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for International
Broadcasting

The Channel

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- 4 Global briefing**
- 17 4A higher power satellite in Africa ... look no further**
A preview of ASTRA's new satellite
- 18 South America's favourite partner station**
Interview with Jan Hoek and colleagues at Radio Netherlands
- 24 It's (r)evolution**
NABA's Michael McEwen on broadcasting in North America
- 26 Between concentration and plural offer**
Isaac Nahon looks at the media in Latin America
- 28 AIB Global Media Business Conference Montreal 5-7 June 2005**
Agenda and booking details for the fourth annual summit of the international broadcasting industry
- 34 Sticky notes and the transmission business**
Canadian company Invidex predicts less hair-challenged broadcast executives
- 36 The journalist's private suffering**
Roger Simpson on the Dart Centre for Journalism and Trauma
- 37 Privatising Al Jazeera**
Is the move a new phase in the network's life?
- 39 Reaching the southern hemisphere**
Joan Mower on US international broadcasting to Latin America
- 40 Counting the risks and costs of RoHS and WEEE**
Will Wohler explains what the lead-free directives mean for the manufacturer
- 42 A winning combination**
Anver Anderson looks at Harris's new Software Systems business unit
- 44 Chipping away at the digital short wave market**
How RadioScape is eying DRM
- 45 American spoken here**
DW's Uta Thofern on targeting the US market
- 46 Airwaves of compassion**
Alan Heil on what international broadcasters did in the wake of the tsunami
- 46 Radios for Aceh**
How Deutsche Welle is helping rebuild radio stations in Indonesia
- 48 In the land of the thunder dragon**
Wilfried Solbach of the AIBD reports from Bhutan
- 49 Where broadcasting leapfrogs**
Anmol Saxena takes a closer look at India
- 50 New vision needed**
...in Algerian PSB, reports Laid Zaghlami
- 52 Looking into the revenue pots**
Manfred Kops researches broadcasting revenue structures
- 54 A mission that is not always popular**
Arne Wessberg on the role of PSB in Europe
- 57 Reinventing PSB for the digital age**
Views from the VLV's international conference
- 58 Book reviews**

March 2005
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18



Working in partnership is the key to success for Dutch international broadcaster, Radio Netherlands

24



Are Desperate Housewives spearheading the HD revolution?

28

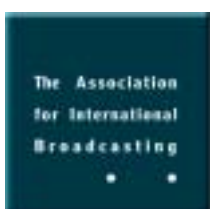


All eyes on Montreal for the fourth AIB Global Media Business Conference, the summit for the international broadcasting industry, 6-7 June

36



Teaching journalists about the emotional effects that follow in the wake of violence



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Filipino Channel comes to Hong Kong

Philippine broadcaster ABS-CBN has teamed up with Hong Kong's Cable TV Ltd to launch The Filipino Channel in Hong Kong. Hong Kong is a very lucrative market for TFC since there are over 150,000 Filipinos living and working in the city. ABS-CBN Global is also looking at Taipei, Malaysia and Indonesia as a part of their regional expansion plan. TFC is operated by ABS-CBN Global, the international operations subsidiary of ABS-CBN. ABS-CBN Global earlier launched the channel on Singapore's StarHub cable TV service, and TFC is currently seen in North America, Australia, Europe, Papua New Guinea, New Caledonia, Indonesia, Japan, Cambodia, American Samoa, the Gulf States and Saudi Arabia.



China's media still muzzled

After nine-and-a-half days of carefully choreographed leadership speeches, news conferences, and votes that made up this year's session of the National People's Congress (NPC), life returned to normal in the Chinese capital. For the ordinary Chinese caught between rampant official corruption and breakneck economic growth, business as usual means a seemingly endless cycle of complaints forms, bureaucracy, queues and attempts to win redress. Radio Free Asia reports that the authorities have succeeded in quashing any attempts at organisation among the tens of thousands of petitioners who descend on the capital around the time of major political meetings like the NPC. A petitioner speaking to RFA's Mandarin service said the petitioners had asked for investigations into their treatment, mostly at the hands of China's judiciary. Chinese state prosecutors investigated 43,757 government officials for job-related crimes during 2004 – for corruption, bribe-taking and embezzlement of public funds, dereliction of duties and abuse of power. The media is still muzzled by government – Chinese reporters covering the NPC were given access to proceedings only in carefully orchestrated press conferences in which questions were allocated to news organisations in advance.

Murdoch close to Indian DTH?

After high-level meetings with government officials in Delhi, Rupert Murdoch is close to securing licence for DTH in India, cutting through the monopoly of the cable operators. Star executives believe they have complied with the regulatory conditions that have delayed their joint bid with Tata Group; Star holds 20% and a unit of the Tata conglomerate owns the rest. If the deal is approved, the joint venture would attract capital investment of US\$400m. In the past year the government has awarded direct-to-home pay licence to Zee TV and to state broadcaster Doordarshan a licence for a free-to-air service. Zee's initiative has so far struggled to attract subscribers largely, say observers, because of a shortage of compelling content.



NSAB commissions SIRIUS 4

Nordic Satellite has awarded the contract to design and manufacture the SIRIUS 4 satellite to Lockheed Martin. NSAB is 75%-owned by SES ASTRA and 25%-owned by Swedish Space Corporation. Terms of the contract remain confidential. SIRIUS 4 will be a multi-mission Ku/Ka-band satellite to be built on Lockheed Martin's reliable A2100AX platform with a minimum service life of 15 years. The spacecraft will be designed to be compatible with all flight-proven commercial launch vehicles and NSAB intends to select the respective launch service provider later on in the year. The satellite will be deployed at NSAB's orbital position of 5° East in the second quarter of 2007.

On TV you are someone – even if you are dead

It's not how powerful you are, but how much coverage you get on TV. That was the finding of a recent opinion poll that asked Russians across the country to name the most influential personalities in politics, business, culture and science. Respondents readily picked President Vladimir Putin as the most powerful politician and pop diva Alla Pugachyova as the leading cultural figure. But they struggled in the other categories: many were unable to name a single scientist, leading to a top 10 list that bunched together Nobel Prize winners with dead scientists, television hosts and a hostage negotiator. The sometimes startling answers are a direct result of the fact that television is the sole information source for many people these days, according to sociologist Irina Palilova of the Levada Center, the independent polling agency that carried out the survey.

Reporting Europe – special workshop

Two hundred senior editors from TV and radio stations across Europe will be gathering in Brussels on April 20th and 21st for a consultative workshop about the problems of reporting the enlarged EU in an interesting way. *Putting Europe in the Picture* will share ideas about how to reflect the growing influence of the European Union, and delegates will make suggestions on how the EU can help broadcasters to cover European affairs more effectively. The event is organised by the European Commission in collaboration with the broadcasting associations based in Europe, including the AIB. For a registration form for this free workshop, contact Claire Brocard (c.brocard@teamwork.fr), providing full contact details including job title and responsibilities.

AIB Global Media Business Conference 2005, Montreal 6-7 June - more at www.aib.org.uk • VOA launches TV to Tibet • Commonwealth Broadcasting Association is 60 • Sony appoints Howard Stringer as chairman and CEO • Bosnian BN TV joins GlobeCast WorldTV DTH lineup in US • Harris holds DRM symposium in Romania • OmniBus appoints Phillip Eade as VP Channels & Marketing EMEA • Radio France Internationale is 30 • Indian regulator TRAI supports private terrestrial TV • French regulator CSA receives 35 applications for 8 DTT channels starting after June 2005 • Deutsche Welle and Lebanese NBN sign cooperation agreement • Harris

Naming the emergencies the media forgets

Brutal conflicts in Congo, Uganda and Sudan are the world's three biggest "forgotten emergencies". Reuters AlertNet, a humanitarian news web site run by Reuters Foundation, asked more than 100 humanitarian professionals, media personalities, academics and activists which "forgotten" crises the media should focus on in 2005. Many experts accused the western media of routinely ignoring emergencies in countries of little geopolitical significance for big powers, despite the enormous scale of suffering. Experts urged the media not to ignore the impact of the HIV/AIDS pandemic.

Quantel wows France

New generation Quantel

technology has been adopted by all five of France's free terrestrial channels in their transition to multi-format, multi-resolution and HD production and broadcasting. Public network France 3 uses HD/multi-resolution Paintbox gQ for news production and close-to-air applications, as does Franco-German cultural channel Arte. M6, France's youth-oriented generalist terrestrial broadcaster, opted for an eQ for their on-air promotion and station identification and transition to HD. Private channel TF1, France's (and Europe's) leading free terrestrial broadcaster, ordered a series of new systems for off-line work. Public broadcaster France 2 bought a Paintbox for its news programmes and other close-to-air applications. In March, Brazilian network TV Globo purchased three Quantel eQ editing/effects/grading/mastering systems. Quantel has also entered into partnership with DayPort, a leader in video streaming, workflow infrastructure and convergence technologies.

GlobeCast and ArabSat launch Euro gateway

Satellite services company GlobeCast and satellite operator ArabSat are to launch a new broadcast platform on Arabsat's fourth-generation satellite Arabsat 4A in late 2005. This digital distribution platform in Ku-band will offer the first European gateway to an ArabSat satellite and will allow broadcasters from around the world direct access to the Middle Eastern and North African markets via GlobeCast's worldwide satellite and fibre distribution network. GlobeCast has also expanded its presence in the Middle East with a new sales office in Dubai's Media City. Headed by Giorgio Giacomini, it will offer the company's full line-up of broadcast services.



RTI launches foreign language network

Radio Taiwan International is launching an island-wide foreign language FM network in mid-2005, broadcasting 12 hours a day, 7 days a week. The service is targeting people living and working in Taiwan who speak English, Japanese, Vietnamese, Thai and Indonesian. Most foreign nationals in Taiwan speak either English or Japanese. The number of Filipino, Thai, Vietnamese, and Indonesian workers and spouses in Taiwan has also increased in recent years. "Due to differences in languages and culture, these foreigners experience problems adjusting to life in Taiwan. For this reason, it is important to establish radio programmes in their languages to serve them", said RTI Chairman Lin Feng-jenq. The radio broadcasts will provide useful information and help with residency, legal, marital, work, and language problems.

Virtual reality set wins RTS innovation award

ITN's ground breaking virtual reality set has won a Royal Television Society Award for Innovation. The set was designed by ITN and developed by ITN in partnership with Vizrt for the ITV News service in the UK. It is based on almost a decade of experience with virtual reality and 3-D modelling for live daily and rolling news. The design and use of virtual reality sets and graphics are two of the broad range of services offered by ITN's consultancy arm, ITN Consulting. ITN Consulting's Managing Director, Adam Chadwick, says the award underlines the depth of expertise available to its clients.



AIB at CABSAT Dubai

With over 400 exhibitors and 7,000 visitors, CABSAT Dubai 2005 was a success. London-based Association for International Broadcasting was represented by AIB Director of Business, Anver Anderson (left), and AIB Regional Representative, Tariq I Bhatti. Many AIB members attended including PanAmSat, Wohler, GlobeCast, Intelsat, inmedia, Hellas-Sat, SES ASTRA, ND-SatCom, and AIB Platinum Member Al Jazeera, whose Marketing Director Hamad Yahya al-Nuaimi was a visitor to the show. This year's conference was the first to include discussion panels on "TV, Broadband and Everything in Between" and many of the speakers were selected from AIB Member companies. The region's leading satellite services provider ArabSat organised the first live HDTV broadcast via satellite in the Middle East, beaming the signal down live in the ArabSat booth. Sony HDW-750P camcorder and GloCom MV 450 HD encoder provided Full MPEG2 compliance and HD picture, and Samacom the uplink to satellite from Dubai Teleport.



supports Australia's first multi-channel mobile TV trial • David Johnson joins Wohler Technologies as COO • UK regulator Ofcom study points to 2012 digital switchover • Armenian Public TV on GlobeCast HOT BIRD in Europe • UK global leader in online TV piracy, ahead of Australia and the US • German pay-TV broadcaster Premiere's IPO 12 times subscribed • Talks begin on Europe-wide satellite radio service • Megahertz makes first new vehicle of BBC's OB fleet ready for HD • ETSI approves pan-European EPG standard • Hannibal TV, Tunisia's first private TV station • Singapore's MediaCorp COO Ernest Wong to leave in September •

AIB conference launch at Canada House

On 11 March, the Canadian High Commissioner to the United Kingdom, HE Mr Mel Cappe, hosted a Reception to celebrate the 60th anniversary of AIB member Radio Canada International and to launch the 2005 AIB Global Media Business Conference which RCI will host in Montreal in June. More than 80 guests from the UK broadcasting industry as well as government officials, regulators and politicians, including AIB members, joined the event in the splendid setting of Canada House overlooking Trafalgar Square in central London. The High Commissioner welcomed the guests and told them of RCI's long history and the many links between Canada House in London and the Montreal-based broadcaster, particularly during the Second World War when Canada House was a base for Canadian servicemen and women posted to Europe.

Ann McMillan, CBC Bureau Chief in London, spoke about RCI's current role in international broadcasting and the importance of Canada's voice around the world. Simon Spanswick, AIB chief executive (left, with BBC World Service's Miles Palmer and Jane Futrell), introduced the Association and its work to the guests. He said that the AIB and its members were delighted to have been invited by RCI to hold its annual AIB Global Media Business Conference in Montreal which would bring together leaders of the international broadcasting industry for two days of high-level debate and discussion. With delegates from all parts of the world, the conference is the only event in the international calendar to specifically focus on the issues surrounding cross-border broadcasting, both radio and television.



RFE/RL affected by Kyrgyzstan media crackdown

In the weeks before the tulip revolution, the Kyrgyz government was actively impeding the flow of information from independent media outlets. Ahead of parliamentary elections on 27 February, independent websites and other media outlets were being blocked. On 24 February, Radio Azattyk, RFE/RL's Kyrgyz-language broadcaster, was stopped



from transmitting on medium wave but remained on the air on FM in three cities, including Bishkek and Osh. RFE/RL's Radio Azattyk had provided the only venue for independent and opposition politicians running in the parliamentary elections and for a number of opposition leaders barred from being candidates by the government. When the Kyrgyz authorities took Radio Azattyk off the air, thousands of people in the Kochkor district turned out to express support for RFE/RL.

Sony goes for RadioScape design

Sony Corporation has chosen RadioScape's RS350A™ DAB module design as the basis for its upcoming automotive DAB radios. The RS350A module is designed for the challenging environment of automotive applications and provides DAB functionality for existing radio designs. Anika Nyberg, President of WorldDAB, welcomed the entry of Sony into the automotive DAB market as a positive endorsement of the excellent growth potential in this market segment. RadioScape has recently appointed Triangle Technologies as its representative in Japan: it provides local support to the Japanese consumer electronics companies, who are now entering the DAB market in a big way.

Swissinfo future bleak

The Swiss Broadcasting Corporation has announced cuts of 80 jobs and eight language services at its international service, Swissinfo, leaving only a reduced English department. SBC has said that it is acting in response to the government's decision to end funding for Swissinfo. The cuts should result in annual savings of 16m Swiss francs (US\$13.6m). The plans are expected to be implemented by the end of 2006. Swissinfo was launched in 1999 as the internet arm of Swiss Radio International and is currently available in nine languages.

Only 26% HD offer

Only 26% of the top 89 TV operators worldwide, as defined by a recent IMS Research study 'Making Digital TV Pay', are currently offering HDTV services to their subscribers. This shows that HDTV is still not a reality for most subscribers. However, looking on a regional basis, IMS Research finds that within the Americas 16 out of 23 top operators, or 70%, are already providing HDTV to some portion of their subscribers. The report says many elements are now coming together to push HDTV adoption, including new compression standards such as MPEG-4 (H.264) and Windows Media 9.

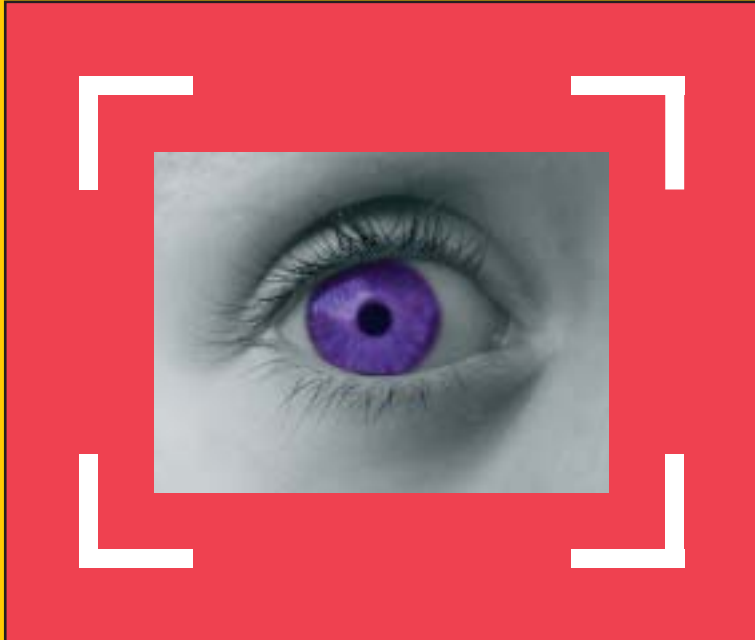
More Dubai DTH Satellite communications services

provider Samacom and the region's leading satellite services provider ArabSat are co-operating in marketing a new DTH platform using transponder capacity on the 2D satellite. Broadcasters in Dubai Media City now have a direct link to ArabSat2 replacing a link from Tunis. Uplinking from DMC will save broadcasters satellite space cost and will also allow broadcasters from Europe, America and Asia to deliver their content from other satellites on the ArabSat/Samacom platform. ArabSat and CITCGI are also in talks about co-operation to market ArabSat services in the Philippines, Pakistan and India.

RCI partners with Radio Nacional Argentina

Radio Canada International has signed an agreement with Argentina's national public broadcaster Radio Nacional Argentina. RNA will broadcast the weekly Spanish-language programme *La semana canadiense*, produced by RCI's Latin-American section. RCI already has over 30 rebroadcasting partners in Argentina. Worldwide, 350 partner stations in 75 countries air RCI programmes. RCI produces programming in English, French, Arabic, Cantonese, Mandarin, Spanish, Portuguese, Russian and Ukrainian, available worldwide via the Internet, analogue and digital short wave, and satellite. RCI is celebrating its 60th anniversary this year. www.rcinet.ca

Intelsat completes acquisition by Zeus Holdings • GlobeCast opens liaison office in Beijing • ICASA proposes big increase in ethnic output of SABC1 • VOA launches Kano Reporting Centre • Malaysian-based ASTRO All Asia Networks accorded "Superbrand" status • Quantel announces Pay as you Go HD • NHK appoints Gen-ichi Hashimoto as President • Al-Jazeera ranked world's fifth top brand • CNBC Pakistan selects TSL for new channel launch • Disney shake-up as David Hulbert leaves • OSCE asks Poland to remove prison sentences from libel law • Australian radio ad revenue up 15% in 2004 • Vietnam to host 2005 ABU General



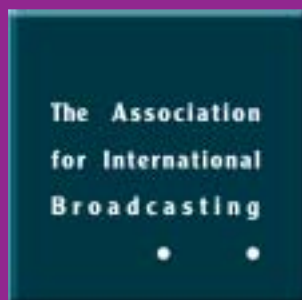
All eyes on Montreal

6-7 June 2005

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DW launches Arabic TV news

Germany's international broadcaster **Deutsche Welle** has become the first European TV broadcaster to present news in Arabic, launching the service in Kuwait in February. The three-hour programme is based on two daily news shows of 26 minutes duration, transmitted via the Nilesat satellite to about 10 million viewers in more than 20 countries from Morocco to Saudi Arabia. In January DW launched its new interactive Arabic web site (www.dw-world.de/arabic) which focuses on current events from Germany, Europe and the Middle East. Over 15 million people in the Arabic-speaking world use the Internet – mainly younger people and opinion formers – and there is growing demand from Morocco to Saudi Arabia.



CRI extends with WRN

CRI has extended its cooperation with WRN, the London-based international broadcaster and transmission service provider. WRN has worked closely with China Radio International for more than six years, distributing its daily programmes around the world using AM and FM transmissions that augment CRI's traditional Short Wave broadcasting from China. Last year saw significant growth in both local and new media outlets that carry CRI programmes: the station can be heard on FM in Berlin and Moscow and on AM in London, St Petersburg, across Western Europe, South West Russia, Ukraine and Romania, and WRN's networks distribute CRI on key platforms such as Sirius satellite radio and Sky Digital.

DRM goes for frequency expansion

Members of the Digital Radio Mondiale consortium have voted to begin the process of extending the DRM on-air system into the broadcasting bands up to 120 MHz. This decision will enhance the range of non-proprietary, digital radio solutions offered worldwide by the DRM consortium and the World DAB Forum, which work together on projects of mutual interest. DRM, a non-proprietary system that has been endorsed by the ITU, IEC and ETSI, currently covers the broadcasting bands below 30 MHz (short wave, medium wave/AM and long wave). DAB Digital Radio is also a non-proprietary system endorsed by the ITU and ETSI, which was developed to work in the broadcast bands between 30MHz and 3GHz.



Indian entertainment industry rockets

The Indian film, television and music sector is set to grow from US\$5 billion to US\$13.36 billion by 2010, say projections from KPMG. The report identifies four major growth drivers in the next five years: new delivery platforms, niche content, newer technologies and better regulation. According to the report, the total number of TV households will touch the 134 million mark by 2010, up from 90 million today. Around 72 million subscribers will be on analogue cable, 8.6 million on digital cable, 2.8 million on DTH broadcasting, and 1.3 million on IPTV or other new technologies and the remainder on terrestrial broadcast, in the next five years. The total of cable and satellite TV homes (including DTH) is expected to touch 85 million.

Pakistan grants licences for private satellite TV

As the AIB's Regional Representative for Pakistan and the Middle East, Tariq Bhatti, reports, Pakistan Electronic Media Regulatory Authority (www.pemra.gov.pk) has for the first time awarded licences to private satellite channels to start operating from Pakistan. At present, most of the country's satellite TV channels originate from outside Pakistan. Pakistan Television is negotiating with Greece-based RJ Communication about setting up a DTH platform in Pakistan. PEMRA has awarded 21 FM radio licences and appointed a new chairman, Mr. Iftikhar Rashid. Tariq Bhatti (right) can be reached at tariq.bhatti@aib.org.uk.



D.A.V.I.D and the 4th generation at NAB

D.A.V.I.D introduces generation 4 of its audio editors at NAB: SingleTrack, EasyTrack and MultiTrack are available now. As key features all editors have 24 bit/96 kHz support, real time processing of all file formats on the time line, sample display and sample accurate cuts, direct processing from audio data of video files, definable recording templates and more. To support new workflow concepts - like audio and video integration - the new Database Manager 3 supports multifile handling, video support and offers user definable fields and masks. Also new is the BCS RegioPlayer for Radio PlayOut of elements with regional splitting. The RegioPlayer supports any number of elements per regional group and automatic sequential processing of all elements of one group.

Umbrella for Uganda's radio and TV

Uganda's state radio and television are to merge and come under a broadcasting agency. The minister of state for information and broadcasting, Dr James Nsaba Buturo, said that the proposed Uganda Broadcasting Agency will be in place by the end of March. Uganda's new Information Bill proposes to introduce a national broadcaster, merging Uganda Television and Radio Uganda.

Assembly • Iraqi Media Network awards Harris \$22m contract • Spain liberalises TV market and boosts DTT • BBC's UK audience share falls as satellite TV gains • DW in Arabic on FM in Lebanon • TI and RadioScape to provide technology for DRM • PanAmSat IPO yields quick profit • Dutch public broadcaster NOS wants change in Dutch media law • MTV launches pan-African channel via Multichoice satellites • South Africa's Midi TV opts for Harris automation system • Reuters and UN launch web site for Iraqi media at www.aswatilraq.info • Liberty Media spins off stakes in Discovery Communications and Ascent Media • Palestine Satellite



AIB awards attract entries from around the world

The first annual AIB International Broadcasting Awards have attracted entries from broadcasters and technology providers around the world. Major TV, radio and multimedia companies from countries such as Iran, Hong Kong, the UK,

Canada, Australia, New Zealand, India, Sweden and France have entered, with programmes intended for international audiences or with examples of innovative technology used for international broadcasting.

"We're delighted with the quality and breadth of entries from all over the world," comments Simon Spanswick, AIB chief executive. "The number of entries demonstrates that there is a tremendous amount of quality programming produced for international television and radio audiences and that technology is being employed in truly dramatic ways in the industry sector."

The presentation of the Awards will take place during the AIB Global Media Business Conference in Montreal, during the gala evening at the Cirque du Soleil's headquarters in the city. More information about the conference appears in the centre pages of this edition of *The Channel*.

TV ad revenues still rising

Research from media buying agency Initiative shows that TV advertising's proportion of global ad spend has risen in the past five years by 4%. A report from the research arm of the agency found expenditure on TV advertising grew from 37.7% of global advertising spending in 2000 to a predicted 42.1% this year. This is despite advert avoidance technology such as TiVo and Sky Plus and the growth of rival media such as the Internet and outdoor. Last year TV was the second fastest growing medium. Spending rose by 12.1% to \$143bn boosted by massive growth in China and presidential elections in both the US and Indonesia. Global advertising will grow this year by 5.8% to reach \$363bn by the end of the year, allowing the global market to exceed the boom year of 2000 by 1.7%, for the first time since the 2001 advertising recession.

Bahrain Radio goes digital with Dalet

Dalet Digital Media Systems has been chosen by Bahrain Radio to digitalise their entire broadcast operations. Managed by the Ministry of Information, Kingdom of Bahrain, Bahrain Radio is the only radio broadcaster in Bahrain. The installation includes Dalet's radio technology for ripping CDs, jingle production, scheduling and broadcast. Dalet worked closely with one of the broadcast distributors in the GCC countries, Professional Systems Corporation, to design and deliver a state-of-the-art music programming workflow and facility.

