

The Association
for International
Broadcasting

The Channel

September 2005
Volume 8 Number 4



focus **Media in the Middle East**

ISSN 1477-8718



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Articles published in *The Channel* do not necessarily reflect the views of the AIB.

The Channel (ISSN 1477-8718, © AIB September 2005) is published quarterly by the Association for International Broadcasting, a non-profit making company limited by guarantee and registered in England.

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Designed and typeset in-house by AIB **Print** by Times Printers, Singapore

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Wohler Technologies growth = move

Wohler Technologies, the world leader in research, design and manufacture of audio and video monitoring products, is enjoying record success that is demanding expansion into a bigger facility. Wohler Technologies began settling into their new facilities in August. The new San Francisco Bay Area facility gives Wohler the space needed to accommodate the current product demands and expansion for future needs. Carl Dempsey, the Executive Vice President stated, "We enjoyed a very successful 2004. It was indeed a record growth year for Wohler as our sales grew by over 26%. The company has enjoyed an average 15% growth rate for the past 5 years. One of the reasons for our continued success is our strong focus on our core competency: audio and video monitoring." The product portfolio comprises the world's largest range of audio monitors and converters as well as a comprehensive line of compact LCD video monitors and test signal generators.

TVNZ charter funding for new urban drama

TVNZ has given the green light to a new 12-part local drama set in Ponsonby in Auckland. The multi-million dollar series - *Rude Awakenings* - is the story of two families thrust into unwelcome intimacy through their tenant/landlord relationship in neighbouring Ponsonby villas. The usual sources of urban conflict are accentuated by perceived differences in wealth and class, and the whole package is complicated by the two teenage children of the warring families developing a keen interest in each other. The series will be fully funded from money provided to TVNZ by the Government for the specific purpose of creating programmes that recognise the TVNZ Charter by reflecting New Zealand life and culture. Written by Garth Maxwell and playwright Stephanie Johnson, the drama will be made by Michele Fantl and Garth Maxwell, through MF Films, with Chloe Smith as Executive Producer.



Aceh News FM back on air thanks to Radio Netherlands

In late June radio station Aceh News FM made its first broadcast since the tsunami on 26 December last year. The station works together with Radio Netherlands, who lent its mobile radio station *Queen Beatrix* to make daily broadcasts possible. "Now the station is back on the air, it will also be broadcasting material from our Indonesian service and letting many people in the region hear independent journalism once again," says Jan Hoek, Radio Netherlands Director General. Radio Netherlands also sent two mobile radio stations Meulaboh and Sigli.

Belarus gets Euro-funded radio

Germany's international broadcaster Deutsche Welle (DW) has won a contract from the European Commission to start radio broadcasting to Belarus. Deutsche Welle will produce a 30-minute daily programme in Russian that will focus on Belarusian and European news. The Commission plans to provide €138,000 annually for the project. Bidders also included the BBC World Service and

EuroNews. Deutsche Welle is expected to launch the programme in the early autumn. The creation of alternative and accessible information sources for Belarus is part of the European Union's draft action plan for

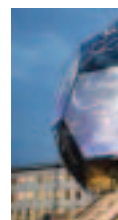
promoting democracy in the country. The EU also considered resuming the operation of Radio Ratsyya in Lithuania or Poland, or establishing an information centre in one of those countries to run several media projects for Belarus. Stefaan de Rynck, a spokesman for the Commission, said that the EU can finance projects aimed at supporting the independent media in Belarus and providing free access to impartial information for the Belarusians. The EU earmarked funds for projects concerning Belarus in the framework of the European Neighbourhood Policy, he said.



Mobile high in broadcasters' strategies

Al-Jazeera Channel and Middle East telecoms operator, Al-Majaz Telecom, have signed an agreement with Bahrain's Telecommunications Company Batelco to provide breaking, political, business and sports news through Al-Jazeera Mobile SMS to customers in Bahrain. The agreement extends the reach of Al Jazeera's mobile phone reach - it launched a service in Qatar, where the channel is based, in 2004. Batelco subscribers in Bahrain can subscribe to Al-Jazeera Mobile, in Arabic or English. Al-Jazeera Channel plans the introduction of WAP technology where Batelco subscribers can browse a selection of articles from the AlJazeera.net website via their GSM phone and video streaming providing mobile owners access to Al-Jazeera Channel news and programmes. Al-Jazeera Channel's Marketing Director, Hamad Yahya Al-Nuaimi, said: "It is gratifying that Bahrain is another country to utilise our service, and can be added to the list of countries where Al-Jazeera Mobile is operating, such as, Qatar, UAE, Kuwait, Jordan, Egypt, Palestine, Yemen, Sudan, and Syria. We are looking forward to extending the reach of Al-Jazeera Mobile service worldwide."

All major international broadcasters now provide mobile content services in a variety of territories worldwide. At present, usage figures have not been made available so the uptake of individual services provided by channels is not known either nationally or regionally. It is, however, a growth area and with the rapid development of video search technology, there will be new applications and potential revenue streams for mobile operators and channel owners. Interestingly, NewsCorp has identified video search technology provider Blinkx as a potential investment target as it seeks to identify new ways to ring-fence viewers to its global network of channels and platforms.



AIB at IBC

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EuroNews success continues

2005 has been the most successful year for EuroNews so far: the channel has broken even financially, sales are up by 35% against last year and audience results are all very positive, the channel being number one in the top five European markets, according to EMS. Such results prove that the concept, format and multilingual aspect answer upmarket viewers' needs. EuroNews is today the best positioned channel to pursue its development in the digital world, already offering interactive TV features and live broadcast on mobile phones.

Intelsat makes US\$3.2bn offer for PanAmSat ■ Claudio Petruccioli appointed new president of RAI ■ SES GLOBAL revenues increased 9.7% ■ ARD cuts back political TV magazine programmes by 15 minutes as election nears ■ Motors TV, the international channel dedicated to motor sport, launches in Poland ■ Al Jazeera International goes HD with Vizrt Graphics ■ RRSat's new MCPC platform is HotBird-6 satellite, transponder 123 ■ Unity Media parent company of German cable networks ish and iesy ■ Kenneth Plummer starts as new director-general of Danmarks Radio ■ Spain allocates new DTT licences ■ Jamie Davis new MD

AIB International Broadcasting Awards presented

The Association for International Broadcasting announced the winners of its inaugural international broadcasting awards at the AIB Regional Media Leaders Forum in London on 15 July. The AIB invited entries in three categories: best radio news or current affairs programme for an international audience; best children's or youth TV programme for an international audience; and most innovative use of technology for international broadcasting. More than 60 entries from broadcasters and technology providers in every continent were submitted to the Awards' judges who comprised the AIB's Executive Committee together with the Association's Chief Executive, Simon Spanswick. The shortlisted entries were:

Category 1 - radio BBC World Service: Crossing Continents/Assignment - North Caucasus; Radio Australia: Bhutan; Radio Netherlands: In Limbo: Gay Palestinians; Radio France Internationale: Prevention Against Aids in Rwanda; RTHK: Mixed Blessings

Category 2 - television AVRO: Lisa; CBC: nerve: How Bad Do You Want it; Miditech PVT Ltd: The Science of India; UNESCO: The New Beginning; UNICEF: Soul Buddiez

Category 3 - technology APTN: APTN Direct; Discovery Networks: Virtual History; EuroNews: Access to Euronews 7 languages via a custom built interactive application; Globecast: IP Delivery; Teletrax: NBC News Channel deployment of Teletrax for 2004 Olympics

The winners were: Radio - BBC News for Crossing Continents/Assignment; Television - UNESCO for The New Beginning and Technology - APTN for APTN Direct.

"We were delighted with the response to these inaugural AIB awards," commented Anver Anderson, AIB Director of Business. "The judges faced an enormous task in evaluating the entries which were all of a tremendously high standard. The awards demonstrate the immense range of programmes broadcast by international television and radio broadcasters every day, and the technology that goes behind them."

The 2006 AIB International Broadcasting Awards will be announced in December this year, with a closing date of May 2006.

Analysing economic efficiency at n-tv

After nearly nine months of successful operation and fine-tuning of the new integrated newsroom system NCPower at the German news channel n-tv, NorCom and the University of Munich's Institute for Information Systems and New Media asked n-tv to undertake a return-on-investment analysis. The special focus of this was to examine the kind of effects on n-tv's organisation and its costs following the channel's investment in "best-of-breed" products as well as the integration of different solutions in a single system. n-tv and the University team, as well as NorCom, had expected savings and a good return-on-investment ratio. The actual results, however, exceeded expectations by far and NorCom has made the results of the analysis available - particularly since the total savings for n-tv exceed €3.1 million per year with current operating costs of €0.5 million. With the investment in the integrated system consisting of NCPower, VPMS/S4M, VizRT and Solo, n-tv is forecast to achieve break-even in the second year of operation.

SES ASTRA plays major role in European HD

HDTV has been one of the key areas of discussion for almost everybody in the European media for over a year now and will move firmly into the consumer domain at Europe's largest consumer electronics show, IFA, taking place in Berlin this month. Analysts regard HDTV as the driving force for Europe's digital switch-over, particularly as 16:9 flat screens grow in popularity and leading pay-TV operators have announced HDTV channel launches in the next 12 months. Germany's Premiere will be first with their new HDTV programme package "Premiere HD". A special Premiere HD trailer can now be seen on the ASTRA HD demonstration channel with brilliant colours and sensational sound providing an excellent sample of 'Premiere HD' with its three full 24-hour channels featuring films, sport and documentaries. Alexander Oudendijk, Chief Commercial Officer and Senior Vice President of ASTRA commented: "We are delighted that Premiere has not only decided at a very early stage to broadcast its HDTV bouquet via ASTRA and to be a trendsetter in Europe, but is now also taking the lead and going live with first high definition content."

The official launch of Premiere HD programmes via ASTRA in November 2005 will create an entirely new television experience and generate excitement in living rooms across Germany; Premiere has confirmed that it will transmit next year's World Cup football in amazing HD picture quality.

Meanwhile SES ASTRA has secured a long-term contract to provide Britain's BSkyB with three additional 28.2° East transponders. Sky will take advantage of the increased availability of transponder capacity to transmit its planned package of HD television services, due for launch in the UK and Ireland in the first half of 2006. The Sky HD service will deliver substantially superior picture quality than standard-definition television broadcasts and will include a range of channels including sports, movies, general entertainment and documentaries.

Root Capital buys Autocue

Autocue has sold its business in the UK and US, including QTV, to Root Capital, a London-based venture capital firm specialising in the technology sector. Simon Philips, partner of Root Capital and Autocue's new chairman, says about their investment: "We are delighted to be investing in Autocue's future and are excited about the prospects for the business. The leading-edge technology, combined with a strong brand and customer base all provide an excellent platform for growth."

Autocue's strategy going forward will be to provide leading products and excellent service to its customers, and to grow through increased geographic coverage around the world.

Hughes uses Intelsat IA-8

Intelsat, an AIB member, has announced that Hughes Network Systems, the world's largest provider of satellite broadband products and services, will use Intelsat's newly launched IA-8 satellite to support its DIRECWAY broadband satellite service across North America. HNS will use multiple Ku-band transponders on IA-8 to support its enterprise, SOHO and consumer offerings. IA-8 was launched in June and offers high-powered Ku-Band coverage of all 50 states.

ITN Archive gets new appointment

ITN has appointed Christopher O'Hearn as Commercial Director of its fast-growing ITN Archive business. O'Hearn joins from APTN where he was Head of Content directing Library and Entertainment services. ITN has rapidly built its archive business and today manages the world's largest collection of archive images and video, containing over 650,000 hours of content dating from 1896 to the present day.

of ESPN Star Sports ■ Dutch transmission company Nozema up for sale for second time ■ AIB launches new Directory of Global Broadcasting edition ■ Echostar adds 225,000 subscribers ■ Real Madrid TV on AsiaSat 2 digital platform ■ RadioScape launches DRM consumer receiver at IFA ■ BBC World commits to Arabsat for next five years ■ RFI to strengthen signals in west Africa as FM and satellite relays stopped ■ Finland to cease analogue TV in 2007 as country gets 100% DTT coverage ■ Al-Jazeera Sports Plus-1 and Al-Jazeera Sports Plus-2 to launch for DTH subscription viewers ■ VoA launches new programmes for

AIB holds first regional media leaders' summit

The Association for International Broadcasting held its inaugural Regional Media Leaders Forum in London on 15 July. This new series of events is designed to bring together the international broadcasting industry for focused debate and effective networking. The first half-day event brought more than 100 delegates from broadcasters, satellite operators, equipment manufacturers, consultants and regulators to the Geological Society in London's Piccadilly, with ITV News Channel anchor Andrew Harvey chairing the Forum. The event's keynote speakers were Mr K S Sarma, Chief Executive of India's Prasar Bharati – the organisation that operates Doordarshan TV and All India Radio – and Nigel Parsons, Managing Director of Al Jazeera International, the new English-language service launching in 2006. Mr Sarma spoke about the plans his organisation has to take India's public television services to global audiences, meeting the needs of the Indian Diaspora and of viewers who want and need to know more about India. But, Mr Sarma said, Prasar Bharati needs help. "Collaboration is very important," said Sarma. "Organisations like the AIB can help us to move forward in an area where we can't do things on our own."

Commenting on the title of the Forum – *Crossing Borders, Influencing Minds in the 21st Century* – Sarma said that he had a more neutral position, with an intention to inform minds rather than influence them. However, he pointed out, every broadcaster inevitably takes a position and defends their position as being the right one. Sarma provided a briefing about the developments of broadcasting within India, including the 2004 launch by Prasar Bharati of its free-to-air DTH service that carries 19 public channels and 14 private TV channels, together with around 12 radio stations in a range of languages. With this, Prasar Bharati's services reach every corner of the country. Now the intention is to build on this domestic success and reach other countries worldwide.

In planning its global services, Sarma said, the intention is not – particularly in its news and current affairs offer – to repeat what CNN and the BBC say, but to use Doordarshan's own reporters and commentators to report on global events, such as the Iraq situation. However, there are major challenges, not least in securing distribution in many countries. Talks are underway with Britain's BSkyB and



Mr K S Sarma and AIB CEO Simon Spanswick in discussion



Nigel Parsons with BBC Arabic head, Hosam Sokari

there have been efforts in other territories such as the USA. Tenders have been published for distribution of some Indian language TV services and there are organisations working to promote these to viewers but, said Sarma, it's not enough. Overall, however, Doordarshan is doing well as it starts to develop and deliver an international service and at home in India, the service is popular despite the enormous growth in competing channels. Asked about All India Radio's international service, Sarma said that it has few, if any, listeners and he'd like to close it to save funds. There is, however, resistance in some quarters, so it's likely to remain in operation for the time being.

Nigel Parsons introduced the concept of the planned English-language service from Al Jazeera. Research has shown, Parsons said, that there is a need for new perspective on news as many people are tired of the established players and want a new voice. Al Jazeera International will respond to this need and be a global channel, far less focused on the Middle East than Al Jazeera's Arabic service. However, despite the different focus, Al Jazeera International will co-operate very closely and share resources. It's also worth noting, Parsons said, that Al Jazeera has unique access to experts and key players in the Middle East and many other parts of the world. Asked to explain more about the point of a new international news channel, Parsons said that it depends where you are in the world as to whether or not "yet another" channel is needed. In Asia, for example, people are waiting for a new voice. And Al Jazeera will meet this need through its philosophy of decentralising the news, with different news hubs contributing input. These hubs will be in Washington DC, London and Kuala Lumpur. The news output will pay very particular attention to the developing world, covering the issues in detail. And Al Jazeera International will not simply follow established players, but will aim to make broadcasting history through the variety and depth of output. In terms of carriage agreements, Parsons admitted that securing distribution is a major concern for the new channel. Cable systems in the USA, for example, are pretty full and there are many misconceptions about what Al Jazeera is. There is major lobbying underway in Washington to correct the impressions that exist about Al Jazeera and to ensure a "smooth ride" when the channel launches. The Washington DC bureau is one of the news hubs from where several hours of daily output will originate (along with London, Doha and Kuala Lumpur) and Parsons is certain that opinion-formers and politicians in the US will want to appear on the channel. Talking about the technical facilities, Parsons explained that the new channel's production systems are being built from the ground up. The station will be HDTV capable from day one, although it's not the channel's intention to start transmitting HD straight away. Over lunch, delegates had the opportunity to discuss more of these issues with both Mr Sarma and Mr Parsons, along with other attendees. The AIB's first Regional Media Leaders' Forum was described by delegates as an excellent and highly worthwhile event – and the AIB will be holding more of these focused debates in other cities around the world over the coming months. See the AIB website at www.aib.org.uk for more details.



Deutsche Welle Editor-in-Chief Uta Thofern with McKinsey's John Turner

Sweden's podcasting

Radio Sweden is now regularly podcasting its programmes in English. The programmes are a "pod" version of the station's traditional international broadcasts. The podcasts come hard on the heels of a successful test of the user friendly format in March and build on the response from pod-listeners around the world.

HELLAS SAT enters Scandinavian market

Hellas Sat is partnering with Sweden's SWE-DISH Satellite Systems to provide solutions in remote areas and highly demanding markets via Hellas-Sat 2. SWE-DISH supplies major broadcasters, civil and armed forces and disaster relief organisations with compact, quick-to-air satellite terminals for live transmission of video, data, internet and voice content from anywhere in the world. Hellas-Sat 2 is a high power satellite that provides cost effective, high throughput satellite IP links in Europe, Middle East and Southern Africa.

Indonesia ■ Radio Nepal extends broadcasting hours to compete with local commercial stations ■ Venezuelan Information Minister Andres Izarra resigns to run new LatAm regional TV station ■ CBC locks out 5,500 staff; international broadcasts stay on air ■ CCTV-9 launches on Sky TV New Zealand ■ Russia Today TV launches www.rttv.ru website ahead of channel launch ■ BBC sells programmes to US-run Al Hurra TV ■ RRI, Indonesia's state broadcaster, to relay Radio Australia news and current affairs programme nationwide ■ Canadian cultural organisations call for rethink on granting of satellite radio licences ■ TV2 Denmark

RFE/RL Russian broadcasts expand

Russian-language programmes of Radio Free Europe/Radio Liberty (RFE/RL), known locally as Radio Svoboda, are now broadcast 18 hours daily on Radio 1 Center, a local station in Moscow. This expansion of US-backed RFE/RL programming in Russia's largest media market is part of RFE/RL's work to expand audiences in Russia through a revamped national schedule that includes new live and interactive programming and improved local distribution. Until now, RFE/RL Russian Service programmes have been available in the Moscow metropolitan area only on the AM frequency band. Research shows that Russians prefer FM radio for news and information, while AM – as is the case throughout Europe – is less popular. Former Soviet President Mikhail Gorbachev, through the Gorbachev Foundation, is a co-owner of Radio 1 Center. RFE/RL President Thomas A. Dine added that "RFE/RL's Russian Service has met the challenge of reaching new audiences beyond the AM band. I am convinced that, by making Radio Svoboda available on VHF-FM, many new listeners will be able to enjoy our informative and thought provoking programmes." Separately, Thomas Dine, RFE/RL President, has announced that he will retire from the organisation in the autumn. Dine has led the Prague-based broadcaster for eight years, securing the long-term future of the US-funded station.

