak TV (1TV)	Private	700
Noorin TV	Private	120
Rah-e-Farda TV	Private	100
Saba TV	Private	55
Ayna TV	Private	100
Ariana TV	Private	35-75
Shamshad TV	Private	160
Tolo TV	Private	80
Kabul RTA	Government	80-100
Lemar TV	Private	60
Tolo News	Private	-
Setara	Private	-
Haft TV	Private	-
Watan TV	Private	-
Zhowandon TV <sup>2</sup>	Private	-
Jawan TV	Private	-
Aria	Private	-
Kahkashan	Private	-

This section offers a very basic snapshot of information collected from the outlet managers interviewed. A more exhaustive analysis of outlets, including those not covered here, can be found in the final report and in the media landscape database.

<sup>2</sup> Zhowandon TV is expected to be launched in November 2010.

### **Shamshad**

Shamshad TV was established in 2006 by Mr. Fazal Karim. It has terrestrial antennas in each of the following 15 provinces: Kunar, Nangarhar, Laghman (only partial coverage), Kabul, Parwan, Kapisa, Logar, Wardak, Khost, Paktia, Kandahar, Kunduz, Takhar, Balkh, and Herat. Transmitter power varies between 500W and 5kW, as does the broadcast radius (30km in Kunar; 160km in Kabul). In the near future, it will set up new transmitters in Helmand, Spin Boldak, and Torkham. The station has submitted a proposal to the United States Agency for International Development (USAID) about setting up nine transmitters over the next two years.

Approximately 80% of Shamshad's programs are in Pashto. The station broadcasts 24 hours a day and employs 89 staff members. Major monthly running expenditure adds up to \$80,000-85,000, with monthly capital expenditure of \$10-15,000.

Advertising (mainly from the International Security Assistance Force (ISAF), MTN and Etisalat telecom companies, the Ministry of Defense, and the Ministry of Health) generates \$100,000 per month (the average price is \$100-120 per minute). *“Our vision is to fight existing discrimination against Pashtun communities, which are often associated with the Taliban, to address human rights violations that have occurred in the past 30 years, and to knock down communication, distance, and cultural barriers.”*

### **Ayna**

Ayna TV was established in 2004 by General Abdul Rashid Dostom. It is currently managed by Mr. Mohammad Yasin Khamosh. Ayna's programming is in Dari (50%), Pashto (20%), Uzbek (20%), Turkmen (8%), and English (2%). The aim is to reach the south and southeast regions of the country. The station employs 62 people (35 in Kabul and 27 in the provinces).

Monthly costs are \$40,000 and are generally covered by General Dostom and by advertising (at \$80, \$100, and \$120 per minute). According to Mr. Khamosh, *“There are generally two categories of media outlet, those with business goals and those with national goals. Ayna TV is in the second category, working with the aim of serving the Afghan nation and communities without any discrimination.”*

### **Saba**

Saba TV is a two-channel TV station established in 2008 and managed by Ms. Zainab Nadiri. It is part of a media group that includes Nawa radio, Gandahara Production, Fajer Printing Press and Saba magazine (whose activities have been interrupted owing to a budget shortfall). Channel 35 broadcasts 24 hours a day. Through a 30m antenna located on TV Hill in Kabul, and a 1kW transmitter, the channel covers the following provinces: Kabul, Wardak, Logar, Parwan, and Kapisa. Additional antennas are located in

Nangarhar, Balkh, Herat, Kandahar, and Uruzgan. The second channel broadcasts six hours a day and covers only Uruzgan. The TV channel is also accessible through satellite.

The outlet employs 76 people, including 40 journalists. Monthly costs were not disclosed, although major sources of income are known to include advertising (\$75-137 for a 30-minute slot), placed mainly by Roshan, Etisalat, MTN, and Kabul Bank.

### **RTA**

The state-run TV channel, RTA, was established in 1978. Its broadcasts equally in Dari and Pashto, with 30 minutes of Uzbek, Turkmen, Pashai, Nuristani, and Baluchi daily (depending on the province and the capacity of the local staff). RTA broadcasts to all 34 provinces in Afghanistan (only about 10% of the country is not covered) and, since 2007, has broadcast via satellite.

Some of the daily programming is generated in Kabul (7pm-9pm), including news, political discussions, and educational programs. Local stations in the provinces also produce their own content. Every day from 6pm-7pm, Ashna TV broadcasts RTA content, paying a fee to RTA. The radio and TV station together employ a total of 1,600 staff, 1,000 of whom are based in Kabul. Overall, RTA employs 200 journalists.

The government covers major costs (including salaries, transport, fuel, and general expenses) in their entirety. These add up to \$5.1 million per year. Advertising is one source of revenue, sold at \$100 a minute to international companies and \$50 a minute to national companies. Additional sources of income include taxes from the antennas on TV Hill in Kabul (which generates approximately \$500 a month from each outlet) and payment for RTA programming from Ashna TV.

The international community has supported RTA over the years with studios (Japan, France), transmitters (US, India), and training and development (Japan, China, India, Iran, Pakistan). Respondents spoke of an agreement underway with USAID to set up a transmitter to increase coverage in Kabul. Training for producers, technical staff, and journalists is reportedly the outlet's major need.

### **Ariana**

Ariana TV was set up in 2005 by Mr. Bayat, who also owns AWCC and the Bayat Foundation. The channel reaches 295 districts and is also available through satellite in Europe, North America, the Middle East, and neighboring countries. The outlet currently broadcasts only from Kabul, although there are plans to build stations in Herat, Mazar-e-Sharif, Kandahar, and Jalalabad. The immediate plan is to set up a new antenna in Nuristan.

Broadcast languages are Dari (45%), Pashto (35%), Uzbek (15%), and English (5%). The station broadcasts a total of 52 programs, including 9 hours of live programming every

week. Approximately 80% of total content is produced locally. The rest (mainly movies and music) is purchased and supplied in the form of CDs, DVDs, and hard drives. The outlet employs a total of 275 people, including 25 full-time journalists in Kabul and 1 journalist in each province, and this number will increase once the outlet expands to other major cities.

No financial information was disclosed, although the managing director, Mr. Ahmad Sultani, reported that advertising, mainly from banks and the Ministry of Defense, is a major source of funding (\$550 a minute at peak times and \$250 a minute off-peak). *“The station has no political direction; it is an independent medium which follows the Afghan Constitution, with a mission to educate and teach people about their rights.”*

### **Yak**

Yak TV was established in February 2010 by Mr. Fahim Hashimi, who plans also to set up Group 1, to include (besides the current TV channel), one Pashto channel, one radio station (the group is in the process of sorting out frequencies), one newspaper, and one magazine. Currently, there are towers located in Kabul, Herat, Nangarhar (Jalalabad city), Balkh (Mazar-e-Sharif city), Kunduz, Kandahar, Helmand, Khost, Ghazni, Paktia (Gardez city), Badakhshan, and Bamyán provinces. The plan is to have a total of 16 towers by September 2010 (to cover areas with over 400,000 inhabitants), and the larger goal is to cover all provinces in the country. Current transmitters range from 500W in smaller cities to 2Kw in major cities and 5Kw in Kabul. The channel is also available through satellite and reaches 52 countries across Europe, Asia, and the Middle East (an estimated 15 million potential viewers).

Programming is entertainment-based (60%), but also includes news and current affairs (30%), literature, culture, and education, including Islamic teachings to offset the “false teaching of the Taliban” (10%). Languages are Dari (60%) and Pashto (40%), with a plan to use English for educational purposes. A total of 50 hours a week of local original content is produced, 20 of which are programmed throughout the week. The station purchases content from other countries, mainly family dramas from Turkey and India (including copyright), which are then dubbed and repeated.