Can Japan's media be trusted?

A recently-published book on Japan's media claims that the country's news media is among the least independent and the least trustworthy in the democratic world. Adam Gamble and Takesato Watanabe, co-authors of the book *A Public Betrayed: An Inside Look at Japanese Media Atrocities and their Warnings to the West* say that Japan's media has not been reformed since World War II. The authors cite Japan's system of so-called press clubs, where reporters work closely with PR officers and tend to publish information fed to them without checking the facts or using a two-source rule. They receive exclusive access to sources and, it is claimed, substantial perks and subsidies. In exchange, journalists police themselves – any journalist caught straying from the approved line is punished by colleagues and can be blackballed.

MXTS – multi-channel, multi-programme audio to DVB

The trend today is to distribute radio programmes on DVB platforms, either by satellite (DVB-S), terrestrial (DVB-T) or cable network (DVB-C). Delft-based company You/Com has launched the MXTS, a multi-programme audio to DVB convertor for 10 channels per 19" rack which is also able to handle dolby 5.1, dts and apt-x multi-channel programme. Special features are: support of ancillary data (RDS data) per programme, and ability to transmit 10 radio programmes in ASI/DVB format over an E1 leased line. For more information contact: +31 15 262 59 55, www.youcom.nl

China re-tightens ownership rules

After allowing approved foreign companies to take minority stakes in TV production companies in November 2004, China is re-tightening some of the foreign media ownership rules. The State Administration of Radio, Film and Television now restricts most foreign companies to only one joint venture and bans the involvement of any found to be "unfriendly". According to SARFT, there is a very strong ideological component to production of broadcast television programmes, and China must understand the political tendencies and background of overseas partners and prevent joint ventures or co-operation from bringing harmful foreign thinking or culture into the production sector. In other words, the leadership is reluctant to give up control over what is shown on China's 400m TV sets and reforms in the TV, radio, film and internet sectors do not mean an end to censorship.

All at sea with BFBS TV and Radio

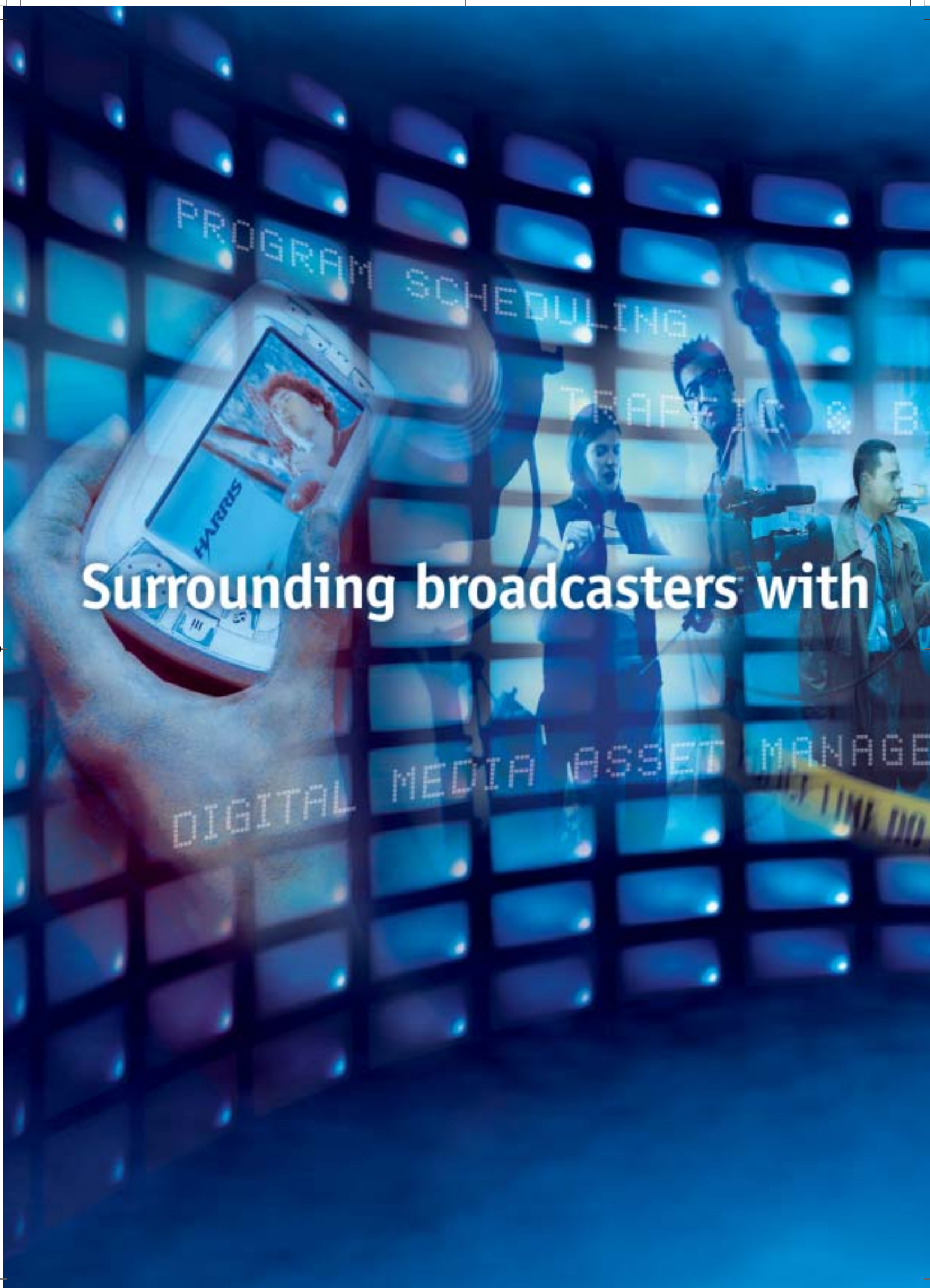
A new service launched by SSVC on 17th February delivers

BFBS Television and Radio to British Royal Navy and Royal Fleet auxiliary ships at sea in the Atlantic Ocean and around the coasts of Africa and the Americas. The first ship equipped is the RFA Grey Rover, and is currently receiving the signals in the South Atlantic. The service uses C-band transponders on New Skies 806 and 703 satellites, and the use of enhanced turbo coding allows reception by stabilised dishes as small as 150 cm. On board ship, the digital stream is converted to standard DVB-S format so that conventional low cost IRDs can be used for decoding.



Jerry Goodman, SSVC

Channel starts full time services on ArabSat2D • Shalimar TV first semi-private station in Pakistan • UAE regional pay-TV network Showtime in expansion programme • Taiwan launches mobile DIMO TV on public transport • India raises foreign investment limit in telecoms • DAB digital radio poised to take off in Europe • Malaysia's Astro and Lippo of Indonesia in joint venture to start satellite pay-TV in Indonesia • Spain may bring analogue switch-off forward to 2008 • RTL Group up 21% • BBC to raise 358m Euro for London media village • Malaysia and Singapore in joint TV production in Bahasa Malaysia, Cantonese and Mandarin •



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Qlog searches archives for spoken words

QLog is the newest broadcast solution from Autocue's QSeries. Based on IPV's analogue package, QLog is a low-resolution, disk-based MPEG output recorder that enables fast searching of archives for spoken words or phrases without prior transcription, enabling multiple users to review material as it's being recorded and record channels output. QScore is another new application that allows sports results to be entered manually, or collected automatically from a number of sources, and then automatically displayed on screen. Finally, Collaborative Prompting, available in QNews, enables the unique ability for multiple prompters, from worldwide locations, to work together in the same running order via a WAN. Autocue presents its new products at NAB Booth #SU 7865.

Zimbabwe private radio 'jammed'

Private radio station SW Radio Africa, which started broadcasting to Zimbabwe from studios in the UK in 2002, said its broadcasts were being jammed by the government. Only state-controlled media are allowed to



broadcast in Zimbabwe. In January, President Robert Mugabe signed into law a measure that sets prison terms of up to two years for any journalist found working without

accreditation from the government-controlled Media and Information Commission. The Committee to Protect Journalists has urged Mugabe and his government to turn away from such measures, while critics say the measures are intended to intimidate the last vestiges of the independent press – two independent weekly newspapers still operate in Zimbabwe, and some local correspondents work for foreign news agencies.

VOA first in China

The Beijing News Awards Committee has presented Voice of America's Mandarin Service China correspondent Kunghua Chang with the first-ever "Award for Excellence in Broadcast News". Chang, a native Mandarin speaker, has reported on a wide variety of subjects, including in-depth coverage and analysis of China's political and economic developments. VOA Mandarin broadcasts 13 hours a week of television programming and 12 hours a day of original radio programming to millions of viewers and listeners in China.

KBS World Radio now in Vietnamese

The Korean Broadcasting System has changed the name of its overseas service "Radio Korea International" to "KBS World Radio". In March it added Vietnamese to its portfolio of languages and launched its new internet homepage <http://world.kbs.co.kr>. KBS said the new language service reflects the station's global mission and is a response to growing demand for news and information about Korea in South Asian countries. KBS broadcasts across the world in Korean, English, Chinese, Japanese, Arabic, Indonesian, Russian, Spanish, French, and German.

NBC tracks with Teletrax

NBC Affiliate Advertising and Promotion Services (AAPS), part of The NBC Agency, the internal advertising agency for NBC Universal, has chosen Teletrax, the first and only global digital video monitoring and media asset management service, to assess the effectiveness of AAPS' marketing efforts by tracking local television airings of network promotion spots in the top 100 US markets. Teletrax maintains a proprietary network of detectors that monitor the TV broadcasts of more than 700 TV stations in the top 100 markets in the US, representing more than 85% of all TV households. Its international network is comprised of 12 monitoring stations in Europe, Asia, the Middle East and South and Central America, which monitor over 200 channels being broadcast from nearly 50 nations. www.teletrax.tv

RTL makes news channel for cable

The Dutch arm of major European broadcaster RTL will develop a news channel for cable company UPC. The cable company is also in negotiations with Dutch public broadcaster NOS to create its own sports channel. Customers of UPC, about 2.3 million, have to pay extra to receive some of the new channels that the cable company wants to own itself.

New pan Latin America TV news channel planned

A new television news channel, reportedly to be funded by the governments of Argentina, Brazil, Uruguay and Venezuela, is planned with a launch later this year. Observers see the station as Latin America's answer to Al Jazeera, BBC World and CNN, providing coverage of events in south and central America for audiences across the region. Broadcasters involved in the project include TV Brasil and Telesur, with the project led by Aram Aharonian, a well-known south American journalist and director of Venezuela's Telesur. It is understood that the channel will be operated from a studio in Caracas, and programming will consist of news together with cultural programmes and documentaries. An exact launch date has not been announced.

Open for business in Australia

PanGlobal TV, the joint marketing alliance between PanAmSat and GlobeCast Australia, is up and running as Australia's multi-ethnic DTH platform offering a range of transmission services to international broadcasters who wish to reach Australia's diverse multi-cultural communities. It is hosted on the PAS-8 Pacific Ocean Region satellite. MySAT, the Arabic Pay TV service, uses the platform to offer ART, LBC, Al Jazeera, ART Movies, Future TV, MBC and Noursat. Horizon World Plus TV Pty Ltd is distributing a bouquet of four Russian television channels on the PanGlobal TV platform – RTVi, Teleklub/Detski Mir, Nashe Kino and RTR Planeta. TV Plus offers Serbian services Pink TV, BN and BK Sat.

Former director of CNBC Europe to head new Al Jazeera English channel • WorldSpace asks India not to regulate satellite radio like FM • Two Way TV gives New Zealand first taste of interactivity • AIB Global Media Business Conference 2005, Montreal 6-7 June - more at www.aib.org.uk • Dutch public broadcasters launch DAB service 24Nieuws • Radio France unveils plans for all-digital distribution network • BBC cuts 3,780 jobs • Danish DR appoints Kenneth Plummer as DG • Australian Broadcasting Corporation launches new FTA digital TV channel ABC2 • SBS launches 3 digital channels for Holland • BBC World Service on FM on Zanzibar

Call for increased funding for Radio Australia

Australia's opposition Labor Party has called for more funding for the Australian Broadcasting Corporation's international service, Radio Australia, urging the government to reverse funding cuts for the service so that it can reach



more people in Indonesia. "It is impossible now to get a strong signal to the western part of the Indonesian archipelago and that includes Sumatra and that includes Aceh", Labor's foreign affairs spokesman said. "We have very limited capacity to get a short wave message out to the 230 million people of Indonesia so that they know, through their own language, what we in Australia are doing." The Australian government is to provide nearly US\$900 million to help Indonesia recover from the tsunami. The package focuses on rebuilding Aceh, the worst-hit region.

Inmedia acquires CAST

With the acquisition of CAST, Inmedia Communications has strengthened its position as the largest independent UK playout provider. It has increased its playout client-base to more than 60 channels playing out half a million hours of TV every year and expanding its service capability to more than 100 channels. Inmedia's major playout customers now include The Travel Channel, The Chinese Channel, ESPN, Sony and Zone Vision. Inmedia uses CAST's 20,000 square foot central London premises at Newman Street W1 as its new London Media Centre, with former CAST general manager Geoff Trickey as head of playout. Inmedia anticipates the acquisition will generate around £3 million incremental turnover from CAST's playout operation alone and sees the deal as a significant part of its long-term strategy to expand its playout operations.

New CEO for Intelsat

Zeus Holdings, the new owner of Intelsat, has named David McGlade, the head of Mmo2's British business, as its new chief executive. McGlade moved to Intelsat in March, replacing Conny Kullman, who becomes chairman. McGlade joined Mmo2, formerly BT Cellnet, four years ago after working in his native America for Sprint, Cable AdNet and TCI Telephony Services.

More US satellite TV broadcasts for Iran

The US government is planning to expand its Persian-language satellite TV broadcasts to Iran as part of an initiative to press for democratic reforms in the Islamic Republic, officials say. The Voice of America plans to go from a 30-minute to a four-hour daily news and information broadcast to Iran. "Iran is an information-deprived society," said Kenneth Tomlinson, chairman of the Broadcasting Board of Governors, the federal agency that oversees international civilian broadcasts. "A large percentage of Iranians appear to be thirsting for information. What we propose to do is exactly what Radio Free Europe, Voice of America and Radio Liberty did in the Cold War, and that is provide a window on the world." VOA already has a 24-hour Persian-language radio service called Radio Farda, which offers a pop-music format geared toward Iran's large youth population.

Harris ahead in Romania

Nearly two years ahead of schedule, Harris Corporation has completed the \$85 million first phase of a comprehensive programme to upgrade and expand the nationwide broadcast infrastructure of S.N. Radiocomunicatii S.A., Romania's state-owned broadcast organisation. It has been estimated that the country's ageing broadcast technology did not reach up to 40% of Romania's 22.3 million. After completion of the radio phase of the modernisation project, the country now enjoys 100% radio coverage at a higher fidelity and lower cost. With the inclusion of new RDS capabilities, public radio stations can be received and retained on the move throughout the country. Romania also has the ability to reach Romanians living in other European countries with the use of a Harris long-wave AM transmitter. Romania's TV transmission infrastructure will be expanded and completed in phase two of the modernisation programme.

Germany-China TV programme exchange

The Cologne-based Institute for Broadcasting Economics is staging a two-day symposium on 28 and 29 April to discuss the opportunities for the sale of TV programming into the enormous Chinese marketplace and the potential that markets around the world offer Chinese TV producers and production houses. The event will examine the empirical and theoretical background for TV programme exchange and look at real experiences in the marketplace, from the angle of German and Chinese producers. A workshop will provide a lively forum for the exchange of experiences and will develop strategies for achieving programme sales in the coming years as the Chinese market opens up and the west's interest in China increases in the run-up to the Beijing Olympic Games in 2008. Full information is available from the Institute's website at www.rundfunk-institut.uni-koeln.de.

Interactive multimedia for Croatia

SES ASTRA and Zagreb-based Vodatel d.o.o. are partners in providing new interactive entertainment services for Croatian households. Under the brand name eTV they will provide a variety of multimedia services comprising Video On-Demand with a choice of one hundred movies every month. Users will also have access to more than 100 international and local TV channels. The services are available via the eTV Media Center box connected to a TV set and a satellite dish pointed at ASTRA 23.5° East. In addition, Vodatel will introduce the Sat ADSL service for the Croatian residential market offering broadband access via satellite to the Internet with speeds of up to 1,024 Kbps.

and Pemba • Spain intensifies competition in the commercial TV market • State management of broadcasting in Vietnam to be strengthened • AsiaSat annual results show solid performance in tough conditions • New funding model for Spanish public TV envisages more subsidies and fewer ads • Papua New Guinea and Australia sign five-year media development programme • Cable TV with Mexican flavour for Switzerland's Spanish-speaking community with Televisa Networks • China's TV stations to launch children channels by 2006 • TV to reach 600m households in Asia Pacific by 2010 • OpenTV, DISH Network and The Sharper Image

2M Maroc and Al Maghribia join DTH in North America

Satellite services company GlobeCast has added Moroccan broadcasters 2M Maroc and Al Maghribia to the lineup of 130 international channels available on GlobeCast WorldTV via Intelsat Americas 5. Both of these channels are FTA and broadcast 24 hours per day, targeting the huge number of Moroccan immigrants in the US. Companion radio channels Radio 2M and Al Maghribia Radio are included in this distribution. GlobeCast WorldTV offers international broadcasters instant access to America's vast TV market, providing satellite capacity, standards conversion, transmission and uplink.

I'm watching TV – I'm on the phone

Nokia has partnered with the Finnish Broadcasting Company's YLETV for a pilot project that allows mobile phone users to watch Finnish and international TV broadcasts on their cell phones



in the Helsinki region. Other partners in the first venture of its kind in Finland are leading commercial TV channels and major mobile service providers, including TeliaSonera and Elisa. Research found test users are mostly interested in news, weather, sports, current affairs and entertainment. Nokia is also testing a digital TV and radio service for mobile users and handheld devices in Taiwan. Partners include Chunghwa Telecom Co., Taiwan's largest phone company, compact disc maker CMC Magnetics Corp., and local TV and radio stations.

The development is the first such initiative in Asia. A pilot service in Taiwan is planned for mid-2005. Conditions in Taiwan are ideal as the handset penetration rate is over 100% and the island started broadcasting digital TV in 2004. Mobile telephone users in Hong Kong have been able to watch Bloomberg TV live on their cell phones, after it launched on Hutchinson's 3G Network 3 mobile phones in February.

The Great Wall is moving

China's new satellite television service was launched across much of East Asia in February, the second major advance of its television programming into the international market. Li Jian, president of the China International TV Corp. said the aim is to meet growing demand from overseas Chinese in the region for Chinese language programmes, in addition to showcasing China to English-speaking audiences. Li spoke of plans to launch the Great Wall satellite service in Europe, Africa and Oceania to serve audiences around the globe.



Major changes at the BBC

The BBC announced in March that the first round of plans to transform the organisation will release £139m a year by 2008 to reinvest in programmes. 1,730 jobs are being lost from the BBC's professional services division, which is being halved in size while an additional 2,050 jobs will go in programme-making areas including BBC News. DG Mark Thompson said: "We need to make the BBC a simpler, more agile operation, ready to take the creative lead in a very different, very challenging digital future." Broadcasting unions have condemned the planned job cuts and called for strikes that could affect BBC television and radio output over the summer months. Thompson's announcements came in the wake of the Government's Green Paper on the BBC's

Charter, in which Secretary of State Tessa Jowell announced that the BBC governors – whose current role is 'unsustainable' and lacks 'clarity and accountability' – are to be replaced in 2007 by a BBC Trust and an executive board. The BBC's licence fee will continue for another 10 years as it retains 'a high degree of public support'. The BBC has also set in motion the sale of its commercial subsidiary BBC Broadcast Limited, which follows on from the Corporation's internal review of its commercial businesses. It is expected that the sale of BBC Broadcast and its staff to the successful bidder will take place by the end of the summer, subject to contract negotiations and regulatory approvals by the BBC Board of Governors and the Secretary of State for Culture, Media & Sport. The Green Paper includes references to the BBC's international role and calls into question the need to retain all the language services that BBC World Service, for example, currently operates. The AIB will be responding to the Green Paper consultation on behalf of its Members.

WebRadio without PC

The WebRadio manufactured by Dutch company Solutions Radio B.V. is selling well, not least because of the growing number of applications. Ethnic groups, the blind, in-store music, closed-user-groups that work with SCA channels (a side band of FM transmitters) are some of its markets. Internet offers many advantages over SCA – there is no limit to distance, no limit to the number of channels and a considerable improvement in the audio quality. The WebRadio connects to the normal analogue telephone line or DSL and can be managed remotely. In principle each radio listener can have his own personalised playlist. The management system supplies information on when, for how long and to which programmes the user listens – important feedback for the marketers and advertisers. www.solutionsradio.nl

SkyRAY has leading edge

The ND SatCom SkyRAY Compact series is the latest generation of aerodynamic SNG antenna subsystems on the market. Designed as a fashionable aero dynamic car-box, it can be easily and quickly roof-mounted on most van or all-terrain vehicle models. The key component of the ND SatCom SkyRAY series is the highly effective 1.5m diamond shaped antenna, a feature which has been successfully integrated into ND SatCom's SNGs for years. The precision reflector surface combined with the diamond shape provides remarkably low sidelobes and excellent cross-polar performance. Furthermore, the antenna mount with tri-axis positioner enables full antenna rotation and polarisation optimisation.

make US retail history with first interactive TV shopping channel • TV Asia launches broadband CTBUZZ in India • One out of every 10 US households subscribes to DISH Network • NHK plans 24-hour satellite TV news channel • Venezuela places restrictions on TV news broadcasts • Public broadcasters from Spain (RTVE), Italy (RAI), UK (BBC), Germany (ARD and ZDF) and France (France Television) pledge to develop DTT in Europe • EICTA introduces 'HDTV-ready' label • China hotels offer Channel NewsAsia • AIB Global Media Business Conference 2005, Montreal 6-7 June - agenda and online registration at www.aib.org.uk



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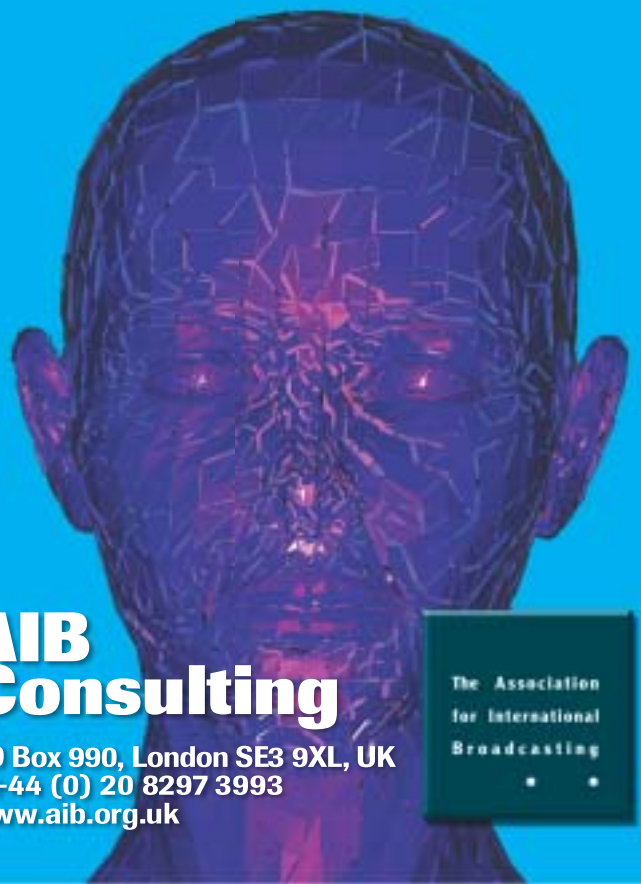


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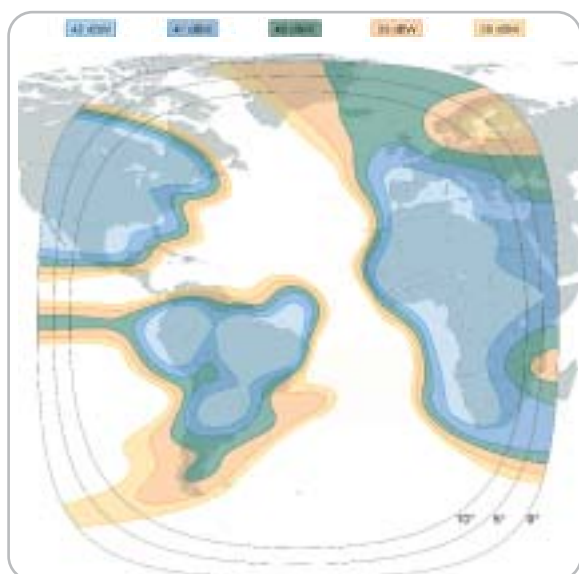
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Launched in February 2005 from Baikonur Cosmodrome in Kazakhstan and scheduled to become operational from April, ASTRA's latest satellite – the high-powered C-band 4A – represents the company's first major step towards worldwide coverage. As John Hill reports, it will provide data and broadcast customers with access to important new markets in Africa, Europe, and North and South America.

4A higher power satellite in Africa ...look no further

This Atlantic Ocean region satellite, in geostationary orbit 37.5° West, boasts greater than 43dBW EIRP coverage, which makes it the most powerful network of its kind in the world and allows the use of sub-2m dishes. This means significantly reduced set-up time and costs, no requirement for tracking equipment, simple deployment of VSAT systems with lower wind loading and fewer planning regulation issues.

ASTRA 4A has the added benefit of being able to reach all four continents from a single uplink thanks to a unique onboard switching matrix. This technology also allows customers to monitor their own signal, which makes it easy to identify and isolate local problems.

Signal reliability is another significant advantage of this satellite, even with these small dish sizes. Because C-band frequencies are much more robust and far less susceptible to adverse weather conditions, it provides exceptionally high availability, making it ideal for building secure data and telecoms networks.