Teletrax gets direct response

American direct response media buying firm Mercury Media has reached a long-term agreement with AIB member Teletrax to electronically track airings of its television advertisements. Mercury Media specialises in media planning and buying services for short form commercials and long form paid-programming with clients including Guthy-Renker Corporation, Time-Life and Modern Media. Teletrax will now monitor broadcast television and cable airings of Mercury Media ad placements in the top 100 TV markets and beyond as its monitoring network expands. "Mercury Media made its initial mark as an infomercial trailblazer, but rapidly achieved success as a powerhouse in short-form media," commented Steve Nober, president and chief operating officer of Mercury Media. "National campaigns involving both genres require the same level of rigorous reporting, which Teletrax masterfully delivers in the most user-friendly fashion. We have been very impressed with the comprehensiveness and accuracy of Teletrax and the extraordinary client service we have received." A direct marketing veteran, Nober also serves on the ERA's Technology Council.

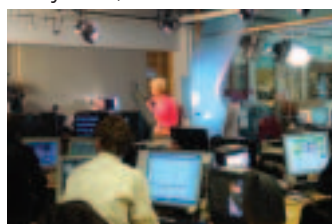
To further advance its business development plan, Teletrax has appointed Dennis P O'Hara as US East Coast Sales Manager and Emmanuel Josserand as Marketing Manager. They will join the Teletrax worldwide sales and marketing teams in New York and London, respectively.

WRN welcomes Sky Gnome

WRN, a leading satellite radio transmission provider, has welcomed the launch of the Sky Gnome, the innovative portable wireless device that will enable customers to listen to Sky around the home, including the 80 free-to-air radio stations available on Sky Digital. Richard Jacobs, WRN's Business Development Manager said: "This is great news for all radio stations on Sky digital because it frees them from the set top box allowing listeners to tune in around the house and even in the garden. The Sky Gnome offers people the biggest choice of digital radio in the UK." WRN currently uplinks almost 1 in 3 of the non-BBC radio stations available on Sky Digital. Radio stations using WRN to get onto Sky digital include Virgin Radio, RTE, EWTN, Trans World Radio, Pulse Unsigned, Radio London, Radio Caroline, Gaydar Radio, Desi Radio, Spectrum Radio, Raaj Radio and Amrit Bani.

Quantel helps NRK return to number 1

Norway's public broadcaster NRK has installed a fully integrated sQ News/Sport production system from Quantel, an AIB member. NRK produces 18 television news broadcasts a day through its network of 12 regional offices in addition to its Oslo headquarters – home to 2,400 staff and encompassing not only all its central news operations but also all production and post production facilities for NRK television and radio. While NRK's regional news operations have made use of stand-alone NLE systems, the Oslo centre has been for many years based around



Digital Betacam technology. "We've really jumped two steps in one leap, going way beyond just non-linear into a totally integrated production environment," reflects Head of News Technology and project manager for NRK's entire digital news transition

programme, Geir Børdalen.

Speed to air was high on NRK's shopping list when they specified the system. Børdalen reports that NRK's sQ system is "the fastest news system out there. When time is really tight, NRK sometimes also plays direct to air from the sQ Edit Plus craft edit stations. "This also increases our backup, as does the fact that while the system has all the operational benefits of a central server system, it is also modular – so the whole system doesn't go down if one server fails. NRK Resources has also started using the system for its sports coverage, with similar results."

The system is based on four sQ servers, each with four video ports and with a total storage of 400 hours of IMX50. There are 124 sQ Cut editing packages on journalists' desktops, eight sQ Edit Plus systems for craft editing and also a Paintbox, used for headline graphics. "The sQ makes it fast and easy to capture and package highlights such as goals and our sports editors are really beginning to push the system. It's a complex system and now it's really come together and we're really pleased. Before we put the Quantel system in, we were struggling with ratings – now we are number one in news in Norway," concludes Børdalen.

China sets out digital timetable

China will digitise cable TV in four stages, according to an official from the State Administration of Radio, Film and Television reported in the *China Daily*. By the end of 2005 all major cities in the eastern part of the country and provincial capitals in the middle and western parts will have completed the transition to digital cable TV. The four stage process is due to be completed by 2015, when the whole western part of the country will have entirely digital cable TV. In addition, China will start direct digital satellite TV services in 2006, with digital terrestrial TV by 2008 and the complete cessation of analogue TV broadcasts in 2015 when digital TV will cover the whole country. China has committed itself to start broadcasting high definition TV programmes during the 2008 Beijing Olympics.

to launch family film channel ■ Radio Free Asia founding president, Dick Richter, retires ■ India grants permission for foreign-owned channels to uplink from the country ■ Azerbaijan Public TV launches ■ XM Radio and New York Times join forces for satellite radio programming ■ BBC launches first online soap for English-language learners ■ Sirius forecasts 3m subscribers by year-end ■ CTV launches terrestrial HD TV transmitters in Toronto and Vancouver ■ Britain's ITV to launch children's free-to-air channel ■ Podcast start-ups attract VC funding ■ China makes life more difficult for foreign media companies ■ Discovery

Danish Broadcasting chooses Harris for new multimedia broadcast centre

AIB member Harris Corporation is to supply Danmarks Radio – the Danish Broadcasting Corporation – with its revolutionary H-Class Broadcast Presentation Manager, a next-generation play-out automation application. H-Class is Harris' new end-to-end Content Delivery Platform. A world first, the H-Class BPM will be installed in DR's new television and radio broadcast centre in Ørestad, one kilometre south of Copenhagen city centre and close to the new Øresund Bridge link to Sweden. DR is moving from multiple sites around Copenhagen to a centralised, purpose-built centre. The construction of the new broadcast centre is one of the largest single projects undertaken by Denmark's national broadcaster for more than 20 years. DR Project Manager Bo Stubbergaard Hansen says: "This is an exciting time in DR's history. It is absolutely vital that we have the ability to migrate our existing media asset management system and other databases, as well as taking advantage of automation and playout benefits."

Harris is working with German systems integrator BFE Studio und Medien Systems for design, installation and integration of a server-based, network integrated platform for play-out to support radio, Internet, broadcast and television. Harris, Mediagenix, Dalet and Omneon will provide a fully automated, software-controlled production system which is linked to a redundant server and play-out system. The four-phase construction of the new broadcast centre has already begun and is expected to be completed in 2006, when DR will move into the new facility, called DR Byen.



Multi-channel digital TV for British Forces

Following a contract signing between the Services Sound and Vision Corporation, British Forces Germany and the UK MoD, work will begin this Summer to provide Direct-to-Home reception of the BFBS TV digital multi-channel package for Forces viewers in Germany. British Forces Broadcasting Service will provide viewers with access to high quality digital pictures of BFBS 1 and 2, The Hits 24hr Music Channel, Sky News, and Sky Sports 1 and 2. The contract means 20,000 accommodation units will be equipped with either satellite reception or DVB-C cable distribution over the next 2 years, with a further 5,000 currently being negotiated. HCM, a German cable TV provider, has been contracted by SSV to install the equipment.

Iraq news death toll mounts

The murder of an American freelance journalist at the beginning of August took the total news media death toll in the Iraq War to 80. Journalists and other newsgathering staff from 16 countries have died since the war began in March 2003 – almost three a month – according to figures compiled by the International News Safety Institute (INSI). But the vast majority of the dead are Iraqi. 56 have now died trying to report their country for their compatriots and the world. "Every single civilian death in this war is to be mourned, but a free press is critical for a free and fearless society. Hopes of a new democracy rising from the ashes of post-Saddam Iraq are being buried alongside these brave reporters," said INSI Director Rodney Pinder. "People who murder reporters are no freedom fighters. They are nothing more than murderous thugs who fear the light of free reporting."

49 of the dead journalists – almost two-thirds of the total – were murdered by insurgents. Thirteen were killed by US troops and seven died in crossfire. Two were killed by Iraqi forces before the fall of Saddam Hussein and one was believed to have been shot by Iraqi troops working with the US-led coalition. Eight died in accidents or from health problems. There is no firm evidence that US forces deliberately sought to kill journalists, though the absence of open inquiries into killings continues to fuel widespread suspicions. No one is known to have been held to account for the death of any journalist in Iraq.

INSI has launched a global inquiry into the rising death toll of journalists and news workers. The initial meeting was held in London in July under the chairmanship of Richard Sambrook, director of BBC Global News and attended in part by the AIB. The inquiry will continue its work into the winter, with findings published in early 2006.

Pan-ASEAN TV network proposed

Malaysia's Foreign Affairs Minister, Datuk Seri Syed Hamid Albar, has suggested that Asean-wide television channels should be introduced to promote a collective sense of belonging among the people of the region. "In order to build an Asean community in the real sense of the word, we must have programmes about Asean in each other's countries rather than from foreign television stations, such as the BBC, for instance," he said. "We should have Asean channels in the form of news, documentaries or segments in order for us to get that sense of integration."

Radio Netherlands gains

The Radio Netherlands television report *Drug Trafficking* has won the CNN *World Report* Award in the category Best Personal Profile. The Prize was awarded to Pieter Landman, Head RNWTV, during CNN's 25th anniversary celebrations at the channel's headquarters in Atlanta, Georgia. The item was made by reporter Annette Posthumus and tells the story of 46 year old Dutch cab driver Pedro Ruijzing who was arrested in Thailand on drug trafficking charges ten years ago. He was pardoned by the Thai government during Queen Beatrix's visit to the country in 2004 and now educates schoolchildren about the dangers of smuggling drugs. At this year's New York Radio Festival in June Radio Netherlands won six awards. The English Department won one World Gold Medal, two World Silver Medals, two World Bronze Medals as well as a Finalist Certificate. The judges had more than one thousand programmes to choose from, entered by many national and international broadcast organisations.

PanAmSat helps Galaxy HD's leadership

PanAmSat and HDNet have executed a long-term extension of their multi-transponder agreement for satellite delivery of HDNet programming networks to US cable and direct broadcast satellite providers to 2021. "HDNet was one of our anchor tenants on Galaxy HD, helping to establish the satellite as the premier platform for the distribution of HD programming to U.S. cable and DBS systems," said Mike Antonovich, executive vice president, Global Sales and Marketing, PanAmSat. "This new contract demonstrates two things – HDNet's long-term commitment to being a leading high-definition network and their belief in the power of the Galaxy HD neighbourhood. The Galaxy HD platform provides programmers such as HDNet the ability to reach virtually every HD-enabled cable head-end in America, guaranteeing the most extensive reach possible."

Networks opens new Television and Technology Centre ■ NewsCorp heading for Russia with possible Ren TV investment ■ Real Madrid TV carried on AsiaSat 2 ■ Radio Netherlands introduces pan-European service for Dutch truck drivers ■ Somaliland gets its first television station ■ China has more than 25 million satellite homes ■ US broadband users watch 2 hours less TV than Internet-free homes ■ Czech TV in-vision announcers to go...trailers will replace them ■ Kyrgyzstan television channels cancel news for staff summer holidays ■ Darren Childs moves from Sony to BBC as head of global TV channels ■ Ukraine's Nashe Radio

AIB at BroadcastAsia

Asia's premier broadcast event, BroadcastAsia, which took place in Singapore during June, encompassed all aspects of interest to today's broadcasters. Three concurrently running exhibitions and conferences, CommunicAsia, EnterpriseIT & BroadcastAsia, demonstrated what convergence is really all about. A range of AIB members exhibited at Broadcast Asia, manning busy stands, including Wohler, PanamSat, RadioScape, Dalet, ABU, GlobeCast, Omnibus, Quantel and Harris. The buzzword among the 2,238 exhibitors was "digital." Whether digital DTH or D-Cinema or DVB-H – handhelds have come a long way – markets and opportunities are opening up. There is a genuine feeling of "let's do it" sweeping the region. Japan and South Korea have taken up digital multimedia broadcasting (DMB) in earnest, particularly in South Korea where the Korean Broadcasting Commission is spearheading DMB development. HDTV was discussed at length and although Asia is generally seen as the next great HDTV opportunity (along with internet and interactivity) there were real concerns raised in the cost of implementation of the networks and receiver population. In the Indian market for example, 65% of the extensive TV home population still has black and white sets. Costs of implementation are thought to be around 35% higher than normal channel distribution and with limited space segment and cable capacity it seemed likely that MPEG4 or Microsoft MP9 implementation would eventually become the network norm. VoIP was very much in the forefront of the news, with the Singapore government announcing its planned introduction of a new policy framework for IP telephony. VoIP services will provide reduced costs to users and there is a need for ordinary telephony to operate alongside VoIP services to offer the most flexible communications packages to customers. Harris, amongst others, was showing off its DVB-H capabilities and featured a live end-to-end transmission which allows broadcasters to create content and move it through the production chain and deliver it to mobile devices such as mobile phones and PDAs. At the DVB-H booth a real live demonstration was aired directly to Nokia 7710 handsets as well as to fixed TV screens at the booth. The overriding theme was the uptake of new DTH services across Asia. After a faltering start, even India now seemed have come to grips with the market potential and regulatory framework. Doordarshan and All India Radio launched their DTH services in January whilst Zee TV launched with Dish TV and others are keen to join the race – Space TV and Sun Direct TV. The four are jostling for position in a country where the number of cable-TV households exceeds 50 million. The set top box market is booming appropriately in the melee.

Pan Euro broadcaster changes hands

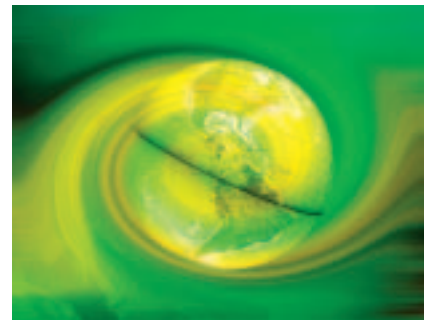
SBS Broadcasting which operates television and radio channels across Europe is being bought in a transaction that values SBS at around €2.094 billion (US\$2.549 billion). SBS's business activities will continue under the new owners, Permira and KKR. SBS, noted for its highly profitable properties such as Kanal 5 in Sweden, has aggressively pursued growth opportunities in eastern and central Europe and this is believed to have been the attraction to the purchasers. They see western Europe as having little growth potential at present, while emerging markets to the east provide potential for new TV and radio operations.

Green issues come to the fore

As IBC gets underway in Amsterdam, few people think of the environmental impact of a major trade exhibition. Yet if you walk through the RAI exhibition centre during build-up and dismantling, you'll see that colossal amounts of waste are generated. UK exhibition firm That's a Wrap – which has produced the graphics for the AIB's international exhibitions and works with a range of broadcast technology companies for their worldwide trade shows – has instigated what MD Samantha Tait describes as an industry-wide change in approach, encouraging clients to work in a green way when they consider their live events and exhibitions.

"120,000 tonnes of waste was created last year within the [UK] exhibition industry," says Tait. "Most of this finds its way to a landfill at a cost of over £40m (US\$72m)." To meet this environmental challenge, That's a Wrap has designed the first ever 100% environmentally-sound exhibition stand and is promoting it – and partial solutions – to companies that regularly attend events around the world to promote their goods and services. "There are three top tips for exhibitors," suggests Tait. "Firstly, insist on the use of flexible modular stands. Secondly, ensure graphics and stands are designed with longevity, with designs that incorporate stand components that can be re-used or refurbished. Thirdly, work with companies that are environmentally aware – always ask to see their environmental policy before signing!"

Tait and fellow director Daniel Backer will be at IBC, and you can get hold of them via the AIB stand, 9.545.



ABU leads pan-Asian HIV/AIDS programme collaboration

Representatives from fourteen national broadcast companies from across the Asia-Pacific region met in Bangkok in July to launch a co-production initiative to raise awareness about the impact of HIV/AIDS global health risk through the creation of media content. The initiative was organised through a cooperative arrangement involving the Asia-Pacific Broadcasting Union, a number of UN agencies, MTV International and the Kaiser Family Foundation. This innovative partnership will produce a series of made-for-television programmes to raise awareness of the global HIV/AIDS pandemic. Participating broadcast producers will create segments to be packaged together as a complete short-form programme that will be shared among all participating broadcasters to air in the different countries. The programming will also be made available rights-free to all ABU member broadcasters.

"The implementation of this initiative reflects the ABU's commitment to pro-social initiatives and the commitment we made in announcing our participation in the Global Media AIDS Initiative at MIPTV last April," ABU Secretary-General, David Astley, said. "The participation of some of our largest and most influential broadcasters demonstrates the increasing awareness of the media of our role and responsibility in perpetuating health and developmental agendas."

takes RFE/RL nationwide ■ Slovakia ends international radio broadcasts ■ Indonesian foreign minister persuades Egypt not to suspend radio broadcasts to the country ■ Iran starts tests of DRM digital AM radio ■ Vietnam TV extends transmission hours, plans total digital production by 2010 ■ Malawi Broadcasting Corporation chief plans additional radio channels for various language groups, funding permitting ■ RTL, UK's talkSport, Voice of Vietnam and Christian Vision start DRM tests ■ Delphi Automotive to develop WorldSpace receivers for Asia ■ RFE/RL to move to new Prague building in 2008

↻ Al Jazeera Satellite Channel ↻
 WorldSpace ↻ Harris Corporation ↻ Radio
 Canada International ↻ Broadcasting Board
 of Governors (BBG) ↻ SES ASTRA ↻ ABS-
 CBN Europe ↻ APTN - Associated Press
 Television News ↻ Autocue ↻ TDP
 (Transmitter Documentation Project) ↻
 Broadcasting Agency of Montenegro ↻ Dalet
 a.n.n. ↻ Teletrax Limited ↻ D.A.V.I.D. GmbH
 ↻ Services Sound & Vision Corporation ↻
 Wohler Technologies ↻ Hellas Sat ↻
 RadioScape Limited ↻ InterMedia Survey
 Institute ↻ World Radio Network ↻ Radio
 Romania International ↻ ITN International
 ↻ Inmedia Communications ↻ Radio Taiwan
 International ↻ NDSatCom ↻ Deutsche
 Welle ↻ Omnibus Systems ↻ PacSat
 International ↻ PanAmSat ↻ You/Com
 Audiocomunicatie B.V. ↻ Radio Free Asia
 ↻ Radio Free Europe/Radio Liberty ↻ ABU -
 Asia-Pacific Broadcasting Union ↻ Radio
 Netherlands ↻ Radio New Zealand
 International ↻ Globecast ↻ Radio Polonia
 ↻ Quantel Ltd ↻ RRSat ↻ Radio Prague ↻
 NorCom ↻ Radio Sweden ↻ Television New
 Zealand ↻ VT Communications ↻ Intelsat
 ↻ Al Jazeera Satellite Channel ↻
 WorldSpace ↻ Harris Corporation ↻ Radio
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 ↻ Services Sound & Vision Corporation ↻
 Wohler Technologies ↻ Hellas Sat ↻
 RadioScape Limited ↻ InterMedia Survey
 Institute ↻ World Radio Network ↻ Television

Alliances, intelligence, business

In the 12 years since it was founded, the Association for International Broadcasting has established itself firmly on the international broadcasting scene. It is a unique organisation linking players inside international broadcasting with those in related industries. Many know of the AIB through its magazine, *The Channel*, but this is really only one activity in the AIB's portfolio

A truly international network The AIB is the non-profit, non-government professional industry association that supports the global broadcasting industry. Increasingly influential and with a growing international membership, the AIB provides a remarkable range of services and is active in markets throughout the world. It enjoys relationships at the highest level with regulators, politicians, broadcasters, journalists and academics, promoting the interests of AIB members, ensuring their voices are heard and providing an unrivalled forum for the collective interests of the international broadcasting industry.