The outlet currently employs 320 staff, including 41 full-time journalists, 105 production staff, 55 staff working on dubbing and acting, 40 administrative staff, and 30 technicians, including video editors. Female staff members number 90.

Major monthly costs (of the current mode) include salaries (\$150,000), copyright (\$100,000), satellite fees (\$20,000), power and operating generators (\$40,000), production costs, rent, transmitter locations, and advertising/marketing, to total \$400,000. The outlet aims to achieve financial sustainability within the next year. Major current funding sources include advertising (\$150,000-200,000 a month) from



commercial entities (telecoms 30%, banks 25%, and consumer goods), as well as a few public service announcements (e.g. earthquake awareness programming).

No international organization has so far bought any advertising on the channel. *“We want to counterinfluence warlords and fundamentalists. We are a 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 not dressed appropriately. We’re pro-Western but we’re not pushing the West in Afghanistan”* (president of Yak TV).

### **Ashna**

Ashna TV was established in 2007, as the TV arm of Ashna/VOA radio (see below). It broadcasts six days a week (6pm-7pm) through RTA. It employs five staff members in Kabul and an additional eight around Afghanistan.

### **Cable networks**

Cable TV is reportedly more common than dish antennas in Kabul. A total of 87,100 connections are currently active, reaching an estimated 435,500 people. In Kabul, there are approximately 21 cable providers (with a few more emerging). Among these, Star Fiber Cable Network and Kabul Zarnigar Fiber Cable Network provide content to the others. This allows for major control over programming content.

The price of a connection ranges from \$2-5 per month (depending on the wealth of the customer), with a total of 72 channels available for viewers. Of these, most are international channels (those most requested are Star Plus, ZTV, and sports-related channels). Three are local Afghan channels (Ariana, Yak TV, and RTA) and another three the network itself provides (Star Cinema, Z Choice, and Z Cartoon). Programming on Star Cinema and Z Choice includes dramas, films (mainly foreign/Indian), and sport (cricket). Z Cartoon offers programs for children. Cable providers said they were interested in generating an additional channel focused on news, as well as offering paid programming.

Kabul is home to the Association of Cable Networks (Itihadia-e-Cable Ha-e-Afghanistan), which was established in 2004. This brings together a total of 118 cable providers from across the country (except Kandahar and Helmand), although apparently only around 90 are currently active. The association is under the management of an appointed director and four deputy directors (administration, culture, technical, and financial), who are in position for a two-year period.

The government has not given the networks license to operate, even though they are registered at the Ministry of Justice. The Association of Cable Networks has also had problems with the government because of an alleged lack of cultural sensitivity in channels’ content. Deputy administration director, Mr. Mohammad Sharif Sikandari, reported no major change despite this.

Cable providers are also present in the following provinces: Herat, Balkh, Nangarhar, Kunduz, Badakhshan, Faryab, Baghlan, and Badghis. In every city, as in Kabul, there are one or more major providers (e.g. two in Herat, one in Jalalabad, and one in Mazar-e-Sharif). Insecurity has led to the closure of cable providers in the following provinces: Khost, Ghazni, Nimroz, and Baghlan. In Takhar, cable providers are no longer active because of a lack of capacity.

The table below does not provide an exhaustive list of all cable providers in Kabul, but instead highlights the two providers that provide content to the rest. Since they all belong to one broader association, information related to the number of channels and localization is common to all providers.

Name	# channels	# subscribers	Localization
Star Fiber Cable Network/ Kabul Zarnigar Fiber Cable Network	72	87,100	Mainly international channels, 3 Afghan, 3 provided by the network

### 2.1.2 Radio

In addition to shortwave radio stations, which are widely available throughout Afghanistan, there are 42 radio stations in Kabul.

Name	Ownership	Frequency	Broadcast radius (km)
Arman FM	Private	98.1	80
Ariana	Private	93.5	35-75
Killid (Kabul)	Private	88	45-50
Maiwand	Private	92.7	100
Mawj	Private	105.5	-
Neda	Private	90.9	80
Noorin	Private	94.4	35
Alexis	Private	90	50
Rah-e-Farda	Private	92	50
RTA Kabul	Government	93/105.2	60
Sadai Zan Afghan	Private	96.3	45-50
Qarabagh	Private	94.8	20-25
Watandar	Private	87.5	100
Zafar	Private	95.2	20-25
Sada-e-Azadi	Military	88.5	50-80
Watandar	Private	98.9	-
Azadi	Public (US)	100.5	25
Ashna/VOA	Public (US)	100.5	25
BBC	Public (UK)	89	20-25
Sobh Bakhair Afghanistan	Private	93/105.2	400
Beltune	Private	104.9	50
Tapesh	Private	97.1	100
Nawa	Private	103.1	45-50
Sadaye Islah	Private	-	-
Nai	Private	94.1	5-10
Kabul Rock Radio	Private	108	35
Qadimi	Private	101.9	50
Rumi	Private	99.9	50
Shahr (Kabul)	Private	95.5	130
Dawat	Private	102.5	30
Afghan Radio	Private	99.6	-
Watan	Private	100.8	-
Setara	Private	97.8	-
Aalim	Private	93.8	-
Jawanan	Private	97.5	170
Amozgar	Private	101.3	-
Deutsche Welle	Foreign	90.5	-
Turkey Radio	Foreign	91.6	-
Zhowandon <sup>3</sup>	Private	-	-
Bakhtar	Private	99.2	-
Spozhmai <sup>4</sup>	Private	102.2	100
Hamoon <sup>5</sup>	Private	-	-

<sup>3</sup> Radio Zhowandon is expected to be launched October 2010.

<sup>4</sup> This radio station is on the MoIC list but we were not able to confirm whether it is currently active.

<sup>5</sup> Ibid.

The section below offers a very basic snapshot of information from outlet managers interviewed. A more exhaustive analysis of outlets, including those not covered here, can be found in the final report and in the media landscape database.

### **Ashna/Voice of America**

Ashna radio was established in 1980. It shares its antenna and frequency with Azadi and broadcasts 12 hours a day (7pm-7am), with Azadi broadcasting for the other 12 hours of the day. It has five FMs in five provinces (Kabul, Nangarhar, Balkh, Kandahar, and Herat), and also a very strong AM (400Kw) that allows the radio station to be heard in neighboring countries (Tajikistan, Uzbekistan, and Pakistan). Programming is 80% news-related and 20% entertainment. Broadcasting is equally in Dari and Pashto (with some English at 1am-4am every day). Program content is decided in Washington, DC, with reporters in main regions feeding in local news and reporting. Approximately 20 freelance journalists work for this outlet throughout the country. In Kabul, there are four journalists (all of them female). There is also one technician and one administrator. All costs are covered by Washington, DC. *“VOA was the first radio station to provide freedom of speech to Afghanistan by creating live call-in shows”* (outlet manager).

### **Azadi**

Azadi radio started operations in 2002. It is part of Radio Free Europe (RFE), hence its management team is based in Prague. It shares its antenna and frequency with Ashna/VOA and broadcasts 12 hours a day (7am-7pm), with Ashna broadcasting for the remaining 12 hours of the day. It has five FMs in five provinces (Kabul, Nangarhar, Balkh, Kandahar, and Herat) and also a very strong AM (400Kw) which allows the radio station to be heard in neighboring countries (Tajikistan, Uzbekistan, and Pakistan). Programming is 70% news (every hour) and 30% music and programming focused on women, family issues, and comedy. The outlet determines 60% of programming (generating 12 hours of local content every week) and Prague headquarters decides 40%. Content is also shared for free with other radio stations, including Ariana. The station broadcasts equally in Dari and Pashto. The outlet employs a total of 117 staff members across Afghanistan, including 30 freelance journalists in Kabul, 21 across the country, and 4 in neighboring countries.