All of which makes ASTRA 4A of particular interest to ISPs, government agencies, educational institutions, telecoms carriers, private networks and GSM operators. To help these customers take full advantage of the new satellite, ASTRA offers a range of managed services that combine its

unrivalled infrastructure, technical expertise and experience.

Eddy Frankland, managing director of SES ASTRA UK and the person responsible for ASTRA 4A, is looking forward to working with the wide range of organisations that will be able to benefit from the satellite's capacity. "This is a high-capacity, 72-transponder satellite, yet we can offer cost-effective solutions to anyone from a digital video bouquet to individual channel, a company that needs a 64 kilobyte IP connection to organisations that require multiple transponders for their services. Our capacity will be especially useful to businesses wanting to expand into and out of countries with limited terrestrial infrastructures. We can offer a scalability and expandability that no one else can provide. This means that our customers, large or small, have the flexibility to grow with us."

Corporate customers can rely on ASTRA to deliver customised solutions for all their communication needs from global VSAT networks to internet trunking, international private lines, broadband and basic connectivity services.

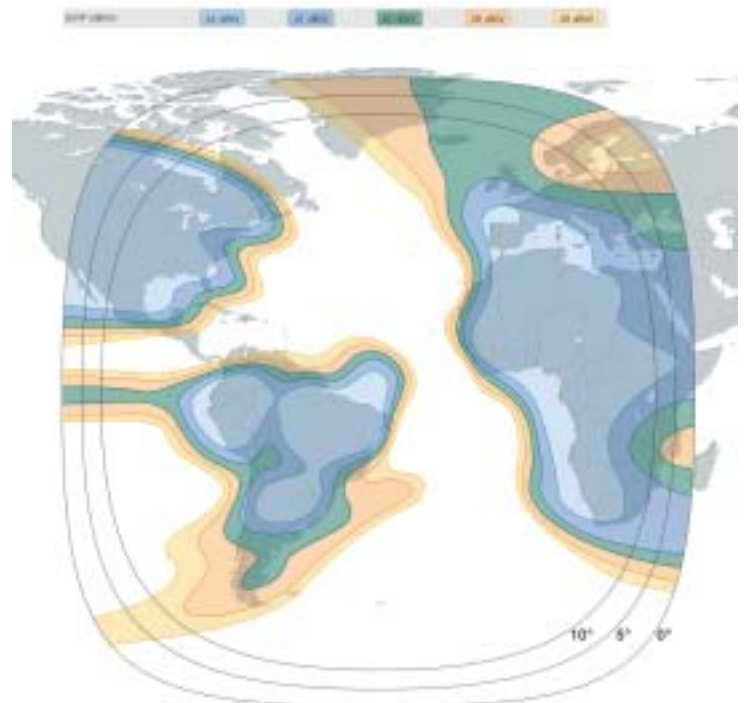
For telecoms carriers and mobile phone operators looking to operate in areas where terrestrial capacity is either unreliable, too costly or simply unavailable, global telephony

via satellite gives instant, cost-effective and robust infrastructures to isolated areas.

ISPs can use ASTRA's voice, data and internet products to develop their business in any direction, and for enterprises needing point-to-point data delivery, ASTRA 4A offers immediate, high-quality service and availability to scalable networks.

And governments across the globe can use this satellite to quickly and efficiently link embassies, hospitals and schools; providing international and domestic public and private voice and data communications, and support news and information networks.

ASTRA's direct-to-home services reach 94 million homes in Europe alone. For broadcasters, syndicators, news and sports organisations, 4A now opens the door to huge new audiences in over 90 countries.



For more information about ASTRA 4A, contact +44 (0) 20 7420 4400.



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ASTRA

South America's favourite partner station



AIB INTERVIEW

Dutch international broadcasts began in 1927 with short wave broadcasts to the Dutch East Indies. Today, Radio Netherlands is the country's international multimedia company offering news, information and culture in Dutch, English, Bahasa Indonesia, Spanish, Portuguese, French, Arabic and Papiamentu and reaching some 50 million people each week. Although ranking only 20th in terms of budget, RN is among the five most influential international media organisations in the world. In Latin America, RN has established itself as a market leader through innovative and extensive cooperation with local radio. Simon Spanswick spoke with Jan Hoek (right), recently appointed Director-General of the Hilversum-based company.

Jan, your background is not just in radio. How did you come to be involved in Radio Netherlands?

I studied IT at the end of the '70s, and started my career in that business, first of all for Royal Dutch airlines, KLM. As a consultant and project manager I moved on to work for various companies ranging from petroleum to insurance. I shifted into general management consulting which included interim management. I also worked for a large Dutch newspaper publishing group, in a primarily financial role. A decade ago, when Radio Netherlands was being re-organised, they were looking for new senior management, preferably without broadcasting background. In 1994, Lodewijk Bouwens and I were recruited as Radio Netherlands Director General and Financial Director respectively. I have stayed because it is just such a great company! Time has flown by.

How does broadcasting differ from the other industries you have worked in?

It's a lot less concrete, especially if you are in international broadcasting. Take the feedback - in the newspaper business you get your readership figures, or your financial results from your in-

house systems. If you are in domestic broadcasting, you can immediately call up your audience figures from the last few days. But in international broadcasting you have to work on a different type of feedback, which is more indirect and long-term. You can't say: the ice-cream department is making money so we'll keep it and the kids' toys department is losing money so we'll close it tomorrow. On the other hand, I find the work at Radio Netherlands a lot more rewarding because of the quality of the feedback. We often get emotional reaction from all over the world - which says we do make a difference in peoples' lives. You don't get that kind of response if you just sell ice-cream!

In the decade that you have been at RN there have been fundamental changes in the organisation itself, but in terms of external factors there has also been a decline in international radio listening in some parts of the world. What have been the effects on you?

Personally, I'm still a fairly avid radio listener. Radio is a secondary medium and that's why it is so useful. You can listen to the radio while you are cleaning the car or doing something else. With regard to Radio Netherlands, we have the same basic aims - we try to reach certain



Radio Netherlands



groups of people with specific messages in chosen target areas. However, the way in which we format our content and, increasingly, the delivery platforms we use are evolving. When we were only on analogue short wave, Radio Netherlands was one of the few alternative information sources in certain areas. Now people are using a variety of platforms to get their information and entertainment. We need to find a relevant mix. That's the key thing.

Is there still a need for Holland to have an international broadcasting voice?

I believe so. We're a relatively small country, geographically, which means most of the world is 'abroad' – a potential audience of over 6.3 billion. The Netherlands is not a powerful country – but it has always been very influential and one which others have looked to. We are not perceived as a country that has ulterior motives. This country's future lies in its relationships with other countries' needs – which means trade, information, all kinds of things. I believe there is enough evidence from our work with partners around the globe to show there is a continuing need for an independent international broadcaster from the Netherlands. We live in uncertain times and press freedom is being curtailed in many countries. Independent thought and opinion are important parts of democratic thinking. We are not directly part of the foreign policy of the Netherlands, but we are part of the way the Netherlands communicates with the rest of the world.

Take us through how the funding process works and how you maintain your independence.

The funding process and the legal status have remained virtually the same over the last decade. The Netherlands used to have a system of licence fees, one of the lowest in Europe. Those funds are supplemented with income gained from advertising blocks that run on public channels. In those days, public broadcasting was comprised of regional, national and international public broadcasting. The government has abolished the separate licence fee for radio and TV and added an amount to general taxation. Out of that total fund, Radio Netherlands gets roughly 6 per cent. We remain independent of the domestic broadcasting organisations – I consider that very important because the minute international broadcasting becomes part of domestic broadcasting and part of the same budget, it is often the case that national broadcasting shortfalls are compensated by cuts in the international operations. So whilst it makes sense for us to share some resources with our national and regional colleagues, our mission – and therefore our budget – needs to be separate and visible. This has been recognised by the Dutch government.

You have a Dutch service targeting Dutch people abroad – is the Radio Netherlands output duplicating to a certain extent the output of the Dutch domestic public broadcasters?

There are areas in Europe where you can hear and see both the Dutch language output from Radio Netherlands (radio and BVN-TV) as well as spill-over coverage from our domestic service colleagues. We therefore have agreements to share the raw material and thus avoid duplication of production effort. We need to shape the material into a different context for listeners living in a different background and living in different time zones.

Does the news agenda differ between the RN Dutch output and the domestic services?

Absolutely. Our editorial charter means that I don't get involved with the editorial content, that is the job of the editor-in-chief, Joop Daalmeijer. I think this separation of editorial and general management is healthy and something I endorse. Obviously, our Dutch broadcasts have selected items that are more in tune with the interests and needs of our listeners abroad. Secondly, our news deliberately focuses on what is happening in the Netherlands. It focuses a little bit less on international developments than the output in our foreign language services.

How do the different language services of RN fit into the overall strategy?

We make radio programmes in Dutch, English, Spanish, Portuguese, Indonesian, French and the language used in the Netherlands Antilles – Papiamentu. Dutch is obviously aimed at Dutch-speaking people

world-wide. Our English language service is always available in most areas of the world. Spanish and Portuguese are beamed to South America. Indonesian is primarily aimed at Indonesia which is not only a former colony of the Netherlands but also a part of the world which is growing in importance. There is a growing Diaspora for those programmes too. Indonesia is also home to the largest Muslim population in the world. French production is co-produced with stations across the African continent.

Is it possible to say which is the most influential, or are they equally important in their target areas?

That's a difficult question because it can be easily misunderstood. Obviously, they are all equally important, because we have recently redefined our policies and selected these languages. However, just because a language department is regional, rather than global in character, doesn't mean it is less effective. We know from feedback from over 1000 partner stations in Latin America that our efforts in Spanish are worthwhile. And just recently, from the Mexican Organisation of Journalists, also a very well-respected organisation, we received the prize for the best international broadcaster in Latin America.

around 20 million people per week. This is something we do all over the world, but we are by far the most successful with this formula in Latin America.

What about partnerships with other international channels?

In South America, we have a delivery system in place and we enable partner stations – the cooperation is primarily satellite delivery and technical support. We have done one series of programmes with Radio Canada International's Spanish service.

Have the partnerships you have with local stations now taken over from the transcription service of sending out CDs and tapes to local stations?

The relationship with our partner stations is more cooperative now – we listen to them and take their views into consideration. Since mail services have got slower, rather than faster, satellite and Internet delivery of material is becoming the preferred method of delivery, especially with speech programmes. If you work more closely with your partners, which are hand-picked, you know when you are broadcast and when you are not broadcast.

Holland – a unique broadcasting landscape

The public broadcast network in the Netherlands comprises 5 radio and 3 television channels. Holland has a unique system of broadcast production – it has 13 different broadcasting societies which share airtime on the national radio and TV networks. In the days when these groups represented various sectors of society (the Catholics, the working class, the Protestants, Hindus, Muslims, educational groups etc), this ensured that there was political and social balance on the airwaves. As the difference between the broadcasters has diminished, the political pressure has increased to change the system. Alongside the national networks, there is also a form of public broadcasting on a provincial level in the 12 Dutch provinces. Commercial broadcasting in the Netherlands is just over a decade old: apart from the national commercial stations, various regional commercial broadcasters transmit in 23 regions across the country.

Does this mean that direct broadcasting is in parts of the world becoming less important to RN?

Developments of the last decade have meant that we have to use every available platform. Rather than saying that direct broadcasting has become less important, I would say that other delivery platforms have become important too. It's a mix of delivery mechanisms.

You have been very involved with Digital Radio Mondiale – is that really going to be a platform of the near future?

It will definitely happen over the next few years. Traditional analogue short wave is very user-unfriendly and doesn't deliver the fidelity required to compete [with FM]. Two things are important: DRM offers better sound quality and the radios are much easier to use. Communication has a lot to do with the threshold a consumer has to cross. If you make it easier for the listener – and that happens with DRM – I guess listening via short wave will pick up. But it will not replace our work with partner stations.

Given the slow penetration of the other digital radio technologies – WorldSpace via satellite or terrestrial DAB which is more advanced in the UK than it is in Holland, for example - what can be done to make the consumer buy that piece of kit?

For the consumer, the added value has to exceed the added cost. If you look at the kind of DRM receivers being planned, the value is crystal-clear – I can hear the difference immediately and also the price has come down. Also, of course, the DRM standard is really global now and the industry is cooperating closely.

Up until a few years ago, RN had an Arabic service. Was it an error to close that down?

The decision to close it was taken 12 years ago based on the fact that short wave was no longer a viable medium in the Arab world. Television was the way to go and that was not an option for RN. It made sense at the time. But the world has changed and we are starting an Arabic language production, but this time through the Internet. Our web site has been on-line since December 2004 (www.aljesr.nl - 'the bridge') but we are not planning to resume radio broadcasts in Arabic.

In the Latin American countries you have done much work described as 'in partnership' with local stations. What does that mean?

It means that these are stations which we can identify with in terms of what they broadcast – they have a reliable reputation in their community and are independent operations. They incorporate Spanish-language RN-produced programmes in their programming. We also co-produce quite a lot of live programmes in the region, where we act as information bridge about events in Europe and the Netherlands. It is clearly a win-win situation for both RN and the partner stations. This method is used to reach

One of the buzz areas in electronic media at the moment is podcasting – programmes made specifically for people to download onto their Apple i-Pod or equivalent. Is that something that you are going to promote?

Podcasting or whatever you want to call it is just one more alternative to what is already available. Again, more and more delivery mechanisms become available which means we will be available via all those that make sense to reach our target groups. It will be a mix. And the good thing is that the added cost is absolutely negligible. We've been putting news and information onto PDA's and MP-3 players successfully for a few years. Pushing content to new devices like i-Pods is next.

Once you are on a platform you need to tell people that you are there. How do you go about marketing your services?

As a public service organisation, you have to be careful how you spend your money. The short wave medium is already known – you have an established position on that. If you use partner stations, they do the marketing – it's partly because of their marketing activities that they have been selected to work with RN. In the Netherlands, practically everyone knows you, and they tell their

relatives all over the world in a sort of multiplier effect. If you look at our television service BVN, which is in cooperation with domestic broadcasting, you can see that we joined the first Multichoice bouquet in South Africa and surrounding countries. You immediately get a potential audience of around 75 million sets, and they are aware that you are there – your details are published in the programme guide. If you look at the US where we have just switched from EchoStar to T5, that's going to be grassroots marketing, which means you phone up the local Dutch clubs, you put advertisements in the local paper, and so on.

Tell us about the RN Media Desk initiative.

In the world of international broadcasting, with all the stringers and correspondents, many journalists help their colleagues. So if a plane crashes in the Netherlands, every journalist who knows RN phones us up to find out what is happening. We thought we should do more about this: we are an independent, reliable, knowledgeable source of information about the Netherlands. So we started a desk which is called RN Media Desk (www.rnw.nl/rninfo) – we have become a source of information on the Netherlands and also Europe for other media organisations. We have a panel of experts that people can turn to and we take a pro-active role. So, if colleagues want to find out something, just phone us up.

What is the role of your Training Centre?

The training operation – now Radio Netherlands Training Centre (RNTC) – was founded about 40 years ago. It is not part of Radio Netherlands' broadcasting operation, but a separate foundation which has distinct financing from the Ministry for Developmental Aid and also from organisations like UNICEF and the World Bank. Of

course, as an international broadcaster it is part of your role to support democratisation processes and freedom of speech. If you train people in how to use media for communication development and for development of countries, and if these people then pass on to others what they have learnt, you get a tremendous multiplier effect. The training centre fits in with the Radio Netherlands mission as a whole.

What are your current priorities?

Like everybody else we are currently very involved in trying to help with all the horrible consequences of the tsunami – we're focusing particularly on Indonesia. We are joining the ABU operation in getting receivers into the area, we are very busy in getting radio stations back on the air again. We loaned three mobile FM radio transmitters to help our partners back on the air within days of the disaster. Furthermore, we are helping the staff of the partner stations and their families.

Where do you think Radio Netherlands will be in ten years' time and what are the principal changes that you foresee?

In the communications business, a decade right now is what a century was twenty years ago – everything is moving so fast. Basically our mission hasn't really changed, nor will it change. However, I do foresee changes in how you get your message across from a delivery point of view – but that is more operational than strategic and is more affected by outside developments. If you look at what's happening in the world, I see a development in which freedom of speech and trustworthy information are increasingly threatened – that's why international broadcasting is growing in importance and that's why we need to be there.

Jan Hoek, thank you.

Faces and voices of Radio Netherlands

Mike Shaw

... worked for the BBC and the World Health Organisation before joining Radio Netherlands as Head of the English Language Service.

Broadcasting English into North America and competing in the most advanced media market in the world, you need a very clear set of strategic objectives. The reality within the last 30 months is that we have had a tremendously successful period – we have seen a month-on-month growth of 7½ per cent in new partner stations, some of them also taking part in direct collaboration which gives you the potential for sustainable development with stations. In the first instance we have been concentrating on the US public radio network. The characteristics of RN programming that appeal to partner stations are, as one manager put it, that we have “a fresh and unstuffy voice” and a “unique” value system – commitment to human rights, to mediation, to international justice. The key to the success in the last period for us has been both the quality of the actual productions – we have a group of highly gifted programme makers – and also that we try to be flexible and recognise the needs of stations. We work very hard to tailor our programmes to local needs. We are not competing in rolling news – the US has one of the most sophisticated news services of its own. But it's our take on events, our analysis and perspective which is valued. We are very much aware of Dutch and European issues.

We have worked with WNYC, we have had material used quite recently on WBUR in Boston, we have a range of other large stations beginning to take our material. With the help of SchardtMEDIA and excellent marketing here, and the type of programmes we are now producing, our conscious aim has been to move up a league



and look at the larger markets. We have been talking to NPR, to PRI, to MPR – it's all about establishing links and reciprocating. The partnership side is a key to our future. There is a huge potential need out there – providing that we can deliver material that is sustainable and has good value and quality. It's just a tremendous sense of excitement really for the future. From the point of view of the entire department, we need that dialogue with North America at the present time – we need to keep those links and to have an exchange of perspective.

Katherine Farnon

...has been living in Holland for over 20 years. She is Head of Crossmedia, Development and Projects at Radio Netherlands.

We've become Holland's musical ambassador to the world, in different genres such as classical, jazz, world, pop and rock (www.rnmusic.nl). We work with 1500 broadcasting partners worldwide, about 400 of them in North America. You can bring across culture by speech and features programmes but you can also do it by music, which is cross-border and cross-language. We find that some stations exclusively take the music service, with others it is a mix of both. Most of the stations in the States have a channel that carries news and current affairs interspersed with music, or you have the pure

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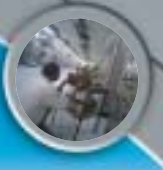


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music channels. We obviously don't just supply North America, the programmes are used worldwide. In Latin America, music is definitely a success story – they use material from the archives; stations in Africa take a lot of jazz and pop and rock and world. New target areas that we'll be focusing on are Indonesia and eastern central Europe. The music service is a cultural ambassador for the Netherlands – which is part of the overall Radio Netherlands mission. One of the key targets for the coming years is partnerships – so it's not just Radio Netherlands standing on its own where culture is concerned but we operate within other cultural entities in Holland, such as OCW [Ministry of Education, Culture



Mike Shaw and Katherine Farnon

and Science] and SICA [Service Centre for International Cultural Activities].

At present the music is available via satellite, distributors and CDs, but we are looking into online distribution – that's a key initiative as far as online presence is concerned. The technology is mostly there but you have to take care of rights issues etc. Last year we implemented a content management system and redesigned large parts of the site, with more parts still lined up for redesigning, implementation and migration into the content management system. For the user on the outside, there is much more inter-activity. You are a lot closer to your user, the client. The biggest leap has been from Latin America – it's come close to the Dutch and English visits. Most English visits come from North America. Generally, there is evidence that people are switching – they are listening to the radio programming online as opposed to listening to it on short wave.

We have started an Arabic site (www.aljesr.nl - 'the bridge') – we have a large Islamic community in the Netherlands and we wanted to build a bridge with the Islam world in general. It's thematic, it's not on-the-ball hard news and current affairs, it's looking at the Islamic world from a Dutch-European perspective and listening to both sides. As part of our marketing campaign in the Middle East we will be promoting it through Aljazeera, Al Arabiya, other online services and FM radio stations. The official launch in the Netherlands is on 3 May to coincide with Press Freedom Day.

I am very much for experimenting with new technology to reach your target audience but you have got to think of the multi-platform strategy. We are reaching a time in technology where in techno terms we are all speaking the same language – you've got all this information and you can feed it to any platform. The challenge for most international broadcasters is servicing other partners to use your material – they all have their demands and if you want to survive you will have to fit their needs.

Alfonso Montealegre

... was born in Colombia and has lived in the Netherlands since he was 17. His first job was at Radio Netherlands and he is still there; he works as a journalist in RN's Latin American department.

The big changes have been mostly technological. With the satellite came the re-broadcasting – we could reach listeners in the big cities in Latin America whereas before our listeners were mostly

outside the big cities. We are now very popular in the region – the goodwill towards us is amazing. I travel a lot in South America and people always say to me: "You sound like a local station but with a European point of view!" That's what they like the most – that we are in touch with the people in the countries we broadcast to. And that we are very independent. Our Latin American partner stations use of our programming what they want – parts or a whole morning show. Regarding the news, we follow closely all kinds of developments in the world, including the local Latin American news stories – it's a mix of regional, international and a small portion of Dutch news. For the news gathering, we use local correspondents and



Alfonso Montealegre

stringers. Our audiences in Latin America are interested in RN because we don't belong to the big enterprises there which use the media for their interests.

Spanish is becoming an increasingly important language in the US and we found that our audience extends to Hawaii, for example. In the big cities of the southern US states there is growing interest in our transmissions, and in 2006 a couple of stations will start re-broadcasting our programmes. In the US you have two big Spanish-language networks, Univisión and Telemundo, they offer news but many Spanish-speaking people want to know what Europe thinks. The same interest applies to North American cities like Vancouver, Toronto, Ottawa, Montreal. Audiences are moving, they are not static. Every day, the need for reliable information is growing. Many people who never before listened to short wave have come to us via new media like the Internet and partner stations.

RN in action

3rd International Radio Meeting: Mexico City, 4-6 May 2005



A 3-day conference organised by Radio Netherlands and Red Nacional de Radiodifusoras y Televisoras Educativas y Culturales de México. Media experts and political figures of the Spanish speaking world will be participating, including Armand Mattelart, Juan Luis Cebrían, Bishop Mgr. Gregorio Rosa Chávez, José Antonio Sanahuja Perales, Elena

Poniatowska, Dante Caputo, Cees Hammelink, Lidia Camacho, Nina Pacari, Sergio Ramirez Mercado.

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It's (r)evolution

Broadcasting in North America

Michael McEwen, Secretary General of NABA, says the members of his organisation are in the midst of the biggest evolution in the television industry since the introduction of colour in the mid-1950s – and at the same time a similar evolution (or revolution) is happening to the traditional broadcasting business model.

For our purposes we'll define North America as Canada, the US and Mexico, since this reflects the membership of the North American Broadcasters Association.

North American television has seen the universe change from basically a few large networks to several networks and hundreds of channels of cable and satellite services in the last 20 to 25 years. Television is all about choice for audiences. But if you are a network appealing to a mass market, how do you preserve your market in a fragmented environment and yet provide material for new services and new revenue streams? It would appear that North American networks are opting for high quality product on their core broadcasting services and then repurposing that product on just about any digital platform you can imagine. They are doing it by creating High Definition programmes and fully digital plants which shoot digital, edit digital, post digital, transmit digital and repurpose and redistribute digitally.

The introduction of digital High Definition television broadcast over the air and redistributed on cable and satellite and the associated take-up rate of HD monitors is much faster than colour was in the 1950s and approaching and even exceeding the unprecedented pace of the DVD player. Today in the US there are more than 1,350 stations on the air with all the major networks (and the smaller ones too) providing HDTV programming throughout prime-time, plus sports and event programming as they happen. In addition there are more than 30 cable and satellite services broadcasting in HDTV. Viewers in most parts of the US can receive four or five over-the-air HD services and if they have cable or satellite they can usually get more than 30 services. Hundreds and hundreds of hours of HD programming are available to the viewer every week. And all of this development in a little more than six years. A remarkable time, to say the least.

When you think that it was a little more than a decade ago that digital was introduced into the system for satellite and eventually

cable programme distribution (and in some cases production), the progress we've made as an industry is amazing. In a few years, all production and distribution will be digital and I believe the majority of that production and transmission will be High Definition.

HD technology has made incredible advances in the US, and the speed of the transition benefits both provider and consumer. Making these services more affordable to the consumer prompts broadcasters and production companies to offer more content. Today there are more than 15 million HD sets in US homes and conservative predictions note that figure rising to 63 million by the end of 2007. Many of the sets in homes are HD monitors which require set top boxes to receive over-the-air, cable or satellite signals, so the penetration of HD services is probably closer to 3 or 4 million sets. That figure will change dramatically over the next few years with the volume of HD programming available and regulations calling for built-in tuners and open cable architecture.

Some have doubted that set penetration would be achieved quickly because of the high cost of an HDTV. But the cost has dramatically dropped by more than 50% over the last six years. Today you can buy an HDTV for under \$1,000 US. Prices will drop further over the next few years while the display quality will continue to improve along with display options including CRT, LCD, DLP, Plasma and projection televisions.

The US market is in large part being driven by the Federal Communications Commission and the US government. They want to auction off analogue spectrum to telecommunication companies who will provide a myriad of mobile services to consumers. While analogue shutdown was contemplated for 2006, a more likely date is 2009 or 2010. Even those dates are remarkable – a total switch from analogue services to digital HD in a little more than a decade is quite an achievement.