From lobbying and advocacy through to providing detailed and carefully researched market intelligence, together with representation and networking, the AIB's head office team in London and regional representatives in Asia and the Americas work throughout the year to ensure that members' interests are fully served.

The AIB works closely with other associations and organisations in the broadcasting sector worldwide, and forges partnerships with publishers, conferences and other bodies to bring additional benefits to its members.

The extensive range of contacts that the AIB has, together with a wealth of information and verified data built up over 12 years, means that the Association has the answers and intelligence members need to take business-critical decisions - information that they rely on time and time again. The AIB resources are there for members to use, 365 days a year.

Solid consulting foundations The AIB offers its data and information on a wider basis through its international consulting service. From detailed market studies and appraisals provided to broadcasters seeking to start services in new territories to licensing and legislative work, AIB Consulting delivers results through its detailed knowledge of the broadcasting marketplace, of regional and national regulation, uplinking and licensing issues. Blue-chip clients including Associated Press, Discovery Networks and ABS-CBN Global have all used AIB Consulting to assist their businesses. AIB members benefit from preferential rates for all consulting work.

Funded principally by membership subscriptions and income from advertising in publications and event sponsorship, the AIB is governed by an Executive Committee of six people, elected by members from member organisations. Its permanent staff include the chief executive and director of business, and support staff based in the United Kingdom, while regional representatives provide local intelligence and support in the Americas, South Asia, the Middle East and South East Asia.

Your invitation to join Membership is open to all organisations involved in international broadcasting, including television and radio broadcasters, satellite operators, infrastructure providers, network operators, regulators and manufacturers who supply international broadcasting stations.

Three levels of membership are provided to meet the individual requirements of organisations involved in the industry: Corporate, Gold and Platinum. Annual membership fees are £1,250 for Corporate, £4,750 for Gold and £9,750 for Platinum.

Corporate members enjoy a comprehensive level of benefits, including market intelligence briefings, representation and networking opportunities, while Gold and Platinum members have additional membership benefits including complimentary advertising within AIB publications and additional brand recognition at AIB events.





AIB Publications

The Channel

The international broadcasting industry quarterly, produced by the AIB and available free-of-charge to qualified readers worldwide. With a rapidly growing regular subscriber base of well in excess of 5,000 readers in 120 countries, plus distribution of thousands of extra copies at major conferences, exhibitions and industry shows in every continent, *The Channel* is the magazine that's relied on by readers to keep them fully-briefed about the international broadcasting sector.

AIB Directory of Global Broadcasting

The only broadcasting directory covering television and radio that is published twice every year, with key contact information on major domestic and international broadcasters, plus country-specific data, maps and other useful information.

AIB eNews

The electronic newsletter with a round-up of news from across the international broadcasting industry. Delivered to the desktops of over 15,000 regular subscribers, *AIB eNews* is an important tool that supports AIB members, delivering their news to the industry, to regulators, to politicians and to journalists.

The AIB is the prime supplier of information on the international broadcasting sector.

Together, its three publications reach around 20,000 executives in broadcasting and related sectors including finance, manufacturing, government regulation, research and consultancy.

Advertising in AIB publications is open to members (who receive preferential rates) and to non-members. Contact **Samantha Woollett** on +44 (0) 7759 394 916, e-mail sam.woollett@aib.org.uk to discuss advertising or full-issue sponsorship of forthcoming editions of *The Channel* and our twice-yearly *Directory of Global Broadcasting*.



Enquiry form

The Association for International Broadcasting - the industry association supporting the world's international broadcasting sector

For further information about any of the areas below, please fax back this form to **+44 (0) 20 7993 8043**.

I am interested in...

☐ **AIB membership**

AIB membership is open to all organisations involved in the international broadcasting sector, including for example television and radio broadcasters, satellite operators, production equipment manufacturers, network operators, regulators, news agencies and service providers.

☐ **AIB consulting**

AIB Consulting provides cost-effective solutions covering television, radio and satellite. AIB Members benefit from preferential rates.

☐ **AIB advertising**

AIB publications reach the top decision-makers in broadcasting in over 120 countries at least once every month. We can tailor advertising and brand-building solutions to meet your precise requirements, delivering the visibility you need.

Name _____

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The best time to contact me is Mon/Tue/Wed/Thur/Fri/Sat/Sun* morning/afternoon*

The best way to contact me is telephone/mobile/e-mail/fax*

* indicates delete as applicable

**Fax back to
+44 (0) 20 7993 8043
mail to**

**AIB, PO Box 141, Cranbrook TN17 9AJ, United Kingdom
e-mail
info@aib.org.uk**



**For more information about the AIB,
go online**

www.aib.org.uk

Since October 2001, Erik Bettermann has been instrumental in shaping the strategy of Germany's international broadcaster Deutsche Welle in his capacity as director-general. His links with the media go back to his university days, and after he moved into politics in the early 1980s, as a member of the Bremen Senate from 1995, he established a personal link to DW by sitting on its administrative board. More than halfway through his term at the helm of DW, Erik Bettermann talked to Gunda Cannon



How would you sum up the experience so far: what's been good, what's been difficult?

Since I had been on DW's administrative board, assuming office as director-general was not really a jump into the deep end. My earlier experience as a journalist also helped. In the past three years, we have accomplished a great deal. Together with the broadcasting and

administrative boards we developed a company profile for DW in mid-2002. It forms the foundation for the reforms we have carried out since – from agreeing key geopolitical projects to regionalisation of the services of DW-TV, DW-RADIO and DW-WORLD.DE. Other achievements are, for example, the founding of the DW-ACADEMY and the passing of the new DW Act. However, I am dissatisfied with one crucial thing: our funding. To be honest I had hoped that the federal government would not merely pay lip-service to the idea of a powerful international media representative but that it would also provide the corresponding funds. Yet I am hopeful that we will be able to discuss DW's financial needs in detail with the politicians.

DW is one of the big names in international broadcasting – in your view, what role does international broadcasting have in our century?

There is a role for international broadcasters even in the 21st century. International broadcasting isn't just short wave radio anymore. The decisive factor is not the delivery platforms, which have changed a lot over the past decades, but the journalism. Particularly in the age of globalisation, we cannot do without transnational media. A country has to have a presence and position itself and its strengths. As for the much-invoked dialogue between cultures, we must take it seriously as a precondition for a safe, peaceful future.

DW is not only a big name but also a huge organisation, employing around 1,500 people and operating DW-RADIO, DW-TV and the multimedia/multilingual web site DW-WORLD.DE. You currently broadcast in 30 languages – how do you decide which languages to broadcast in?

The most important question is: whom do I want to reach, where and why? Our statutory mission defines the following target groups: present and future opinion leaders and decision makers who are interested in differentiated information about Germany and Europe, people living in censored media markets or crisis regions, Germans who live permanently or temporarily overseas and people all over the world who are learning German. We try to align our services and transmission routes as precisely as possible to the specific interests and needs of the audience. They have to be configured to offer viewers, listeners and users distinct added value, with as little technical effort as possible and at the optimal broadcasting time. We rely both on traditional and on the most modern delivery platforms. Our priorities are determined in the so-called "task plan". Until 2009, we are focusing chiefly on dialogue with the Islamic world, increased regionalisation – for example in Latin America –, strengthening our presence in Asia and promoting European cooperation. In doing so, we also ask: can we reach the people there with what we have or do we need to launch new programmes? On 1 October 2005, for instance, we are launching a specific radio slot for Belarus.

Have your language priorities changed over the last years?

Rapid technological developments and geopolitical changes constantly force us to examine our language priorities. Reflecting the developments within the Commonwealth of Independent States (CIS), we set up a Ukrainian Service in the year 2000; since then Ukrainian has also been used on our website DW-WORLD.DE. Another example: following the attacks on September 11, we set up an Arabic-language programme slot on DW-TV in the summer of 2002 with the aim of intensifying the dialogue with people of the Muslim faith. Along with strengthening DW-TV, we considerably extended our radio service in Arabic – to five hours – and set up a separate Arabic-language desk at DW online.

How important are rebroadcasting partnerships?

DW pursues a differentiated distribution strategy. Rebroadcasting is an important part of that and involves loyal alliances. We have roughly 5,000 partner stations around the world that rebroadcast programming of DW-TV or DW-RADIO either in part or whole. Due to our financial situation, we cannot be present on our own FM frequencies in all of our target regions. So far, this is the case in cities such as Sofia, Prishtina and Tirana. Wherever possible we want to expand "metropolitan radio," particularly in Europe, but in many places this will only be possible in partnership. Setting up "metropolitan radio" in southeastern Europe is our response to the beginning liberalisation of the media markets there. In view of dozens of FM stations, analogue short wave radio will soon be a discontinued model.

In May of this year you signed a new rebroadcasting partner in Iraq, Radio Alnas – your second rebroadcaster in that country. Are you targeting specifically the Middle East?

Yes, we give special attention to the Arabic world. After all, it is a highly politically sensitive region that is not far from us. Dialogue with the Islamic world means not only services in Arabic, but also

Dialogue b

in languages such as Urdu, Dari, Pashto and Indonesian. Since late February, Dima Tarhini is the first Arabic woman in Europe to anchor the Arabic-language news for a western international broadcaster. DW-TV is relevant as an alternative to the government-controlled media in the region and to the Anglo-American channels. We expanded the Arabic services on DW-RADIO and DW-WORLD.DE as well. In the Middle East, we are seeing signs of an opening vis-à-vis democratic principles: to permit elections, to allow women more rights and to align economic structures to western ideals. We should take advantage of this new openness by using our services to help people form their own opinions.

How do you measure your success in different markets?

It's difficult to get reliable figures. We share



this problem with all international broadcasters. We estimate that Deutsche Welle has a weekly reach of more than 90 million listeners and viewers worldwide. For the internet, our figures have jumped by 1,000% over the last three years – DW is the most efficient international broadcaster on the internet. Around 65 million listeners worldwide use DW-RADIO as their source of information, received via short wave, satellite, rebroadcasting and other transmission techniques. Our international television service DW-TV, which can be received worldwide via satellite, is watched by a good 28 million viewers – primarily in Latin America, in the countries of the EU and in the Middle East and northern Africa.

You say you are not satisfied with the funding of DW – how is DW funded at present?

Deutsche Welle is largely funded from the federal budget. Our funds are allocated to us annually; for the year 2005 DW's operating budget is €261 million. We have made clear our objectives to the German Bundestag: qualified journalistic coverage of vital German interests in the world. This of course costs money. We at DW are aware that the public coffers are not exactly overflowing. But we need answers to questions such as: What is Germany's international image worth to the country? What benefits does the government expect from an efficient, competitive media vehicle that carries Germany's economic, academic and cultural image into the world? In view of the current federal budget, it is likely that we will have to put some projects on ice.

The new Deutsche Welle Act has been in force since January 2005 – what changes has this brought for DW?

The new DW Act strengthens the independence of Germany's international broadcaster and allows us to react more flexibly than before to the challenges of world politics. The programme mission was modernised – we are now expressly instructed to "promote understanding and dialogue between cultures and peoples". It is also very important for DW that the telemedia/internet are now recognised as an independent pillar, meaning that DW-WORLD.DE provides a separate journalistic service alongside DW-TV and DW-RADIO. If you look at our first web site dating from 1995 when DW was the first radio station in Germany on the internet, and compare it with today's site, you can see the huge changes that reflect the rapid development of this



AIB INTERVIEW

e between cultures is key

medium. For us, the internet is an indispensable medium that's still growing in importance, for it helps us reach our target group of disseminators. We use all the modern distribution channels for DW-WORLD.DE. In addition to the World Wide Web (WWW), we rely in particular on mobile-capable transmission protocols as well as e-mail and syndication formats like RSS. This enables both stationary and mobile use of DW-WORLD.DE. The streaming audio and video content are offered for narrow and broadband connections, both live and on-demand. In the telemedia and online services, we will benefit from the fact that opinion formers and disseminators in particular will search for mobile services in their native languages. For the football world championships in 2006, we will have some great new ideas for our online services. This year's Confederation Cup in Germany, which we also reported on in Chinese, offered a taste of what's to come.

How do you maintain your editorial independence?

Credibility is our most valuable asset, based and built on independent journalism practised in our daily work. DW has roughly 500 journalists from more than 60 nations and they are all aware of

their journalistic and editorial responsibilities. The new DW Act underlines our independence: we at DW determine our programming objectives, key projects and priorities. Throughout my entire term of office, I have never experienced any attempts by a government office to influence our programming. And if such an attempt were made we would resolutely defend our independence.

DW and RFI are joining forces in the Arab world and CIS, helping each other to develop programmes and reach more listeners. How important is co-operation with other international broadcasters?

I think that cooperation with other – especially European – international broadcasters is indispensable – and not only because the new DW Act demands it. The countries of Europe are moving closer together and that cannot pass unnoticed by the national broadcasters. The better we are networked, the better we can mutually support one another. Take the internet for example: there has been a regular exchange of DW and BBC online editors since 2004. Both sides benefit from knowledge sharing and even joint internet campaigns have taken place. In radio, we cooperate closely

with RFI, for example through the joint use of FM frequencies in Eastern Europe, the CIS regions and Africa.

DW is also involved in GERMAN TV, the joint German-language programme of DW, ARD and ZDF. The channel has been on air for just over 3 years now – how successful has it been?

GERMAN TV now reaches over 20,000 subscribers in North America and various regions of Latin America. It has become apparent that we are unlikely to achieve the number of subscribers needed to cover the operating costs. Therefore, and due to ever-tighter public budgets, we want to find a solution that satisfies the current subscribers of GERMAN TV and does not place an additional burden on the federal budget. Also, we wish to maintain the good alliance between the regional broadcasters of the ARD, the ZDF and Deutsche Welle. At the same time, the German international television service should be free-to-air. The coming weeks will show what future there is for the project "German international television service".

Apart from the link via GERMAN TV, is there cooperation between DW and the domestic broadcasters in Germany?

We work closely and very well with the ARD institutions and the ZDF. Both sides benefit from this cooperation and I hope we can further intensify our alliance in the future.

You also run DW-ACADEMY – how does training for journalists and broadcasters from around the world fit into DW's mission?

The range of services that DW-ACADEMY offers complements what we do at Deutsche Welle. Over the coming years, we plan to expand DW-ACADEMY into a centre for international media training. Its services, like the DW programmes, promote the dialogue between cultures. The DW-ACADEMY employs numerous instructors from the DW services, so there is close interaction which creates many synergies from which the course participants benefit, especially those from developing and threshold nations, but also those from Eastern Europe and the CIS.

You are heavily involved in Digital Radio Mondiale – what is your prognosis for success or failure?

The technological development of radio, television and telemedia is marked by increasing digitalisation and convergence. I am sure that short wave digitalisation will succeed and lead to a short wave renaissance. Transnational radio programmes will soon be heard in FM quality in countries such as China, India and Uganda, countries where freedom of information is not a matter of course. We were among the first to join DRM and our radio strategy is consistently aligned to it.

How important is it for Germany to have an international broadcasting voice of its own?

Germany's political and economic weight in Europe and the world grew with unification. Yet in many places little is known about German society, culture and economics or about Germany's important role in the process of European unity. If a nation's culture and language are not accessible, that nation is immediately less attractive. It is Deutsche Welle's job to spread information from Germany and Europe and to convey Germany's image to the world.

What about closer cooperation with other international broadcasters in Europe – for example forming a pan-European broadcasting station broadcasting to the world – an idea that was mentioned by RFI's president Antoine Schwarz in his interview with The Channel?

We have been cooperating with other radio stations in Europe for many years. Antoine Schwarz's idea has a lot going for it and we have often discussed it both in Paris and in Bonn. Yet, along with all the wishful and visionary thinking, I'm enough of a realist to know that, attractive as the project may be, it will take us a very long time to get there. It is clear that the EU member states have widely diverging interests. In its project phase the idea is like a tiny, delicate plant that needs to be well looked after and nurtured. Who knows how well it will grow in the coming years? I would be delighted to see it grow strong and tall.

Which developments do you see on the horizon for international broadcasting?

International broadcasters must keep up with the enormous dynamics of technological change. My impression is that services will become more highly segmented in international broadcasting in order to satisfy the target groups' interests. This is easiest to implement online. The importance of mobile information services will certainly continue to grow as well.

In his speech at the 3rd International Radio Meeting in Mexico City in May, Radio Netherlands DG Jan Hoek said the media have social responsibility as they have enormous power to influence public opinion, and they must use this power to search for balance, being critical when things go wrong, but also constructive to show that there are alternatives to a spiralling circle of poverty, misery, disease and maybe war.

I can only agree with my colleague. Of course, we bear a huge responsibility for what we broadcast overseas. We must always heed the mentalities, the religious sensibilities and the cultural traditions of our listeners, viewers and users. Credibility, competence and independent journalism are benchmarks for acceptance in our target regions. We set our standards high. If we are successful in our dialogue between cultures and if we can convincingly promote understanding of democratic processes then international broadcasting has a future. This is especially true as long as two thirds of the world's nations have no or only very restricted freedom of the press and freedom of speech.

What would you like to achieve during the rest of your term?

I want to contribute to Deutsche Welle being able to face the challenges of the future with confidence and political backup. Deutsche Welle is one of Europe's most modern broadcasters – past reforms now facilitate DW's further development and more distinct positioning. I would of course be very pleased if were to get better funding so that we can realise our objectives properly.

Erik Bettermann, thank you.