The US Congress covers all costs (\$80,000 per month). *“During the last presidential election, Azadi hosted debate. This was a strong signal that the majority of political parties trust Azadi, perceiving it to be independent and neutral”* (bureau chief).

*“People do not differentiate between Sada-e-Azadi (ISAF) and Azadi (RFE). In Kabul, taxi drivers driving Japanese cars do not have access to FMs higher than 90 so they cannot listen to Azadi/VOA. However, when surveyed about their preferences, they say they listen to Azadi”* (outlet manager, Kabul).

### **BBC**

The BBC began its Pashto service in 1981 and has been broadcasting since then. The station broadcasts through 20 FM antennas (and transmitters with a power range of 200W and 1Kw) located on the hilltops of every province and major city in the country. The plan is to set up 20 more FM antennas in the next three years. The outlet employs a total of 35 full-time journalists and 15 non-journalists, 2 administrative staff, and 5 technicians (4 staff members are female).

Content is equally in Pashto and Dari, the latter starting in 2003. English is broadcast for four to six hours a day after midnight and Uzbek for 30 minutes every day. Programming includes news, current affairs, and weekly features (70%) and entertainment and education (30%). All of it is locally produced except for the international news, which comes from the London office.

Monthly running costs add up to \$100,000, with salaries the major costs. The British Foreign Office covers all costs and no other source of funding is accepted (no advertising or public service announcements). Mr. Dawood Azami, the bureau chief, reported that training for journalists is the priority area for support.

### **2.1.3 Newspapers**

Rather unsurprisingly, Kabul's print outlets are the most established in Afghanistan. The city is home to a number of publications, which Nye Express distributes across the country.

According to Nye Express Kabul's operations manager, Mr. Yar Mohammad Atayee, Nye's activities cover nine operational zones: Kabul, Herat, Bamyan, Kandahar, Mazar-e-Sharif, Khost, Jalalabad, Ghazni, and Puli Khumri. Nye distributes printed press to these operational zones mostly from Kabul. Distribution to northern and central provinces, and within these, is relatively easy; in the south and southeast, the situation is more constrained, owing to insecurity.

Initially, Nye distributed to 200 *karachis* (carts) all across the country. It currently distributes to 60 *karachis* and 23 kiosks. Additionally, Nye has contracts with 300 shops in Afghanistan, and supplies approximately 1,700 with free publications. Only Zumat (Paktia), Kishum (Badakhshan), and Chek (Wardak) use kiosks and *karachis*.

Approximately 50 types of publications (including books, magazines, and newspapers) go from Kabul to the nine operational zones. Those sent most often are Killid (25,000 copies), Mursal (15,000), Roz and Mahaz-e-Milli (8,000-9,000 sent to Mahaz-e-Milli regional offices only), and Khidmadgar (sent to 10-12 provinces, mostly southern). Publication-specific agreements affect Nye's resale price in the provinces.

The section below offers a very basic snapshot of information from these outlets. More information can be found in the final report.

### **Daily Outlook and Daily Afghanistan**

Daily Outlook is an English publication that started in 2005, and Daily Afghanistan is a Dari publication that started in 2006. They are currently run by founder and owner Mr. Hussein Yasa. A total of 4,200 copies of Daily Outlook are printed daily and 5,000 copies of Daily Afghanistan. Each is sold at a unit price of \$0.20. There is one office in Kabul and one in Mazar-e-Sharif. The publications are distributed through 22 hawkers in 30 provinces in Afghanistan, and it appears they also reach Dubai and eastern Pakistan. The owner is interested in setting up distribution points in five major cities and sending Daily Afghanistan to remote villages.

News agencies, including PAN and international news agencies, generate 90% of the content (purchased at a price of \$300 per month), with 10% self-produced. *“It is too risky a business to produce news on our own and it is very expensive to pay journalists, so we rely on news agencies as our major source of information.”* The outlet employs 67 staff members, including 27 editorial staff. Total running costs add up to \$42,000 every month, including salaries (\$9,000), electricity (\$2,500), maintenance (\$2,000), and printing (\$9,000). Sources of funding include advertising (\$40,000 per month) and subscriptions (\$5,000 per month).

### **Kabul Weekly**

Kabul Weekly was established in 1993 by Mr. Fahim Dashty. Its activities were interrupted in 1996 when the Taliban captured Kabul, and in 2006 for financial reasons. A total of 10,000-15,000 copies are printed, sold at a unit price of \$0.12. The publication is distributed in 22 provinces, with a number of provinces excluded from distribution owing to low literacy rates (Nuristan, Farah, and Ghor). Content varies slightly depending on the city, and is mainly in Dari and Pashto, with some English. The publication employs 33 people, including 9 full-time and 3 part-time journalists. Advertising by banks, airlines, and mobile phone companies, together with paid listings (job announcements) and awareness campaigns, generate 70% of total income.

*“I want a daily 16-page newspaper with a circulation of 45,000 ... a professional quality daily newspaper that needs funding of \$3 million for a period of 1.5 years. And then it will be self-sustaining. But the money I am offered is conditional – I will accept no money with conditions. This is why I have not succeeded in getting money so far. Starting from the government to Western organizations, I cannot accept conditions. I think the media can be independent only if they are financially independent”* (owner).

### **Hasht-e-Subh**

Hasht-e-Subh newspaper was started in 2006 by owner manager Mr. Sanjer Sohail. It is distributed in Kabul, Herat, Mazar-e-Sharif, Bamyan, Ghazni, and Jalalabad (with one office in each location). By the end of the year, the plan is to extend coverage to Khost and Kandahar. A total of 15,000 copies are printed; of these, approximately 5,000-7,000 copies are sold at the unit price of \$1, with the rest distributed for free. It is a 75% Dari and 25% Pashto publication, and claims to be the only one in the country with a daily special focus on human rights, climate change, cinema, and the voice of victims of war. Content is generally fed by a network of reporters spread across the country. Some is also taken from PAN, through a monthly subscription of \$400.

The outlet employs 65 staff members, including 12 full-time journalists (6 in Kabul). Total running expenditures add up to \$65,000-75,000 a month, with salaries accounting for the largest part, followed by printing (20-25%) and distribution costs (5%). Besides sales revenue (\$15,000 per month), major sources of income include that generated from a total of 1,500 yearly subscribers (\$1,700-2,100 a month), advertising (mainly from banks and mobile companies (\$6,000-7,000 a month), and donor funding (65% of the total) from the Open Society Institute (OSI), the National Endowment for Democracy (NED), the Heinrich BöllStiftung Foundation (HBS), and the Afghanistan Independent Human Rights Commission (AIHRC).

## **2.2 New media**

### **2.2.1 Mobile media**

There are approximately 100 computer shops selling hardware, DVD, drives, and cameras (in Chawk-e-Sharwali) and another 100 video shops, making an average of \$200-400 a month. Some offer downloads of ringtones and video clips, popular among youth. Mobile phones are, however, not really used as a source of information.