In the end it is not digital infrastructure, production, or delivery which will effect a

timely transition but the programming. In the '80s and '90s, it was all about choice and the 200 channel universe. There certainly is a lot of choice out there with the growth in conventional over-the-air stations and networks, and literally hundreds of cable and satellite delivered services. But today television is about both choice and quality. Quality means HDTV in wonderful surround sound, a viewing experience that once again is creating appointment television.

The Americans have led this transition – it is their transmission and production standards that both Canada and Mexico have adopted. While Canada is a few years behind the US, Canadian broadcasters are gearing up with transmitters in the large population centers coming on stream and carriage of HD services by Canadian cable and satellite providers. The Canadian independent production community is beginning to embrace HD production and the creation of Canadian HD programming. Canada's strategy of lagging behind the US roll-out was a good one in that Canada did not have to pay the premiums for broadcast and production equipment that accompanied the early transition years, and Canadian consumers didn't have to face the high initial costs of HD displays. But that strategy assumes that Canada will finish their transition at the same time as the Americans, so Canadian broadcasters and distributors will face a busy five years to come. Not to make the transition in a timely way may result in Canadian viewers demanding access to more US services which would significantly reduce Canadian providers' ability to tap into their domestic market.

Interestingly, Canadian consumers are purchasing HD displays at about the same rate as their American cousins but with far less product available. One suspects that these displays work very well in the DVD environment and have played an initial role in displays making their way to consumers in both the Canadian and US markets. With the coming of the HD DVD and abundant HD services, this early trend will only accelerate.



Highly defined housewives

Our Mexican colleagues have just got underway with HDTV in Mexico City and a few US border cities. But like Canada they are short of original HD Mexican programming. Mexico is the world's largest producer of Spanish speaking soap operas and made-for-TV movies, and as they look at international markets and the shelf life of their product, a switch to HD production is inevitable. Mexican broadcasters are also looking to provide some of their digital spectrum to telecommunications services to help finance their transition costs and create new lines of ongoing revenue.

Similar financing ideas have been tried in the US where some broadcasters are looking at additional over-the-air services that use a modest amount of their digital spectrum, such as NBC's Weather Channel launched in New York a few months ago. Nobody has found the right mix yet, but in the digital world there are opportunities which simply were not possible in the analogue environment. Sooner or later, these opportunities will be turned into revenue streams.

But who is paying for all of this change, infrastructure and programming? As yet, there are really no new sources of revenue that broadcasters and distributors can tap into to pay for all the new toys, but not to invest would direly affect broadcasters' futures. The investment is essential for broadcasters to stay in business. During the '80s and '90s, broadcasters, cable and satellite grew services that both expanded the advertising pot and subscriber revenue.

In doing so, they fragmented audiences and markets. For the most part these sources of revenue have been maxed out.

So why is the North American broadcaster doing this? As I noted at the beginning of this article, the last 20 plus years have been all about choice. Choice will always be important, but choice with enhanced quality may give the over-the-air conventional broadcaster an edge in the market. And let's face it, when a government thinks it's a good idea and the other guy decides to do it, a new market environment has just been established whether you like it or not.

It is not just about the cost of staying in business, because in the new digital environment the opportunity to repurpose high quality content produced originally for the core network service for different digital platforms becomes a very real possibility at a very reasonable price. Television for the mobile phone is already being explored; Programme on Demand utilizing IP technology is another potential opportunity; new services can be delivered cheaply to niche markets; and DVD product of existing programmes is already on the market (much of it with bonus content). And there are definitely ideas we have yet to discover.

But without a fully digital environment that centres on a high quality core product like HDTV to drive the basic broadcast service then all these new ideas will have a tough time getting off the ground. And challenges will continue for broadcasters:

choice in the zillion channel universe, fragmented markets, limits to the subscriber and advertising pie, and the competition of groundbreaking new ideas.

Broadcasters need to provide additional choices to be part of the multi-channel environment which has already caused so much damage to their traditional mass market strategies. They need to be creative about new services with revenue streams that add to the value of their core services and enhance their ability to compete against new technologies like Personal Video Recorders, Video on Demand and the ever-expanding DVD market. Only by being a player in providing a high quality core service with the ability to repurpose that product onto multiple digital platforms will North American broadcasters be able to maintain their central role in the broadcasting systems of their respective countries.

One final observation about the evolving North American television landscape – the horizontal integration of programme making, distribution and broadcasting. All US major broadcasters are now part of a much larger media conglomerate including NBC Universal, ABC Disney, CBS Viacom Paramount, Fox and Time Warner. Revenue comes from producing the product, broadcasting it, selling it and distributing it. All of this has happened since the early '90s and it is one of the reasons why the US system is as healthy as it is. Mexico has a similar integrated system that includes publishing and

music (as does the US) and Canada has seen a great deal of consolidation but mostly with publishing and broadcasting being the key partners. Is this a lesson for the rest of the world?

So, if you accept my argument that ultimately content is king in this new environment, then protecting this content from piracy becomes absolutely critical to realizing the business model. In a digital environment a HD programme delivered to the viewer is of a pristine quality that challenges a movie experience. The Internet has certainly damaged the music industry who is just now struggling to stem a recurrent loss of revenue due to piracy. Internet bandwidth and compression solutions are increasing dramatically, and this could profoundly affect international markets and sales in the redistribution of HDTV programmes. It is for this reason that NABA is working hard to see protection technology is in place to prevent mass Internet redistribution while preserving the viewers' right for personal use. We believe this initiative is in the interests of broadcasters, creators and viewers around the world.

It is also worth nothing that radio in North America is enjoying unprecedented audiences and, in the private sector, unprecedented profits. It is indeed a very healthy market. Satellite radio has been introduced in the US and subscriptions suggest that these services will be successful despite earlier skepticism. Service providers have applied for licences in Canada and Mexico and they are likely to succeed. Meanwhile, conventional radio broadcasters are introducing digital services using IBOC technology in the US and DAB technology in Canada. Mexico has yet to move beyond the testing phase. Digital radio is likely to be a much slower transition than television unless new revenue streams and services are found. And while there has been much innovation with the Internet, these ideas are yet to translate to over-the-air services.

When the AIB gathers in Montreal this coming June, it does so at a time of massive change and challenge to North America's broadcast systems. From this change North America may well set trends for the rest of the world as it has done so much in the past.



Founded in 1972 and based in Toronto, Canada, the **North American Broadcasters Association (NABA)** is a union of broadcasting organisations throughout North America committed to advancing the interests of broadcasters at home and internationally.



As a member of the World Broadcasting Unions (WBU), NABA creates the opportunity for North American broadcasters to share information, identify common interests and reach consensus on issues of an international nature. Its members are network broadcasters, both public and private, in Canada, Mexico and the United States.

Michael McEwen will be a panellist at the AIB Global Media Business Conference taking place in Montreal, Canada, on 6 and 7 June 2005.

www.nabanet.com



Between concentration and plural offer

The large media conglomerates have strengthened their positions in the market. This is the case of Televisa in Mexico which projects itself strongly in the US Hispanic market. It is also the case of groups such as CEI and Clarin from Argentina, Globo Group from Brazil and Cisneros Group from Venezuela, which lately has been strengthening its international ventures due to the crisis in its original core market.

In Central America, ownership of the media in few powerful hands is even more noticeable than in other Latin American countries. In Guatemala, for example, one family (Gonzalez Gonzalez) completely dominates the television and radio industries including interests in Nicaragua where they own six television stations.

Ownership of the media has profound political implications. The media has played a key role in the balance of social, political and economic powers in every recent crisis in the region from the resignation of Argentina's president, Fernando de la Rúa, to the political conflict surrounding Venezuela's President, Hugo Chavez. Some analysts believe that the media is filling the void left by political parties, which have been diminished by scandals and have lost touch with the public. Others believe that media conglomerates exert their power and influence over the government to achieve their business objectives.

Along with the process of media ownership concentration, we can also observe a diversification of the media offer. Side by side with the traditional groups, new media – like for example TV Azteca (which competes with Televisa) – is gaining ground much faster than traditional conglomerates. In Venezuela, specialised news channels like Globovision introduced the 24-hour news format to the country. The global media offer has set foot in Latin America. The cable industry is growing at a steady pace, particularly in Brazil, Argentina and Mexico – countries in which 20% of homes have access to cable TV. Satellite reception has also grown over the last couple of years. Even though official figures are lower compared with developed markets, it is well-known that



Media in Latin America

The evolution of the media environment in Latin America goes hand-in-hand with the political and economical development of the region. The process of democratization and the globalisation of economies have fostered the proliferation of new media, particularly television and radio. At the same time, ownership of the media has been placed in the hands of few but strong economic groups with ties to government and politicians. Here Isaac Nahon, Director Burson-Marsteller Latin America, gives his assessment.

clandestine use of antennas and decoders is very high in urban zones.

From the content perspective, Latin America has exported the “telenovela”, a very Latinamerica-produced genre of television. The televised dramas produced in Mexico, Colombia, Brazil and Venezuela are widely broadcast in Europe, Asia and the Middle East. Hispanic television in the US is dominated by Univision (property of Televisa and Cisneros Group) and Telemundo (property of NBC) and they both broadcast telenovelas during their primetime schedules. Their popular name is “Culebrones” and they have evolved into very sophisticated transnational productions including performers from different countries in the region. This reality has opened the door for variety shows like “Sabado Gigante”, conceived in Chile, produced in Miami and broadcast to the world.

Media access and consumption reveal important characteristics of the social structure of Latin America. Open television is the dominant mass media vehicle (200 sets for every thousand people according to the World Bank) with an emphasis in the lower class. Radio has a substantial degree of influence, particularly in rural zones. In Mexico there are 1,400 radio stations. In Brazil - the southern giant - there are over 2,400 radio stations with a wide range of programming, from local music supported by the strongest music industry in the region

to religious stations aiming to convert the souls of the less fortunate. In Colombia, where radio is considered to be a very influential source of information, the two radio networks, Radio Caracol and RCN, are among the best information providers in the region.

Access to the Internet has grown, but it is still considered a media vehicle for the upper classes with only 18% of the population connected to the global network. This is low in comparison to the 50% of the population that have access to the Internet in the US. In terms of broadband, less than 1% of households in Latin America have access to a fast connection. However, some countries have assigned a priority to the popularisation of the Internet. The most notable case being Chile, where broadband access reaches 3.1% of households and the government has set as goal to reach one million households by 2010. Other countries have also designed an Internet initiative for broadband access like Brazil through the Telecommunications Services Universalisation Fund in Mexico, where the plan is known as e-Mexico.

Use of the internet is predominantly by young people. This reality does not differ from other parts of the world. However, in a region characterised by a young population, there are significant demographic and cultural consequences. 62% of the population between the ages of 21-24 has used the

Internet, compared to only 36% of the population between the ages of 55-64. These numbers are indicative of a change in the way Latin Americans relate to and understand the rest of the world, creating expectations for a plural and open environment.

Due to increasing connectivity and global media consumption, news originated in Latin America now has a strong impact in other countries. The world takes note of political crises and they have deeper consequences in the general social dynamics of the region. The same goes for the business environment where information travels fast, influencing both decision-makers and consumers. It is difficult to imagine Latin America going back to the autocracies and central planning of previous decades. The fact is that the media has contributed to the creation of a more democratic continent.



The author has more than 20 years experience in journalism, public affairs and research as well as a broad expertise in health communications. **Burson-Marsteller** is a leading global public relations and public affairs firm which provides its clients with strategic thinking and programme execution across a complete range of public relations, public affairs, advertising and other communications services. Through proprietary research, the firm leads the industry in knowledge of and insights into the relationship between communications and the reputations of companies and their CEOs. Burson-Marsteller has an integrated network of offices and consultants in all major markets in Europe, the Americas, and the Asia-Pacific region. www.bm.com

Source: www.internetworldstats.com

	Population (2004 estimate)	Population (% of world)	Internet Usage latest data	Usage Growth (2000-2002)	Penetration (% population)	World Users %
Africa	893,197,200	14.00%	12,937,100	186.60%	1.40%	1.60%
Asia	3,607,499,800	56.50%	257,898,314	125.60%	7.10%	31.70%
Europe	730,894,078	11.40%	230,886,424	124.00%	31.60%	28.40%
Middle East	258,993,600	4.10%	17,325,900	227.80%	6.70%	2.10%
North America	325,246,100	5.10%	222,165,659	105.50%	68.30%	27.30%
Latin America/Caribbean	541,775,800	8.50%	55,930,974	209.50%	10.30%	6.90%
Oceania / Australia	32,540,909	0.50%	15,787,221	107.20%	48.50%	1.90%
WORLD TOTAL	6,390,147,487	100.00%	812,931,592	125.20%	12.70%	100.00%



The media has never been more influential around the world than it is today. It provides vital access to news and information, it provides entertainment, it provides knowledge. Often the international media are disliked by politicians who distrust the wide ranging influence that the electronic media has over consumers in territories worldwide. Often the media don't get on amongst themselves.

It's because of a lack of 'joined-up' thinking that the media is often compartmentalised, working in distinct and individual silos. The need for the Global Media Business Conference is therefore clear and is stronger than ever. The international broadcasting industry needs a platform to debate its collective future and an opportunity for all stakeholders – broadcasters, financiers, politicians, content owners, and supporting industries – to debate the industry, debate their concerns, explore opportunities and develop a definitive blueprint for the international media sector.

This important meeting will take place "in the round" at the headquarters of the Canadian Broadcasting Corporation in Montreal and will bring together senior executives of the world's leading international television and radio broadcasters, as well as satellite operators, transmission companies, consulting firms, politicians and regulators.

AIB Global Media Business Conference **6-7 June 2005**



Organised by the
Association for International Broadcasting
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Montreal

Montreal skyline from the Old Port © Tourisme Montréal, Stéphan Poulin

Montreal in the summertime is all about celebrating life outdoors. Whether it's people-watching from the many pavement cafés, joining an open-air jazz concert, strolling through the bustling Old Port and Old Montreal, or hiking up Mount Royal – there's much to do in this vibrant city. Montreal is Canada's second largest city with a unique mix of French and English cultures, combined with myriad other traditions brought in by the thousands of migrants from all over the world. Remember to brush up your French-language skills as around 67% of the city's inhabitants consider French their mother tongue – indeed, Montreal is the second most populous French-speaking city in the world.

With so much on offer in Montreal, delegates to the AIB Global Media Business Conference 2005 may be tempted to sneak out during the day and just enjoy the city. Don't worry, there's plenty of time – the celebrating goes on into the small hours! Montreal plays host to more than 40 festivals every year with jazz and comedy festivals amongst the best known. Many events are available to the public at no cost.

From both the conference venue at the CBC and our principal conference hotel you can walk to just about anywhere. Old Montreal and the Old Port, the downtown shopping centre, McGill University's beautiful campus, Mount Royal, the historic Central Station, trendy Saint-Denis and Saint-Laurent streets, the Planetarium, the Montreal Museum of Fine Arts and of course countless superb restaurants are all within easy reach. If you want to go further afield, hop on the metro for a clean, safe, quick ride. This underground transportation system will take you to places like the Jean-Talon Market in Montreal's Little Italy or to the Biôme, an environmental museum where you can experience four natural ecosystems.

You might prefer to just walk around Montreal and soak up the city's unique architecture, blending European and North American influences. Victorian mansions and Beaux-Arts style monuments blend with modern skyscrapers, making Montreal a creative and eclectic urban landscape. Several late 20th century buildings, such as the Canadian Centre for Architecture, have integrated the graceful stone structures of their more historical neighbours into their contemporary designs. And be sure to take in the brightly painted wrought iron staircases that wind up the outside of duplexes and triplexes and the cobblestone streets of Old Montreal.

One thing you can be sure of when you're in Montreal: you'll eat well. The city is renowned for its fine food and wealth of restaurants. Just about any stop promises to be a good choice, whether it's a Greek restaurant in the Plateau Mont-Royal, French food in Old Montreal, or a smoked meat on Saint-Laurent street.

Radio Canada International has been broadcasting to the world since 1945. RCI's role is developing awareness of Canada and of Canadian identity. Thanks to RCI, Canadians living abroad or travelling around the world can keep in touch with their country everyday. RCI broadcasts a comprehensive range of daily and weekly programmes in nine languages: English, French, Spanish, Russian, Ukrainian, Mandarin, Cantonese, Arabic and Portuguese. RCI also broadcasts a bouquet of programmes from the CBC/Radio-Canada domestic service, including national and international news, regional events from across Canada, in-depth analysis, reports and interviews on political, economic, social, scientific and cultural issues.

RCI also produces weekly and monthly programmes for the Montreal-based broadcaster's numerous partner stations around the world which are transmitted locally in English, French, Spanish, Russian and Chinese: *Canada à la Carte*, *Canadá a la Carta* and *Panorama* provide a series of reports and interviews broadcast on Radio Canada International concerning diverse national and international issues.

RCI produces language lessons designed for radio. These English and French lessons aim to teach children from 7 to 12 years old, together with their parents, either one of the official languages of Canada (French and English). Using tales, legends, nursery rhymes, traditional songs and games from Canadian culture and tradition, this program combines educational and entertaining means to teach children a second language. These programmes are broadcast on RCI and are available on its web site.

Most of Radio Canada International's staff is based in Montreal and to reflect the whole of Canada and Canadian life, RCI has regional reporters in Vancouver, Calgary, Toronto and in the nation's capital, Ottawa.



AIB Global Media Business Conference 2005



Sunday 5 June 2005

1430 **AIB Executive Committee meeting**

1700-1900 **Opening reception**
Montreal Hotel de Ville (pictured right) hosted by
M. Gérald Tremblay, Mayor of Montreal



Monday 6 June 2005

Conference chair Mark Montgomery, Radio Canada International

0900 **Official opening**
Pierre Pettigrew, Canadian Foreign Minister
Sylvain Lafrance, Vice-President, CBC French Radio
Simon Spanswick, Chief Executive, AIB

0930 **The year in pictures**
APTN showcases the world's major news images from the past twelve months

0935 **International broadcasting – What is it? What's it for? What's happening?**
A briefing on the current state of cross-border broadcasting, with a review of activities in the sector since the last AIB Global Media Business Conference in Prague, May 2004

0945 **The world about us...opportunities for international channels**
The Americas
More than 350 million people live in the Americas region. With increasing levels of affluence what opportunities are there for international channels? What are the pitfalls? And can new brands establish themselves in the highly competitive media marketplaces of north, central and south America?

Participants include

Michael McEwen, Secretary-General, North American Broadcasters Association

Mary Frost, GlobeCast

Rüdiger Lentz, Deutsche Welle

Raffy Lopez, Director, ABS-CBN North America

Albert Alcouloubre, TV Globo, Brazil

Jorge Jaidar, TV Azteca, Mexico City (invited)

Steve Smith, International Channel (invited)

Fernando Barbosa, Disney Latin America (invited)

Plus a **case study**: radio co-operation in Latin America, featuring Radio Canada International, Radio Netherlands and Deutsche Welle

1130 **Coffee**

1200 **The digital hub**
The converged world has arrived in much of the world. 3G phones enable consumers to access content wherever and whenever they want or need it. Always-on connections offer instant communication via voice, text and video. The question facing international broadcasters is how to react to the new opportunities that digital multimedia broadcasting and 3G telephony offer as technology develops ever more rapidly. Experts in the field provide an overview of today's marketplace and offer predictions for business in the future.

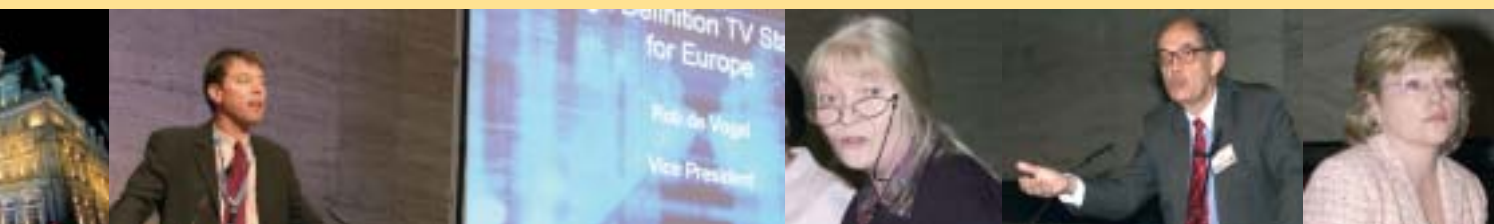
Gerd Leonhard, Music Futurologist

Anssi Vanjoki, Executive Vice President, Nokia (invited)

Senior representative, Samsung Electronics

Dr Christopher Chia, Chief Executive, Media Development Authority, Singapore (invited)

1330 **Keynote Luncheon**



1430

Workshops

The AIB Global Media Business Conference is conceived as an interactive event and workshops are a vital component. This year there are two specialist workshops that will explore in detail the most topical and relevant issues.

Track 1 HDTV

Led by industry experts, the HDTV workshop will discuss the impact of high definition in domestic markets and the issues surrounding the delivery of international content to international audiences - often to areas where HDTV has not been implemented or where a different standard is in use. This informal workshop setting will allow the frank exchange of views, with contributions from leading broadcasters such as **CBC, CBS** and **ESPN**, plus industry suppliers.

Track 2 Radio

Radio is an essential part of the media mix. International services are relied on for information in many parts of the world where local media is not free, but what of the rest of the world? And what about delivery - what's the best way to reach listeners in the digital environment? These and many other issues will be covered in this workshop where the results will feed into the strategies of many of the world's leading radio operators.

1630

Media training

Training is as vital in broadcasting as it is in any other industry - but who should be responsible for this? Broadcasters have started a range of initiatives, such as the Discovery Campus and the Deutsche Welle Academy, while organisations such as the World Bank, BBC World Service Trust and the Media Development Loan Fund have come up with solutions for many of the world's most politically complex areas.

This session looks at some of the initiatives in media training around the world; also included are issues such as safety training, essential not just for news teams working in the front line, but also for other programme makers faced with difficult and potentially hostile situations.

Contributions from **INSI, CNN, BBC World Service Trust, DW Academy, Discovery**, plus input from the **DART Centre**.

Produced by **Radio Canada International**.

1800

Reception at **Cirque du Soleil**'s headquarters, including a behind-the-scenes tour of the Cirque's Montreal circus training school

Followed by

Gala dinner and awards ceremony

The first AIB International Broadcasting Awards will be presented during the evening





Tuesday 7 June 2005

0745 **Breakfast briefings**

0900 **The world about us...opportunities for international channels
Asia and the Pacific**

Two-thirds of the world's population live in Asia and everyone suggests that it's the market that they want to crack. Just how easy will this be, and what about programming coming out of the region? This session will investigate the opportunities and hear some of the success stories from the region – and can the west keep up with the technological developments on offer in parts of the region? Contributors to this session include

Mrs Jeanne-Marie Gescher OBE, Claydon Gescher Associates, Beijing

Mr K S Sarma, CEO, Prasar Bharati, Delhi

Ms Linden Clark, Radio New Zealand International

Mr Shaun Seow, MediaCorp, Singapore (invited)

1045 Coffee

1115 **New devices, new methods, new challenges**

From IPTV to DRM, 3G phones to digital production – broadcasting is changing faster than ever before. This session will examine what's new and explore how broadcasters need to react – at national and international levels. Contributions from **Harris Corporation**, **Invidex**, **Blinkx** and others working on our futures.

1230 **AIB members annual meeting**

The annual general meeting of the Association for International Broadcasting, with presentations from the AIB's Executive Committee and the permanent Executive. Open exclusively to AIB members

1330 **Keynote luncheon**

1445 **Global media debate**

Panel debate – moderator: Peter Mansbridge, CBC News

This major debate will involve some of the world's most senior practitioners and experts in global media who, together with the conference audience, will tackle subjects ranging from media credibility to piracy in the digital age, from children's television to media for development. With speakers from:

CBC – including **Robert Rabinovitch**, Chief Executive, CBC, and **Tony Burman**, Editor in Chief, CBC News

Al Hurra TV

Al Jazeera TV

Canadian Radio-Television Telecommunications Commission

CNN International

Developing World Farm Radio

Discovery Networks

Fox Kids

Media Development Authority, Singapore

NBC Universal

Sesame Workshop

United Nations

Viacom

1700 **Conference wrap-up**

1715 **Closing reception**



Sticky notes

+

the video transmission business

Video transmissions can involve multi-million dollar satellite systems or sub-sea fibre optic facilities, costing millions, while scheduling and record keeping may involve white boards, dry erase markers, yellow sticky notes and the occasional spreadsheet. Today, there are no seamless video transmission network providers that support delivery of a television signal from anywhere in the world to any other. Consequently, broadcasters, service vendors and content providers are often forced to supplement their own video transmission infrastructure with services from multiple providers.

enterprise software solution off-the-shelf or to develop custom software in-house. The decision falls somewhere between the transmission operations department (satellite desk manager, transmission manager), the IT department (IT manager, Head of IT, CIO) and the finance department (when they are pushed into an invoice reconciliation process and are buying from external suppliers). News, sports and entertainment divisions are also involved parties in the decision processes, as requests for occasional video transmissions often originate with them. Although they are not key decision makers, they have a stake in the solution. In the past, many broadcast industry companies tended toward in-house solutions. Today, with the rapid pace of new technology and the headaches associated with the development of new requirements and support, many companies are turning to outside suppliers to remain competitive.

Successful implementation of a solution requires a flexible and adaptable enterprise platform, suitable to meet the customer's requirements. Of course, this entails a detailed study of the customer's business model. The analysis evaluates the organisational impact and technical interoperability issues associated with the deployment, allowing for a graceful and timely installation of the system. The necessary review of the customer's business processes often exposes operational weaknesses and hence opportunities for spectacular gains in many areas. Of course, such an evaluation is of little use unless conducted by experienced and knowledgeable staff from several disciplines. The vendor of any such system must count such professionals and experts among its staff to be successful. Also, the assessment process should be conducted in a non-confrontational, collaborative environment. The ideal situation will see the platform

Today the broadcast industry's video transmission market is a paradoxical business. On the one hand, it employs some of the world's most complex, sophisticated infrastructure, while on the other, some of the operational business processes and support systems employed to run it would make the typical CEO or CFO's hair fall out with worry, says Michael Scott, VP Marketing, Channel Partnerships and Strategic Alliances, at Montreal-based Invidex.