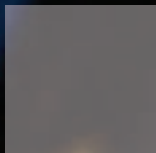
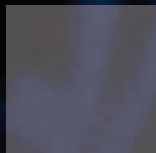
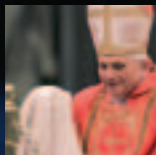
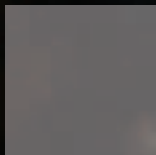
Deutsche Welle is Germany's international broadcaster with DW-TV, DW-RADIO and DW-WORLD.DE. Publicly funded, it is one of the five largest international broadcasting services in the world - more than 1,400 broadcast professionals from over 60 nations staff its radio, TV and internet divisions. DW offers 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



Deutsche Welle is a member of the AIB



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AP Television News

Nothing will stop us bringing you the best news footage - in any event. With the weight of The Associated Press behind us - we're a powerful force. And we're changing our name from APTN to AP Television News to reflect this. Take it from us, we're 100% committed to being in the thick of the action wherever it happens. And no-one is better qualified to do this. With us on your side you'll never find yourself in a tight spot.

www.aptn.com



The Middle East is one of the fastest growing media markets in the world. With new channels being launched and more 24-hour news coverage every year, video news content providers in the Arabic-speaking market need to offer wide-ranging and tailored services. For over seven years the AP Middle East Services department (formerly Middle East Custom Coverage) has provided the only truly customised international news and broadcast facilities service for television networks in the region

A unique TV news service in an extraordinary market

"AP Middle East Services has become essential to television networks anxious to provide international news and context for complex developments in the region," says Alla Salehian, commercial manager for AP Middle East Services. "Effectively we are the extension of the client's foreign desk or assignment desk. This gives clients the ability to tap into the extensive resources and skills of our department and of AP Television News – something that would cost them much more to replicate."



Clients of the MES reporting service (its main source of revenue) must be subscribers to AP Television News' content as delivered on the Global Video Wire (GVW). That way, fulfilling MES client needs does not duplicate AP Television News coverage. In addition, Broadcast Services support can be used by non-subscribers. This includes sending a video feed over an AP Television News satellite uplink or editing material with AP equipment in the field. The reporting service provides clients with ready-to-air news reports from the field – using the clients' logo and reporter sign-off. There may be a 10-minute story about Baghdad residents dealing with security problems or a report on Iraqis observing the month of Ramadan amid the upheaval.

Some subscribers request that a news report run for five minutes with at least two interviews, says Salehian, while others want a shorter two-minute report. They may ask that the journalist appear only at the end of the report and others require a bridge with a "stand-upper" by the reporter in the middle. Though Middle East Services' reports are tailored to the clients' needs in these ways, they always maintain the AP commitment to accurate, objective news reporting.

The year-round operation has two teams working opposite shifts. Each team has two client editors, two producers, three coordinators, three tape-machine editors, three satellite coordinators, a graphics designer, and two production coordinators. Dayside MES staff also include accounts and administration support. "I think what makes this service so successful is that they think through the news agenda from a broadcaster's viewpoint so that the journalistic support provided is truly customised to each network's needs," says Salehian. "For many customers AP Middle East Services has become indispensable. This is only possible because of the wealth of experience in our team, and the commitment we have to top-class delivery."

Middle East Services' customer base consists of terrestrial and

satellite news and general channels from Tunisia to Iran. MES is the sole provider of coverage for all royal and ministerial visits and special events for most clients, including Egypt TV, Kuwait TV, Saudi TV, Bahrain TV, and Oman TV. All of the main Arab channels use some or all of AP Middle East services. Among MES' other clients are Oman TV, Dubai TV, Emirates Media (Abu Dhabi), MBC/Al Arabiya (Dubai), Qatar TV, Al Jazeera TV, Nile News, Tunisia TV, and Al-Hurra. AP moved into this business when in 1998 APTV acquired WTN and with it the Middle East department. The newly named APTN capitalised on the trend toward international news coverage in the region to expand the service to Mideast clients.

Based in AP Television News bureaux in key territories, Middle East Services boasts dedicated Arabic-speaking production and editorial teams. The department employs 42 full time staff – of whom half are based in London. All staff are bilingual in Arabic and English, though the majority of MES reports are in Arabic. An additional 45 Arabic-speaking freelance reporters serve clients of the reporting service, with freelance technicians and producers working in smaller bureaux. Middle East Services staffers work closely with AP Television News producers in each bureau so that no overlaps in coverage occur. They also coordinate coverage plans with the Broadcast Services department, and work together during special events.

Aided by an English/Arabic Web site, the Middle East Services department has developed its client services over the last three years and attracted business from non-Middle Eastern clients interested in tapping the extensive knowledge of the region. The name change, says Salehian, better represents the wide range of services now offered by the department.

Since most clients are not equipped with planning tools, MES staff developed a regularly updated forward planner for the Web site. "It lists all future events that we think might be of interest," says managing editor Gasim Hassan. "We also call and fax clients with specific events and offers for coverage." The planning editor also closely monitors the editorial needs of clients and makes necessary adjustments to ensure that TV customers receive the appropriate support.

"We have a well-developed and well-respected brand in the Middle East market. With the promising trend of increased future business, we are well placed to meet the growing demands for new content," says Salehian. This includes an expansion of local coverage, in everything from sports to entertainment news. "Just as the market is growing so is the number of competitors, and we need to keep adapting our products and developing new services to maintain our unique position in the marketplace."

A day in the life of AP Middle East Services

seen through the eyes of **Gasim Hassan**, Managing Editor, AP Middle East Services



0700 Editor of the Day compiles and sends News coverage offers to all clients.

0800 Request from Kuwait TV to cover Iraq Conference in Istanbul. Crew and reporter contacted and instructed to prepare report.

0900 Al-Hurra TV inquires about possibility of receiving Live signal of peace signing ceremonies from Khartoum, Sudan. Sudan TV and Arab Broadcasting Union contacted to arrange for a Live shot to be transmitted. NTL in London contacted to downlink the signal. Availability confirmed to client.

1000 All clients respond to offers by choosing stories to be covered by MES. Bureaux and reporters made aware of coverage plans.

1100 MES producer in Jerusalem calls saying a big explosion hit the centre of Tel Aviv. Extra crews deployed to the area. Clients informed. They request reports and Live shots where possible.

1230 Al-Hurra TV request three Live shots for their 'Free Hour' show, from Beirut, Cairo and Oslo. Bureaux and vendors informed. Studios and satellite booked. Transatlantic fibres arranged. Jobs confirmed to the client.

1300-1500 Reports fed from locations to London. Those edited being on-passed to clients. The rest edited, and fed as soon as completed.

1500 Dubai TV requests coverage of UAE Head of State trip to Europe and the United States of America. Bureaux and offices informed of the schedule. Coverage plan confirmed to client.

1600 Al Rai TV requests a Live shot from London for their 18.00 Newscast. Studio and circuits booked. Transport for guest arranged. Job confirmed to client.

1745 The three Lives shots for Al Hurra 'Free Hour' show lined up and coordinated, and IFBs connected.

1700-1800 All reports fed to clients.

1800-2000 Clients informed about following day coverage plans. Crews booked for confirmed shoots, and resources assigned.

AP Middle East Services team provides a truly customised, international news and broadcast service for television clients in this region. Based in AP bureaux in key territories, AP's dedicated Arabic-speaking production teams are an international extension of Middle Eastern clients' newsrooms. From reporters to editors, camera crews to technical staff, AP have the experience and expertise to cover and deliver international stories, relevant to the Middle Eastern audience - as they break. AP Middle East Services is part of the international television division of The Associated Press, the world's largest and most-experienced newsgathering organisation.

www.ap.org

APTN is a member of the AIB.



In much the same way a butterfly emerges from its chrysalis, the Middle East is undergoing a transformation. Political, economic and cultural change over the last 15 years has resulted in the creation of a vibrant media sector that is attracting huge investment as well as experiencing massive growth in terms of the number and variety of channels operating within the region. This, says Georges Baroud, Director, GlobeCast Near & Middle East, is in turn creating opportunities for satellite service providers to drive change in the way content is gathered, managed and distributed

Liberalisation and opportunity

GlobeCast has a strong presence in the Middle East, having had an office in Lebanon since 2000 and planning a second sales office in Dubai which should be operational by the end of this year. Our expansion is a direct response to the increased opportunities in the region, resulting from both deregulation in countries such as Egypt, Lebanon and Morocco as well as the creation of media-specific free zones in Bahrain, Dubai and Jordan.

The opportunities arising from liberalisation initially derive from a nation's hunger for information, news and commentary. Qatar-based Al Jazeera spotted this opportunity early on and whilst it sent shockwaves round the world when it launched in 1996, it has since become recognised as a credible commentator on world events by both Middle Eastern and world audiences. It has been followed by other commercial Arabic news broadcasters looking to challenge the stereotypical views of both the region's public broadcasters as well as those around the world. Examples include Al Arabiya which launched in 2003 from the Dubai Media City and Arabic News Broadcasting (ANB) which broadcasts from Beirut and London. In turn this has prompted more traditional broadcasters (commercial

and publicly owned) to adopt a new way of dealing with information. The result is a drastically changed news media market.

Liberalisation has also opened up the market to western broadcasters which now regularly feed a variety of news, entertainment, music and other programming into

the region. Satellite pay-TV platform Showtime Arabia is operated by Gulf DTH LDC, a joint venture between Viacom and the Kuwait Projects Company (KIPCO), and offers 51 premium channels on four multiplexed DVB transport streams, including Turner Classic Movies, Discovery Civilisation, BBC Food, Hallmark, MTV Middle East and Bloomberg. Three of the platform's transponders on Nilesat 102 are now operated from Dubai but GlobeCast has recently taken over management of the fourth out of the UK.

Faced with the challenge of competing with such varied content, Arabic broadcasters started to commission western-style music and entertainment programming themselves as well as buying in movies, comedy, drama and reality shows from the West. In the mid-nineties, broadcasters such as MBC and One TV also introduced free-to-air entertainment channels to compete with the pay-TV packages.

Opportunity and innovation

As well as challenging the domination of the public broadcasters within the region, commercial broadcasters have recognised the potential to reach Arabic audiences around the world. GlobeCast also recognised that potential and has embarked on a number of ventures.

There are three major satellite platforms in the US but GlobeCast WorldTV is the leading source for international programming, delivering 36 Arabic television and radio channels among its 130 international services to viewers via Direct-to-Home (DTH) satellite on Intelsat Americas 5. As such, WorldTV is the largest platform for Arabic programming anywhere outside the Middle East. In March 2004, we partnered with satellite operator Arabsat and the Arab States Broadcasting Union (ASBU) to bring a bundled package of Arabic-language programming to viewers around the world. This was the first time a bouquet dedicated to community channels debuted in four continents simultaneously on GlobeCast platforms. A year later, new channels were added and we expanded distribution of the bouquet to other parts of the world. As a result, Arabic-language channels may now be watched in six continents: Asia, Africa, Australia, Europe, North and South America.

We have since partnered with Arabsat to launch a new broadcast platform on Arabsat 4A that will allow European uplink to the Middle East DTH market. The move is in response to the demand from European and other broadcasters wanting to reach the 31 million DTH households in the region. Set for launch later this year, the new Ku-band platform will be the first European gateway to an Arabsat satellite, allowing broadcasters from around the world direct access to the Middle Eastern and North African markets.

Innovation and technology

This proliferation of content flowing within, into and from the region has contributed to the growth in the number of satellites and transponders servicing the region. GlobeCast operates more than 50 digital DTH/cable distribution platforms to offer the widest regional coverage and has capacity on several satellites servicing the Middle East, including Arabsat 4A, Eutelsat W3 and Hot Bird.

However, as the opportunities have developed, so too has the technology and the role of a service provider such as GlobeCast has had to change significantly over the last few years. Whilst the distribution of permanent services via satellite still forms the majority of our business, we are increasingly asked to add value to our services, and as such, have transformed ourselves from a traditional satellite service provider into a network-agnostic content management business.

Content management

One of the criticisms levied at broadcasters in the region is that they have little or no regard for local and regional variations in TV viewing needs – indeed, they have consciously positioned themselves as pan-Arab broadcasters. This is largely due to the fact that the region is dominated by satellite TV operators, unlike the US and Europe, both of which have a strong local distribution model due to the existence of local cable and/or terrestrial affiliates.

However, IP is set to change all that. Whilst satellite remains an efficient way of delivering content across large areas, IP content management solutions, such as those developed by GlobeCast, will allow broadcasters to cost-effectively tailor content for specific audiences. Content is stored on a central server but each



The Middle East – new land of opportunity



broadcaster can remotely payout, re-schedule content or insert local advertising and/or local programming via a simple internet connection. Ultimately, they will be able to create a unique channel for each market at marginal cost.

Another application for IP-based solutions is newsgathering. Whilst the Middle East has often been in the news in recent years, the reputations of international news broadcasters are made or broken by their ability to break news the instant it happens. Satellite service providers such as GlobeCast are instrumental in providing the means to do this, enabling field reporters to deliver their news packages quickly, easily and cost effectively. However, until now, journalists have been limited in two ways – by the delivery method and by the number of recipients they can reach at any one time.

GlobeCast's WING delivery system is an IP-based video exchange platform. It works in a very similar way to email and instant messaging, allowing a field journalist to send a video file simultaneously to many recipients over the internet, unlike most FTP-based Store & Forward solutions which are limited to point-to-point delivery. It can also be used to stream live footage and, because it runs through a main server (based in Paris), it is able to convert incoming signals on the fly to match each recipient's requested format, whether that is a WM9 or MPEG 4 HD video file. The service is also suitable for bureau-to-bureau contact.

HD

Although the Middle East is by no means a leader in the move towards HD adoption, there is no doubt that it will both generate and demand HD content in the near future. New media centres and broadcasters such as Al Jazeera International, Abu Dhabi and Dubai TV (plus others) are inevitably equipping themselves accordingly, and GlobeCast is doing its bit to promote the format. We are already in discussion with a number of Arabic broadcasters about providing HD delivery solutions and late last year, we teamed up with Arabsat to demonstrate the beauty of HD via a live HD

stream to key decision makers at the Cairo Sat fair. We have also embarked on an HD-upgrade programme (to include MPEG 4 encoders) for our SNG trucks which will be available to broadcasters throughout Europe and the Middle East, and our global fibre network (Europe/Asia/America) can be configured for permanent and ad hoc HD circuit feeds.

Spreading its wings

The emergence of the Middle East as a vibrant media, entertainment and commercial region is also providing companies such as GlobeCast with non-broadcast opportunities. Enterprise solutions such as Captive Audience Networks (CAN) and digital signage are ideally suited to the region's burgeoning shopping mall culture, enabling advertisers to use screen media to target their customer base at the point of sale as well as providing retailers with effective tools to increase turnover and/or generate revenue through media sales. The Middle East is emerging as a true land of opportunity.

GlobeCast operates a global network of satellite platforms to deliver professional broadcast, enterprise and retail media, government communications and a growing range of file-based multimedia content. A subsidiary of France Telecom, the company is present on five continents, accessible through 15 teleports and technical operation centres in the world's leading media hubs. More than 900 employees worldwide support a diverse range of clients who use satellite for content distribution, including leading TV and radio broadcasters, corporations, retailers, government agencies, sports rights holders, news organisations, programme producers, production companies and Internet services providers.

www.globecast.com

GlobeCast is a Gold member of the AIB.

Shifting sands

**Simon Dore, Senior Vice President of
Technology & Operations at Showtime
Arabia offers a perspective on the changing
technological environment of a region**

In a dark, cool room on the edge of the Arabian gulf, flashes of light pick out the features of the earnest young faces intent on the minute detail of the flickering images whilst outside hot wind whips thin clouds of sand over the rapidly changing landscape... in edit suite number three the finishing touches are put to a promotion for a new movie channel shot in high definition.

The Middle East has big plans. Gulf States, once secured against colossal and inexhaustible oil resources, have seized the opportunity of this seed capital and used it to invest in the future – realising that there's another story to be told if the money's going to keep rolling in.

In a simple straw poll, at least until recently, the Middle East with all the baggage that the name carries would have been one of the last places on earth chosen by many as a preferred holiday destination. Now Dubai is said to have replaced Puerto Banus and the Med as the most popular sun spot for the British holiday maker. And there's good reason for it; the region in general and Dubai in particular has invested heavily and creatively in the infrastructure required to offer world-class destination facilities. The concentration of five-star hotels, restaurants, bars and leisure resorts alongside the miles of sandy beaches and acres of glitzy shopping malls makes it difficult for the visiting Martian to determine whether the saucer has come to rest in Jeddah or Miami Beach.

This development, largely driven by the economic vision and practical wealth of the ruling families isn't just restricted to tourism. The highest concentration of tower cranes in the world that make another quotable statistic for Dubai is a reflection of the fact that the building industry represents a disproportionate percentage of the annual turnover of this cosmopolitan Gulf State. But with the literally breathtaking rate of construction here, the building of hotels and apartment blocks, shopping malls and highways will soon reduce to a more normal level.

It's really in other business sectors that the Middle East has identified its ability to develop long term sustainable revenues and, for us at least, in the media in particular that infrastructure and opportunity is being built. The region has of course captured attention because of the global events that have their roots here and economically it's a part of the world that no-one can afford to ignore. In terms of average wealth per capita and a large unexploited market – skewed, it is true, to a lower but nonetheless enticing percentage of the population – it offers great growth potential. Development of the media sector has followed a well-trodden path; onshore offshore tax havens are carved out within the huge available swathes of land that characterise the Arabian peninsula and are rapidly developed into business hubs complete with landscaping, golf-courses, bars and boutiques.

But convincing media companies to operate in this area requires more than just convenient sushi and a handy beach. The

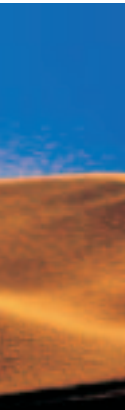
technological backdrop, availability of facilities and an economic operating environment are the real drivers. Let's face it: you don't actually have to operate from the Middle East to provide services there and you don't actually have to have your playout operation in the region to take advantage of its convenient location for drop off to Asia and Africa.

Broadcast and media companies have, however, chosen to locate their operations in the various 'media cities' that are springing up and the Dubai Media City (DMC) must be the most successful of these today. Run by TECOM, the Technology, Electronic Commerce and Media Free Zone managed by Sheikh Mohammed bin Rashid Al Maktoum's investment entity Dubai Holdings, the zone has enticed over 650 companies to date according to its website, with a significant number of these being world-leading brands. The recent announcement of Dubai Studio City – another Dubai Holdings business – aimed at attracting serious production investment into the Emirate confirms the determination of the Maktoums to establish a world beating media industry.

And if the Middle East conjures images of shanty towns, with poor air-con, jerry built production facilities and regular power failures, let me assure you, facilities companies, technology suppliers broadcasters and service providers abound – this is *not* a low technology region. Consumers, by and large, are well educated and aware of the latest CE technologies even if they don't completely understand what they do, but what's new there? A population of early adopters, here it is essential to own the latest, smartest, neatest devices and to have all the premium services available. High Definition is well and truly on the radar, the penetration of widescreen, HD-ready flat panel displays is impressive and although the wealth divide does mean that there is a high number of low quality screens these can be largely ignored by the hard-nosed as they are only really present in uneconomic households that have no significant spending power to respond to advertising nor the wherewithal to invest in Pay-media services. But it is a fact that among the 350 million strong population across the Arabic speaking world, those with an income that can excite investors are significant in number despite their smaller percentage representation. And their appetite for premium media services is enormous.