### **2.2.2 Internet**

Internet in Afghanistan is currently provided by approximately 20 small and medium-sized internet service providers (ISPs), which connect to expensive satellite links from other countries. Kabul features the highest number of ISPs, including the following: IO-Global, Liwal, Atlas Telecom, Strim Link, Rana Technology, Pactic, Ariana Network Services, Afsat, KBI Neda Telecom, Cere Techs, New Dunia, Multinet, Insta, Net Zone, Asix, UTS, Afghan ICT, ACG Nashita, Aria Sat, Milat Networks, and Stan Telecom. Telecom companies (including Afghan Telecom, Wasel, Roshan, Etisalat, MTN, and AWCC) also act as ISPs in the country's capital.

Internet through optic fiber is available in Kabul, although it is still not a convenient option. The optic fiber project, which includes a plan to set up a 3,200km-long backbone

across the country (on a route through Kabul, Kandahar, Herat, and Mazar, then heading off to Tajikistan, Uzbekistan, and Pakistan) and would ensure quick telecom and IT services at low prices, is moving slower than expected, and is so far connecting only Kabul, Parwan, Mazar, Faryab, and Badghis. The project was to be complete in two years (starting in 2006), but significant sections remain incomplete owing to regional fighting.

As of July 2010, the government was preparing a tender process for issuing WIMAX licenses, which is expected to pave the way to more comprehensive internet provision.

A number of internet cafés spread across the city provide public internet access. An internet café in a residential area would normally have 30 users a day (mainly over 15 years of age and male), who pay \$1.20 a hour for a good quality connection. One large, well-established internet café close to Kabul University (in the suburb of Karte Se) has 14 computers/cabins and 280-350 users a day (mainly students or youth above 12 years old, approximately 30% female), who connect for \$1 an hour.

### 2.2.3 Government

Information on MoIC and BNA can be found in the final report. There is a public library in Malik Asghar Square, where members can borrow books to take home, a student library in Kabul University, and a religious library in Karte Se (Dar al Quran).

### 2.2.4 Outlet managers and journalists

Journalism has gained popularity across the country in recent years: *“Journalism is now a profession that people want to do. People are proud to be journalists. Previously, poets were very respected, but now it’s journalists. Their social position has been raised a lot”* (Mr. Fahim Dashty, Kabul Weekly). There is a Faculty of Journalism at the University of Kabul, enrolling approximately 250-300 students a year. The number of journalists is harder to estimate, with the large majority seemingly employed as freelancers.

Our investigation across outlet managers in Kabul suggests a number of challenges affecting journalism. These include independence, security/limited capacity and skills. *(“I have been working for 24 years but sometimes I feel I’m not good at my work. We need training as a means to improve ourselves. Some 90% of Afghan journalists do not know their own language,”*Radio Asnha, outlet manager). There is also a dearth of standards. *(“There is a very low level of journalistic education and there is no proper structure for journalism education.”)*

### 2.2.5 Other content providers

There are over 11 news agencies in the country, most of them based in Kabul, including: PAN, Roz, Hindu Kush, Afghan Islamic Press, Wact, and the government BNA. The main report provides a comprehensive analysis of the major news agencies.



### **2.2.6 Media NGOs**

Kabul is home to a number of media NGOs. Further information can be found in the final report, with a brief overview of the main organizations provided below.

#### **Mediothek**

Mediothek is a German NGO founded in 1993 and funded by the German Development Service (DED), the German Federal Ministry for Economic Cooperation and Development (BMZ), and the German Federal Foreign Office. Apart from this regular funding, USAID and the US Institute of Peace (USIP) have also funded the NGO in the past two years.

Mediothek set up its current structure in 1995, with five community centers, in Khost, Jalalabad, Kunduz, Kabul, and Faizabad, and four media houses (sometimes linked to the above), in Kunduz, Jalalabad, Khost, and Peshawar. Mediothek has also received a grant from the German Federal Foreign Office to set up a media house in Mazar-e-Sharif, which should be up and running in August 2010. Media houses carry out a number of activities. They provide internet access, working space, and equipment for journalists (both freelance and employed) and organize trainings, workshops, cross-border dialogue (the media house in Peshawar aims specifically to address cross-border media dialogue for increased transparency and neutral communication), roundtables on current issues, conferences, and publications (four years ago it founded a monthly magazine, Afghanistan Emroz, in Kunduz to report on peace and development in the north of the country). There are roughly 50-60 staff members across media houses and community centers, with 2-4 people employed in every media house as well as around 25 trainers, freelancers, and consultants.

#### **Equal Access**

Equal Access is an international NGO created in 2003 to support the media and promote access to information. It produces different radio programs in-house, including dramas (e.g. “My Destiny,” on the effects of drug use), series, and radio spots on human rights, women’s rights, governance, youth, and health, as well as other civic education and awareness programs. Approximately 26 radio stations across Afghanistan broadcast its content and also receive capacity building. Equal Access is funded by, among others, USAID (through Development Alternatives Inc (DAI)), the US State Department Bureau of Democracy, Human Rights and Labor, OSI, the British Embassy, and the British Council, to a total of \$1.5 million every year.

#### **Nai Supporting Open Media**

Nai Supporting Open Media was founded in 2004 as a partner of Internews, and provides training in journalism, reporting, production, and media management to the media sector in Afghanistan. Current training topics include: human rights, investigative journalism, election reporting, networking, community engagement, and radio production. The NGO has offices in Kabul, Mazar-e-Sharif, and Jalalabad. Nai also

produces a monthly report called Media Watch, which monitors violations against journalists and the media. The provincial governor is made aware of such violations through this report, as are ministries, spokespeople, and MPs. Attached to Nai is a radio station, which is used for training but also broadcasts to a small area in west Kabul.

Former Nai funders have included the UN Development Programme (UNDP) (election reporting), UNESCO, the UN Population Fund (UNFPA) (family planning reporting), the Danish Embassy, USAID, and the European Union (EU). In 2008, UNSECO provided the radio station with \$27,000.

### 2.2.7 Insurgents

The research suggests that insurgent communication in the city is rather lively: *“The Taliban seem to be using the media more than they ever did”* (international development community representative); *“The Taliban are using the media as a tool in their war ... They are quicker than the government and the international press to give information!”* (outlet manager, Kabul). Outlet managers and journalists in Kabul, as elsewhere in the country, claim they are often approached by insurgents by phone or, more generally, through press releases sent via email. *“Twice a month, the Taliban send emails or call the newspaper. We never return calls; it is a very dangerous business to get into”* (print outlet manager, Kabul).

Respondents identified a general difference in the way international and national media report on and interact with insurgents: the former often give a great deal more attention to insurgents; the Afghan media are more suspicious of them.

### 2.2.8 Military

ISAF runs Sada-e-Azadi radio and newspaper. The branch in charge is the CJPOTF. More information in this respect is provided in the final report.

### 2.2.9 Others

Afghan political parties, sometimes represented by an individual political or religious figure, are more and more instrumental in the creation of radio stations and TV channels (Ayna, Rah-e-Farda, Tamadon, Noor, Kawsar, Dawat, for instance). They provide funds and/or buildings, facilitate recruitment, and define the general ideological line of the media outlet. This perspective is analyzed further in the final report.

### 3 Audience

The following is a description of the audience in Kabul city, based on 290 close-ended face-to-face interviews (not phone) and 435 phone interviews of 61 unique media users. Additional qualitative fieldwork was conducted in the city and the province through paired interviews and community case studies. Qualitative results in Afghanistan's cities are the focus of detailed analysis in the national survey report. We present here only a brief insight into Kabul's audience.