Managing these expansive video transmissions with their associated disparate providers along with their own internal resources is currently, more often than not, a time consuming manual task. In fact, although video network equipment often comes with state-of-the-art network management systems, these systems are mostly hardware-focused and cannot track or link the usage of outside vendors or internal network to the appropriate cost centres (i.e. different programmes, events or shows for which the network or vendor is being used), let alone accounting and invoicing systems. Sometimes, several departments within an organisation may have a mandate to establish transmission services, further complicating the equation. In fact, several unrelated and unlinked operation support systems may exist, much to the consternation of the IT department. Operational pandemonium is often the result, though often not obviously so. System weaknesses lurk just below water, like reefs. Mistakes are exposed accidentally, sometimes months after the event, occasionally never, but too late to be reacted to before the damage is done.

For regional and international broadcasters, matching the level of flexibility, quality, response time and operation effectiveness associated with true private video networks would require an enterprise software solution capable of supporting numerous back-office system capabilities in an integrated fashion. The "Holy Grail". Pricing enquiries, order booking and tracking, resource scheduling, inventory management, billing and invoice reconciliation are just a few of the operational functionalities which are required to be supported in an integrated fashion. Video transmission service providers face similar challenges, with large bandwidth network investments of their own. These providers require company-wide software solutions to define services and rates, track transmission orders and bill customers accurately.

For many companies seeking a solution to their operational requirements, a decision has to be made as to whether to buy an

becoming the information sharing engine within an organisation, turning an Achilles heel into a major strength.

Since its inception in 2002, Invidex's objective has been to develop a product suite to support video transmission operations, along with a staff of experienced industry experts. The core of that product suite is VideoLinX. Throughout 2003 and 2004, Invidex developed many integrated functionalities for the VideoLinX enterprise platform, including a detailed and comprehensive enterprise-level inventory module, an automatic routing engine to determine routing options and associated costs/prices, a price calculator for direct selling or reselling, a workflow engine, a service order generation and management capability, a web front-end for remote routing and booking requests and customer support, a report generator, a scheduling system and an accounting module with vendor reconciliation capability. The platform can be integrated seamlessly into 3rd party accounting systems, billing platforms and database systems.

To assist companies in the broadcast industry in appreciating the productivity gains, cost savings and opportunity for revenue enhancement that can be realized in the deployment of a system such as VideoLinX, Invidex developed a ROI (Return On Investment) calculator. The ROI calculator is a flexible tool which allows various broadcast industry companies, such as broadcasters, service vendors and resellers to input their own operational data in determining the ROI payback term, for an enterprise system such as VideoLinX. The tool models all tasks and timelines associated with the provisioning and on-going support of broadcast services.

In early 2004, after a full year of an in-house beta trial with the company's Invidex Booking Center (IBC), Invidex began deploying the first commercial VideoLinX platform with a major broadcaster. The implementation process exposed many operational

weaknesses and bookkeeping problems, which had led to numerous, significant missed billings for the customer. The first half of 2005 will see the second commercial deployment of the product to an industry leader in the Americas region.

The need for enterprise-level operations support systems has never been clearer. Hopefully, in future, as a cross-impact of deployment of such operational support systems, we'll see less hair-challenged executives in the broadcast industry.

Invidex is an innovative provider of software-driven solutions and services that enable the broadcast industry to reduce costs and increase revenues through improved management of broadcast video transmissions. The Invidex VideoLinX technology platform enables broadcast industry to fully manage the costs and technical issues related to video transmissions. Invidex offers its broadcast customers end-to-end video transmission services, including multiple route options, feed coordination and billing integration. Based in Montreal, Quebec, Invidex is a privately-held Canadian company that currently provides broadcast solutions to customers in Latin America, North America, Europe, Asia and the Middle East. www.invidex.com



Invidex became a Member of the AIB in February 2005.

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Each horrific event that we eventually hear or see on our radio and tv sends journalists from around the globe swarming to the scene. These courageous men and women, working with laptops, sat phones and cameras, search for the words and images to convey their exceptional experience of witnessing to thousands or millions of others. Then they retreat, move to the next assignment, and in many cases privately nurse the emotional wounds afflicted by the violence of man or nature. That private suffering, long an unmentioned part of the journalist's work, is becoming part of the public knowledge of violence – through the efforts of the Dart Centre for Journalism and Trauma, as the Centre's Executive Director, **Roger Simpson**, explains.

The journalist's private suffering



A bomb cuts short the lives of 168 men, women and children in or near a federal government building in Oklahoma City. The tsunami waves crash against the fragile coastlines of South Asia, snuffing countless lives and undermining the social and economic foundations of struggling nations. Two troubled boys end their lives as the exclamation point to the senseless killings of 12 schoolmates and a teacher in a suburban Denver, Colorado, high school. And there was 9/11.

The Dart Centre is the only US organisation dedicated primarily to teaching journalists about the emotional effects that follow in the wake of violence. The Centre has created energetic branches, first in London to direct outreach in Europe and Africa (headed by Mark Brayne, former BBC correspondent and senior editor), and in Australia for Asian outreach (directed by Cait McMahon, a therapist directly interested in what journalists endure in tragedy reporting). Bruce Shapiro, journalist and educator, balances the West Coast location of the Centre with outreach that covers the eastern side of the nation and extends into international projects from his base in New Haven, Connecticut. The Centre's staff coordinates an international network of journalists, mental-health professionals and educators toward new efforts to enhance the integrity and emotional health of those who do journalism on the public's behalf. Today, key leaders in such organisations as CNN, National Public Radio in the US and the BBC have heeded the Dart message – yet only a decade ago, that same message by the Centre founders often encountered skeptical resistance.

Philosophy Sensitive, informed coverage of victims is at the core of the Centre's educational programmes, which apply lessons learned from the education of trauma to the ways violence is reported. For example, those who report on disaster are compelled to seek out the eyewitness survivor. In the white heat of the moment, that survivor may struggle to find the language to express feelings or to describe what has happened – frequently a reflection of an emotional wound. The Centre wants journalists to give increased attention to "Act II" stories – reports on the second, more poignant phase of the traumatic experience that represents recovery from the initial shock or wound. "What it's all about is putting Act II on page one," says Frank Ochberg, a Michigan psychiatrist who is chairman emeritus of the Centre's executive committee, "learning how to get that right up there where the journalist is rewarded and the reader is rewarded and we train ourselves to see beyond the trauma."

The journalist's capacity for a resilient response to violence also is a central concern of the Centre. Journalists too are vulnerable to traumatic injury from the events they cover though relatively few suffer more than

short-term effects. Reporters and photographers who understand those effects readily adopt techniques of self-care that extend their capacity to work under the most trying circumstances. A television journalist who covered the tsunami effects in Banda Aceh reported addressing the emotionally overwhelming impact of what he saw by spending time alone, talking quietly with companions, and reflecting on his experience, instead of trying to wall off the inevitable impact of emotions. Managers who understand trauma give due emphasis to training before deployment, to tracking correspondents on assignment, and to support once the journalist returns to the newsroom. Editors will recognize the vulnerability of those who routinely process and select the images of death and destruction.

A short history – 1990s to 2005 The west coast centre had its roots at Michigan State University where Ochberg, a former mental-health director for the state of Michigan, saw the opportunity to use the journalism school as a proving ground for a thought that was grinding away at a man happiest when he could confront and change troubling conditions. To Ochberg, one of the authors of the psychiatric profession's diagnosis of chronic traumatic injury – post-traumatic stress disorder – , journalists were harming victims of violence by the way they interviewed and reported because they often lacked a good sense of what the victim was enduring. The efforts of Ochberg and his associates at MSU in the early 1990s yielded innovations in classroom training, and an annual national newspaper award for exceptional writing about victims of violence.

In parallel, the journalism school at the University of Washington introduced interviewing of victims as part of its core training, and in 1996 brought journalists and journalism educators on the west coast together for two days, a meeting that forged much of the philosophical basis for the Dart programmes. It also conducted the first research to assess the extent of trauma exposure among journalists. Both MSU and Washington benefited from Ochberg's role as advisor to the newly formed Dart Foundation, the charitable agency created by a Michigan family that had prospered from plastics inventions and manufacturing.

By mid-1999, Ochberg and the Foundation resolved to create a single centre to serve as a global resource for journalists covering violence. In November 1999, the Centre opened in Seattle, directed by Roger Simpson, a professor in the Communication Department of the University of Washington. Less than two years later, after the attacks of September 11, 2001, the Dart Centre with added help from the Dart Foundation placed two representatives in New York City for six months to assess the impact on journalists there and to study effective ways

to respond to extraordinary events. Today, the Dart Foundation's support of the Centre exceeds \$1 million a year. The Centre's agenda now addresses the challenge of serving journalists worldwide.

Electronic awards With twelve years of experience judging the quality of newspaper reporting about victims of violence, the Centre is moving this year to embrace the electronic news media. The annual \$10,000 newspaper prize will be matched with annual prizes for radio journalism beginning with reports broadcast in 2005 and for television journalism beginning with work first presented in 2006. The electronic entries will face the same rigorous judging by journalists and mental-health specialists that has given the newspaper award solid standing in a legion of special prizes. This year, the Dart Centre's annual awards ceremony will close a day-long international conference on reporting on the tsunami and recovery, April 15, 2005, at the University of Washington in Seattle.

Dart Ochberg Fellowships Ten US, British and Australian journalists went to New Orleans last November to immerse themselves in the Dart Centre's theory of trauma and journalism and its message of self- and group-care. The group included reporters who had investigated rape in the US military, a television news producer, photojournalists whose images had conveyed the ultimate horrors of the war in Kosovo and the aftermath of the Cambodian genocide, and reporters daily exposed to the violence of mid- and small-town America. These journalists – now dubbed Dart Centre Ochberg Fellows – returned to their newsrooms and communities ready to work at changing conditions for themselves and others, agents in a network that now numbers more than fifty journalists.

Research and training Guided by its research director, Elana Newman, a psychologist at the University of Tulsa, the Centre is addressing a range of research issues: What are the effects on journalists of covering the Iraq war or the Asian tsunami? Are there effective ways to use the Internet to help journalists recovering from emotional wounds? And how has the Centre's work affected the flow of news to readers and viewers? More than fifty US college and university teachers, trained to understand trauma, are effective agents of the Dart Centre, giving students realistic views of what they face as journalists and tools for taking care of themselves in the worst situations. The first class for European educators will take place on June 15, 2005, in London. The Centre continues training conferences for journalists, a part of its programme since 1999.

How Dart can help Typical cases where the Centre's help has been sought have been:

- Executives of National Public Radio asked for briefings on traumatic injury for the entire staff in its Washington DC headquarters. Ochberg and Shapiro dedicated two days to talking with correspondents, editors, engineers and others.
- The Houston Chronicle, its staff reacting to the difficult challenge of covering the breakup of the space shuttle Columbia, invited the Dart Centre team to meet with staff members.
- A suburban Seattle newspaper assigned two reporters full-time to the difficult task of covering all criminal trials and police action in the readership area. The stress of the journalists led to meetings with the Dart Centre that prompted managers to add a third person to the beat to provide opportunities to shift the crime specialists to other topics from time to time.

The Centre's website shares the stories of journalists who have paid the price of getting close to death, grief and destruction, offers concrete tips about planning for the unexpected and taking care of oneself and colleagues afterwards, approaching survivors sensitively, and facing one of the most difficult times any organisation faces – the death of a colleague.

www.dartcentre.org
www.dartcentre.org/europe



Now that Al Jazeera has asserted itself as the news service of choice regionally and a credible alternative source of information globally, the channel's widely reported moves towards privatisation could signal the advent of a new phase in the Arab network's life cycle, says Al Jazeera's Communications Manager **Jihad Ballout**.

Privatising Al Jazeera

The idea of moving Al Jazeera into private ownership is not new. In fact the idea was first made public towards the end of 2003, at the time a reshuffle of the Board of Directors was announced. Then, an official statement called on the new board to look into the viability and feasibility of privatising Al Jazeera, and the board commissioned an international firm of consultants to do just that. There was just one, irrevocable, proviso: that Al Jazeera's editorial independence and core editorial values remain safe and untouched.

The decision to privatise is a business one. Economic indicators point to the fact that the privatisation process, if indeed it does go ahead, could reap benefits for potential investors. Al Jazeera has been recognised as one of the top five most influential global brands (Brandchannel Online Magazine, 2005), and the only one in the media category. With an audience of over 35 million the network enjoys unparalleled viewing figures in the Middle East (Pan Arab Research Centre, 2002). In Egypt for example, 68.3% of satellite viewers tune in to news channels; 88.4% of them watch Al Jazeera (The Arab Advisory Group in Amman, November 2004 and January 2005). The nearest rival manages only 35.1%. The same viewership scenario is reflected in most other Arab states. These factors alone are sure to resonate within the investment community regionally and perhaps internationally too.

It is often argued that it is very difficult for a channel wholly dedicated to news and current affairs to make real money. News networks around the world have diversified into other media services in order to achieve economic viability. Al Jazeera has been building its own media services portfolio, and will eventually combine several specialised services that cater for varying needs and preferences. In addition to the channels already on air, Arabic news and Al Jazeera Sports, and the Arabic and English websites, the bouquet will incorporate Al Jazeera International (24 hour English language news and current affairs), Al Jazeera Documentary and Al Jazeera Kids channels. The latter three are planned to launch during 2005. Except for Al Jazeera International, all channels will be in Arabic.

For over a year now, Al Jazeera has been running its vocational operation Al Jazeera Media Training & Development Centre. Run on a business basis, the Centre conducts tailor-made media courses. Its services are not restricted to the specific area of journalism but extend to media technicians and administrators, as well as advertising, promotion and other related professional activities. Although it holds regular training and refresher courses for Al Jazeera employees, the centre also accommodates external requests, from journalists, companies and government departments. While expanding the scope of its media services, Al Jazeera has embarked on a re-organisation and re-structuring drive for its next development phase. The channel's continuing commitment to a high level of professionalism is reflected, for example, in the range of documents it has issued such as the Code of Professional Ethics – a first for Arab media – and the Code of Practice which defines internal editorial guidelines.

Founded in 1996 and based in Qatar, the **Al Jazeera** news network is the fastest growing network among Arab communities and Arabic speaking people, with more than 30 bureaux and a network of correspondents worldwide. In 2001 *aljazeera.net* was launched as the first mainstream Arabic news site and quickly attracted millions of visits. Al Jazeera's English-language web site <http://english.aljazeera.net> offers news and information to a worldwide audience in an interactive format.



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Keynote Speaker



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**Distinguished Service Award
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Lowry Mays
Chairman of the Board
Clear Channel
Communications

**Spirit of Broadcasting Award
Recipient: Howard University**



H. Patrick Swygert
President
Howard University



Debbie Allen
Producer, Director, Actor
and Choreographer
Howard University Alumna

April 17, 2005

**Broadcast Engineering
Conference Opening
Keynote Speaker**



Dr. Robert Pepper
Chief, Policy Development
FCC

April 18, 2005

**MultiMedia World
Keynote Speaker**



Hector Ruiz
Chairman & CEO
Advanced Micro Devices
(AMD)

April 18, 2005

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Award Recipient:




Charles Osgood
CBS

April 18, 2005

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Jay Leno
Host of *The Tonight Show*
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Luncheon sponsored by:  **Microsoft**

April 19, 2005

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Keynote Speaker



John Gage
Co-Founder and Chief
Researcher
Sun Microsystems

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1924-2002

Accepting:




Carole Buck

Special Remarks:



Ozzie Smith
National Baseball
Hall of Fame

Luncheon sponsored by:  **ASCAP**

April 20, 2005

Technology Luncheon

Keynote Speaker



Dr. Robert W. Lucky
Engineer/Author

**Engineering Achievement Award
Recipient (Radio)**



Milford K. Smith
Greater Media, Inc.

**Engineering Achievement Award
Recipient (TV)**




Dr. Oded Bendov
TV Transmission
Antenna Group, Inc.

**Convergence and Content on the
Move: Riding the Digital, Mobile,
Virtual and Personal Wave**



April 18, 2005
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Chief Technology Officer/
Chief Strategy Officer
HP

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Video – The Next Wave in Publishing



April 19, 2005
Steve Saylor
Vice President of Digital
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Adobe Systems

**IPTV – The Technology and
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Reaching the southern hemisphere

Twenty years ago, during the heat of the Cold War, the U.S. Government launched Radio Marti – aimed at listeners in Cuba – from studios in Washington, DC. Broadcasting 14½ hours a day, the radio was born after President Reagan declared his intention to provide Cuban listeners with news and information they couldn't get living under Fidel Castro's dictatorship. On May 20, Radio Marti will celebrate its two-decade anniversary, and much has changed. **Joan Mower**, Senior Development Officer for International Media Training/Development in the Broadcasting Board of Governors (BBG), reports on broadcasting to the southern hemisphere.

Much has changed in the last twenty years, but – as the saying goes – much remains the same: Castro and his government dominate the politics in the island nation, which is rated as “Not Free” by Freedom House, the New York-based independent, non-governmental organisation that monitors freedom around the world. “Freedom of movement and the right to choose one's residence, education, and job are severely restricted. Attempting to leave the island without permission is a punishable offence,” Freedom House's most recent report says about Cuba. “The press in Cuba is the object of a targeted campaign of intimidation by the government.”

Despite the Castro regime's long-time efforts to block short wave and medium wave broadcasts from the United States, Radio Marti, now based in Miami, Florida, has become the leading international broadcaster on the island of more than 11 million people, according to surveys by the Broadcasting Board of Governors (BBG), the federal agency that oversees all US international broadcasting. And Radio Marti has expanded dramatically since its creation. Today, the station broadcasts news and a variety of feature and news analysis programmes seven days a week, 24 hours a day. Its sister station, TV Marti produces eight hours of programming daily including two 30-minute newscasts. Both comprise the Office of Cuba Broadcasting under the BBG.

Broadcasting to Cuba remains a high priority for the Bush Administration, which is spending more than \$25 million in FY 2005 to reach people in Cuba. “The freedom of Cuba's long-suffering people remains a high priority for this (Bush) administration as it does for the American people,” BBG Chairman Kenneth Y. Tomlinson said recently. “So long as the Cuban people remain in chains, the liberty of all people is threatened. Our efforts to provide reliable, accurate, and accessible sources of news and information to the people of Cuba will advance the day when they can breathe free.”

To that end, the United States last year began broadcasting weekly Radio and TV Marti signals from an aircraft within US airspace. The television broadcasts use Channel 13, which was authorized by the Federal Communications Commission while Radio Marti was broadcast on an AM frequency not used by US commercial broadcasters. Additionally, TV Marti is now available on Hispasat, a satellite service with a large footprint in Cuba and the rest of Latin America. Satellite receivers on the island are able to receive direct-to-home and free-to-air broadcasts.

All the while, the Martis have moved to increase news programmes, along with special features such as the wildly popular weekly Major

League Baseball games, playoffs and World Series. OCB Director Pedro Roig says news is what information-starved Cubans want: “Over 60 percent of Cuba's listeners want the news.” As a result, Radio Marti has moved “to an all-news and information programme schedule.”

Governed by the editorial charter of its fellow broadcaster, Voice of America (VOA), the Martis present all points of view on a variety of discussion programmes, Roig said. The Martis adhere to the Charter which says, among other things, that the services “will serve as a consistently reliable and authoritative source of news” and will be “accurate, objective, and comprehensive.” VOA is also broadcasting to Cuba with *Ventana a Cuba*, a 30-minute show, six days a week, for Cuban listeners.

Broadcasting to Cuba is only a part of US international broadcasting's Spanish-language programming. Since 1942 when the VOA began, there has been an effort to reach the southern hemisphere populations in their own language. During the 1940s and 1950s, VOA's Spanish service consisted of contracting with private radio stations to produce and transmit programmes for Latin America. The Latin America Service was created in 1961, and includes Spanish-language broadcasting as well as Creole broadcasting to Haiti. Portuguese broadcasting to Brazil was ended several years ago. “The Voice of America has a long history of reaching out to our neighbours to the South, and we're continuing that tradition by putting our news and information on radio, TV and the Internet,” said VOA Director David Jackson.

Today, VOA broadcasts by short wave and AM as well as through a network of hundreds of FM affiliates that carry programming from Argentina to Venezuela. Scores of TV stations also carry VOA's programming (www.VOANews.com). “We're trying to get the widest possible reach through a multimedia system by establishing radio and television broadcasts, an expanded website and satellite delivery of events in Washington,” said Richard Araujo, chief of the VOA Latin America Service. In conjunction with the Organisation of American States, VOA is also broadcasting a weekly educational conference to the region. “Our audience in Latin America continues to thirst for information about the United States as our regions grow closer together,” Araujo said.

General radio programmes in Spanish reach out to listeners in the morning and in the evening: *Buenos Dias America* and *Buenos Noches America*. They look at local and international news, along with political, diplomatic and scientific stories and general features. Two programmes target specific areas: *Enfoque Andino*, an hour-



long daily show, targets the Andean region as well as US policies towards that region and *Ventana a Cuba*. A popular weekly talk show is VOA's *Hablemos con Washington* in which well-known guests discuss a wide range of topics for an hour.

With many Latin Americans turning to television for news, VOA-TV launched a five-minute weekday show with television news capsules. Entitled *Desde Washington* (From Washington), the show has affiliates in more than a dozen countries. Its companion show, *Foro Interamericano*, is a weekly public affairs programme. Broadcasting to Haiti in Creole, the VOA reaches nearly 30 percent of Haitians on a weekly basis with its popular programming carried on short wave and by affiliates.

Although the Bush Administration's foreign policy agenda has been dominated by the Iraq war and the fight against terrorism, Latin America remains a key area of interest for the United States which has moved to strengthen economic partnerships in the region, fight terrorism and drug trafficking and advance shared political and economic values.

Besides traditional broadcasting, US international broadcasting has embarked on other innovative projects to reach Latin Americans. Recently, the agency created a Health Journalism CD-ROM (available in Spanish and English for the Caribbean), designed as a support and teaching tool for journalists, students and journalism educators to improve interviewing, reporting and editing techniques and produce accurate, objective, fact-based stories. The multi-media CD-ROM - funded primarily by the US Agency for International Development and distributed free of charge - allows journalists to access up-to-date information about topics such as HIV/AIDS and the health consequences of natural disasters.

In October 2004, VOA staged a health journalism workshop for reporters from around the continent, focusing on HIV/AIDS, a disease that UNAIDS said affected an estimated 2 million in the region in 2003, with 250,000 people newly infected. Leading speakers presented the latest developments in HIV/AIDS while journalists used the three day session to exchange ideas on how to improve coverage - for example how to overcome the roadblocks they encounter in covering the disease, including religious and social taboos about sexuality and the failure of editors to recognize the potential deadliness of the disease. Sonia Perilla, a health journalist with the newspaper *El Tiempo* in Bogotá, Colombia, said that journalists need to find new ways of reporting on the epidemic so that people understand the economic and social impact of the disease. It is the task of the journalists and the broadcasters to make the disease more 'visible'.

Under the supervision of the **Broadcasting Board of Governors** (BBG), the International Broadcasting Bureau (IBB) provides the administrative and engineering support for U.S. government-funded non-military international broadcast services. Broadcast elements include the Voice of America (VOA), Radio Sawa, and Radio and TV Martí (Office of Cuba Broadcasting). In addition, the IBB provides engineering and programme support to Radio Free Europe/Radio Liberty and Radio Free Asia. The IBB was formed in 1994 by the International Broadcasting Act, which also created a nine-member, bipartisan Broadcasting Board of Governors (BBG). The IBB was initially part of the U.S. Information Agency (USIA). When USIA was disbanded in October 1999, the IBB and BBG were established as independent federal government entities. www.ibb.gov



Counting the risks + costs of RoHS and WEEE

Imagine for a moment growing mountains of discarded household appliances, PCs and mobile phones encroaching on formerly green meadows - landfills that spew, leak and release who-knows-what deadly toxins and carcinogens into the environment. If those frightening images accurately portrayed reality, the RoHS (Restriction of Hazardous Substances) and WEEE (Waste Electrical & Electronic Equipment) Directives might well be considered necessary measures for reducing grave risks to public health and the environment. They certainly enjoy broad public support. Yet there is no scientific evidence to substantiate these fears. The assertions made by the EU Parliament (item 7 in the RoHS preamble) that these banned substances' hazards in waste EEE have been scientifically established are not only unsubstantiated but in many cases false.

RoHS initially bans four heavy metals - Lead, Mercury, Cadmium, Hexavalent Chromium, and two brominated flame retardants, "PBB" and "PBDE" - from all electrical/electronic equipment sold in the EU from mid-2006. Also targeted soon for ban are a host of additional substances, including many other halogenated flame retardants. And it won't end there - indeed, literal application of the "Precautionary Principle" might eventually result in banning any technologically useful material, as nearly anything can be shown to cause some sort of health or environmental problem in unfavourable circumstances.

WEEE addresses the disposal issue, requiring manufacturers to arrange for collection and subsequent processing of all equipment being discarded by consumers. (Notably for our industry, disposal of end-of life "professional" equipment may instead be arranged between equipment users and suppliers.) Since the legislation which evolved into WEEE originated from recycling, concerns arose that recycling operations might be impaired by "hazardous" substances in discarded articles. Thus, RoHS is inextricably linked to WEEE.

Not readily apparent about these two measures is how little actual benefit, if any, they would confer. Also unrecognized on the cost side is the serious threat they pose to the vitality of our broadcast industry - just think how much R&D effort will have to be diverted from technology and product innovation to achieve 'compliance'. Many smaller equipment producers will be unable to bear the significant extra burdens of the RoHS and WEEE and will thus be forced out of the EU market (and perhaps Japan), to the great detriment of their customers everywhere. And the significant extra costs for products meeting Directive requirements will also adversely impact our industry's ultimate customers (audiences), thereby affecting the global economy. Consider last December's tsunamis - what fraction of the vast resources required just to convert to no-lead solder (estimated by one expert to be US1 bn dollars) would it have cost to establish a tsunami warning system?