And there's much to choose from. In an already cluttered TV environment, Free to Air and VanityTV is also endemic. Aside from the serious, established players there are plenty of new single-channel entrants. With the cost of entry into the business diminishing every month and no shortage of funds, anyone who is anyone, it seems, wants





to own their own little channel, hopeful of – but not dependent upon – mitigating at least some of the cost through a tiny share of the ever more thinly spread advertising dollar. Some of course do this very well and quickly become a staple part of the viewers' diet. As a result of this frenetic growth channels come and go with mind-reeling frequency. There are always more than 200 TV channels available although the viewing figures (such as they are) for the majority would make even the UK's Channel 5 feel that life wasn't quite so bad.

But to get an insight into the real environment here it's worth taking a closer look at what we at Showtime Arabia have built. Establishing ourselves in a brand-new headquarters in the DMC alongside other global brands such as CNN, Reuters, MBC and CNBC, we've quickly built a reputation for excellence in call centre and broadcast operations. Transmission is the heart and soul of any broadcaster – more than just the mechanical operation of stringing programmes, promos and breaks together, it's where the character of a channel is created. Slick continuity and strong branding in a busy TV environment mean that viewers will keep returning. This is also where the quality of the service is defined. Get it right and the customer stays with you; get it wrong and you can wave the sub goodbye.

When Showtime Arabia launched its first bouquet of dedicated and pass-through channels, playout was sub-contracted to a facility in London. This was far from ideal, and as the service grew we determined to build our own dedicated playout centre somewhere within the region. Starting from a clean sheet, and with support from TECOM we could design a true 21st century facility, with all the benefits of the latest technology. First, we wanted to provide comprehensive facilities at the highest possible quality, comparable with or better than major platforms like DirecTV or BSkyB. Second, whilst Showtime Arabia's owned and operated and pass through channels were to be the first users, we wanted to create sufficient capacity to provide for third party channels, not part of the Showtime Arabia platform, who need playout facilities, wherever they may be. DMC was the obvious choice.

We chose Sony BPE as system integrators and worked with them to design a Network Operations Centre which uses leading edge but proven technology. To deliver multiple services efficiently – the centre currently handles 53 channels – we needed excellent automation and centralised handling of content. Within the centre, all media is held on Omneon video servers which access an archive based on a Sony Petasite robotic library. The Petasite is currently equipped to 30,000 hours of storage, and transfers between the live servers and the archive are seamless. Automation here is provided by specialist British company Pebble Beach Systems. We wanted a single, reliable system that would cover all our operations from ingest and preparation through playout and archiving, and which could be readily scaled as we added new services.



Running a multi-channel broadcast NOC is more than loading a schedule and watching it go to air. Showtime Arabia and our client channels all acquire programming from around the world some of which will need modifying before it airs: splitting into parts to meet break patterns, and perhaps editing for slot. Channel marketers also need to create compelling promos and trailers from the same content to drive audiences to the shows. In the traditional model that means duplicating tapes and dispatching to external post houses. Tracking library material and dealing with customs and couriers is a time-consuming, costly step requiring staff, and using external facilities means money leaving the operation; neither contributes to a smooth workflow nor a cost-effective service.

In the Showtime Arabia NOC we have incorporated the post facilities needed to support the business and have designed them

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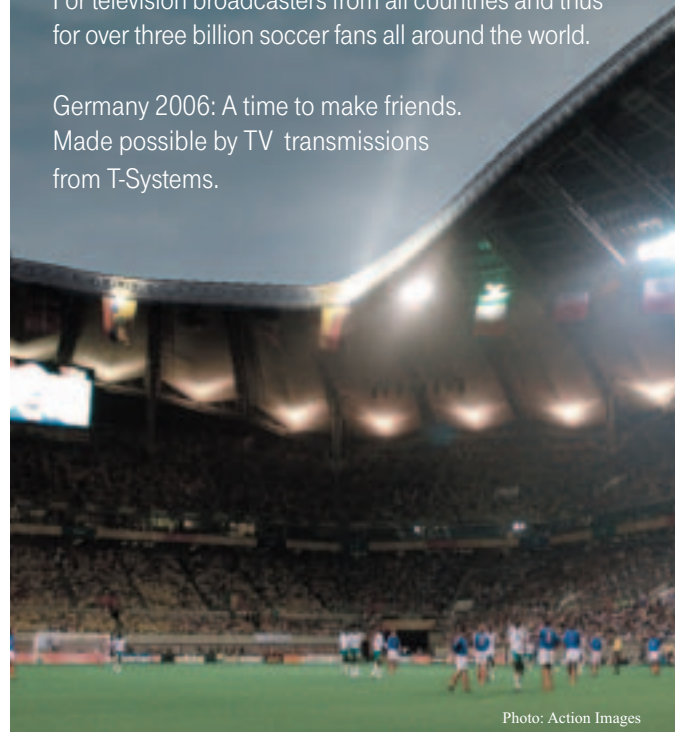
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to access the same material as the playout environment. Additionally, a third browse server holds low resolution copies for offline viewing and the creation of EDLs. In short, once the content is delivered and ingested into our system, it stays in the digital domain throughout its life with us. Tapes simply don't have a place in our workflows. Automation supplier Pebble Beach provided the desktop editors through its own tool, Razorfish. On completion of the offline EDL, the file is transferred into our Final Cut Pro post facility for finishing using the same digital content – of course. There's no time wasted – as soon as the programme is ingested into the server it can be cut for promos – and no material needs to leave the building again. And all that troublesome data entry: different versions of trailers, precise duration of programme parts, double entry and so on is handled by the automation, ensuring there are no data related slip-ups and the playout is always frame accurate. At the same time, schedulers and controllers can preview any of the content in the system. Their computers have browse facilities which allow them to look at anything in the system without tying up broadcast resources.



Our new playout centre, which has been on air since mid 2004, is very nearly the perfect tapeless environment. At present we still have to handle videotapes once: most material still arrives on tape. We're working with secure service providers like SmartJog, and we're urging content producers and owners to move to delivering their material digitally, so that we can eliminate this last remaining process.

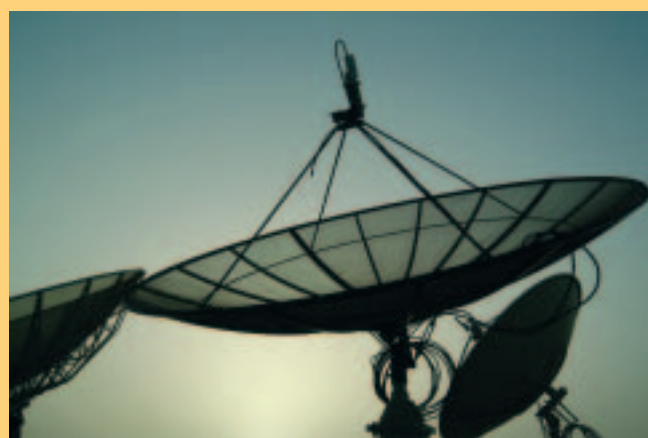
All in all this paints the perfect backdrop for a vibrant broadcast media industry, but there are a few key elements that make a significant difference to the decision to operate here. As an example, the DMC regulator and administrator TECOM is a real estate business with a number of interesting service providers tacked on. "Interesting" because they are exclusive providers in their zone, monopolies in fact and in this part of the world monopoly is a very popular game. The provision of most important services in DMC is – like the rest of the UAE – offered on a no competition basis. Like it, or lump it. Telecommunication services, in the Middle East almost exclusively a preserve of wealthy families or government who have monopoly positions, are expensive. With no competition or effective independent regulator to control tariffs the cost of essential elements such as contribution feeds, data links, internet bandwidth etc. can prove to be prohibitive.

The phenomenally successful development of call centre businesses in India is brought about through cost effective infrastructure, alongside a well-educated, low cost, bi-lingual workforce – but India is not a location which can work for the Arabic speaking markets. The only logical place to look is in the

region itself, a fantastic opportunity to see the same growth for the 23 Arabic speaking countries as India has seen for Europe. However, in the Middle East, Voice over IP (VOIP) is largely illegal, banned by those that seek to protect traditional revenue streams. Telecommunications regulations, high prices and lack of competition have to date denied the region access to this huge opportunity. And because there's no competition, there's little desire to provide a high standard of customer service. Reliability is therefore distinctly hit and miss. Add the complexity of relationships that have to be struck with and between two national monopolies when you need an international service of any kind and service provision rarely meets business requirements.

In turn this restricts the growth of business in the Media zones such as DMC and is frustrating to those who choose to operate here and to those who have invested so much. Still, the rules are said to be changing...still. Qualified statements are often made about the nature of the market which promises to open up but I for one shan't be holding my breath.

So, have we benefited from this move? Undoubtedly. The quality and reliability of our service is second to none and the reduced cost of provision through new technology and streamlined workflows is material. We are in the heart of our market and providing the services that our subscribers want. We're perfectly positioned to take advantage of this exciting opportunity. But would I recommend it to everyone? No. It's important to recognize that there is much that needs to be done here to bring real flexibility into the media sector, much of this technological and much regulatory. But the region has a hunger and I've no doubt that once this message is firmly understood there won't be a stone left unturned to ensure that it becomes truly competitive with international media hubs such as those in the US, Europe and Asia on every level.



Showtime is the leading digital satellite pay-TV network in the Middle East and North Africa. It is a joint media venture between Viacom and KIPCO – Kuwait Projects Company (Holding). Showtime offers over 51 premium channels of predominantly Western television entertainment including four sports and four movie channels – for the entire family, plus ten CD audio channels. Four subscription options offer choice suited to the viewer's lifestyle: Showtime Plus, Sports Plus, Movies Plus and Total Plus, while Disney Channel is available as an à la carte option. www.showtimearabia.com

Iraq Media Network - ready to serve

Iraq's media is moving from totalitarian control under Saddam's regime to one with a properly constituted public service broadcasting, competing commercial TV and radio, plus a vibrant free press. That's the theory. In practice, it's a little more complex. As we have reported in every edition of *The Channel* since the Second Gulf War, anyone working for the electronic and press media seems to have been seen as fair game for those seeking to disrupt life in post-Saddam Iraq - 80 journalists and news workers have died covering Iraq since the start of the conflict in early 2003 and the death toll is likely to continue to rise between this article going to press and you reading it.

It's against this background that AIB Gold member Harris Corporation has been rebuilding Iraq's publicly-funded media. In 2004, a US\$96 million contract was awarded to Harris to turn Saddam Hussein's old media network - TV, radio and a national newspaper - into an independent voice for the Iraqi people. In early 2005, Harris won a supplementary contract with a value of US\$21 million to complete its work over the following three months.

It's been a major project, as the Iraqi Media Network (IMN) comprises 33 broadcast sites providing complete broadcast coverage of Iraq. The network's central hub is in Baghdad, where Harris has completed construction of a world class news studio and a world class entertainment studio - delivering, installing, testing and providing operator training on the latest professional radio and TV equipment available today. This central hub supports two national television channels and two national radio channels. IMN supports both terrestrial TV broadcasting as well as Al-Iraqiya TV, a DTH satellite channel. IMN benefits from a 24-hour news desk manned by IMN employees who have been trained to support 24-hour multiple international news feeds.

IMN has two regional centres, Mosul in northern Iraq and Basra in southern Iraq. Harris has completed construction on these 300m² regional TV and radio studios, training IMN employees to install, test and operate these studios which have now been equipped with the latest professional radio and television equipment. The 33 transmitter sites for IMN are connected by a satellite network supporting satellite uplink/downlink.

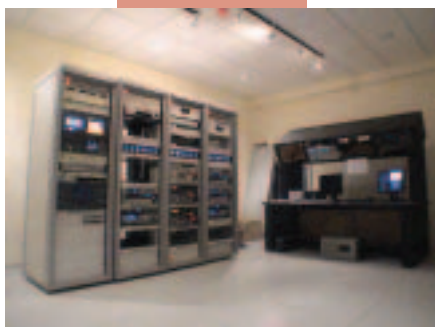
The Harris-designed network includes all-digital TV and radio systems including:

- Ikegami HK399 studio cameras
- Grass Valley production switchers
- Grass Valley routing switcher systems
- Grass Valley digital video distribution
- Pinnacle Deko series graphic generators
- Harris BMX digital audio consoles
- Pinnacle non-linear editing systems - Vortex for News and Liquid for Post Production
- Pinnacle 900 Media Stream video servers
- Harris Net VX MPEG-2 digital video networking terminals



as part of the satellite distribution system

- Harris ADC Automation for automated playlist/playlists
- Voice over Internet Protocol (VoIP) telephone links for radio and TV



- Miranda Kaleido II multi-image display processing and large screen LCD monitor walls for production control rooms and master control centres

Radio and TV transmitters include:

- Harris Platinum Z-Series solid state FM transmitters (ranging from 1 to 15 kilowatts)
- Harris Atlas Series UHF TV transmitters
- Harris Platinum and HTEL VHF TV transmitters (5-20 kW)
- Harris Sigma Series high power UHF TV transmitters
- Dual exciters for all FM and TV transmitters
- Harris programme input and signal processing systems for each transmitter
- Nicam stereo generation equipment for each TV transmitter
- Harris NetVX integrated high-speed video networking

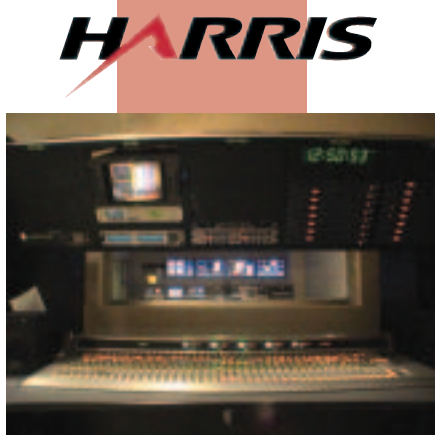
Harris also designed and equipped:

- Lighting grids and instruments with solid state dimming and ETC control systems
- 3 satellite news gathering (SNG) vans
- 3 fly-away terminals
- 30 electronic field production systems to support field news

All of the systems for IMN were designed by Harris' Broadcast Communications Division in Mason, Ohio. The systems were pre-built and tested for quick deployment to IMN locations. A team of 20 installation engineers worked from March 2004 to November 2004 testing the systems prior to shipment to the Middle East.

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 a Gold member of the AIB



Qatar-based Al Jazeera channel made its name through live broadcasting of breaking news, top stories, and current affairs. It caused a revolution in the media industry and turned Arab audiences away from western news broadcasts. Today, eight years after its launch, the 24-hour channel has set its sights at supporting the development of the media industry in the Arab World

Al Jazeera aspires to be a bridge between people and cultures, to support the right of the individual to acquire information, and to strengthen the values of tolerance, democracy and the respect of liberties and human rights. Seeing itself as a forum for plurality, Al Jazeera endeavours to promote

aspect of the development of the media industry. During July 2004, Al Jazeera hosted a two-day international media forum, Al Jazeera Media Forum, which attracted media personalities, experts, and intellectuals from all over the world. The participants exchanged experiences and

These projects are all part of the institutional developments that Al Jazeera as a network has embarked on in the past few years, beginning with the launch of Al Jazeera Net (Arabic & English). Other projects that Al Jazeera is undertaking are the launch of a documentary channel, children's channel, and an English language news channel, during the end of this year and the first half of next year. All of these new services will accommodate media needs domestically and regionally. The new projects are proof of the channel's deliberative efforts to assert its commitment to its audiences, and to widen its impact regionally and internationally.

New horizons for media in the Arab world

public awareness of issues of concern, seeking the truth while observing the principles of professionalism within an institutional framework.

Al Jazeera Channel established its Al Jazeera Media Training and Development Center (JMTDC) in February 2004 - the first of its kind in the Arab world. The Center aims to increase awareness of the media - its role and message - and communication between media organisations, and offers training through a principle-based approach. The work of the Center extends beyond television to include radio and print and electronic media. The Center's activities also cover non-media organisations through programmes designed to improve media output. To achieve its goal, the Center has embarked on a twin-track approach: offering courses, workshops, seminars and conferences to media workers, plus providing studies and consultation to media institutions. Through this Center, Al Jazeera is contributing in theory and in practice to the development of skills and raising of performance level of media workers in many sectors of Arab and world media.

Enhancing the communication process among media sectors is another important

viewpoints, with a view to enhance media diversity and find things in common between the Arab media, especially all-news satellite channels, and their international matches. The conference also explored the impact of the shifting sands of international policy and diplomacy. During this event, Al Jazeera unveiled a code of ethics underlying the vision and mission it has set for itself.

Al Jazeera has also established a Centre for Studies and Polling to cover areas of politics, economics, and journalism - locally, regionally as well as internationally. The newly established centre will operate as a central unit with a mandate to provide Al Jazeera Channel, Al Jazeera Net, and other parts of the network with all the information required on media developmental studies, opinion polls, and research services. The Centre will draw on in-house resources in the preparation of studies, advisories, or scientific polling required by consumers. In addition to that, there will also be an advanced information centre, the Al Jazeera Production Centre. Its aim is to help expand the dissemination and circulation processes of available information and data electronically or through printing.

The Al Jazeera Television Production Festival held in July of this year proved a vital platform for recognising, assessing, and valuing talent and art as necessary elements of the media in the Arab World. The event not only facilitated interaction between producers and TV personalities in the Arab world but also promoted the documentary industry in the region. The festival featured three seminars on this subject: "International documentary co-production with the Arab world", "The director, the producer: the role and the relationship crisis", and "Towards a documentary industry in the Arab world". An independent jury screened documentary films focusing on various social, political and cultural issues in the Arab world and awarded gold, silver, and bronze medals. The majority of the films lined up for the festival were themed on the Palestinian issue and the war and devastation in Iraq.

The event opened new horizons for young television producers by providing an opportunity to exchange ideas and experiences related to the problems the Arab World is facing in the field of TV production, particularly documentaries. A special award named "New Horizons" was given to the two best experimental films presented by young film makers. Dubai TV, Syrian Satellite Channel, Palestinian Broadcasting Corporation, Qatar TV, Libyan TV, Moroccan TV, Manar TV and LBC also



Going international

participated in the event, and Al Jazeera has plans to widen the scope of the festival in the future with entries from across the world.

Al Jazeera Channel utilised a new service to broadcast Al Jazeera Television Production Festival - "Al Jazeera Live", launched in April 2005, another first in Arab broadcasting. It is a specialised media service that broadcasts only live conferences, social, cultural, economic and other issues of relevance. Currently available via ArabSat satellite, there are plans to widen the footprint by utilising other satellites in the near future. "Al Jazeera Live" falls under the flagship of existing media services, the Arabic language news service, Al Jazeera Net with its two websites (Arabic & English), Al Jazeera Media Training & Development Centre, and Al Jazeera Sport Channel.

Al Jazeera, as a network, has over the last years assumed the responsibility of covering every aspect in the media field and moved ahead at a rapid pace. For this reason, its brand name is recognised among the top five most influential brands globally, and the number one media brand, according to Brandchannel's 2004 results announced earlier this year. The ability to maintain progress despite obstacles, and the ability to overcome obstacles along the way and continue on the same path, is a true test for any institution's success.