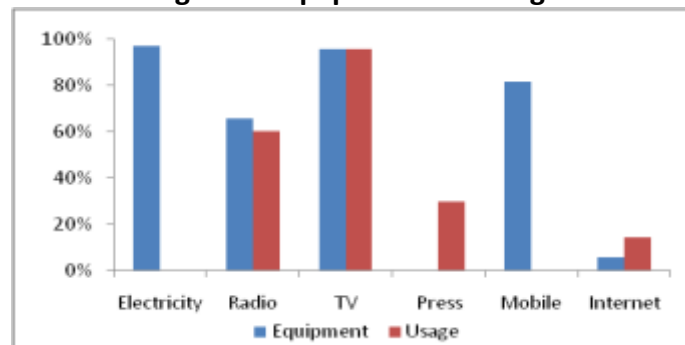
#### 3.1 Equipment and usage

##### 3.1.1 Household equipment

With widespread access to grid electricity (83% of respondents), the capital is almost saturated with regard to TV equipment in households.

One consequence is that equipment and usage rates for radio are significantly lower and are actually decreasing (the same trend was observed in Herat and Mazar-e-Sharif). Quite clearly, TV is to some extent replacing radio: a third of interviewees do not consider it useful to keep a radio set in their homes, despite the negligible price.

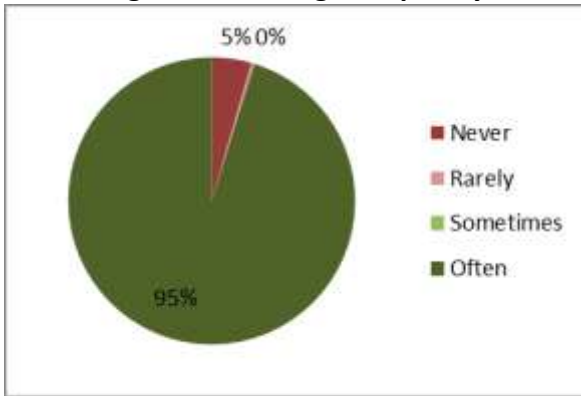
**Figure 1: Equipment and usage**



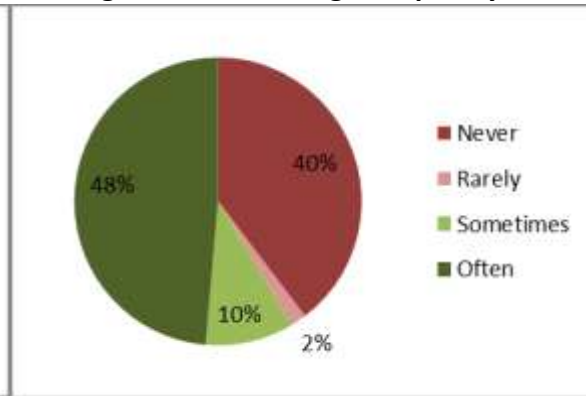
##### 3.1.2 Sources of information and media usage

Usage frequency data confirm the partial replacement of radio by TV in major urban centers, especially in the capital. Whereas in all rural districts surveyed radio is used more frequently than TV, the contrary is true in Kabul. A large majority of the capital's inhabitants have switched to at least daily usage of TV, and the radio has been relegated to more occasional use (although this question probably did not capture passive listenership of the radio, in taxis for instance).

**Figure 2: TV usage frequency**



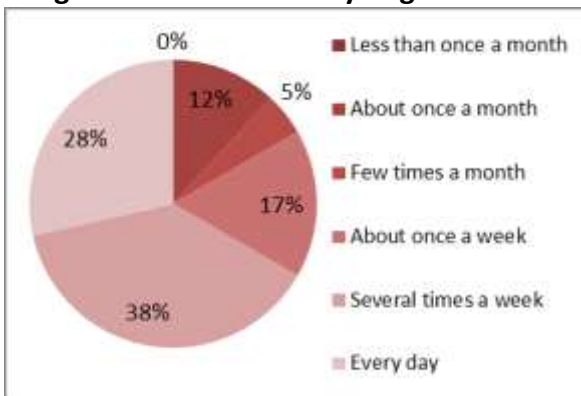
**Figure 3: Radio usage frequency**



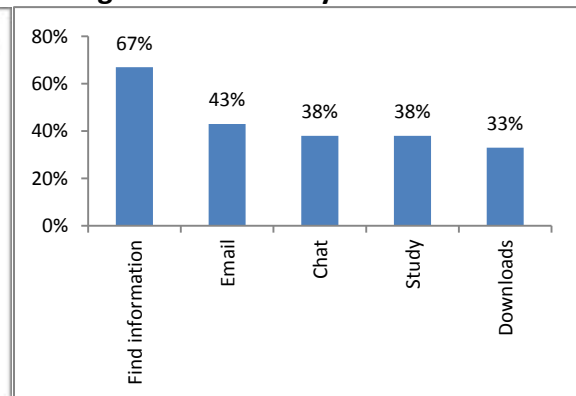
As is to be expected, usage of printed press and the internet in the capital is among the highest in the country. However, usage rates are lower than those in Jalalabad, partly because the literacy rate and the average salary are significantly higher in Jalalabad than in Kabul. This relates to the commercial and agricultural dynamism of the Nangarhar region on the one hand and the influx into Kabul of refugees and poor rural people looking for jobs on the other.

Most interviewees who use the internet do so very regularly (67% at least several times a week), which suggests people take advantage of connections at their workplace. Heavy use of email and chat probably comes from contacting Afghans living abroad.

**Figure 4: How often do you go online?**



**Figure 5: What do you do online?**

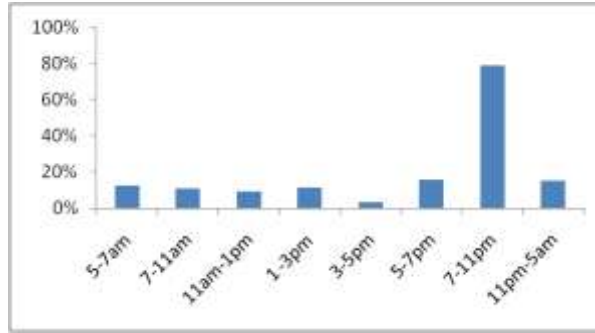


### 3.1.3 Usage patterns

The peak time for TV usage in Kabul is in line with trends in other urban and rural districts, concentrated between 7pm and 11pm (the audience survey provides statistics broken down by half hours and by channels).

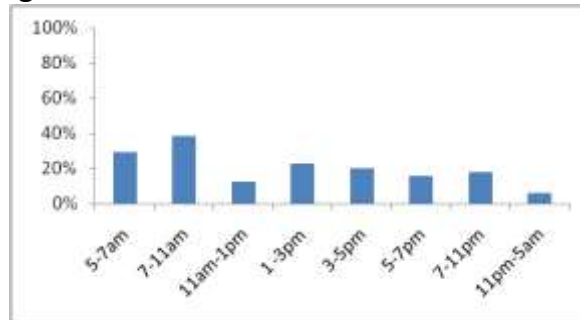
Since most interviewees can access grid electricity, usually throughout the day, this peak is explained mostly by the end of working hours and by families gathering for dinner.

**Figure 2: Preferred times to watch TV**



Radio listeners appear to have adapted to TV’s dominance, with audiences reaching their peak between 5am and 11am, a time when TV is almost unused. The pattern probably relates to the routine of morning prayers, breakfast, and going to work by taxi, in a personal car, or on public transport. Radio audiences are low during TV’s peak between 7pm and 11pm.