Turning from economic to purely environmental concerns, Brussels' ambition to lead the world on this campaign (so stated in some of the Directives' Procedural documents) is arbitrarily diverting a great amount of time, energy and resources from a host of other environmental and health concerns. Indeed, Greenpeace co-founder Patrick Moore and Bjorn Lomborg (author of "Skeptical Environmentalist") are among the growing number of thoughtful, committed environmentalists who are realizing that their movement

In our age of consumable electronics – thrown away rather than repaired – governments all over the world are putting in place legislation that restricts the use of hazardous substances in electronics. Japan has led the way with a number of countries now following suit such as America, China and in the EU. On 1 July 2006 the EU's Restriction of Hazardous Substances (RoHS) directive comes into effect which will make it illegal to use six substances in the manufacture of electronics, the most problematic of which is the removal of lead from solder. As the electronics industry moves to lead-free manufacture, any product destined for sale in the EU must be RoHS-compliant from July 2006. Here **Will Wohler**, President and Founder, Wohler Technologies, gives his assessment of what this means for the manufacturers.



Fact file Lead usage for electronic solder is less than 0.5% of total lead usage • Both Tin Whisker formation (top left image) over time when using "lead-free" solder and increased rates of solder joint failures raise grave concerns for product reliability • Lead usage for storage batteries, paints, ceramics, chemicals, etc. will continue, unaffected by the new EU restrictions on electronics manufacturing • World reserves of Ag, Bi, In, Sb are far less than reserves of lead and tin • Significantly higher, and escalating costs are inevitable • Lead-free processes increase energy usage tremendously due to prebake requirements and increased soldering temperatures • Waste and scrap are multiplied due to PCB warpage, increased component fall-out (from higher soldering temperatures), and obsolescence of incompatible existing components and 'non-compliant' assemblies • All available scientific evidence and US government reports indicate that the lead used in printed wiring board (PWB) manufacturing and electronic assembly produces no significant environmental or health hazards (including ground water pollution) • Alternative solder-formulations themselves pose toxicity concerns • The variety of "lead-free" alloys is expected to make WEEE metal recovery efforts more difficult.

Source: *The Real Cost of Lead-Free Soldering* by Dr. Laura Turbini, IPC Lead-Free Conference, Denver, Colorado, August 2003, www.ipc.org

has been hijacked by anti-growth ideologues (see www.lomborg.com or www.greenspirit.com/key_issues/).

Lead used in electronics manufacturing is less than one-half percent of annual global use. Even though lead in equipment and appliances may account for as much as half of lead in landfills or incinerated, it's the total amount of lead exposure which matters, not just that portion contributed by EEE. Advocates of a blanket ban on lead offer no scientific evidence of hazards to health or the environment from lead solder already disposed of in landfills. The only relevant study, about risk of lead leaching into groundwater shows no danger of groundwater leaching, even from lead compounds (more chemically-active and water-soluble forms of lead than the elemental form of lead in solder). Also, the "lead-free" alternatives pose other, perhaps quite significant, environmental concerns themselves.

True, the volume of discarded appliances and electronic equipment is significant and growing. And better to deal with potential problems before, rather than after the fact. Avoiding unnecessary mixing of different waste types seems useful in addressing many disposal concerns. Segregating disposal sites by broad category, a relatively low-cost action we could take now, may prove quite helpful as new technology develops the ability to 'digest' these wastes for extraction of economically-useful materials. An intriguing and revolutionary waste treatment possibility for much of the EEE waste targeted by WEEE is explained at www.changingworldtech.com/index.asp.

Ironically, much discarded broadcast equipment seems an unlikely candidate for such processing – much of this equipment's structural materials are metal rather than the plastics used most often in consumer goods. Still, such processing seems promising for the vast bulk of consumer goods, which are the greatest concern.

But protecting the public from unsubstantiated and perhaps non-existent hazards is irrational – and this "protection" throws a stifling regulatory web over economic sectors which in recent decades have provided some of the most impressive gains in prosperity worldwide. Sure, manufacturing technologies can be developed to address any environmental concern, and post-manufacturing infrastructures may similarly be developed. But each comes at a cost, so the benefits of each alternative adopted must exceed its cost. Probably electronics-related industries have developed so well largely because they haven't been burdened with a high level of regulatory interference. It's likely there are many different solutions to these problems, not just the monolithic approach of RoHS and WEEE. Consider also that broadcast equipment has a much longer service life than the typical mobile phone, or even PC. And all this equipment (save perhaps transmitters) is far less bulky than most household appliances.

There is a further aspect to compliance with RoHS. Buried deep within the actual legislation is the requirement for the generation and exchange, to and from the furthest supply chain ends, of massive amounts of documentation on the composition of each part within each piece of equipment. This extreme level of data collection is required to prove compliance with RoHS. A Japanese consortium has been formed to provide, in quintessentially Japanese detail, a most comprehensive data collection and reporting scheme, now being implementing to the furthest reaches of each company's supply chain (see <http://home.jeita.or.jp/eps/greendata/JgpssiOperation-eg-20030722/Manual-eg-20030722.pdf>). Enterprise-level software suppliers are also rising to the occasion, sensing new markets for the auditing programmes necessary to track such exquisite details. The person-hours necessary for this data gathering and reporting are truly staggering.

Looked at from a broad perspective, much of the impetus for these measures stems from an urge to reduce certain environmental and health risks to vanishingly low (and utterly impractical) levels. But are we perhaps ignoring other, greater risks – more real and important problems that are crying out for our attention? Like myself, many in the industry feel that we must educate the public about the facts and openly oppose the folly of these Directives, by petition to the European Parliament, the Japanese Diet, and the U.S. Congress, or otherwise.

Wohler Technologies is a leading manufacturer of audio and video monitoring equipment for the broadcast electronics industry. With a strong focus on in-rack audio and video monitoring, Wohler provides standard or custom solutions for the broadcast industry's audio and video monitoring needs. Wohler's latest innovations include a range of Dolby Audio Monitoring products and a new line of LCD video monitors. Founded in 1983, Wohler is a private company headquartered in South San Francisco, California, USA. www.wohler.com

Wohler Technologies joined the AIB in January 2005.

Harris Corporation recently announced the formation of a new Software Systems business unit within its Broadcast Communications Division. The new business unit brings together the resources of Harris' automation business and Encoda Systems, a global leader in broadcast media software that was acquired by Harris in November 2004. When the AIB's Anver Anderson spoke with Jeremy Wensinger (right), President and General Manager of Harris' BCD, he learnt how the combination will enable Harris to provide total content delivery solutions to existing and emerging broadcast, enterprise and government markets.

A winning combination



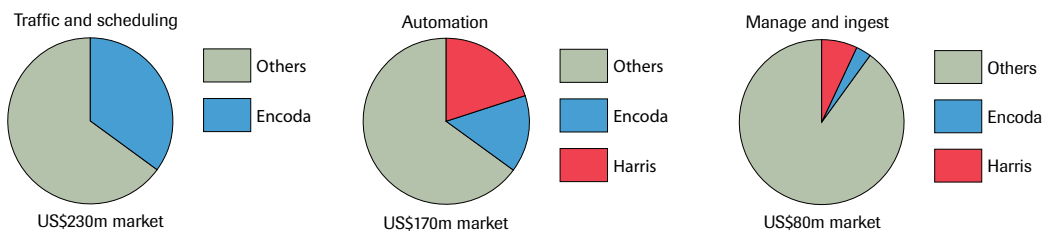
Harris' primary tactics for growth are to maintain the company's global position in radio and television hardware whilst adding networking and end-to-end "back office" software solutions that deliver high value to current and potential users. The main targets are "call letter" broadcasters, cable/MSO and satellite service providers as well as advertising agencies, media rep firms, and enterprises. The new Software Systems business unit will offer modular, standards-based workflow management and service management solutions engineered with open APIs (application protocol interfaces) for maximum ease of integration and future scalability.

The reason why Harris acquired Encoda is clear: Encoda have around a third of the traffic and scheduling market (total market value of some \$230 million). In automation Harris have around 20% and Encoda around 15% of a global \$170 million market and in the management and ingest market, worth around \$80 million globally, Harris have some 10% and Encoda around 5% of the market. This takes the BCD revenue mix from \$287 million to \$411 million and provides greater diversity in the product ranges offered by Harris to the terrestrial and cable & satellite market places.

incorporation of Encoda is going well. "We've been able to put together a full end-to-end solution for our customers, with viable upgrade paths and open access platforms to maximise our market reach. In addition - and vitally importantly - we have been able to establish an organisational structure which supports sales, marketing and customer service globally."

The new Software Systems business unit expands Harris BCD's organisational structure and will be key to extending the position Harris already enjoys in broadcast transmission hardware to emerging software areas. Software Systems becomes the fifth business unit of Harris Broadcast Communications, joining Radio Broadcast Systems, Television Broadcast Systems, Networking and Government Solutions, and Broadcast Systems Europe (which develops European-standard transmission products). With the significantly expanded capabilities of the new Software Systems business unit, Harris will be able to offer end-to-end content delivery solutions across the distinct phases of content creation, distribution and transmission.

Global broadcast software market



John Sorensen, former CEO of Encoda Systems who previously held positions with Unisys and Hewlett-Packard, has been named President of the new Software Systems business unit. Sorensen joined Encoda Systems in 1987 as the principal designer and developer of

According to Jeremy Wensinger, who was appointed President of Harris Broadcast Communications Division in May 2004 and previously headed Harris Technical Services Corporation, the new unit represents the next chapter in Harris' mission to deliver systems that drive customer business results. In his words, "the inception of the new Software Systems business unit - and the open, standards-based solutions it offers - represent an important proactive position for Harris in customising solutions that increase functionality, productivity and revenue."

Seventy-five days (of a planned 100 day integration period) into the acquisition Wensinger is confident that the

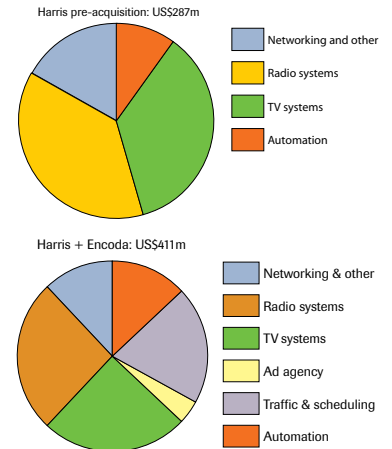
company's industry-leading traffic management and billing software systems for the cable/MSO market. "It is evident that Harris is expanding from a hardware-focused, transmission system provider to a provider of integrated workflow solutions that are applicable to broadband, advertising, digital asset management, automation and 'back office' technology," Sorensen said. "With Harris' solutions set, we can facilitate the flow of content from its inception through delivery. The progress we're making today continues to strengthen the breadth and depth of the solutions we're bringing to market - and further positions Harris to capitalise on this evolving opportunity for comprehensive and nonproprietary next-generation automation and traffic platforms."



The collaboration certainly seems to put Harris in a position where it can speed up the research aspect for Encoda's development work – and speed to market is everything in the fast moving area of international broadcasting. Product names will remain in place in order to ease customers' recognition and concerns about the changes, although the Encoda name will disappear to be replaced with Harris.

Harris is emerging as a "real" end-to-end service provider for terrestrial, cable and satellite markets as has been evidenced by their involvement in projects as diverse as the Iraqi Media Network and the TV Jamaica integrated networking platform, utilising the NetVX high-speed networking platform and TRuepoint, Harris' next-generation microwave radio which is an ideal solution for the smaller or developing regional broadcaster. With a presence in 150 countries and a strong financial position, the foundation for long-term growth is in place.

BCD revenue mix



Harris Broadcast Communications Division is one of four divisions within Harris Corporation, an international communications equipment company focused on providing assured communications services for government and commercial customers in more than 150 countries. One of the world's leading suppliers of broadcast technology, Harris Broadcast Communications Division offers a full range of solutions that support the digital delivery, automation and management of audio, video and data.
www.broadcast.harris.com

Harris is an AIB Gold Member.



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- Turkmen
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- Uzbek

Chipping away at the digital short wave market



The brand name 'RadioScape' is practically synonymous with digital radio – many of the digital radios in the shops today are built around the various RadioScape core modules. Now the company is eyeing the digital short wave market – Anver Anderson has the details.

With around £25m of venture capital invested in 1997, RadioScape's initial endeavours to produce broadcasting equipment laid the foundation for its current position as the largest DAB broadcast technology supplier in the world – around 40% market share. Much of this is due to its involvement in the supply of the commercial network throughout the UK operated by NTL. One of the prime drivers for RadioScape's present success was its development of a test receiver – a first step in rolling out any broadcast system. Texas Instruments asked RadioScape to develop software for one of their digital signal processors, to produce a DAB chip. Having designed individual digital radios for several companies, RadioScape decided to develop a core module, around which radio manufacturers can develop their own receivers simply by adding an aerial, power supplier, amplifier and a display unit. This completely transformed the market dynamic for the digital radio market – from only two models available 18 months ago to around 200 models today. This business model of providing a core module has been successful with many of today's digital radios using the RadioScape module as core component. "This is how to get radios onto the shelves in the stores," says Nigel Oakley, RadioScape's VP Marketing.

RadioScape has now turned its attention to the digital short wave market. Digital Radio Mondiale (DRM) has become a hot topic with broadcasters who were about to turn off their (analogue) broadcasts over short wave, medium wave and long wave due to rapidly dwindling listening audiences who prefer the better audio quality of FM. The attraction of DRM is that it offers audio quality similar to FM by using digital technologies over long distances. There is always a chicken-and-egg situation with the launch of any new technology: *Who will provide the content when there are few listeners due to lack of available receiving equipment?* and *Who will buy high value receivers when there is little content to be received?* With over 70 companies around the world already broadcasting DRM, including RTL, Deutsche Welle, Voice of America, Vatican Radio and BBC World Service, the race for DRM is now starting.

Like its analogue predecessor, one DRM transmitter easily covers an entire continent and reaches across oceans to other regions. Europe's biggest commercial broadcaster, RTL Group, plans to use DRM for new country-wide stations for France and Germany and also offer a service targeting the UK under the re-launched and

legendary "Radio Luxembourg" brand. Existing regulations and lack of spectrum availability in FM preclude the creation of such services but, because DRM can re-use existing AM spectrum allocations, these issues can be sidestepped.

DRM offers the combination of broadcast range and improved audio quality whilst DAB is capable of delivering much higher data rates, but requires transmitters to be located roughly 40 miles apart. DAB's higher data rates enable the delivery of many innovative services such as images, broadcast web sites and associated data services. For regional and "highly differentiated" programming DAB is a great choice. Of course, DAB also has infrastructure and services in place in many countries, accelerating return on investment. Digital Multimedia Broadcasting (DMB) is another prime example of the use of the additional data capacity available over a DAB network and provides a robust transport mechanism for video to a mobile device. Korea in particular is pioneering the implementation of this technology, rolling out services in 2005, with China planning to follow suit. Trials are also planned for Europe.

The DRM and DAB standards each have their place and can happily co-exist. Listeners benefit from more content and a differentiated listening experience. At present, however, DRM receivers are currently few and far between and very expensive – essentially at the same stage that DAB receivers were several years ago. Fortunately, as DAB and DRM share many similar characteristics, it is entirely possible to add DRM capability to DAB receivers without too much additional cost, especially using a software-defined radio approach.

Reasoning that the majority of customers would not buy a "single technology" radio receiver – RadioScape has dared to imagine a situation where the world has multi-standard digital radios that can receive DRM, DAB in both Band III and L-band, RDS, FM, AM, LW and MW. RadioScape's new module – available towards the end of 2005 – will provide this multi-standard heart for all future radios. This is a significant step forward in future radio receiver supply and deserves to become the norm. No longer will listeners have to remember on which frequency or technology stations are broadcasting. Instead, the receivers will display the station name so that consumers select by content – the transport technology becomes transparent. The calculation balances: DRM + DAB + Band III + L-band + RDS + FM + AM + LW + MW = Market Entry for DRM + development of DAB.

RadioScape is one of the world leaders in software defined solutions for digital radio applications. In partnership with Texas Instruments it creates digital radio chips for consumer products, and designs its own family of DAB/FM modules. RadioScape is headquartered in London with offices in Singapore, Japan and Hong Kong.
www.radioscape.com

American spoken here

Deutsche Welle Radio, one of the “big five” of international broadcasting, is also targeting the US market. Here **Uta Thofern**, DW-RADIO’s Editor-in-Chief (English and German programmes/EU projects) gives the background to the station’s on-going expansion of prime-time radio news.



“Newslink Plus”, first introduced in April 2004, is the first new hour-long daily current affairs and features magazine aimed at the US market in a decade. The programme concept itself had been tried and tested. Deutsche Welle Radio had expanded its news and feature broadcasts in English to 24/7 a year previously. An already established keystone of the new programme structure was “Newslink”, a 30-minute news and current affairs block aired hourly, world-wide, with special regionalised editions prepared specifically for audiences in Asia, Africa and Europe. From there, it was a logical extension to begin offering a genuinely European perspective on topical events to an American audience looking for an alternative information source. The sophisticated US market demands not only the latest in modern technology (one reason why Deutsche Welle Radio no longer broadcasts to North America via short wave) but also requires modern programme formats.

By expanding the block to one hour and tailoring its production to fit the needs of NPR stations, “Newslink Plus” was created. One novel aspect of the programme’s production is that each of the hour’s 30-minute segments is presented as a stand-alone package, so rebroadcasters can either air only the current affairs-oriented first half or the feature-story second half-hour, in order to better fit their programme formats.

During the run-up to the Iraq war, with growing US interest in foreign points of view, “Newslink Plus” offered an independent and uniquely European perspective on world opinion and reactions. Today, “Newslink Plus” provides news, background information and international comment on a broad range of topics



Uta Thofern

Newslink Plus presenters John Doyle and Rick Demarest



Deutsche Welle is Germany’s international broadcaster with DW-TV, DW-RADIO and DW-WORLD.DE. Publicly funded, it is one of the five largest international broadcasting services in the world - more than 1,400 broadcast professionals from over 60 nations staff its radio, TV and internet divisions. DW offers news and cultural highlights from all over the world with a European and German perspective. DW-RADIO broadcasts in German, English and 28 other languages (including Amharic, Urdu, Bengali and Ukrainian). Reception is direct-to-home via short wave, satellite or cable, or local stations operated by rebroadcasting partners. DW-TV broadcasts its 24-hour information programme in German and English from studios in Berlin. There are also regional programme slots in Arabic, Dari and Pashto. www.dw-world.de

reflecting transatlantic interests. Broadcast live from Deutsche Welle’s state-of-the-art studios in Bonn, Germany, its primary purpose is to provide an alternative information source for public radio broadcasters desiring access to an additional global network of experienced, multi-lingual foreign correspondents.

“Newslink Plus” is transmitted in the US via satellite by Chicago-based distributor WFMT Networks at 9:00 pm EDT Monday through Friday. NPR stations have the option of airing “Newslink Plus” live or time shifting it for later broadcast. The programme includes a news window, so rebroadcasters have the choice of beginning the hour with either a live NPR or Deutsche Welle Radio newscast.

The reason for producing an international current affairs broadcast for the US is simple. American public radio listeners, an intellectually discerning and highly educated audience, have expressed a desire for a wider variety of viewpoints from around the globe. All over the world, local media naturally tend to cover events from a national perspective, particularly during times of crisis. And the more important international relations become, the more valuable it is to have additional sources of news and opinion. Also, with the expansion of the European Union and its currency, the euro, Europe is becoming an increasingly important world player, alongside the United States.

As the largest international broadcaster in central Europe, Deutsche Welle Radio is well placed to report on and from this dynamic continent. Our staff, recruited from every corner of the globe, have unique knowledge and expertise in more than 30 languages to offer our listeners insights into the world-wide impact of matters ranging from terrorism to tsunamis, from opera to World Cup soccer. Deutsche Welle’s Director General Erik Bettermann makes the point: “As world events have recently clearly demonstrated, it is vitally important that people of various nations and cultures be given the opportunity to understand the differing standpoints of other countries in order to ensure the continuation of constructive dialogue.”

The American audiences now have that opportunity of gaining a new perspective on world events - by listening to what on-the-scene correspondents are reporting on a network that is far removed from both Wall Street and the Washington beltway. Deutsche Welle’s “Newslink Plus” editors, reporters and hosts have direct access to all international news resources, speak the local languages and deliver professional radio programming presented, for the most part, even in American-accented English.



Airwaves of compassion

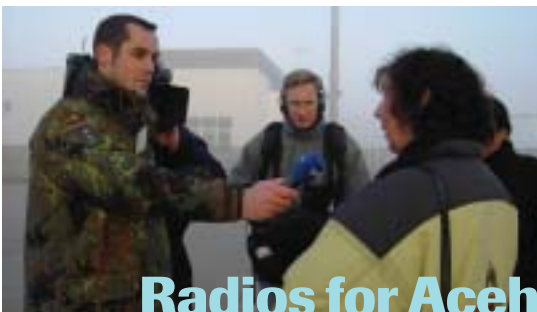
"It was a quake that literally rocked the world," observed VOA Asia correspondent Kate Pound Dawson. "Geologists say the planet actually wobbled on its axis. And it has become the first global natural disaster in modern times, spanning a dozen countries, two continents and an entire ocean." International broadcasters rushed to cover a cataclysm that claimed more than 220,000 lives, left tens of thousands missing or injured, and millions without shelter.

Media specialist David Carr of the *New York Times* noted that video compression images, fed by digital cameras linked to satellite and videophones, as well as laptops with uplink capabilities, enabled people all over the world to see the deadly aftermath of the tsunami just hours after it struck. "Real time video footage taken by tourists of the tidal wave striking the shores on or near the beaches in Thailand," Carr added, "began showing up on network broadcasts" almost immediately. Everyone wanted to get pictures out dramatising the magnitude of the disaster. There was a compelling humanitarian need to help the victims and locate the missing.

A BBC World Service announcement observed that the December 26 tsunami prompted one of that network's largest

newsgathering efforts ever, with correspondents deployed on an unprecedented scale: "It is probably the biggest story since 9/11, because of the huge area affected, parts of which were inaccessible." Within hours, VOA's central newsroom was taking in correspondent and stringer reports from Indonesia, Thailand, India, and Kenya. In the first twenty-four hours, correspondents provided a steady stream of news updates and enlisted science editors to explain the history of quakes and tsunamis, the potential economic consequences of the disaster, and early relief efforts.

Indonesia was hardest hit by the tsunami, and suffered the greatest losses. The Indonesian Services of the BBC World Service and VOA immediately broadcast on-scene accounts from the devastated northern Sumatran province of Aceh. VOA Jakarta bureau chief Nancy-Amelia Collins and Indonesian Service stringer Budi Nahaba arrived there hours after the disaster and immediately filed interviews for both radio and television with survivors, relief officials and a spokesman for Indonesian President Yudoyono. Shortly after the tidal waves inundated northern Sumatra, Menuk Suwondo, head of the BBC Indonesian Service in London, received a message from a reporter at one of the BBC's partner stations in Banda Aceh



Radios for Aceh

DW is helping rebuild radio stations in Indonesia, report Sybille Golte and Renata Permadi of DW-RADIO's Indonesian service

Channel | 46

Jauhari, a reporter at DW's partner station Radio Nikoya in Banda Aceh, began the day like many other days before. It was a Sunday, a holiday – people headed to the beach or for a stroll through town. Then the tsunami hit, reaching all the way to the centre of the provincial capital. Today, Jauhari's station no longer exists. Situated in the middle of town, Radio Nikoya was once surrounded by buildings. Today, Jauhari can see all the way to the now tranquil sea. Nothing was left standing.

Twelve journalists used to report from Banda Aceh for Radio Nikoya. Five of them are still missing. The events traumatised Jauhari, but he already has plans for the future. "We're hoping for help from Germany so that life can get back to normal again in Banda Aceh." Banda Aceh once had ten private radio stations and housed the broadcasting centre of the state Radio Republic Indonesia. For many years, DW has cooperated with a number of rebroadcasters, small FM stations, in Aceh. Most of them, eight in total in the cities of Banda Aceh and Meulaboh, were apparently victims of the tsunami. Studios were swept away by the waves, radio masts were snapped in two like matchsticks. There is still no sign of many small stations in the crisis region.

The question is though: even when Radio Nikoya recommences transmission, who will be listening? Most of the survivors of the catastrophe lost everything they owned; they have no

Alan Heil reports how international broadcasters covered the Indian Ocean tsunami, helped encourage relief donations and assisted electronic media in the region devastated during the tragedy



which said: "I am alive, but the rest of the team are missing."

The Asia-Pacific Broadcasting Union immediately mobilised, along with member stations, to assist affiliated radios destroyed or temporarily knocked off the air by the tsunami. The European Broadcasting Union asked its members to contact the ABU directly to see what assistance they could offer. The ABU joined several international broadcasters in listing websites of relief organisations

appealing for donations. Several listed contact points in ministries around the Indian Ocean area where information was available about missing people. Radio Australia quickly moved to an all-news format and Commercial Radio Australia led a mission to restore broadcast operations throughout the region, contributing some 50,000 AM/FM radios to affected areas.

Radio Netherlands Indonesian Service head Indra Titus said: "We want to help get radio stations back on the air, because radio is a very important means of communication in the stricken areas. As help begins to flow, communications must be restored to assist in the search for family members and make information accessible. Even under normal circumstances, radio in Indonesia is a vital means of communications that people cannot be without." Radio Netherlands also appealed to its 6,000 partner stations around the world to collect money and equipment.