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.

Al Jazeera is a Platinum member of the AIB.

Nigel Parsons is a household name in the media business, with 30 years of experience under his belt, gained from roles at BBC World Service and WTN (Worldwide Television News), and from successfully managing TV start-up news network teams, such as EBC in Switzerland and Telecampione in Italy. Now he has taken up a new challenge as Managing Director for Al Jazeera's new International channel. At the AIB Regional Media Leaders Forum in London on 15 July, he outlined his plans, saying that research carried out worldwide had shown that there is a need for a new perspective on news – viewers are tired of the established channels and want a new voice

Why did you decide to launch an English language channel?

This is a question for the Government of Qatar, but never before has there been such an intense political, intellectual, and market-based interest in either the Arab world, or in a news outlet that can offer a unique 360 degree view of global current events. In recent years there have been groundbreaking developments in the Arab world that have encouraged growth of the free press, and we intend to build on this by bringing a fresh perspective on regional and global news from a unique view. We know there is a strong demand among the English-speaking global audience markets for an intellectual and educated voice that can provide such a complete view on world events, and we intend to tap into that through our extensive global news network.

What is the philosophy of the channel?

Al Jazeera International will be committed to utilising its global resources, including its extensive international staff, news broadcast centres strategically placed around the world (Doha, Kuala Lumpur, London and Washington DC) and dozens of bureaux around the world, to present issues and perspectives from a variety of sources. We will offer a unique, independent, and unbiased view of world events. We are committed to promoting rational, informative, and intellectual perspectives to our global English-speaking audience. We will also adhere to the strictest of ethical standards consistent with that of the rest of the international and western media, and will make our codes publicly available.



Are Arabs/Muslims Al Jazeera International's primary audience?

Al Jazeera International will appeal to a truly international audience by providing a fresh perspective that is not limited to one viewpoint of one nation or people – but to concerns around the world. We want to appeal to as large an audience as possible.

Where will you broadcast?

We will broadcast in key English-speaking territories across the world such as Europe, North America, Asia and the Middle East and we have secured satellite coverage to make us available in these areas now.

Who are your competitors?

As the first English-language global television network based in the Middle East, we have no direct competitors, we are unique, and first of a kind. Al Jazeera International will be an international station with no domestic agenda that offers a perspective unmatched by any other news

network. We take pride in being based in the groundbreaking free press environment of the Arab world, and we will utilise our position and vast global resources to present a unique view of regional and global events.

Will Al Jazeera International be a Middle Eastern view which is similar to its Arab counterpart?

We cannot speak on behalf of the Arab channel. Al Jazeera International will be editorially independent and make its own decisions. We will be committed to presenting all sides of an issue. Our internationally experienced news and editorial staff will utilise a wide range of resources to ensure that a fair and factual reporting of the news will conform to the highest level of journalistic ethics and integrity that our English-speaking audience can trust and feel comfortable with. As the first international television network based in the Middle East we are fortunate in that we have access to a wide range of Middle Eastern experts.

What will the station broadcast?

We will offer news and current affairs 24/7 - with a mix of discussion programmes, analysis and documentaries.

Who is the senior management team?

I was brought on board as Managing Director in August 2004. I am supported by a team of talented senior executives: Morgan Almeida, award winning designer and former creative director of CNN International as Creative Design Director; Steve Clark, a former controller of Factual Programmes at ITV as Director of News; Paul Gibbs, who was responsible for BBC TV's highly successful *Business Breakfast* and *Working Lunch*, as Director of Programming; Steve Jedowski, founder and Director of e-SCAPE consulting and former BBC Technology Director, as Technology Director; Gary Napier, former Managing Director of Soho Images, as Director of Finance and Administration; Lindsey Oliver who joins the station as Commercial Director from CNBC Europe where she was General Counsel and Director of Network.

What about technology and equipment - are you going to broadcast in High Definition?

Al Jazeera International will be the first global High Definition television station adopting the 1080i standard. We are building broadcast centres which will utilise the best technology available to deliver our

programmes to viewers around the world. This will include HD studio equipment, non-linear editing (NLE) and post production equipment (both in our broadcast centres and in the field) and transmission servers, all driven by networked newsroom and station automation systems to provide a stable technology platform for our 24/7 operations based in Doha, Kuala Lumpur, London and Washington DC.

When will you launch?

Our launch date is early 2006.

Nigel Parsons, good luck and thank you very much for talking to us.



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Ignoring MENA women is no longer an option



Until recently, few media producers or analysts paid much attention to Middle Eastern women as consumers. However, at Washington D.C.-based media research company InterMedia, the dramatic changes in the region's media markets over the last decade have been closely observed. Aylin Talgar, InterMedia Project Manager, Middle East and Africa, reports on some of the most interesting findings

The rising popularity of regional or pan-Arab satellite television has created intensely competitive media markets. As competition has intensified, regional and local stations have increased audience segmentation. The pan-Arab networks have made some progress toward targeting women as media consumers, but international broadcasters seem to be behind the curve.

At the same time that regional and local broadcasters are increasingly acknowledging women audiences in their programming, women still receive little coverage from the region's mainstream media. When women are shown at all, both national and international media often portray them as a homogenous group—at worst brutalised and at best silenced by oppressive governments. This article argues that international broadcasters to the Middle East and North Africa (MENA) should work both to develop more programming targeted to women and to increase constructive coverage of women and issues important to them.

The landscape

In the Arab world alone, there are over 200 satellite channels, with two new stations opening monthly, but international broadcast media still under-serves the region's women. Because international channels from Europe and the United States tend to be heavily news-oriented, it is natural there has not been a significant focus on women's issues or programming. They tend to concentrate on "hard," political news coverage and analysis, ignoring other specific programming women may value. To compete in these media markets, broadcasters will need to diversify their approach, catering more to certain segments of the population.

Media practitioners and observers may be unaware of the growing importance of MENA women as audience members and consumers. InterMedia surveys conducted in 2004 show women's media consumption, on

the whole, to be growing more quickly than men's. [The following analysis is based on aggregated datasets and individual country data for Egypt, Iran, Iraq, Morocco, Saudi Arabia, Turkey and the UAE (Abu Dhabi and Dubai). InterMedia has commissioned surveys in these countries where interviewing is done nationwide in most instances, the sample size is 1,200-2,000 with a 95% confidence interval and a range of error of +/- 2.19-2.83 percent.] As access to various news, information and entertainment channels rises, women seem to be tapping into these media streams at a comparatively higher rate than men. Furthermore, in much of the MENA, women hold significant sway in the private sphere, which can include control over media consumption habits within the household. In addition, they have some responsibility for the allocation of family disposable income.

Consequently, international media that ignore the region's women and remain unresponsive to their needs and preferences do so at their own risk: women, increasingly sophisticated consumers, will abandon these media—a prospect investors and producers surely want to avoid in such competitive markets.

Types of media

Survey data suggests broad similarities in media consumption patterns among the Middle East's women, but also important differences worth discussing. Television is far and away the most popular media among Middle Eastern women for news, information and entertainment, but preferences vary from one market to the next. In the Gulf and most other Arab countries, satellite TV dominates; in North Africa, Iran and Turkey domestic, terrestrial channels are decidedly more popular. Over 70% of Egyptian women identify Egypt Channel 1 as their most important news source, and 80% of Moroccan women say the

same about 2M Internationale. In Saudi Arabia and the emirates of Abu Dhabi and Dubai, by contrast, Al Jazeera is the most important news source among 53% and 68% of women, respectively.

The North African divergence may be explained in part by lower penetration rates of satellite TV in the region—many simply cannot afford the equipment. In many ways, the oil-rich UAE where 99% of households have a working satellite antenna, is hardly populous Egypt, where only 17% have satellite TV. [It is interesting to note, however that there is a flourishing trade in pirated cable spreading throughout Cairo and Alexandria. As the cable and satellite connections are considerably cheaper and more available now through these means, it could mean that soon Egypt's television scene might be

Women managed to shock the Umma (the new satellite-connected Muslim community) not only by belly-dancing in the most popular television series, but also as producers of films and as talk show anchors.

Fatema Mernissi

opening up more to the regional players.] Also, North African countries, in some cases, have contracts with European governments to provide various private

television channels through terrestrial signals instead of having to broadcast via satellite, as is the case with Canal 5 in Tunisia. Some North African countries do have flourishing and diverse local media markets.

The media environments in Iran and Turkey—where language differences make connection to the pan-Arab media network pointless—have evolved into polar opposites of one another, largely because of the vastly different political climates. Although the enforcement of legislation guaranteeing media freedom in Turkey is sometimes weak, it is not comparable to the strict restrictions on freedom of expression in the Islamic Republic of Iran, especially on TV broadcasts. Turkey has a vibrant and competitive media market, with about 1,180 radio stations and 244 private TV networks. [According to the

Turkish Supreme Council of Radio and Television (RTÜK) as based on radio and television outlets that have applied for licences in the country.] With a mix of public and private radio and television stations vying for audiences, the overall quality and diversity of Turkish media has increased dramatically in recent years. In Iran, on the other hand, the government's tight media control means that possible avenues to an open exchange of ideas are pursued through the internet and newspapers, where there are fewer strictures on expression.

Print media, though not a major news source in much of the Arab world, is thriving in both Iran and Turkey. Two of the top five news and information sources in Iran are newspapers. "Newspapers play an important role in Iranian society," said Dr. Haleh Vaziri, InterMedia's Regional Research Manager for the Middle East and North Africa. "Although Iran's judiciary persists in cracking down against editors and journalists, newspapers still tend to be a forum for more diverse viewpoints. They are often more vocal, bolder and more partisan than domestic television and radio in their coverage, and represent the full political spectrum, from reformist to conservative." Radio continues to be a very important source for news and entertainment in some parts of the region—in Iran and North Africa, for example—but its listenership is diminishing in other countries.

Subjects of interest

Research into broadcast viewing habits of women in the MENA shows that audience preferences in terms of subject matter vary from country to country. Again, it is important to note how the particular cultural, political and social environments in the MENA differ from one country to the next, and how those differences are reflected in women's varied interests. Egyptian and Saudi women, who live in societies that emphasize personal piety, rank religious programming most important to them. Egyptian women also say that news about Iraq, domestic news and political developments in other Arab countries are of great interest. Their Iraqi and Moroccan counterparts are drawn to news programming. In the UAE, again a country of relative stability and wealth, they tend to prefer movies and dramas, as well as entertainment and variety shows, more than women in other countries in the region. Political news attracts women in Turkey, especially coverage of Iraq, U.S.-Turkish relations and the "war on terrorism," not surprising given the high domestic visibility of all three issues.

There is an audience beyond those morning chat shows which only unemployed and bored housewives can catch, definitely. The issue is not there, the issue is how to capitalise on the audience by tackling these issues in a professional, sophisticated and attractive way, and this is where a journalist's genius comes in.

Jika Kesseouan, Lebanese

Organisation for the Prevention of Violence Against Women

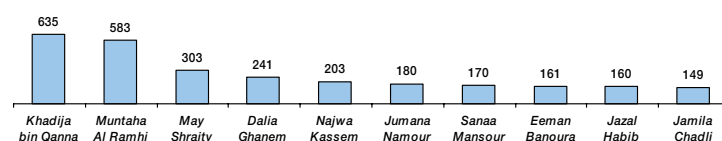
In several countries, women consider programming about their rights important, but numerous other topics interest them as well. In the UAE, women are drawn toward programming on health, social issues and fashion and beauty; in Morocco, toward youth and parenting; and toward cooking, current affairs and needlework in Iraq. The differences between women's and men's programming interests are often striking. Although women might be interested in more typically feminine subjects like cooking, personal care, and child-rearing, they are also curious about the concerns of young people and advances in health and medicine. Significantly, women are more drawn than men to programming that explores and seeks solutions to social problems in much of the region. InterMedia focus groups with satellite TV viewers in Jordan and Morocco in August 2004 showed most women welcome the idea of an all-female programme; also, they recommended "social programming" on the environment, unemployment among Arab youth, customs and life in other countries, and other topics. To date, it is not clear that international broadcasters have adequately addressed these specific and varied programming preferences.

[The table 'Topics of greatest interest' which gives the percentage of women and men saying they are "very" or "somewhat" interested in a number of topics is based on aggregated data from surveys conducted in August 2004. The data are weighted to reflect the relative population size of the countries surveyed: Egypt, Jordan, Kuwait, Morocco, Saudi Arabia and the UAE. The columns may not add to 100% because "don't know/no response" answers are excluded.]



Television personalities

Middle Eastern women value the presence on TV of strong female hosts and news anchors. Among Arab survey respondents of both sexes, two of the top five anchors named as favourites are women. The graph below ranks the top 10 female anchors, many from the popular pan-Arab satellite channels, according to how many women and men chose them as favourites. [The graph is based on aggregated data from surveys conducted in August 2004. The data are not weighted to reflect the relative population size of the countries but are ranked only on frequency. The countries surveyed were Egypt, Iraq, Jordan, Kuwait, Lebanon, Morocco, Saudi Arabia and the UAE.] As a subset, women overwhelmingly identified women anchors as their favourites.



Times of television viewing

Certain television viewing patterns are similar throughout the region. The graph is based on aggregated data from Egypt, Jordan, Kuwait, Morocco, Saudi Arabia and the UAE, and standardised to GMT to illustrate viewing times among women. However, some notable differences are highlighted when breaking down the data by country. For example, peak viewing time is between about 22:30 and midnight in the UAE and Saudi Arabia; it begins and ends much earlier in Egypt, Iran, Iraq and Morocco. Peak viewing in Iran

Topics of Greatest Interest
Percentage of women and men saying they are "very" or "somewhat" interested in the following topics
Top Ten Responses

Topic of Interest	Aggregated Total	Aggregated	
		Male	Female
National news	95%	96%	93%
Religion	94%	94%	94%
News about the Arab world	88%	92%	85%
Interests and concerns of young people	85%	84%	85%
International news	84%	87%	80%
Personal care, health and fitness	82%	76%	88%
Entertainment news	80%	79%	81%
Discussions of current affairs	79%	83%	75%
Daily life in other Arab countries	77%	79%	73%
Advances in medicine	76%	75%	77%

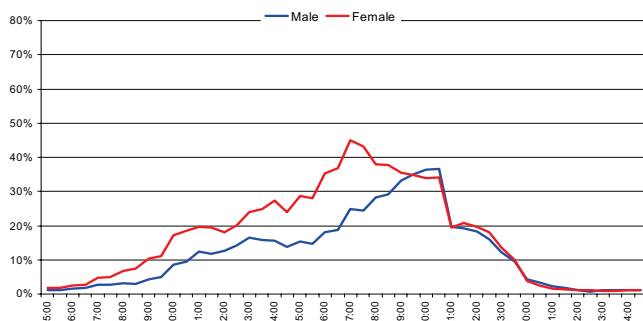
is from 21:00 to 22:00, and in Egypt, 20:00 to 21:00. These times are associated with the overall lifestyle differences between these countries' citizens. In Saudi Arabia and the UAE, InterMedia survey observation work shows the day generally begins much later and ends later than in other countries in the region, so more people are up at night watching TV. As testimony to TV's dominance in these markets: well over 50% of all those sampled watch television at these peak viewing hours.

Emerging media

In many Middle East markets, internet use among women is still low but is sometimes growing at a faster rate compared to that of men. In Iran, for example, internet use by women has been increasing slowly over the past several years. In 2001, less than 4% of women in Iran said they use the internet on a weekly basis. Surveys done in 2004 and 2005, however, show well over 10% of Iranian women report using the internet at least weekly. In fact, Iranian women are innovative in how they use the internet, logging on to keep daily blogs, participating in online discussion forums and engaging in political advocacy. The government's strict media regulation in Iran has motivated consumers to adopt new technologies, like the internet, that empower and foster open discourse. The internet is especially attractive as it comes with the benefits of anonymity, if desired.

Besides the rise in internet use (among women and men), the region's media consumers are discovering the effectiveness of other new technologies for news gathering. 22% of Saudi women use SMS text messaging via mobile phone for information on

TV Reach By Half-Hour
Percentage of Adults Viewing "Yesterday"—GMT Standardized
Egypt-Jordan-Kuwait-Morocco-Saudi Arabia-UAE



N=10,206 (adults 15 and older)—weighted for population size

current events—slightly more than international radio (21%) and higher than the internet (10%). As media and communications technologies evolve, women in the Middle East are discovering ways to maximise the advantages of these developments and to become more connected to the rest of the world.

Television as a medium for social change

Ultimately, media coverage of women in the Middle East is very low, both in national and international broadcasts. At a recent Amnesty International workshop in Cairo, researcher Zeina Awad pointed out that only Africa has less coverage of women in the news than the Middle East (14%). By comparison, the global average is 20%. This lack of coverage poses challenges to social progress. There is a range of ways in which the media could be used to improve the lot of the region's women, from promoting strong images to information on rights and freedoms. Aysenur Yazici, a popular Turkish television personality argues, "The media is an independent institution that portrays different perspectives and keeps the country awake. We carry the duty to teach democracy." She argues that serious shows

with professional guests are important to make women aware of their rights in the home and workplace." She says, "These particular television shows are for informing and educating women regarding their rights... These programmes still provide the only available information and guidance to uneducated oppressed women without any other resources."

While an emphasis on media as a means towards further freedoms for women is certainly a movement in the right direction, there are risks associated with thrusting women to the forefront of media. Marwan Kraidy, a professor of communications at American University, Washington, D.C. says that he believes the current media scene has a dual impact on women in the Middle East. On the one hand, the media empowers them by showing them in positions equal to men - in talk shows, discussing important issues, contradicting men in public or competing with men in popular reality TV shows. At the same time, however, he argues that certain portrayals of women in the media serve to objectify them. In particular he points to how some music videos show women as blatant sex objects. Professor Kraidy says he is optimistic, in the end, saying, "I think, ultimately, the mass media, including satellite television, have had a positive effect on the status of women in the Middle East."

Women's numbers and influence as media consumers are growing, and they are making professional inroads as journalists, reporters, producers. Unfortunately, the media's portrayal of women is not keeping pace with these advances. Progress is slow, the path ahead uncertain. Taboos are being broken, and every year, women are further integrated into the media landscape of these countries. The region's dynamic media scene could very well be used as a forum to increase women's participation and involvement in the public sphere. Indeed, investors and producers are in a win-win situation: tailoring their programming to women's needs and preferences will at once inspire social change and increase audience share—great opportunities that should not be missed.