**Figure 3: Preferred times to listen to the radio**

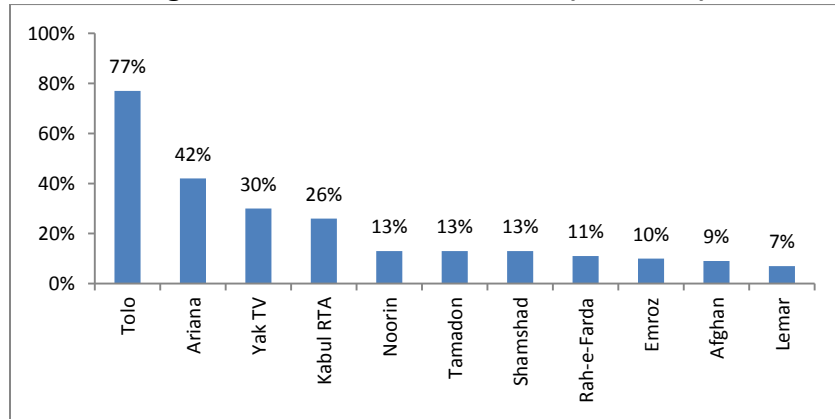


## 3.2 Preferences

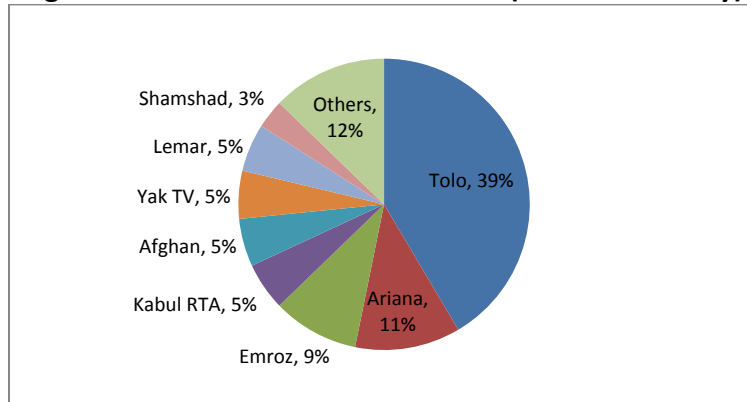
### 3.2.1 Television

There is an interesting contrast in relation to TV preferences between the capital and the rural districts studied. Ariana comes first in rural districts, possibly because of its extensive coverage, its balanced use of Pashto and Dari, and its rather serious conservative style. However, Tolo is very clearly ahead in the urban, less conservative, and mostly Dari-speaking environment of Kabul. These preferences are consistent with audience survey findings, which present Tolo and Ariana as the two channels with the greatest audience share.

**Figure 4: Preferred TV channels (3 choices)**



**Figure 5: Most watched TV channels (audience survey)**



The most striking result is that Yak TV, which was founded in February 2010 and yet ranks third among preferences after only three months (fieldwork was conducted in April-May 2010). This seems to be thanks to effective and professional programming, including many popular series, and aggressive advertising: content analysis is underway to explain this success and to enable an understanding of the orientations of the different TV channels, especially the newest ones. Yak’s audience share in the audience survey is slightly less favorable: it is fourth largest after Emroz (tied with RTA, Afghan TV, and Lemar).

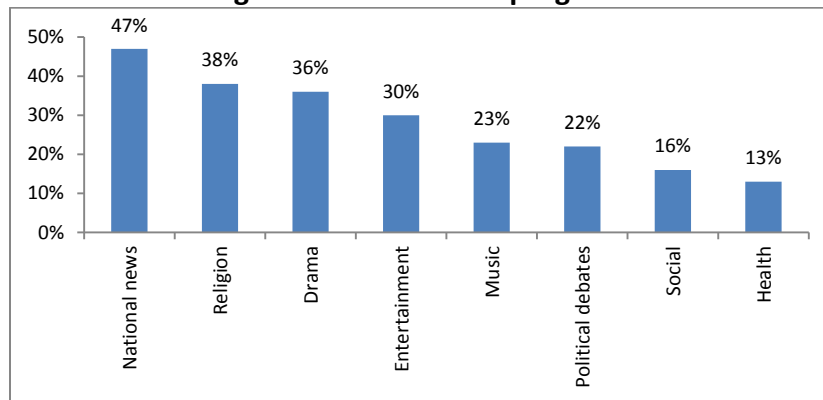
The popularity of RTA seems not to have decreased since previous studies, despite fast-growing competition from private channels and problems related to its own programming and identity. A significant number of respondents seemed to appreciate its balanced use of Dari and Pashto and its focus on Afghan culture (compared with private channels, which tend to broadcast more foreign series, music, and movies, mostly from India, Turkey, Iran, and the US).

Four years on from its launch, Pashto-speaking Shamshad seems to have fallen short of its initial objective, which was to be among the most watched Afghan private channels. Its popularity remains confined to eastern Pashto-speaking regions (it is first in

Jalalabad): it lags rather far behind in the capital, as well as in most of the rural southern Pashto-speaking districts studied.

Although still far from being top players, the more political Noorin (close to Panjshiri) and Rah-e-Farda (founded by Mohammed Mohaqiq) have gained a certain amount of popularity, even though they were set up relatively recently and have limited resources. The religious Tamadon, founded by Shia Ayatollah Mohseni, has had a small but undeniable impact, with programming that mixes Quran recitation and interpretation, Iranian series, general programs, and news.

**Figure 6: Preferred TV programs**



National news is the preferred TV program type: all channels broadcast mainly national (rather than local, international, economic, or cultural) news during peak audience times (the main newscasts are usually at 7pm and 8pm).

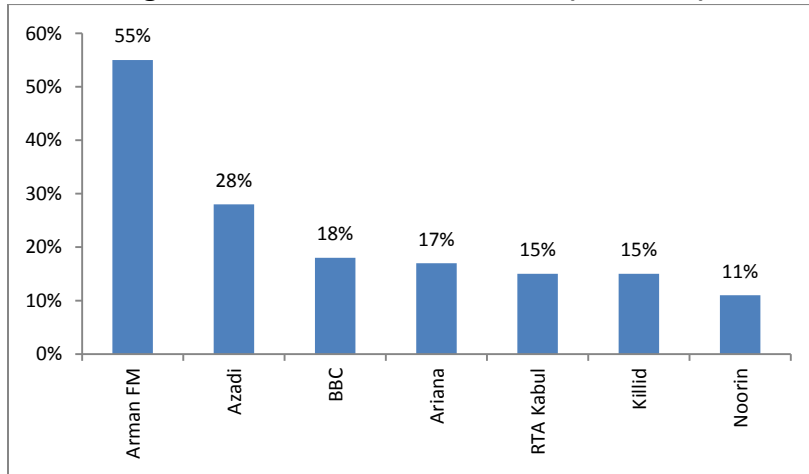
Figures for religious programs (mostly calls to prayer, Quran recitation, translation and interpretation, conferences by clerics, roundtables, and interactive programs with viewers asking religious figures questions) and for dramas/series (mostly Indian, Turkish, Iranian, and US, but also Afghan, notably on Tolo) are very similar.

It could be that people watch and like both kinds of programs. But a closer look at the data shows that it is rarely the same interviewees who like both (one-fifth). This is confirmed by the fact that dramas come out as the most disliked programs (51% of answers). Thus, the audience appears to be divided between a conservative and a more liberal wing. These are asymmetrical, as the conservatives openly reject entertainment programs but the liberals dare not do the same with religious programs (only 2%).