Leading edge technologies spurred unprecedented instantaneous coordination among international broadcasters and non-governmental organisations. Jonathan Marks of Critical Distance BV, the Netherlands, and Andy Sennitt, international media specialist

at Radio Netherlands, worked together to employ relatively new and speedy *wiki* technology as a global electronic bulletin board on tsunami relief. *Wikiwiki*, a Hawaiian term, means "quickly". Marks, Sennitt, Michael Hedges of Switzerland and Ton Zijlstra of the Netherlands have demonstrated that a collaborative *wiki* website (www.tsunamihelp.info/wiki/index/phpBroadcasters) can reap huge benefits. In Marks' words, "it can be up in an hour to exchange information among international broadcasters and NGOs on catastrophes."

This technology is extremely helpful over time. News of the Indian Ocean tsunami is disappearing from the headlines in both electronic and print media yet reconstruction aid and post trauma counselling remain indispensable. The key long-range coordinator of sustained assistance to media in the region is Sharad Sadhu of the ABU (www.abu.org.my). The ABU so far has:

- Arranged for the initial shipment by its members of 20,000 radio sets for tsunami survivors to the capital cities of Indonesia, Sri Lanka and the Maldives, with assured clearances through customs.
- Appealed for donations of low power radio and TV transmitters, emergency studio equipment, portable production equipment and volunteer engineers to help tsunami-devastated stations recover.
- Arranged an exchange among ABU members of educational and documentary programmes about earthquakes and tsunamis on a rights-free basis. These specials will be offered on the ABU website.
- Organised an emergency workshop sponsored by NHK Japan in Tokyo and the ABU from 28 February to 2 March to examine how broadcasters can relay early warnings to reduce casualties in future natural disasters.

One of the most remarkable stories of tangible aid came from Internews Indonesia. As of January 12, the only radio station back on the air in tsunami-ravaged Banda Aceh was using a "suitcase" transmitter, tape recorders and computer equipment supplied by the California-based firm. A second suitcase radio station was planned for Meulaboh, southwest of that provincial capital. Internews also was establishing smaller radio stations in displaced persons camps in Aceh where more than 400,000 people are resettled for an estimated one to two years. "We have our own infrastructure out here," an Internews announcement said, "but will be looking for volunteer broadcasters and broadcast engineers paying their own way to come in for short stints to help meet this enormous challenge."

Alan Heil, former deputy director of VOA, is a regular contributor to The Channel and author of *Voice of America: A History* (Columbia University Press, 2003)

electricity and their radios are gone. Aceh lacks not only food, medicine and blankets; in the regions most critically affected, the breakdown of communications has cut the population off from the outside world making it practically impossible to get reliable information. The traumatised flood victims are not aware of the extent of the catastrophe that has engulfed them; they do not know what aid measures are already on their way or who to turn to. They are also lacking the necessary information that can protect them from disease and epidemics. Deutsche Welle therefore plans to distribute radios in Banda Aceh and the rest of the crisis region and to help with the reconstruction of partner stations – the first DW project is Radio Nikoya. A partner station from Jakarta has already sent out an investigative team to ascertain firsthand how to get at least one or two stations up and running as quickly as possible. By restoring a working information network, DW hopes to give the victims of the catastrophe in Indonesia at least some hope for improving their situation. At the same time, seminars are being planned to support the democratisation process in the war-torn province of Aceh.

Before the tsunami, Aceh was in a state of emergency. Foreign reporters were refused entry visas and national media were censored. Now, peace negotiations have recommenced in Aceh. If successful, local media observation is urgently needed to inform the population – which has lived through a decades-long civil war – with objective reporting about the peace process and to allow them to take part in the widespread Indonesian call-in programmes. For these reasons, the demolished radio stations must be rebuilt as quickly as possible – not only in Banda Aceh, but also in other regions of the province. The next goal in DW's rebuilding project is the city of Meulaboh on the west coast of Banda Aceh.

The mountain kingdom of Bhutan is one of the few unspoiled places on earth – a land of soaring snowcapped peaks, alpine meadows and densely forested hills and ravines abounding in exotic flora and fauna. Though known as Bhutan to the outside world, to the Bhutanese, the country is known as Druk Yul, 'land of the thunder dragon'. Wilfried Solbach of the Asia-Pacific Institute for Broadcasting Development visited the country on the "roof of the world" during a two week mission.

In the land of the thunder dragon



Bhutan is a mountainous country the size of Switzerland situated in the Himalayas and sandwiched between India and China. It is the only kingdom in the world which has Mahayana Buddhism as its state religion. The majority of the population (around one million) speak Tibetan and Nepali languages, while the national language is Dzongkha. The capital of Bhutan is Thimphu. The economy, one of the world's smallest and least developed, is based on agriculture and forestry, which provide the main livelihood for more than 90% of the population. Agriculture consists largely of subsistence farming and animal husbandry. Rugged mountains dominate the terrain and make the building of roads and other infrastructure difficult and expensive. The government in its cautious expansion of the tourist sector encourages visits by the environmentally aware.



Radio broadcasting was started in 1977 by a group of young volunteers – with a 30-minute mix of music and news broadcast on Sundays. The station called itself NYAB (National Youth Association of Bhutan). Six years later it was integrated into the Ministry of Information. In 1986 the name was changed to Bhutan Broadcasting Service and a daily three hour long programme was launched. In 1991 a 50kw short wave transmitter was purchased and a permanent studio and office building next to the Ministry of Information was inaugurated. In 1999 the national television service was launched by BBS to commemorate the Silver Jubilee of the reign of His Majesty the King of Bhutan.



Today, radio broadcasts are on the air from 0700 to 1900 daily. In these ten hours BBS Radio broadcasts in four national languages – in Dzongkha, Sharchop, Lhotsam and English. For a detailed programme schedule see www.bbs.com.bt/Telschedule.htm. From 1900 to 2200 the soundtrack of TV news and other programmes is also broadcast via radio to the rural population which at the moment is still unable to receive the TV signal – BBS plays an important role as a communication link between the urban areas and the rural communities. BBS changed its transmitting policy for radio in 1999. So by the end of 2006 the whole country will be served by FM transmitters and the short wave transmitter will be phased out. When the TV service started in 1999 it did so without a proper preparatory phase and consequently TV drew upon radio personnel to produce the TV programmes. This shortage of staff is still felt today and radio producers work in TV and vice versa. A considerable number of new staff, going hand in hand with an upgrading in TV production skills, is needed to cope with the planned extension to six hours of broadcasting over the next few years. A TV programme schedule can be found under <http://www.bbs.com.bt/TVSchedule.htm>.



In December 2004, BBS increased its TV airtime to four hours: from 1800 to 2000, the station broadcasts news and programmes in the national language Dzongkha; from 2000 to 2100 the broadcasts are in English; and from 2100 to 2200 in Dzongkha. Apart from the daily new bulletins, BBS devotes 75% of its programming to development issues such as rural development, youth, women and child care, IT, new farming methods, health and hygiene, environment preservation and distance education. A new TV broadcasting centre will be built this year with the help of the Indian government. At the moment TV still uses one studio in the radio building. Initially, the television service was available only to the residents of Thimphu but it is being extended to cover the whole country. This extension of coverage and the further extension of air time to six hours is especially important when considering the impact of 45 foreign TV stations being transmitted in Bhutan via cable and satellite. Cable operators started transmitting in 1999 and there are now more than 30 cable operators in Bhutan and coverage of the capital is around 80%. Most popular with Bhutanese viewers are Indian soap operas. The 'Media Impact Study 2003' commissioned by the Ministry of Information is slightly pessimistic about the cultural impact of these 45 foreign TV stations: "The survey confirms the viewing habits of most people in Bhutan whose favourite channels are the Star, Zee and Sony packages broadcasting from India. It supports the popularity of Indian films and TV serials which reflects the lives of the middle class. An implication of this is that the influence of an urban class can become dominant and there is little that reflects the views and lives of rural or poor people. Bhutanese viewers will become more exposed to, and familiar with, the lives of people from middle class society – mostly from India. Bhutanese TV viewers generally believe that the TV programmes reflect the values of rich, urban people. This means that Bhutanese society could potentially assimilate with urban lifestyles more quickly." The full text of the – highly recommendable – Media Impact Study can be found under www.dit.gov.bt/bips/documents/documents.htm.

Siok Sian Pek who led the 2003 Media Impact Study recently remarked in an interview with Kuensel, the only English language newspaper in Bhutan: "With the introduction of global television Bhutanese found themselves with a choice of up to 45 channels. This chaotic and unregulated introduction of cable TV is not unlike the experience in South Asia and other developing countries but the impact will be far greater in Bhutan, a small and vulnerable society with limited resources and difficult terrain."

The **Asia-Pacific Institute for Broadcasting Development (AIBD)** is a regional inter-governmental organisation servicing countries of the United Nations Economic and Social Commission for Asia and the Pacific (UN-ESCAP) in the field of electronic media development. Hosted by the Government of Malaysia, the AIBD's mandate is to achieve a vibrant media environment in the region – by mobilising the intellectual and technological resources available within the national broadcasting organisations as well as regional and international bodies. www.aibd.org.my

Comprehensive details of the world's broadcasters – including the Bhutan Broadcasting Service – are available in the *AIB Directory of Global Broadcasting*. Published twice every year, the *AIB Directory* is an invaluable resource for everyone involved in electronic media. Order online at www.aib.org.uk, or by phone: +44 (0) 20 8297 3993

India is one of the most promising broadcasting nations today. Sound broadcasting started in the country in 1927 through the proliferation of private radio “clubs” and All India Radio began operations in 1936 as a government organisation to inform, educate and entertain. Over the last five years, growth in the industry has been meteoric – but no less chaotic. Outsiders sometimes have difficulty in making sense of the various developments affecting radio and TV, such as DTH, FDI and CAS. In print and television, the Indian media industry has leapfrogged but radio has been left behind, remaining in government hands. Only recently with the establishment of private FM stations is radio beginning to catch up. Anmol Saxena, the AIB’s representative for South Asia, takes a closer look.

Looked at from any angle - content, marketing or advertising - the growth of the Indian broadcasting industry is truly staggering. The figures alone are impressive: over 90% of the one billion plus population is covered by terrestrial broadcasting; cable and satellite coverage accounts for over 60%. Together, cable and terrestrial reach out to over 100 million TV homes. The viewing population - over 500 million - has nearly 100 television channels to choose from.

The previous governments have been extremely enthusiastic in their efforts to develop the media industry but there appears to be reluctance to lift all the controls, particularly in radio. While television broadcasters have not seriously suffered from the regulations that were imposed, international radio news broadcasters are finding the going tough.

Take radio news, which is still completely under government control through its broadcasting organ Prasar Bharati. It might sound absurd but it is true that while you can view BBC television news in India you might find it difficult to tune in to BBC radio. The reason: the government is wary of giving space in the radio segment to a credible international broadcaster like the BBC. In any transition to a less regimented regime the process is slow. In the case of radio it seems painful as well. One of the reasons is that while radio is trying to throw off the shackles of government control, it remains the last bastion of the government’s propaganda machine.

When India attained Independence in 1947, All India Radio had a network of six stations and a complement of 18 transmitters. The coverage was 2.5% of the area and just 11% of the population. Post-Independence, rapid expansion of the network took place and AIR was seen as the key instrument for national development in a largely illiterate country. As elsewhere in the developing world, Indian leaders found it difficult to relinquish political control over broadcasting, the most potent instrument of mass persuasion and propaganda. Yet in 1948, India’s first Prime Minister, Jawaharlal Nehru, told the constituent assembly which

was drafting India’s constitution, ‘my own view of the set-up for broadcasting is that we should approximate as far as possible to the British model, the BBC; that is to say, it would be better if we had a semi-autonomous corporation. Now I think that is not immediately feasible’. (Chatterjee, 1991: 182)

The public broadcasting monopoly became little more than a propaganda service for successive governments, a tool to highlight achievements. This was particularly noticeable in the period from 1975 to 1977, when the then Prime Minister Indira Gandhi

was to educate, inform and create a feeling of national identity and help maintain national unity. Doordarshan followed the AIR broadcasting code which prohibited, among other things, criticism of friendly countries, attacks on religion or communities, incitement to violence, or material affecting the integrity of the nation.

The commercialisation of the electronic media was given a boost as globalisation hit India, bringing about the transformation of Indian television in the early 1990s. The pioneering efforts of ZEE which in the early nineties had got control over both distribution and content were in many ways responsible for other major players like Star and Sony entering the market. The private broadcast boom was accelerated by the combined impact of new communication technologies and the opening up of global markets. Economic liberalisation, deregulation and privatisation contributed to the expansion of Indian media corporations, facilitated by joint ventures with international media conglomerates. Such developments revolutionised broadcasting in what used to be a heavily protected media market, certainly the most regulated among the world’s democracies. Gradual deregulation and privatisation of television has transformed the media landscape, evident in the exponential growth

in the number of television channels - from Doordarshan as the sole state-controlled channel in 1991 to more than 70 in 2000.

The control regulations in the broadcasting industry have led to a bitter dispute over the CAS - conditional access system. In spite of the CAS Bill being passed by parliament the previous government was caught between power lobbies of private operators. The government entered into the debate of how much the consumer should pay for cable - it soon realised that it would have to face the wrath of the viewer who also has a political voice. There are still some disputes over direct-to-home where some private operators have the early mover advantage while others don’t. But increasingly there is a realisation that the government would only regulate and create broad norms for free market forces to operate.



called a state of emergency in a deepening political and economic crisis and suspended many civil liberties. This was a time when broadcasts from the BBC scored because of their independent India coverage. Like other public sector departments, broadcasting in India was over-bureaucratised and its performance was dull. How far it succeeded in serving any developmental purposes is also open to debate.

The introduction of television in 1959 as a pilot UNESCO-sponsored educational project reflected the initial attitude to the medium as an educational tool and a means for disseminating state policies and public information. The state television channel, Doordarshan, was part of AIR until 1976, when it became a separate department under the Information and Broadcasting Ministry. The aim of the national broadcaster

Now 'decontrol' has become the new buzz word. The Information and Broadcasting Ministry is in the process of finalising Phase II of the proposed policy. The recommendations from TRAI (Telecom Regulatory Authority of India) and a special committee set up by an industry body called Radio Broadcasting Policy Committee are being studied before a final policy framework goes to the cabinet for approval. Information and Broadcasting Minister Jaipal Reddy is hopeful that the FM radio policy will usher in a radio revolution throughout the country. He has announced plans to set up 70 new FM radio stations during the 10th Five-Year Plan, which runs till 2007; in addition, 150 low-powered FM transmitters are also being planned for areas not currently covered, subject to approval and availability of resources. The existing policy has failed to achieve good growth – out of the 108 frequency bids only 21 stations are operating, and most of them are in the red. The FM band covers only 30% of the population. Now there has been a definite shift in the way the policy is being guided; whereas earlier the focus was on revenue generation it has now shifted to maximisation of coverage. There is a feeling that this approach would be more industry-friendly in the FM band which has opened up.

The AM band continues to be with AIR, the national broadcaster, which operates a network of over 200 broadcasting centres, covering 24 languages and 146 dialects in its home service and 27 languages in its external services. The government is also trying to open up this area by allowing AIR facilities to be used by international broadcasters. Such a proposal is pending for clearance by the ministry. Prasar Bharati's CEO



K .S. Sarma is trying hard to manage the inevitable contradiction of his corporation being a public broadcaster on the one hand and at the same time ensuring that there is adequate revenue. Some of his moves have succeeded but it will be some time before Prasar Bharati becomes totally self-reliant and not dependent on government funding.

As for television, sooner or later the TV market will get even more cluttered which will eventually lead to consolidation. Against the background of channel proliferation, rising programme costs (sports and movies, in particular), the increased commoditisation of content and greater competition between platforms (which DTH and broadband TV promise), there will be growing consolidation in the channel space with only the strongest surviving in a fragmented universe. At present, channels depend largely on advertising revenue. This needs to change, and once channels start generating substantial revenue from distribution real niche content will get wider exposure. DTH is a welcome introduction and Dish TV and DD Direct are already there to grab the market share as they have the first mover advantage. Star is also readying to launch its platform along with Tata and at this time fighting a business battle to protect its content driving someone else's platform. And, rather crucially, advertising revenue for television is growing at a good rate.

India might not be one of the most organised media markets but it is definitely one of the most promising markets for new technologies and new content creators and distributors. In my view, it will not be long before the government will find its way among interested lobbies to create the right policy framework which will fuel even faster growth.

India's public service broadcaster, the **Prasar Bharati Corporation**, was established as a statutory autonomous body in 1997. The objective of public service broadcasting is to be achieved through All India Radio (www.allindiaradio.org) and Doordarshan's television channels (www.ddindia.com) which previously were independent media units under the Ministry of Information and Broadcasting (www.mib.nic.in). Currently, Prasar Bharati CEO K.S.Sarma is planning to take his television and radio channels to the vast Indian Diaspora, in an ambitious bid to deliver 13 television and 12 radio channels in national and regional languages through local carriers worldwide. Mr Sarma will be talking at the AIB Global Media Business Conference in Montreal, Canada, 6-7 June 2005.

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It is generally acknowledged that the mandate of public service broadcasting is to provide information, education and entertainment and to promote democratic values, equality, liberty and dignity of individuals. Furthermore, PSB should give the public 'what we think they need and what they want, but few

actually know what they want and even fewer know what they need'. This statement appears to fit the Algerian broadcasting scene. In Algeria, information and communication policies are regulated by decrees and information bills. The last 1990 information law brought more press freedom than previously allowed but media professionals still consider it an authoritarian code. Although the 1990s bill paved the way for media pluralism of the press, the electronic media has remained in public hands. Over the last fifteen years the situation has not dramatically changed and today the state monopoly is still fully and completely exercised.

RTA reshuffled Prior to the reshuffle of 1986, the electronic media was operated by the Algerian Radio and Television (Radio Télévision Algérienne), inherited in 1962 from the ORTF (French Radio and TV) during the colonisation period. The ART was restructured to form four public enterprises: the national radio enterprise (ENRS), the National TV enterprise (ENTV), the National Audio-Visual Production Enterprise (ENPA), and the National Broadcasting enterprise (ENTD) for carrying and transmitting radio and TV programmes.

Radio, owned and run by the public broadcasting enterprise ENRS, is headquartered in Algiers with 3,000 employees, of which 951 work in local radio stations. Three national radio channels are on air which are organised according to national, local, regional and thematic structures: Channel One broadcasts in Arabic, Channel Two broadcasts in Tamazight (Chawi, Mozabite, Targui, Chenoua and Kabyle languages), and Channel Three broadcasts in French. Koran radio broadcasts religious programmes and Holy Koran verses, Culture radio promotes arts, literature and poetry. In addition, the Continuing Training University (Open University) operates an educational radio station. Algerian Radio also has external services and broadcasts in English and Spanish through Bahja Radio.

Local radio is a new reality in the audiovisual sector. Presently, 28 local radio stations broadcast daily between 4 to 12 hours of programmes on local, cultural, social and political issues. The first local radio stations created in 1991 were Bechar Radio, Mitidja, Ouargla and Laghouat. From 1992 to 2004, 22 radio stations were set up in the main cities: Tamanrest, Tlemcen, Setif, Batna, Oran, Tebessa, Constantine, Adrar, Annaba, Illizi, Tiaret, Tindouf, Naama, Biskra, Ghardaia, Mascara, Msila, Skikda, Mostaganem, Chleff, Sid Bel Abbes, El Bayadh (only Souk Ahras Radio is not launched). Available on FM (57%) and AM (42%), local radios broadcast live (52%) and recorded material (48%) in classical Arabic (62%), dialect Arabic (17%) and Tamazight (20%).

At present, Algeria's national television group operates one national channel called ENTV and two satellite channels – Canal Algérie and Third Channel – with different programme content. ENTV has four regional stations, Constantine, Oran, Ouargla and Bechar. Daily broadcasts cover news, current affairs, sports, films, series, documentaries. News, current affairs (reports, debates), sports, music and documentaries make up 3098 hours of total broadcasting output and are produced by the public broadcaster. Private/commercial producers contribute with 253 hours. Foreign programming made up of soaps, films and documentaries represents 140 hours – it originates



Laid Zaghlami is an experienced journalist who knows the Algerian broadcasting scene inside out – he has contributed as speaker and author to international publications and media events. Currently he works as Associate Professor in the Faculty of Political Sciences and Information at Algiers University and is also involved in training at Algeria’s public service broadcaster. Here he gives an overview of the present state of Algerian broadcasting.

New vision needed

from Egypt, Jordan, Lebanon, Syria, the Gulf states, France, Italy, UK, United States and Canada.

In 1994, Canal Algérie was launched which offers news, culture, sports and entertainment for Algerian communities worldwide. 80% of programmes are in French for Algerian emigrants and the Beur generation (second generation of Algerians born in France). Its popularity with several Arab and African television channels was confirmed by a survey carried out by Kara Consulting for Eutelsat. The Third channel was created in 2001 and covers the Arab world, broadcasting local news, culture, arts and traditions.



Shifting to digital technology In 2000 Algerian radio opted for a gradual process of digitalisation. Six local radio stations are already fully digital. In 2003 new equipment was introduced, such as digital switchers, Studer On-Air 2000 digital consoles, Digimedia workstations and D424 magneto-optical disc

recorders. Algerian television has also embarked on a promising and ambitious digital update. Equipment (studios, outside broadcast vans), editing, transmission and distribution tools; microwaves, digital satellite news gathering are being purchased and computing facilities are introduced to newsrooms and archives. So from a technological point of view public service broadcasting is well prepared, trained and equipped, but problem areas are human resources management and human resistance, and that may delay the process.

In 2003, Algerian television invested 35 billion Algerian Dinars (\$4.5 million) to buy in from and co-produce with local private production companies whose contribution to programme output increased from 1% in 2000 to 4% in 2003 (documentaries, sitcoms, reportage, comedy and quiz). Of the total output, 46% is dedicated to entertainment, 31% to educational programmes and 21% to news and current affairs. In 2004, 35 private sitcom projects were launched. However, the independent producers association with its 40 members is struggling financially due to the high cost of production, post-production and social charges.

Financial support patterns The state subsidises PSB according to codes of obligations. Para-fiscal fees are collected through the electricity bill. Because of its status as an industrial and commercial public enterprise, Algerian broadcasting is allowed and encouraged to engage in advertising, sponsorship and other funding activities. Taking the ENTV budget as an example: in 1997, the state contributed 79 billion AD, 17 billion AD came from publicity and sponsors, and 42 billion AD from other fees. Personnel costs were estimated at 88 billion AD (64% of the total budget), management costs at 24 billion AD, and the purchase of foreign programmes cost 15 billion AD. Significantly, human resources have increased sharply – between 1993 and 2003 there was an increase of 31% (3000 employees in December 2003). ENTV’s budget represents 5.7% of Al Jazeera’s and 3% of French public television’s budget.

Pressures and challenges Algerian PSB faces social, political and cultural pressures. Its monopoly status has prevented the

emergence of an efficient audiovisual sector. It is subject to criticism from political parties, and from civil society for its lack of objectivity and independence. If an independent assessment of credibility and impartiality were to be carried out, the present organisational structure, programme content, quality of news and current affairs, and editorial independence, would rate poorly. One of the present system’s main failures is the lack of competition, and this situation has created a sentiment of deep dissatisfaction. Social and political reality is depicted in such a way that the focus is on personalities and officials rather than on events and issues. Television gives excessive exposure to politicians and other official authorities. The result is that what is reported and portrayed by television is legitimate and what is not reported is therefore not legitimate. News is treated in an official and formal manner that discourages independent and innovative approaches.

Algeria also suffers from the brain drain phenomenon – people are leaving the country at an alarming rate. Technical staff and journalists move to other Arabic satellite radio and television channels: Al Jazeera, Al Arabyia, Abu Dhabi ANN, MBC, Kuwait TV, El Alam (Iran) and EDTV (United Arab Emirates). It seems as though Algerian PSB is just a training centre to provide foreign channels with media professionals. Also, because of poor quality and content of programmes, a zapping culture has taken hold. Foreign channels from France (TF1, France2, France3, M6, TF6 etc.), Middle East (Egyptian Satellite, Syrian TV) and the Gulf States (Al Jazeera, Abu Dhabi, Dubai TV) are popular in Algeria.



Algeria’s PSB monopoly has forced many Algerian managers to invest in France. Berber Television (BRTV) broadcasts from France a wide range of cultural, social and political programmes aimed at the Berber community in Europe and the Maghreeb states. Beur Television is the second Algerian ‘ethnic television station’ based in France, with strong ties to the Mediterranean and programmes on social, cultural and political issues. Algérie Lumières is the newly-born television channel that will broadcast Algerian cultural programmes from Belgium.

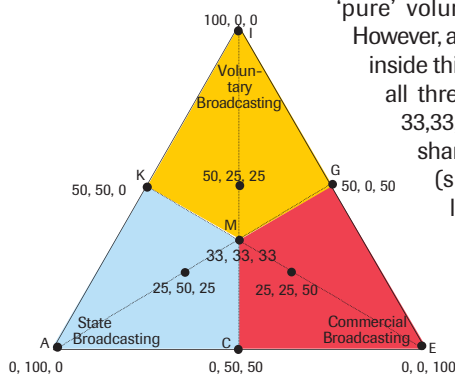
Words of optimism PSB in Algeria still has some way to go to reach maturity. It is poised and committed to improving its governance. Democratic access, human resources training, fairness (in terms of neutrality and accountability), programme content, imports, language, and advertising are key issues that the public service should keep high on its agenda over the next few years if it wants to remain credible and popular. Some words of optimism and comfort came from Algeria’s President Abdelaziz Bouteflika who confirmed during the ASBU meeting in Algiers in December 2004 that a new organisation is planned to strengthen media pluralism and preserve freedom of expression. In the autumn of 2005, Algerian television will launch a Tamazight channel and two other channels targeting sports enthusiasts and young viewers.