Founded in 1996, **InterMedia** is a leading international media research, evaluation and consulting organisation, creatively equipping clients to understand their audiences, gauge their effectiveness and target their communications in transitional and developing countries worldwide. InterMedia designs, implements and interprets research to turn public attitudes and behaviour into market intelligence and strategic communication solutions. Based in Washington, DC, and the UK, InterMedia staff and associates have decades of accumulated research and consulting experience and vast geographic expertise spanning over 120 countries around the world.

www.intermedia.org

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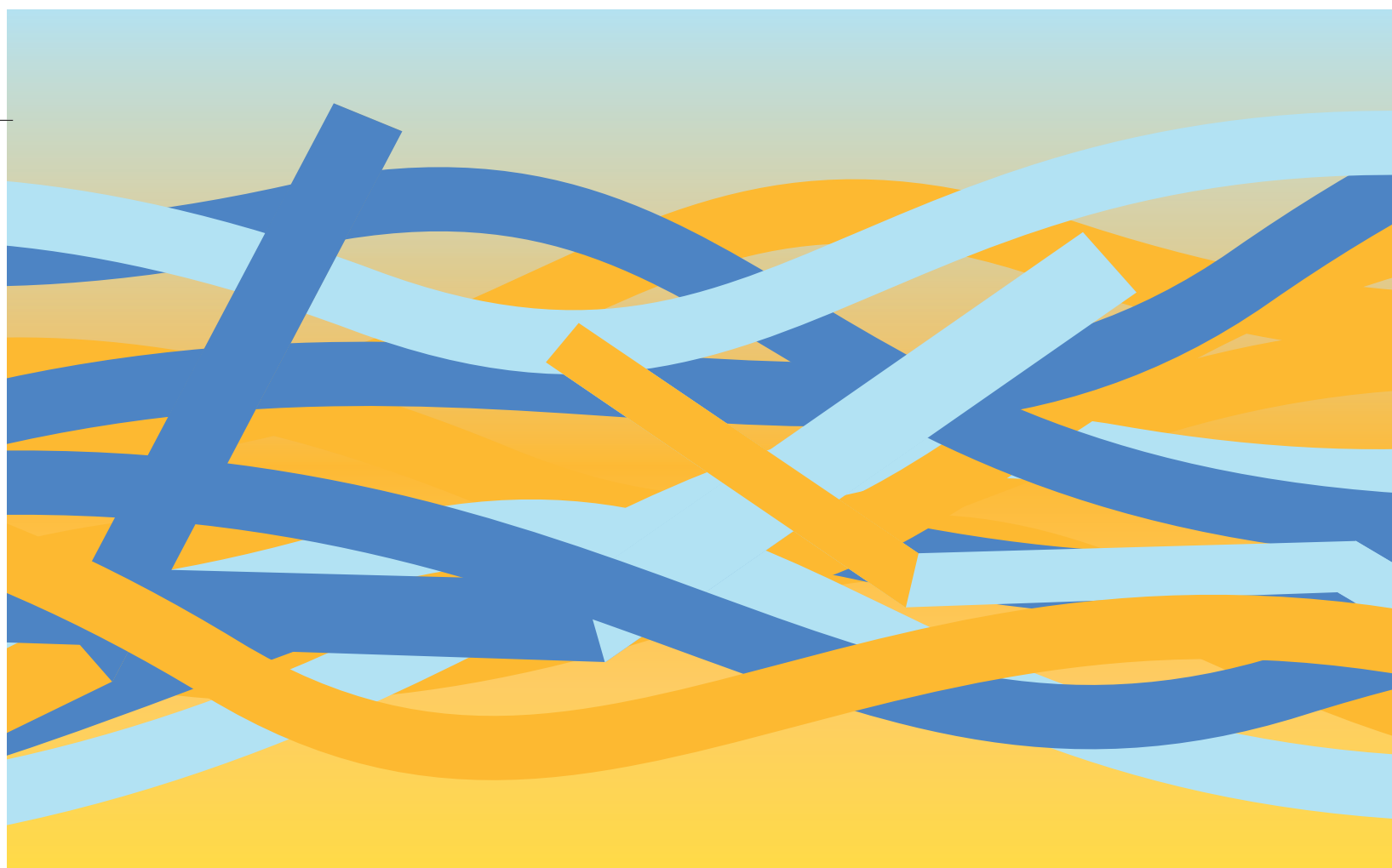
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PUBLIC BROADCASTING



Middle East media market to outpace Europe and the US

The Middle East media and entertainment market entered 2005 in buoyant mood, with spending on all forms of media having grown by 9.4% in 2004, followed by an estimated 8.1% in 2005. While these rates of growth pale in comparison to some of the world's fastest-growing regions " China was up 29% in 2004 and will top 30% this year " they remain well ahead of those currently seen in larger, more established markets such as Western Europe and the US. And while growth in the Middle East will drift downwards from 2006 onwards, our forecast is that it will remain relatively strong by global standards.

As media delivery channels proliferate and technologies become more mature, the drivers behind the growth in the Middle East market will become increasingly diverse " and the resulting expansion quite dramatic in some areas. One key global trend apparent in the Middle East is that multi-channel television is continuing to gain share from analogue terrestrial services. At the same time, as in other regions of the world, the ongoing roll-out of broadband internet access will be a major catalyst of growth, helping to boost advertising and online commerce. Continuing advances in wireless technologies will also have a positive impact, with growing interest in downloading of music, images and news to mobile handsets. Online and wireless games are also set for strong growth in all parts of the world, the Middle East included.

One area where the Middle East will outpace more mature media markets elsewhere is the TV networks market. This consists mainly of advertiser spending on broadcast (both terrestrial and satellite) and cable TV networks, plus some other sources of revenue. Out of a global television network market that will be worth a total of US\$204 billion in 2009, the Middle East will account for a mere US\$1.08 billion. But the relative growth rates paint a different picture, with the Middle East's compound annual growth of 11.2% during the forecast period 2005-2009 running at almost twice the average global rate of 6.0%.

This strong performance largely reflects the positive impact on the overall TV advertising market of the ongoing shift in the television audience from terrestrial to multi-channel. Our research shows that as this trend continues across the world, the resulting increases in multi-channel advertising will

be proportionally larger than decreases in terrestrial advertising. This impact is independent of all other factors that affect television advertising, including the economic climate, which has turned more positive, and growth in the number of commercial outlets. In fact, the signs are that this uplift is already under way, with TV advertising in the Middle East rising by a heady 15.5% in 2004, to be followed by a further 15% increase in 2005.

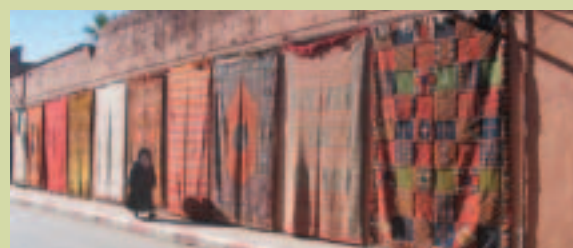
Less impressive is the growth rate expected over the next few years in spending on TV distribution, a segment which consists mainly of revenues generated by distributors of television programming to viewers " and which includes spending by consumers on basic and premium subscriptions to terrestrial and satellite providers. In this sector, the expansion in Middle East spending will lag well behind more mature markets, with compound annual growth in the Middle East expected to average just 6.7% through to 2009, as against 8.9% in Western Europe.

That said, the penetration of subscription TV households in the Middle East will continue to rise, helping to drive the strengthening we have already highlighted in TV advertising revenues. The total of 2.65 million subscription TV households across the Middle East in 2004 is expected to rise to 3.45 million in 2009, a compound annual growth rate of 5.4%. This represents a steady but hardly spectacular rate of expansion, given that multi-channel penetration in counties such as Russia will be growing at more than 11% compounded annually through the period. However, this disparity may be largely due to the already high level of take-up in the Middle East, with subscription multi-channel TV penetration in the region expected to reach 81.2% by 2009, compared to just 63.2% in Western Europe.

A further significant trend we expect to see is healthy growth in the radio and out-of-home advertising market. This consists of advertisers' spending on radio stations and radio networks, plus out-of-home media such as billboards and sports arena displays. This market will expand by 7.9% compounded annually through to 2009, thanks partly to a surge of 14.3% in 2005. Retailers tend to be major advertisers on radio, and they will remain one of the main sources of this increased spending.

PricewaterhouseCoopers' newly-released *Global Entertainment & Media Outlook: 2005-2009* suggests the Middle East media market will outpace Western Europe and the US over the forecast period, growing at a compound annual rate of 7.6% against Western Europe's 5.4% and the US's 5.6%. Broadcasting will spearhead this growth, as new technologies help to drive up Middle East spending on radio/out-of-home by 7.9% compounded annually, and on TV networks by an impressive 11.2%.
Gary Simmons, partner and leader, Middle East Organisational & Human Capital, PricewaterhouseCoopers Dubai has the details

Overall, the outlook for the media " and specifically broadcasting " market in the Middle East is set fair for the next few years. High population growth (with relatively large numbers of young people compared to western economies), with net migration in the Gulf in particular and the likelihood of (at least) fairly buoyant economic growth will, coupled with strong demand for new digital delivery technologies and a greater variety of content, underpin a generally healthy rise in media spending across the region through to 2009.



PricewaterhouseCoopers' Entertainment and Media Practice is a global network of more than 3,000 practitioners providing assurance, tax and advisory services to help clients manage risk, maximise shareholder value and support M&A activities. It addresses business challenges for its clients, including developing strategies to leverage digital technology; marketplace positioning in industries characterised by consolidation and convergence; and identifying new sources of financing.
www.pwc.com

Fostering investigative journalism

Aneela works for a morning newspaper in Ramallah but her home is the Nabulus refugee camp. She can only go home once a week because the journey, once taking only 30 minutes, now takes four hours with all the checkpoints currently in place. She is the main breadwinner for her eleven siblings and parents. But this month Aneela joined the Thomson Foundation's three months summer courses as the first Palestinian woman to be trained in Cardiff for many years. Fortunately there is also another Palestinian journalist on the same course as well as three Jordanian journalists, all of whom have Palestinian connections. If there was more funding available the Foundation would do more courses in Palestine. But the funds for training are more easily available elsewhere in the Middle East.

Al Jazeera TV is focused on the skills of its journalists and the Foundation designed their training centre, which opened in 2003, since when several hundred TV personnel have passed through its doors and the hands of Thomson trainers in the widest variety of TV skills. But then Al Jazeera is

the techniques of investigative reporting. These took the form of a series of short training workshops following which the embassy invited journalists to enter current stories for the "Inquirer Award". After the judging two winners (one writing in Arabic and one in English) enjoyed the prize of a week in London with the Thomson Foundation as host.

In 2003 the training work was confined to Jordan alone. Last year, still organised from Amman but in co-operation with other UK diplomatic posts, the scheme was extended to Syria, Lebanon, and Palestine and involved more than 100 participants. Among the topics covered last year were the growing plight of beggars in rich Middle Eastern cities and unemployment in the region. After starting in Amman, the trainer went on to Damascus, Beirut, Ramallah, and Jerusalem.

Reporting to Thomson's Cardiff headquarters during his tour, trainer Russell Lyne said: "Investigative journalism is growing rapidly in the Middle East and this project is serving as a catalyst to assist in that growth. There is a huge interest in the workshops and the project and a demand for more investigative knowledge from journalists of all ages." Later in his tour, from Ramallah, he observed: "Borders are frequently closed and journalists, like everyone else, have problems just getting from one town to another... In Palestine, the working conditions are all but impossible and retaining objectivity is very difficult."

The largest continuous Thomson Foundation project in the Middle East however was an EU funded project to provide regional assistance to NGO's and the media in four countries - Lebanon, Jordan, Syria and Egypt. In partnership initially with NARD (National Association

The need for media training in the Middle East seems endless but there are signs that investigative journalism is growing rapidly in the region, despite the sometimes challenging working conditions which make retaining objectivity difficult, reports Gareth Price, Director of the Thomson Foundation

a serious TV station. It must be doing something right if the Americans would like to see it closed down and the current Iraqi government refuses to allow the station access to the country. That does not stop the Iraqis watching it and merely illustrates the way in which even today's governments think. Suffice it to say that whatever the faults of Al Jazeera, it is the first Arabic TV station to break the mould and enter independent broadcasting with credibility - something which certain American TV stations patently failed to do during the Iraq war.

Al Jazeera's audience is very large, mainly stolen from the old fashioned state broadcasters of the surrounding Arab countries. It works within the cultural norms of Arabic society and is not shy of showing carnage in the streets at a level which could never be shown by the BBC. That is the essence of broadcasting from the perspective of one's own culture. Now the Sudanese and Libyans are also being trained by the Foundation through the good offices of Al Jazeera's training Centre.

All this does not mean that the well-established Arab States Broadcasting Union (ASBU) training college in Damascus is irrelevant.



The Arab States on the Mediterranean have centred their training there for many years with a resulting improvement in several programme areas such as children and drama - the real heavy end of the TV market. But you cannot expect governments to fund their TV stations and allow criticism of their policies. Their news programmes are obviously

vehicles for government propaganda but they can still invest heavily in the general programme areas which are themselves very expensive. The state TV stations have their place outside the news departments and ASBU is one of the few organisations in the developing world which offer courses outside journalism or management.

Meanwhile the Jordanians are particularly proud of their training efforts. Under the patronage of the British Embassy in Jordan programmes were held in 2003 and 2004 to train Arab journalists in

for the Rights of Disabled People in Lebanon), the overall objectives of this project were to improve the performance and raise the profile of NGOs in Lebanon, Egypt, Syria and Jordan and to secure better coverage of social issues in the Arab media. It aimed to encourage young Arab journalists to better report issues of civil and human rights. The response from participants was overwhelmingly positive.

Many young press journalist participants had rarely ever left the office, depending instead on government handouts and telephone interviews for copy. For them it was a new experience to be taken, for the first time, to visit a Cairo or Amman slum and to come face to face, to interview and to report on those who lived there. The quality and quantity of any serious reporting on social issues in the Arab media is generally low, except in Lebanon, where some papers - e.g. An Nahar - and the TV channels have in recent years increased their coverage, especially of women's and disability issues. Consequently, training young journalists to report civil and human rights issues has proved to be one of the project's major successes.

Where the funding exists the training always brings appreciation and fairly dramatic improvement in skills. The gap between the trained and untrained is getting wider. While a TV station such as Al Jazeera is steaming ahead, the need for further media training in the Middle East may be endless but at least it is a much cheaper method of developing democracy than any other.

Established in 1962, the Thomson Foundation is a leading independent provider of practical training without political, ideological or commercial strings. A small full-time staff at the UK headquarters in Wales is supported by specialist freelance consultants who deliver workshops, seminars, courses and consultancies worldwide throughout the year.
www.thomsonfoundation.org.uk

The idea of founding a professional union at the Arab level dates back to the mid-1950's. All governmental Arab broadcasting corporations are members of the ASBU, and taking account of developments in the audiovisual field in the Arab world, the Union has extended its membership to private Arab broadcasting channels. ASBU Technical Director Abdelrahim Suleiman profiles the organisation

Arabvision

The organisation and coordination of exchange of radio and TV news programmes and sporting events among its member broadcasters is one of ASBU's main activities. This service has grown rapidly - Arab television are now exchanging three daily news and two weekly sporting packages, along with an economic and a cultural package. The coordination is carried out through the ASBU Exchange Centre. ASBU uses a flow capacity allowing for the transmission, 24 hours a day, of six television channels via Arabsat-2B. Four of the channels are on C-Band and two on Ku-Band.

In 1999, ASBU digitalised its Arabvision network. The standard adopted is professional profile MPEG-2 4:2:2. In 2004 ASBU exchanges averaged 22 hours a day of which 50% are bilateral exchanges, 35% multilateral exchanges and 15% are international exchanges, mainly Eurovision and some from Asiavision and Afrovision. Viewers in and outside the Arab world are now able to follow live major events, such as world conferences and summits, regional meetings, and important Arab and international sporting events.

Convinced of the importance of radio, ASBU launched a VSAT system in 2000, offering a number of services. It groups three radio high quality exchange channels and allows for the simultaneous and live and recorded transmission of radio programmes. The VSAT system also offers two voice-conferencing services, 11 data exchange channels as well as point-to-point telephone call service. Since implementing the system, the volume of radio exchanges has grown considerably and it is now possible to provide live radio coverage of information, cultural and artistic events in the Arab world.

Technical activities

ASBU provides important technical services to its member broadcasters. In this context, the Union, through its Technical Committee, has opted for the adoption of digital systems for terrestrial (DVB-T, DRM) and satellite (DVB-S) transmissions. It also set common standards for digital receiving equipment in the Arab region, enabling Arab viewers to receive multiple transmission systems on a single set. ASBU also coordinates the use of short wave among Arab broadcasters and cooperates with the International Telecommunication Union regarding the distribution of terrestrial and space frequencies for radio and TV.

Training activities

ASBU has a solid training programme,

Future proofing Arab media

established in 1982 and run at its Training Centre in Damascus. About 25 courses are organised each year, providing training for more than 400 staff from member organisations. Because of the rapid developments in the field of audio and visual media, there is a need to train more broadcasters in order to improve the quality of the TV and radio content. Consequently, ASBU has started to complement its existing training programme by distance training as an additional cost-effective training method able to reach the greatest possible number of personnel in the ASBU radio and TV organisations in their own country. ASBU has upgraded its existing VSAT network to support distance training applications providing interactivity, video and audio transmissions.

Global Arabic digital radio and TV bouquet

In April 2004, ASBU and Arabsat launched the Global Arabic Digital Bouquet aimed at the worldwide distribution of a bundle of premium channels. In partnership with satellite services provider GlobeCast it has been possible to secure the full coverage required through key orbital positions beaming to DTH and cable markets and successfully targeting Arabic speaking and Muslim populations around the globe. The Arabic Bouquet is currently broadcasting 11 Arabic TV channels and 20 radio channels and is looking to expand this through new premium programmes. The rationale behind this project is compelling: the bouquet serves the interests of ASBU members and enables Arabic viewers to access multiple channels via one single platform and one receiver while consolidating global distribution costs and making significant savings for both broadcaster and viewer.

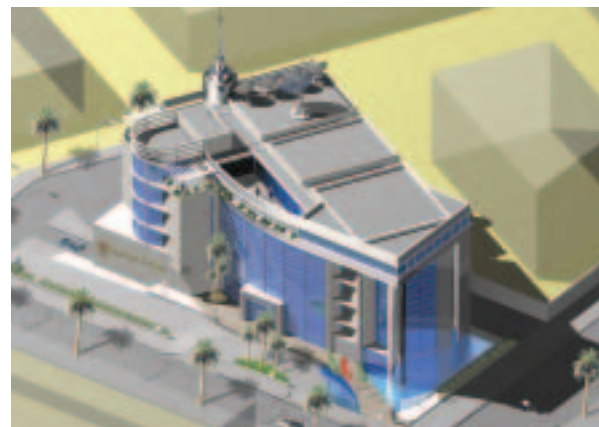
New projects

The current ASBU network for exchange of audio and TV programmes between ASBU members is close to saturation. In order to cope with the increase in demand for bandwidth ASBU has started planning its future contribution and exchange network topology

based on open IP technology - the ASBU Multimedia Exchange Network Over Satellite (ASBU MENOS). The new network will be star-based, consisting of a central hub with a potential in Phase 1 of up to 1000 terminals. In Phase 2 the number of terminals can be even higher. The network will be scalable in such a way that the downtime is minimised when the network is extended. ASBU will play the role of access network provider, assuming the necessary responsibilities of managing the network. Each ASBU member will be able to operate a sub-network within the overall network for its own regional and national needs. This sub-network will be managed independently by the ASBU member and will be secured from the rest of the network using advanced VPN technologies.