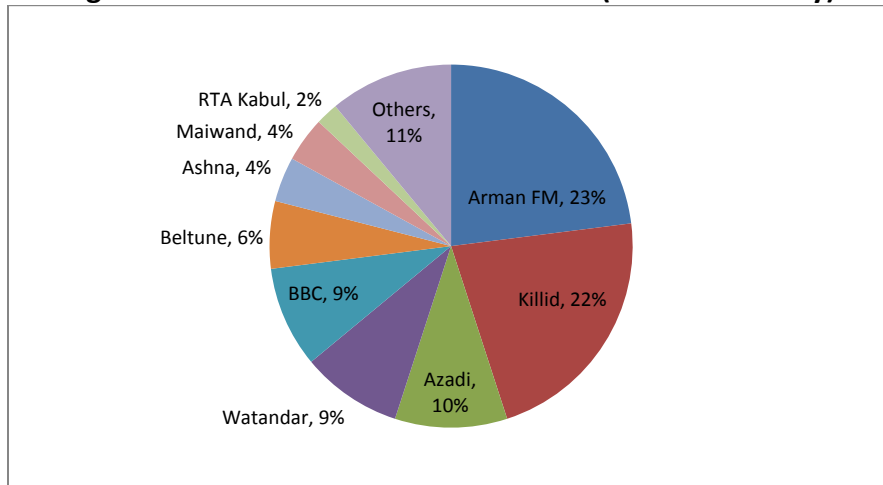
### 3.2.2 Radio

As in previous studies, Arman FM is far ahead of all other stations in Kabul, thanks to its dynamic mix of music and interactive programming, as well as a great deal of advertising. Audience survey data confirm this finding.

**Figure 7: Preferred radio stations (3 choices)**



**Figure 8: Most listened to radio stations (audience survey)**



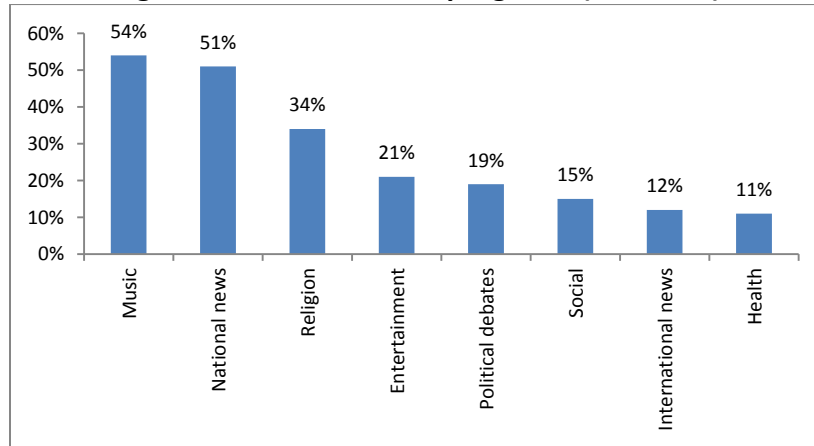
International radio stations Azadi and the BBC, with richer content, like news, educational, and cultural programs, come next, then stations associated with TV channels (Ariana, RTA Kabul, and Noorin).

Killid is in a peculiar position. It cannot rely on the vast facilities and networks of correspondents that international stations like the BBC and Azadi can, yet it has deliberately chosen to avoid music and entertainment for the most part in favor of a high-end, cultural, and intellectual identity. Nevertheless, it has attained a high level of popularity: it is among the self-declared preferences and has the second greatest audience share after Arman FM.

A preference for music on the radio helps explain the success of music stations such as Arman FM. It also seems that the radio is used for the morning national news whereas the TV is preferred for the evening news.



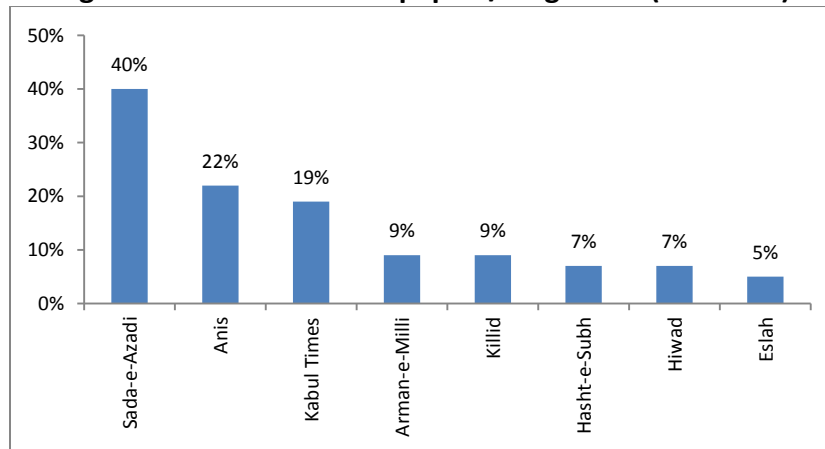
**Figure 9: Preferred radio programs (3 choices)**



### 3.2.3 Printed press

The gap in popularity between ISAF-published Sada-e-Azadi and the rest of the printed press probably owes to the massive gap between their circulations: nearly half a million copies for the first and not more than 30,000 for Afghan newspapers and magazines. Moreover, the first is free and can be found in many places, whereas the distribution of Afghan newspapers is problematic.

**Figure 10: Preferred newspapers/magazines (3 choices)**

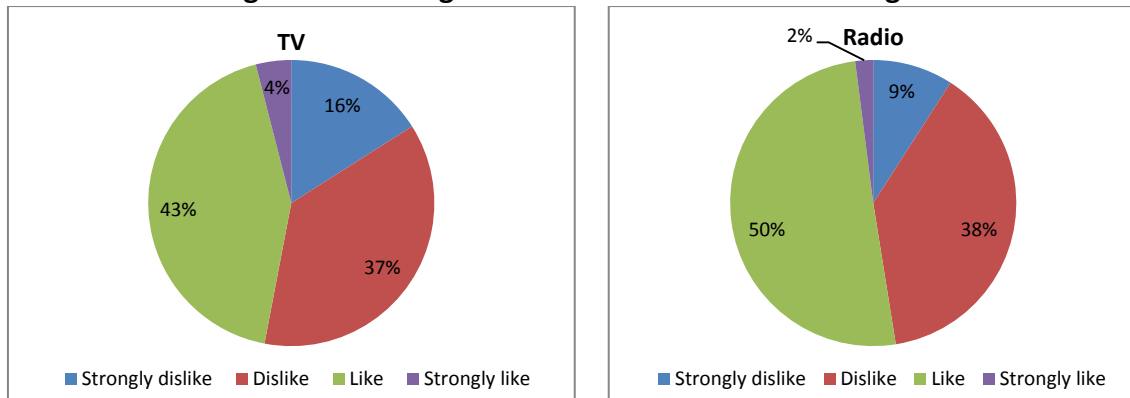


The government daily Anis, distributed widely in government and public institutions, is easily accessible by large sections of the capital’s population. This, combined with its rather neutral, non-partisan tone, accounts for its high position.

### 3.2.4 Advertising

Intense exposure to private, advertising-funded media, which has been the situation now for around eight years, has led to a predictable outcome: more and more interviewees are tired of commercials, on the radio and even more so on TV.

**Figure 11: Feelings towards commercial advertising**



This is to be compared with the 9% of interviewees who dislike radio commercials and the 7% who dislike TV commercials in the rural districts surveyed, where media exposure is lighter and newer. In the future, private media outlets will certainly have to take this change into account, in order to find a compromise between financial need and the limits to their audience’s patience.