Looking into the revenue pots



One essential characteristic of a successful public broadcaster is that it retains a sufficiently large market share to keep the commercial sector honest – some argue that this is one of the reasons why the commercial sector supports the licence fee. Manfred Kops at Cologne's Institute for Broadcasting Economics has embarked on a project comparing revenue structures of broadcasters worldwide

Goods in general – and broadcasting programmes in particular – can be provided by the state (government), the market, and the so-called 'voluntary' (non-governmental non-profit) sector. Thus our study on revenue structures in broadcasting includes market revenues, state revenues, and voluntary revenues. Worldwide, there are hardly any broadcasters that rely only on one type of revenue, be it market revenues (subscriptions from viewers and listeners, or revenues from advertising, sponsoring, merchandising and programme sale), state revenues (taxes or state grants), or voluntary revenues (donations from individuals or institutions in cash or kind). Instead most broadcasters combine elements of each of these 'pure' forms, with their specific advantages and disadvantages. Fig. 1 illustrates this. 'Pure' commercial broadcasters would be located in corner E of the triangle, 'pure' state broadcasters in corner A, and 'pure' voluntary broadcasters in corner I.



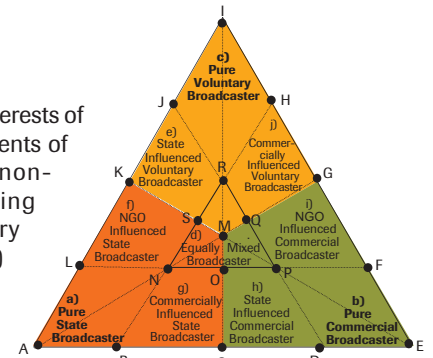
However, all existing broadcasters are located inside this triangle, using a different mix of all three types of revenue. A vector of 33,33,33 for instance describes equal shares for all three types of revenue (such a broadcaster would be located in the middle of the triangle, point M); and a vector of 50,50,0 describes a broadcaster that is 50% financed by voluntary revenues and 50% by state revenues – such a broadcaster would be located in the middle of the triangle's left edge (point K).

Extending the definition of 'pure' to apply to all broadcasters for which one of the three types of revenue dominates (where 'domination' means that it provides 50% or more of the total budget), a broadcaster can be classified as a) 'pure state broadcaster' if the state revenues exceed 50% of the total revenues (in Fig.2 this type is located inside the rhombus ABNL), b) as a 'pure commercial broadcaster' if the market revenues exceed 50% of the total revenues (rhombus EFPD), and c) as a 'pure voluntary broadcaster' if the voluntary revenues exceed 50% of the total revenues (rhombus IJRH).

Apart from the three types of 'pure' broadcasters, seven types of 'mixed' broadcasters are possible. In Fig.1 they are positioned as follows: d) Equally balanced mixed broadcasters (triangle NPR), e) State influenced voluntary broadcasters (JKSR), f) NGO influenced state broadcasters (KLNS), g) Commercially influenced state broadcasters (BCON), h) State influenced commercial broadcasters (CDPO), i) NGO influenced commercial broadcasters (FGQP), and j) Commercially influenced voluntary broadcasters (GHRQ).

Public service broadcasters are mixed broadcasters. In fact, they usually combine voluntary, state, and market elements. With regard

to their mission to serve the interests of the public, they possess elements of the non-profit and non-governmental sector, being supported by voluntary contributions (in cash or kind) of the public. In practice these contributions are seldom sufficient to provide programmes of high quality and a broad range which could compete with the output of private or state broadcasters.



For this reason PSB is usually supported by the state, either directly by taxes or state grants, or indirectly by the state channeling revenue to the broadcasters, in the form of the licence fee, a share of the electricity revenues, or a tax on new radio and TV receiving sets. Broadcasters that are supported directly by the state (like in most African and many East European countries) usually are closely bound by this "golden tie", possibly being as dependent as state broadcasters; broadcasters that are supported only indirectly (like the BBC) are more independent, but they also have to take into account that the state may withdraw or reduce the specific revenue channel.

It depends on the legal framework and on the political culture if this makes the broadcaster an 'NGO-influenced state broadcaster' (in Fig.2 at worst being located in point L) or if it leaves him a 'State influenced voluntary broadcaster' (in Fig.2 at best being located in point J). In addition to direct or indirect support from the state most public service broadcasters try to boost their coffers with market revenues. As long as these revenues do not exceed a certain portion of the overall budget (in Fig.2 we assume 25%) and if there are appropriate incentives to provide a programme which is (sufficiently) independent from political and commercial interests, they can still be classified as public service broadcasters. In Fig.2 this hybrid type is located inside the area that is bordered by the points J, R, N and L.

If countries want to optimise their broadcasting system with regard to the prevailing economic, political, cultural and social situation, they have to compare and evaluate the advantages and disadvantages of the alternative allocation mechanisms. If one looks at the existing broadcasting systems worldwide, a wide spectrum of solutions becomes visible – ranging from countries where state broadcasting still dominates, to countries where PSB is most important, to countries where mainly or nearly exclusively commercial broadcasters exist.

Our study also charts the changes in the revenue structures of selected broadcasters over time. For Germany for instance, the relative importance of revenue from advertisements has decreased since 1999. Accordingly, public broadcasters ARD and ZDF have shifted

PSB around the world

In September 2004 a study by McKinsey examined PSB patterns in 12 western industrialised countries (Australia, Canada, France, Germany, Italy, Japan, Netherlands, New Zealand, Spain, Sweden, UK, US). Among the findings were:

There is no strong evidence to suggest that the quantity of PSB genre output is affected by the level of public funding per head • In every country examined 31-42% of viewing is in PSB genres • On average, English-speaking countries deliver 25% less domestically produced content than non-English speaking countries in peak hours • The study observed three broad intervention approaches to encourage PSB: Minimalist – examples Italy, New Zealand, Portugal, Spain, US; Cultural exception – examples Australia, Canada, France; Broad PSB intervention – examples Germany, Netherlands, Sweden, UK • Funding for PSB remains strong; e.g. funding in the US grew by 7.7% between 1998 and 2003 • There is no evidence that commercial funding is commonly “crowded out” by high levels of public funding. The most statistically significant effect came from GDP, which has a particularly strong effect on the level of advertising funding • During the period of distributing a portion of public funds through grants, Canada and New Zealand have increased domestic production levels • In the US, subscription-funded broadcasting delivers a significant quantity of viewing in PSB genres. The US has one of the highest penetrations of multi-channel television in the world. Subscribers are being migrated to digital platforms, offering hundreds of channels. Overall, 38% of viewing in the US is in PSB genres, 3% above average. This viewing is delivered primarily by subscription-funded thematic channels, rather than the mainstream FTA networks.

Source: Review of Public Service Broadcasting around the world, 2004 www.mckinsey.com

to the left in our diagram. If one takes into account that the licence fee in Germany recently has not been increased by the amount suggested by the independent commission KEF (Kommission zur Ermittlung des Finanzbedarfs), but due to political intervention only by a smaller amount (from 2005 fee is 17,03 Euro per month), there also is a shift downwards in the diagram, towards the state pole. For most other countries the opposite trend can be observed. In the former communist countries of Eastern Europe, but also in China and in other Asian countries the share of market revenues has increased (and the share of state revenues has decreased). Voluntary elements, however, are still weak there, as many institutions of civil society have not yet been established. In the diagram the changes appear as a horizontal shift from left to right, near to the triangle's border line. From a socio-political point of view this is an ambivalent development, praised as a release from the state by some and criticised as commercialisation by others.

The **Institute for Broadcasting Economics** in Cologne, Germany was founded in 1990 and is the only institution of its kind engaging in research into media economics worldwide. An independent research body, it is affiliated to the University of Cologne. www.rundfunk-institut.uni-koeln.de



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A mission that's not always popular



Since the signing of the Amsterdam Protocol in 1997, which provides the anchor for public broadcasting in Europe, many fast-paced changes have occurred, with new technology like the internet blurring the definition of the term 'broadcasting'. Arne Wessberg, Director General of Yleisradio (YLE), Finland's public broadcaster, and President of the European Broadcasting Union, says that PSB still plays a key role in the 21st century

People are not only audiences and consumers. They are citizens, parents, couples, children, managers, workers, pensioners, students. They have national, regional, religious, historical identities which sometimes overlap and sometimes conflict. European public broadcasters have a social and cultural mandate: it is their mission to serve minority and majority alike, in traditional and progressive ways, and with multiple identities in mind. We have to act responsibly in programmes dealing with the many dimensions of cultural identity and cultural life, and provide services that celebrate social diversity but also facilitate social cohesion. Furthermore we provide a forum for public discussion and debate, a platform for cultural sensitivity and social tolerance.

The most important identity in terms of democracy is one's identity as a citizen. Whether one can effectively exercise one's identity as a good citizen depends on the quality and variety of information provided about the whole range of decisions taken in public and civic life. Public service broadcasters play a key role in providing that information – they have an obligation to act responsibly in all news and current affairs programming as an essential service to the public in the exercise of their citizenship. It is a social responsibility.



Each public service broadcaster has a distinctly domestic focus. We serve people at the local level where daily life takes place and the most important personal concerns are rooted. At the same time, the members of the EBU serve Europeans as a cultural and social community. Europe is rich with diversity and quite different when compared with the American context. Public service companies represent the most effective

counterweight to the growing presence and influence of American audio-visual products in Europe.

Public more than a market PSB provides services to a public that is more than a market. Commercial media are required to pursue material objectives and market-driven interests. There is evidence that economic dependencies shape the form and substance of content, govern the definition and targeting of audiences, and colour values. Public service broadcasters have a duty to act responsibly in monitoring marketplace practices and serving social and cultural concerns related to that, and to focus on essential ingredients of public and private life that are not primarily market-based or market-driven. We serve communities that aren't commercially attractive and produce programmes that aren't always popular or profitable. We ensure universal

service, educational programming and develop new media services to widen and support open access to free-to-air broadcasting.

More content with less money Although not market-driven, we are essential actors in a market-driven media environment. PSB has the responsibility to spend the public's money in efficient, effective and transparent ways that provides the greatest value for our owners, i.e. the people paying the television licence fees. We have become increasingly efficient and productive in the past ten years. Today, EBU members are providing more content of more types on more channels with fewer employees. In order to fulfil their responsibilities EBU members require responsible policies and clear support. It is a two-way street: a relationship of shared responsibilities. The framework for those conditions is documented in the protocol on the system of public broadcasting, the Amsterdam Protocol, adopted on 2 October 1997 and now an integral part of the EC Treaty. The protocol leaves it to the member states to organise public service broadcasting, define its remit and provide for its funding. Europeans believe this to be of crucial importance to safeguard pluralism, cultural diversity, and social and territorial cohesion. The financing of PSB in Europe is transparent and accountability is high. Public money, particularly the licence fee, is the primary source of funding. Individual member states determine to what degree, if any, advertising is permitted as additional funding.

Co-existence of public and private Almost all European states have chosen dual broadcasting systems in which public service and commercially-funded private broadcasters co-exist. There is a broad consensus that the balance between public and commercially-funded broadcasting will be preserved and even strengthened. This requires that public broadcasters receive fair economic compensation for the fulfilment of their public service duties. The public broadcasters are determined to stride forward in the 21st century by developing new services and applying new technology for the benefit of every citizen. As major producers and providers of European content and as driving forces for digital development, public broadcasters are an asset of fundamental importance for bringing the benefits of the information society to everyone, and thus crucial for bridging the digital divide.

Traditional and new media side by side In the rapidly changing environment the public broadcasters cannot fulfil their mission if they are confined to traditional broadcast media. That is why it is of utmost importance that the resolution taken by the European Parliament in April 2004 on freedom of expression and information stresses "that the concept of public broadcasting service is evolving in the converging information society; in addition to traditional television and radio broadcasting the

development of new media services is becoming increasingly important in order to fulfil their remit to provide pluralistic content.” The public broadcasters of Europe are required and determined to fulfil their remit and their diverse and complex responsibilities, which are frequently challenged and always challenging. Our mission is not always popular, but decades of experience show the social value and importance of keeping faith in that mission. PSB is a duty that demands integrity; it is a privilege that demands responsibility. To ensure continuation of this, public service broadcasters must be allowed to serve citizens with all media technologies they choose to use, and under adequate and predictable economic conditions.

The Geneva-based **EBU** is the largest professional association of national broadcasters in the world. It serves 72 active members in 52 countries in Europe, North Africa and the Middle East and 50 associate members in 30 countries further afield. On behalf of its members the EBU negotiates broadcasting rights for major sports events, owns and operates the Eurovision and Euroradio networks, organises programme exchanges, is the centre for coproductions and acquisitions, and provides a full range of other operational, commercial, technical, legal and strategic services. Arne Wessberg took office as President of the EBU on 1 January 2001. He has been Director General of YLE (Yleisradio Oy, the Finnish Broadcasting Company) since April 1994. www.ebu.ch www.yle.fi

European Commission investigates public broadcasters

The European Commission has requested clarifications from Germany, Ireland and The Netherlands about the role and the financing of public service broadcasters. Having examined allegations from several complainants, the Commission’s preliminary view is that the current financing system in these Member States is no longer in line with EC Treaty rules requiring Member States not to grant subsidies liable to distort competition (Article 87). The Member States concerned now have the opportunity to submit their comments and to propose changes to the financing regime for public broadcasters.

The current investigations in Germany, Ireland and The Netherlands are to ensure the transparency necessary to assess the proportionality of state funding and to guard against cross-subsidies for activities not related to public service functions. The Commission has in the past investigated similar financing regimes in France, Italy, Spain and Portugal. Now Germany, Ireland and The Netherlands are being asked to implement the fundamental principles of clarity, transparency and market behaviour: clear definition of the public service remit, separation of accounts distinguishing between public service and other activities and adequate mechanisms to prevent overcompensation of public service activities. Commercial activities by public broadcasters should be in line with market principles, and there should be an independent (national) authority checking compliance with these rules.

The complaints in Germany and The Netherlands have also raised new issues, such as the financing of public broadcasters’ online activities. The Commission does not question that public broadcasters offer online services as part of their public service mission. However, the scope of such online activities and whether they are financed by public funds should be determined not by the public broadcasters themselves but by the Member States concerned, to ensure that only those services are included which serve the same democratic, social and cultural needs of society as traditional broadcasting.

The US model of public broadcasting

Radio

The public radio system in the US includes more than 760 local, independent stations of varying formats, whose licences are owned either by colleges and universities, community foundations, or other organisations. The strength of public radio’s vital community service lies in its unique collaboration between local public radio stations and national programme producers. **National Public Radio** and **Public Radio International** are the two major public radio networks. Individual public radio stations can be affiliates of PRI and members of NPR, selecting programming offered by each.

Incorporated in 1970 after the Public Broadcasting Act of 1967, NPR is a private, self-supporting non-profit media company

whose programming is heard on more than 750 independent public radio stations. Its audience has more than doubled in the last 10 years, to more than 20 million weekly listeners. NPR receives no direct federal funding but supports its operations through a combination of membership dues and programming fees from stations, contributions from private foundations and corporations, and revenue from the sales of transcripts, books, CDs, and merchandise. Between 1-2% of NPR’s annual budget (annual operating budget is approx. \$100 million a year) comes from competitive grants sought by NPR from federally funded organisations, such as the **Corporation for Public Broadcasting**. The private, non-profit CPB (www.cpb.org) receives an annual appropriation from Congress, representing 14% of public broadcasting revenues. www.npr.org

Founded in 1983, PRI is an independent, not-for-profit corporation and managing partner of American Public Radio LLC, the satellite radio company. The network provides over 400 hours of programming each week, content that is broadcast and streamed online by its 724 affiliates nationwide, reaching 31 million listeners weekly. PRI’s cultural programming is available via XM Public Radio. Its news and information programming is available via Sirius Satellite Radio. PRI’s focuses on programming with a global perspective and is increasingly involved in international audio publishing. Financial support comes from station fees, corporate underwriting, and grants from individuals and foundations. www.pri.org

Television

Founded in 1969, **Public Broadcasting Service** (www.pbs.org) is a private, non-profit media enterprise owned and operated by the nation’s 349 public television stations. Available to 99% of American homes with televisions and to an increasing number of digital multimedia households, PBS serves nearly 100 million people each week, in all 50 states, Puerto Rico, the US Virgin Islands, Guam and American Samoa. PBS oversees programme acquisition, distribution and promotion; education services; new media ventures; fundraising support; engineering and technology development; and video marketing. 170 noncommercial, educational licensees operate 349 PBS member stations. Of the 170 licensees, 87 are community organisations, 57 are colleges/universities, 20 are state authorities and 6 are local educational or municipal authorities. Sources of revenue: members (23%); state governments (18%); CPB and federal grants/contracts (16%); businesses (16%); state colleges and universities (6%); foundations (5%); and contributions from individuals. www.pbs.org



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Over 100 people from 30 countries gathered in London for the Voice of the Listener & Viewer's 10th international conference to consider the future for PSB in Europe and the Commonwealth. VLV's Chairman Jocelyn Hay reports on highlights from the event

Reinventing PSB for the digital age



The conference started with an address by Adam Singer, from the UK regulator Ofcom, but speaking in a personal capacity. He claimed that although public service broadcasting was as relevant as it had ever been, it needed to re-invent itself to survive in the digital age. New technology is transforming broadcasting, he said, production costs are falling, bandwidth extending, and the age of digital music downloads would be followed by TV and film downloads. The key to the future would be relevant content, and a key task the creation of a public service electronic programme guide to enable people to find what they want to view or hear.

K.S. Sarma, CEO of India's Prasar Bharati Broadcasting Corporation, painted a very different picture, explaining that the sheer size and diversity of his audiences meant delivering programmes in dozens of different languages to audiences from different backgrounds and cultures – from sophisticated city dwellers to those with no access to any form of modern communication. Ken Clark, CEO of the Fiji Television Corporation, outlined a plan to create public television in a new Fiji and Pacific Island Network spanning a vast geographic area from the Solomon to the Cook Islands, New Zealand to the Philippines. George Valarino of the Gibraltar Broadcasting Corporation, by comparison, explained the difficulties of producing local programming for a population of 30,000 which is the target of hundreds of satellite rivals and surrounded by powerful neighbours.

It became clear that some of the European public service broadcasters are on the defensive. Dr Verena Wiedemann, Head of European Affairs at ARD, Germany, said that the combination of economic uncertainty in Germany and what she described as a new 'neo-liberal' agenda by the European Commission, was encouraging some commercial rivals to lobby for limits to be placed on the public service broadcasters' right to play a full part in the new media revolution. Nicola Frank, Deputy Head of the EBU Office in Brussels, agreed and said the public service broadcasters should play a full part in the new media technologies. At the heart of this issue was the debate about the future of the Television Without Frontiers Directive and possible revisions to the Services Directive. Broadcasting must continue to be treated as a distinct service, she said, and not be lumped in with other services. Karol Jakubowicz, Chair of the Council of Europe CDMM Committee, claimed that ideology, not technology, would determine the future of public service broadcasting and he outlined three approaches: Full Market – with no public sector involvement; Market Dominance – with limited public intervention; and Market/Public Balance – where the community has a duty to provide a supply of what people need as citizens, and where this can be provided by public service broadcasters.

In the session devoted to news values (chaired by John Owen, Executive Producer of NewsXchange), delegates heard different

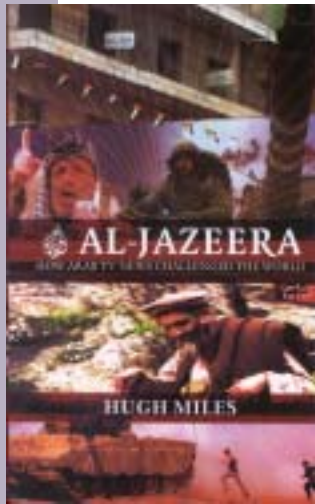
approaches from three international broadcasters. Paul Gibbs, Programme Director of Aljazeera International, said their new English language service to be launched in November would have no 'home' news but news hubs in Doha, London, Washington and Kuala Lumpur. Nigel Chapman, Director of the BBC World Service, said the BBC's journalism had to be based on facts and evidence. Nick Wrenn, Director of CNN's London Bureau explained that CNN International had a global agenda and a separate editorial process from CNN in the US.

The final session, chaired by VLV Board member Professor Vincent Porter, examined ways in which citizens could become more active in determining the future of PSB. Jamie Cowling from IPPR outlined governance and broadcast regulation in the UK, which had, he said, been marked by top-down paternalism. Now a 'bottom up' approach was needed in which government and regulators work with individuals and citizen groups. Dr Manfred Kops of Cologne University, speaking on behalf of EURALVA, did not agree with either the top down or bottom up models, but said that the strength of public service broadcasting reflected the strength of civil society. The problem was that in many countries civil society was weak and unorganised but the market was international and dominated by powerful multi-national players. Cultures and society were local or regional and unable to provide an effective counter-balance. Vladimir Gai, Chief, Communications Development, UNESCO Paris, defined PSB as being 'editorially independent broadcasting' and stressed the importance of the role it plays in disseminating information, education and knowledge. A major challenge to mankind is that over one billion people around the world have no access even to a radio.

Four key priorities were identified for VLV and other civil society representatives: - to assist the public service broadcasters to re-invent themselves for the digital age; - to ensure that public service broadcasters have adequate funding and governance; - to develop links with other bodies engaged in strengthening civil society and to extend their work internationally.



Voice of the Listener & Viewer (VLV), founded in 1983, is an independent and influential organisation – it is the only organisation in the UK speaking for listeners and viewers on the full range of issues which underpin the British broadcasting system: the structures, regulation, funding and institutions. VLV has been instrumental in setting up EURALVA, the European Alliance of Listeners' and Viewers' Associations. Member organisations operate in Denmark, Finland, Germany, Norway, Portugal and the UK – and the Friends of Canadian Broadcasting and the Friends of the ABC, Australia, are associates. Plans are underway to develop EURALVA's work internationally. www.vlv.org.uk



Book review

Al-Jazeera - How Arab TV news challenged the world details the origins and gradual expansion of the network which changed the Middle Eastern and global broadcast media landscapes. The author, Hugh Miles, an Arabic speaker born and partly educated in the Middle East, claims the particular situation of Qatar and the vision of its ruler allowed the creation of an independent channel in the emirate. From the distinctive nature and shortcomings of the Arabic media scene and the collapse of the BBC Arabic TV channel, to the working practices of the channel and reactions to its broadcasts in the Muslim and Western world, Miles gives a comprehensive account of what made Al-Jazeera such a special phenomenon.

Miles offers a broad overview of Al-Jazeera's unique – in the Arab world – and often provocative programming. In particular, lively talk shows and interviews which saw officials and dissidents from all Arab countries discussing contemporary issues and arguing angrily. These proved very popular among Arab viewers, but angered many governments, leading to the closure of several Al-Jazeera bureaux throughout the region and a widespread Saudi-backed ban on advertising on the network.

The 9/11 attacks and their aftermath proved a watershed for Al-Jazeera and established its global status. The channel was the only one with a bureau in Taliban-controlled Afghanistan and western networks started vying for its footage after it broadcast tapes from Osama bin Laden. This enhanced status also marked the beginning of tense relations with Washington, which continue to this day, and have resulted in strong direct and indirect pressures from Washington on the channel and the Qatari authorities.

Miles also highlights contradictions in the US treatment of media: whilst advocating free speech in the Arab world, Washington reserves its harshest criticism for a channel which has truly opened up political debate in the Arab world. It could be argued that Al-Jazeera is no more anti-American than many European media organizations: according to a recent survey, there were more negative statements about the US on Germany's leading news show "Tagesthemen" (produced by public broadcaster ARD) than on Al-Jazeera news in January 2005 (Media Tenor, February 2005). Yet Western media are not targeted by Washington. However, not all US officials are hostile to Al-Jazeera, with Department of State Spokesman Dr Nabil Khouri quoted as saying: "I would prefer to watch Al-Jazeera any time rather than Fox".

Too often perhaps, this book appears overly "positive" about Al-Jazeera, dismissing criticism too easily. With a comprehensive index, but lacking notes, it is a key book for those wanting to understand the Arab media scene and the fundamental transformations of the past ten years or so, thanks precisely to Al-Jazeera. It is also essential reading for all those interested in Middle Eastern politics, international broadcasting, public diplomacy and international relations.

Morand Fachot reviewed *Al-Jazeera - How Arab TV news challenged the world* by Hugh Miles, ISBN 0-349-11807-8, Abacus Books



Book review

From the very moment of drawing our first breath we become communicators. The need to express ourselves is one of the foremost instincts that we as humans possess. This need is no less important in journalism, particularly in broadcast journalism where information of all kinds has to be put across in a straightforward and concise way to diverse audiences across the globe. Interestingly, at a recent debate held to promote Rick Thompson's new book, "Writing for Broadcast Journalists", the audience – which included many professional broadcasters and journalists – was asked to choose the correct meaning of ten words commonly used in news bulletins. Only 48% of the answers were right.

All the more reason then for media professionals and students alike to buy this entertaining and informative reference work which draws on Rick Thompson's editorial experience and skill, gained over many years in senior positions with BBC News and more recently as an educator. Designed to help broadcasting journalists write in a clear, accurate and, not least, elegant manner, it's the kind of book that you will want to have to hand on a daily basis. Offering practical advice and ideas on writing for broadcast media – as Thompson puts it 'writing words that are usually spoken aloud and received via the ear rather than the eye' – the content is sure to appeal to anyone who has an interest in communicating effectively and with style. Thompson describes the different techniques required for radio, TV and online news together with tips on how to avoid cliches and 'news-speak'. There is excellent information on the use and misuse of language in broadcast news and an exceptionally

good appendix of 'dangerous words and phrases' waiting to trap the unwary scriptwriter. The book should be essential reading in newsrooms everywhere.

Tim Keeler reviewed *Writing for Broadcast Journalists* by Rick Thompson, published by Routledge in their *Media Skill* series www.routledge.com



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* 2005 "Brandchannel", the world's only online exchange about branding, produced by "Interbrand"