There seems to have been a shift in the advertising market: both on radio and on TV, people remember commercials for banks most – it used to be phone companies. A quick check across TV channels confirms that this sector is currently the main buyer of media space.

### 3.2.5 Personalities

The most mentioned personalities (people Kabul interviewees would like to hear or see on the media) were (ordered by frequency): Dr. Ramazan Bashar Doost (MP, outspoken anti-corruption champion, and former presidential candidate); Sheikh Mohammad Asif Mohseni (Shia ayatollah, founder of Islamic university Khatem al-Nabiin and Tamadon TV); President Hamed Karzai; and Dr. Abdullah Abdullah (former foreign affairs minister and presidential candidate).

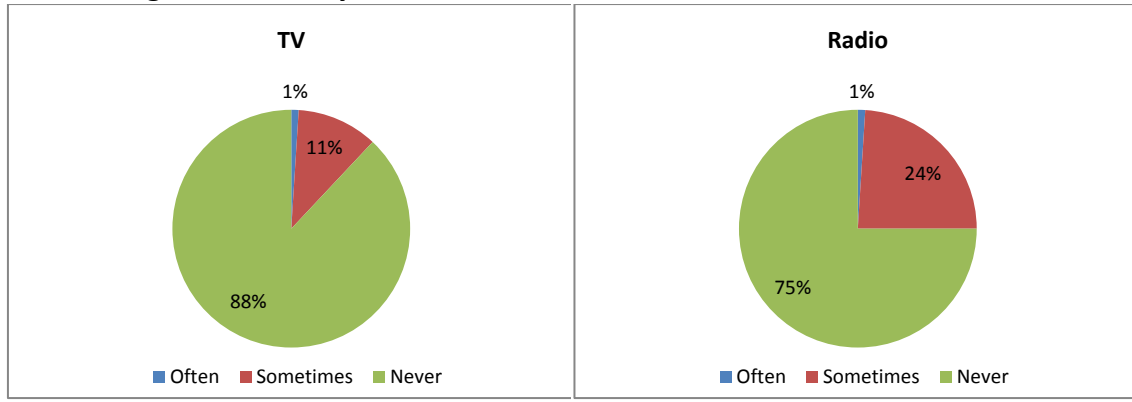
## 3.3 Perceptions and impact

### 3.3.1 Participation

Interactive programs make up quite a large proportion of programming, both on radio and on TV. As such, a significant portion of respondents take part.

Further analysis shows that interaction on the radio consists mostly of song requests (primarily on Arman FM), whereas for TV it is mostly questions during one of the many interactive programs offered (the political “Your Opinion” on Afghan TV or the religious “Answer” on Noor TV, for instance).

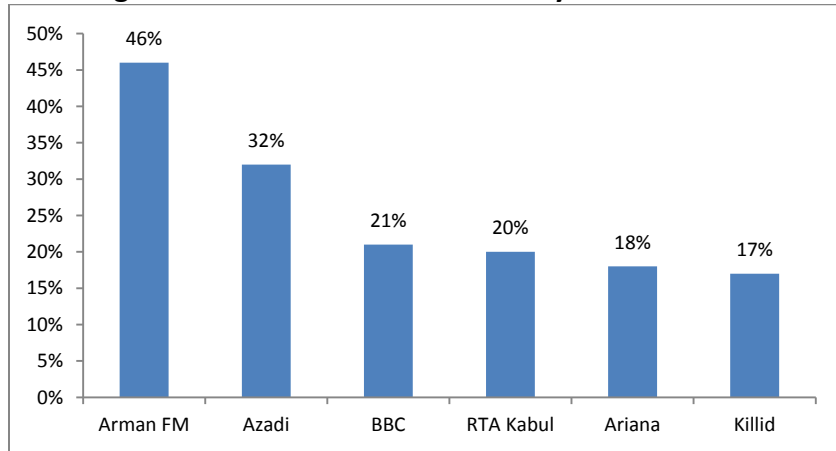
**Figure 12: Have you ever contacted radio stations or TV channels?**



### 3.3.2 Trust

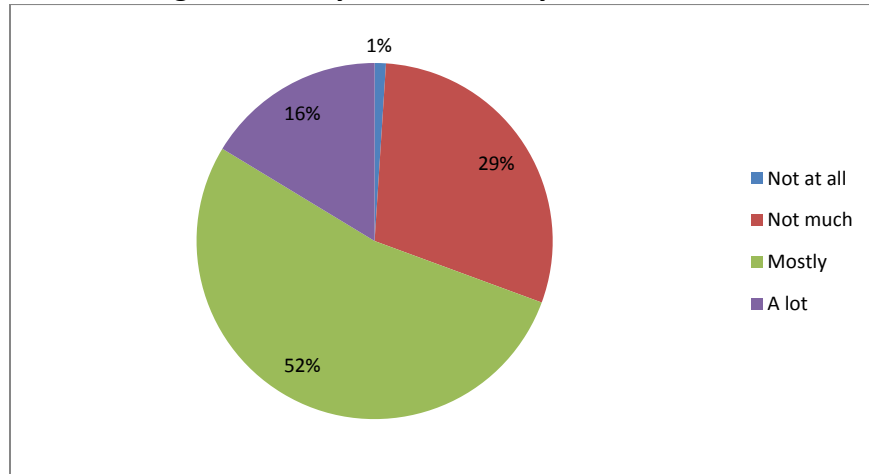
As in most districts, trust in radio stations closely follows popularity patterns. Still, it is interesting to note the high level of trust in Azadi, probably thanks to its extensive and thorough coverage of news all over Afghanistan, with in-depth reporting, including interviews of officials and ordinary people on specific topics.

**Figure 13: Which radio stations do you trust most?**



TV channels are not trusted to a great degree: nearly one-third of the sample doubt what they see and hear on TV. We do not have data broken down by channel but the plethora of partisan TV channels emerging in recent years may be a factor explaining this.

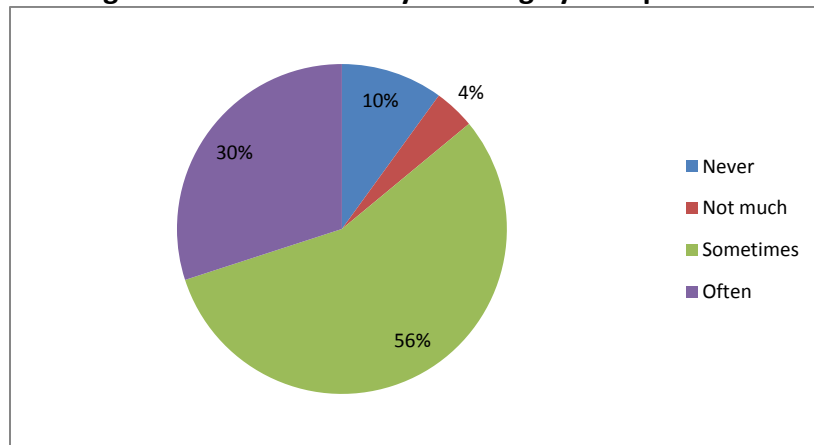
**Figure 14: Do you trust what you see on TV?**



### 3.3.3 Circulation and impact

Only 30% of interviewees in Kabul said that TV had changed their opinion on certain matters, which is quite low compared with in the nine rural districts studied (52%). Kabulis are likely to be more used to the new ideas, images, and information that TV brings – or at least this is the image they have of themselves.

**Figure 15: Can TV make you change your opinions?**



## **4 Conclusions and areas of opportunity**

Please refer to the final report.