A Ku-band transponder on Arabsat-4B or equivalent satellite will be used to support the first phase services, simultaneously and independently of the ASBU MENOS project. In the second phase - after two years - a second transponder will be used. ASBU has allocated the necessary budget to launch the project which includes the hub station in ASBU Exchange Centre and 50 SITs (terminals) to be distributed to ASBU members. The ASBU members will purchase their respective additional requests of SITs. ASBU has, so far, received requests for more than 500 SITs from 13 members for their respective national and sub-regional VPNs, with more to come. The ASBU MENOS system is scheduled to be operational by June 2006.

Founded in 1969, the **Arab States' Broadcasting Union** is a professional, non-profit organisation including 28 Arab networks broadcasting via satellite. ASBU has 70 staff in three countries - the ASBU HQ in Tunis, ASBU Exchange Centre in Algiers and ASBU Training Centre in Damascus. www.asbu.net



Anver Anderson talks to

Khalid Ahmed Balkheyour
Chief Executive
ArabSat



Middle East TV boom

As ARABSAT heads towards its 20th anniversary, Middle East television is entering a growth period. More channels are being added by major broadcasters and it's often ARABSAT that channels in the region turn to for delivery. For example, 18 new channels are being added by Al Afdaliyah Group, with two already on the air - the new genres will include children's, music, women, education and marketing. Meanwhile, regional consulting firm Arab Advisors Group has revealed that 55 channels have been launched on a free-to-air basis since the beginning of 2004. The report's author, Judeh Siwady, says "The Arab world has witnessed a huge transformation in the TV industry over the past 10 years. Viewers in the region now have a large variety of TV choice available as terrestrial, pay-TV and [an] enormously [large range of] free-to-air satellite channels. There are two satellite systems providers that cater to the Arab region, Arabsat and Nilesat. Together these two satellites provide 155 Free-to-Air TV channels, more than 20 free radio stations and carry the TV and radio channels of the three main pay-TV providers in the region, ART, Orbit and Showtime."



Siwady continued: "Pay-TV operators have been struggling to gain more subscribers amidst the flood of well-financed FTA channels. With the growth of the satellite free TV channels, the task is becoming more challenging. 2004 has witnessed an alteration in the strategies of most of the FTA channels in terms of programme content which, for some, now rivals that of the pay-TV channels. For example, the MBC network changed the content of its English entertainment channel, MBC2, and introduced the first free satellite channel exclusively broadcasting American movies,

and pushed its non-movies entertainment programmes to MBC4. With the appeal and popularity of western reality and game shows, and Arab TV stations buying the rights to remake these shows, viewers are increasingly getting wide choices from these FTA channels and many see no need to subscribe to any of the pay-TV networks."

It's against this background that Anver Anderson talked to the chief executive of ARABSAT.

How did the ARABSAT consortium come about?

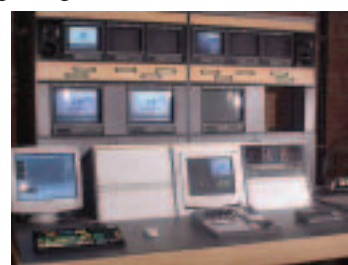
ARABSAT was formed in the mid-1970s and the whole purpose was to interlink the Arab countries for telecommunications. It was an outcome of a decision made by the Arab League which comprises all Arab countries - about 21 at that time. It remained a telecommunications service until the early 1990s; during the first Gulf War when satellite broadcasting started to emerge in the region, Arab broadcasters started to have a need for satellites. They started to use ARABSAT and now we provide not only telecommunications services to Arab countries but TV coverage in the region, both analogue and digital. The largest shareholders in ARABSAT are Saudi Arabia, Libya, Kuwait, but all other Arab countries are equity shareholders in the consortium.

Let's look at the ARABSAT fleet - how is it formed at present?

We have two satellites in operation - one at 26o and one at 30.5o. In addition we are leasing two satellites at 26o, one for C-band and one for Ku-band. We have contracts for the delivery of two further satellites, one of which should be delivered by the end of this year and the second during the first quarter of 2006.

How big are the broadcasting markets at present? Is digital taking over from analogue?

No, the analogue market is not as booming as digital, that's for sure. In some instances, broadcasters are not sure whether to continue with analogue, but we see very little decline in analogue despite the introduction of digital broadcasting. We're in a transition period but analogue will continue for some years. Some viewers still want to remain on analogue, according to the latest surveys. Analogue is declining but there is still significant analogue usage out there, from Morocco through to the Gulf, from the Levant to the south Sahara.



What is the range of services that ARABSAT offers - is it still a mix of enterprise services and broadcast services?

Yes, that's right. Today we want to link all our countries by satellite. Each Arab country has ARABSAT telecommunications connectivity and that includes Iraq where an uplink is being built and is almost ready to enter service. We also provide broadcasting along with broadband and IP for some customers.

What about high definition services for broadcasting - is there a demand in the region for HDTV?

During CabSat in Dubai this year we introduced our HD services on ARABSAT and there are discussions with a leading Arab broadcaster to join ARABSAT for a consumer HD service. It's growing very fast in North America and Europe is starting to pick up HD - hopefully this region will start to catch up. The new generation of satellites launching next year will be geared up for HD.

You work with other partners to extend the reach of ARABSAT's services, such as AIB member GlobeCast.

GlobeCast is a partner in two areas. We have signed a contract with GlobeCast to have a "global bouquet" of television available throughout the world - in North America, South America, the Far East and Africa. We are also working with them on uplinking facilities.

How did you become involved in ARABSAT.

I have a degree in engineering from the USA and I have worked in broadcasting engineering, building television stations. Then I moved into telecommunications for around 15 years before moving into the challenging area of new technologies in Saudi Arabia. I was approached to join ARABSAT as Director-General around three years ago, and am now the CEO.

And when you're not looking after the company, how do you spend your time?

I enjoy reading, but don't get enough time! Apart from that, it's sports, walking and so on...

Mr Balkheyour, thank you for talking with us.

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Hate and the radio



The recent success of *Hotel Rwanda* on cinema screens around the world has once again highlighted the enormous damage hate radio can do. David Smith knows all about hate. The Johannesburg-based media consultant pioneered the collaborative effort between UNTAES Radio and Serbian Radio Vukovar. He has also set up peacekeeping radio stations in the Central African Republic and the Democratic Republic of Congo, as well as implementing South Africa's first transition project for commercial radio prior to the first democratic elections in 1994. He asks: Should we talk to the bad guys?

There aren't many in the media business who haven't heard of Radio Television Libre Mille Collines (RTLM). If you haven't, suffice to say that its hate programming during the Rwandan genocide of 1994 contributed directly to the mad frenzy that saw neighbour brutally murder neighbour during a one hundred day period. The United Nations commander on the ground at the time, Lt-General Romeo Dallaire knew that shutting down Radio Mille Collines would save lives, and that's what he wanted to do. Head office in New York told him not to. Have we learned any lessons since then? Hate radio still exists. And it exists on virtually every continent.

Less than two years after the genocide and after RTLM had been shut down, the UN established a new peacekeeping mission in another region troubled by ethnic tension – Croatia's eastern border region with Serbia. The former Yugoslavia was already home to other peacekeeping missions, however this one, the United Nations Transitional Administration for Eastern Slavonia, Baranja and Western Srem (UNTAES), aimed to reintegrate a small but extremely fertile patch of land on the Danube into Croatia. A significant part of Croatia's then large Serbian minority lived in this region, thousands of them had previously lived in other parts of Croatia, from where they had been removed during a lightning raid by the Croatian army in 1995. In Eastern Croatia, most of the remaining Serbs in the country lived in this rogue region.

The Serbs, however, were not the only people living in this particular area. Roughly half the population of Eastern Slavonia was

Croat. The battle for control of Vukovar, one of the region's principal commercial centres, strategically located on the Croatia-Serbia border on the Danube River, was perhaps the most violent and destructive of any of the wars in the Balkans over the past two decades. The battle was at its worst between August and November 1991, shortly after Croatia had declared its independence from Yugoslavia. Most of the Croats who had lived there were gone by the time UNTAES had been established in 1995. They had either moved to other parts of Croatia, had fled overseas, or were dead. The atmosphere between the two protagonists could best be described as one of hate. And this hate was fuelled by radio.

The UN *had* learned a lesson in Rwanda. Three approaches were used in Eastern Slavonia to deal with inflammatory programming. Serbian Radio Vukovar was playing folk music and spewing anti-Croatian venom across the airwaves when the UN set up shop in what was left of the town. Across the frontline in Croatia "proper", radio in Osijek was delivering a similar message, but targeting the Serbs as the bad guys. Yet another Serb-run station was threatening the peace process in the northern part of the UN-administered enclave in Baranja, at Radio Beli Manastir.

Staff at Serbian Radio Vukovar worked hard to ensure that Serbs and Croats would not live side-by-side again. Day after day announcers, most of whom were in their 20's and 30's, instilled fear in the devastated community about what would happen to them if Croats were allowed to move back to the houses they had been forced to leave.

The installation of a UN radio station in Vukovar did little to change either their output or their mindset, until UN Radio convinced them to produce joint programming. Why, one might ask, should a peacekeeping radio service collaborate with hate radio? The answer is very simple. Most Serbs in the Vukovar area listened to Serbian Radio Vukovar and they weren't about to change their listening habits. They *wanted* to believe what *their* radio was telling them. It was unlikely they were going to listen to UNTAES Radio, and, if they did, it was unlikely that they were going to *believe* what it told them, because they didn't *want* to believe it. If Eastern Slavonia was to be successfully re-integrated into Croatia, success depended not only on convincing Serbs that their lives were not at risk, but also that they should stay.

Continued personal, primarily social contact with staff at the radio eventually convinced station management at Serbian Radio Vukovar to accept limited collaboration with UNTAES Radio. The collaboration worked in both directions. UN Radio journalists produced daily programmes on Serbian Radio Vukovar, which were presented live by Serbian Radio Vukovar Staff. Serbian Radio Vukovar staff also presented live news bulletins on UNTAES radio, inside the UN's Vukovar Headquarters. Fear and uncertainty certainly did not evaporate completely, but a human face was put on both sides of the coin. Croats and Serbs worked together at UNTAES Radio. They didn't necessarily like each other (although often they did), however, for perhaps the first time in the conflict, they did hear and understand the *other* point of view.

Not everybody believes in reconciliation. Most seem to, but there are those belligerents who aren't willing to accept a new dispensation. They usually end up leaving. The director of Serbian Radio Vukovar was one such man. Perhaps he saw the writing on the wall, and by agreeing to allow his staff to move towards conflict resolution programming, he gave himself time to plan for his future, a future that would see him flee the region. Is there a correct way to cooperate with such people? With Serbian Radio Vukovar it was important not to allow one person to derail the big picture of reconciliation.

Tackling the acerbic programming emanating from Osijek required different tactics. The part of Croatia beyond the Eastern Slavonia enclave was under the UNTAES transitional administration mandate. The Zagreb-based government under then president Franjo Tudjman called the shots. Croatia, especially Mr. Tudjman's government, was impatient for

the re-integration of Eastern Slavonia. One of the few cards the UN could play to influence activity beyond the frontline was the pace at which re-integration would take place. The UN's chief of the mission at the time, Jacques-Paul Klein, put pressure on Zagreb to reign in the on-air belligerents in Osijek. In return, he promised to do the same on his side of the minefield separating the two sides. It worked. The carrot and stick approach served to dramatically reduce hate programming on Croat radio. The collaboration approach with Serbian Radio Vukovar won its staff over to the side of conflict resolution rather than conflict perpetuation. Serbian Radio Vukovar, now known as Radio Dunav, survives to this day as a cultural voice for the Serbs of the region. It's speculation, but chances are this and other Serb-dominated radios in the region would not exist today had this initial collaborative effort not happened.

The third example of dealing with hate radio is that of Radio Beli Manastir programming, which was more or less the same as Serbian Radio Vukovar. While its sister station in Vukovar moved towards conflict resolution programming, and Croat stations in Osijek toned down *their* vitriol, Radio Beli Manastir did virtually nothing to change its output in spite of diplomatic pleas for it to do so. In order to prove to Zagreb that he was serious about reintegration, Mr Klein ordered his peacekeepers to seize Radio Beli Manastir's transmission facilities. This is another approach. Although effective in the short term, it does little to convince belligerent parties that there is value in talking. Today Radio Beli Manastir is back on the air. It's still seen as a Serb remnant of the former enclave, and few Croats listen to it.

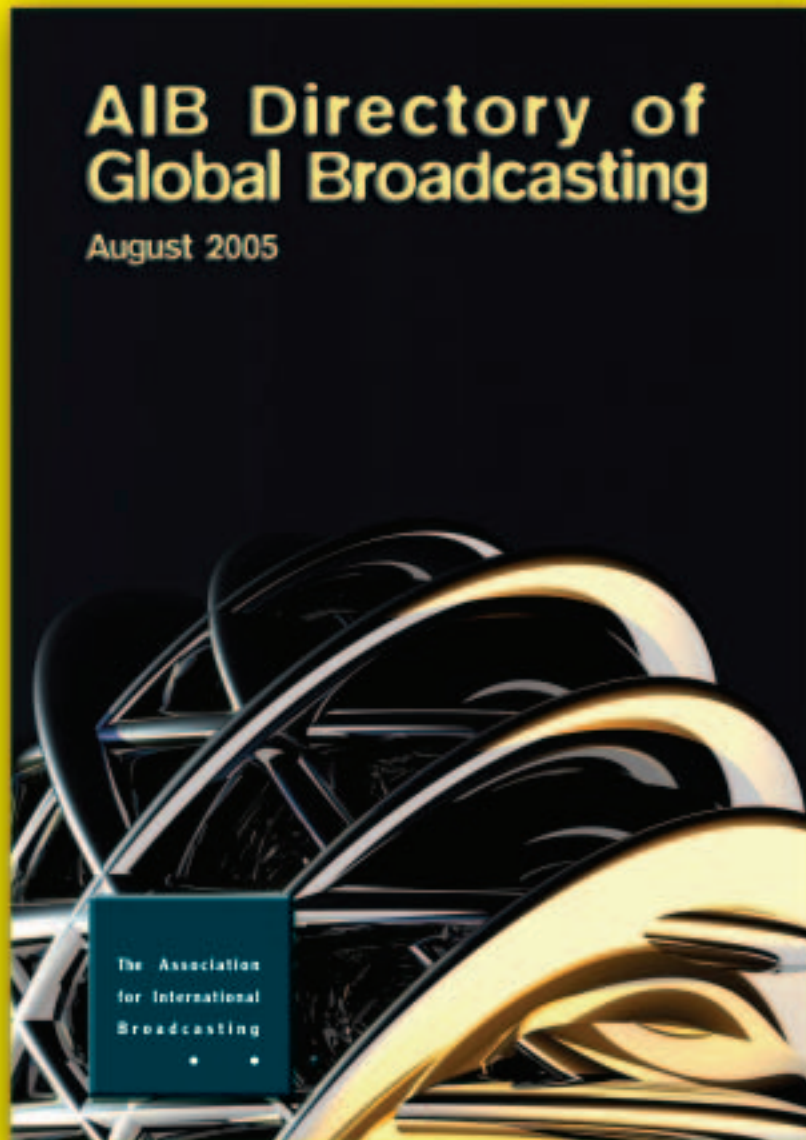
Today, Eastern Slavonia is not without its problems. The wounds on both sides are deep and certainly not entirely healed. The region suffers a prolonged economic depression. A large percentage of the Serbs who had lived there during the previous decade are now living in either the Serb part of Bosnia or in refugee camps in Serbia proper. Most of the Croats who lived in Vukovar have not returned because there are no jobs, and, in many cases, their destroyed houses have not been rebuilt.

But what would have happened if the hate radio had not been transformed into an instrument of reconciliation? Sustainable peace is a long-term process that involves much more than a strong security force. The South Africans and the Iraqis understand this. So do the Rwandans. What should have been done to Radio Mille Collines? There is more than one answer. But doing nothing was not the right one.



The *Media Network* section of the website of AIB member **Radio Netherlands** carries a major dossier on hate radio throughout the world.
www.rnw.nl

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Looking at the broadcast sector of this Mediterranean country (size 13,812 km², population 648,000), the most important TV stations in Montenegro are Television of Montenegro (RTCG) - national PBS; INTelevision - private broadcaster with national coverage; PinkTelevision - private broadcaster with national coverage; Montena Television - private broadcaster; Elmag Television - private broadcaster; MBC (Montenegrin Broadcasting Company) - private broadcaster. For radio, the list is headed by national PBS station Radio of Montenegro, and among the most important private radio stations are: Antena M, Elmag Radio, Radio Svetigora, Radio D, Radio Corona. In addition to the national radio and TV public service broadcaster, every municipality in Montenegro has its own local public service broadcaster - mainly radio while some also have local TV PBS - so there are almost 15 radio and 3 TV local public service broadcasters.

Allocation Plan, a first in the country. This year the Agency issued two public tenders for the allocation of TV and radio frequencies. More than 50 radio and more than 15 commercial TV stations are expected to obtain broadcasting licences. Intensive cooperation with regional, international and intergovernmental organisations as well as individual broadcasting regulators has been one of the Agency's priorities - with a view to keeping pace with the latest development trends and best practices regionally and internationally. This year, the Agency has focused on coordination with surrounding countries, as well as preparation for the RRC-06 for both analogue and digital areas.

Given that the Broadcasting Agency has adopted the new Broadcasting Frequency Allocation Plan of the Republic of Montenegro, the new broadcasting frequency allocations

broadcasters and therefore the Agency has developed mechanisms for the distribution of broadcasting fees and taxes. It ensures that both commercial and local public service broadcasters (TV and radio) receive 10% each of the total of broadcasting fees and taxes collected. While the broadcasting fee amounts to €3.50 per month payable by each owner of a fixed telephone line capable of receiving a radio or TV signal and being in possession of a TV or radio receiver, the broadcasting tax (€6) is payable by each car owner who has a car radio receiver. Since August 2004, this provision has brought in revenue of more than €1.5m for local public service and commercial broadcasters. The first rounds of allocations are being implemented according to coverage and programme based criteria. This new system is being set up to complement the broadcasting fee system which used to provide funds for the state-owned radio and TV only. Since the

Montenegro's bold vision

Montenegro is the pearl of the Mediterranean, say the tourist brochures: in the morning you can wake up by the beautiful Adriatic coast, have lunch on the banks of Skadar Lake and in the evening enjoy a walk in the mountains. The country's Broadcasting Agency was set up in 2003 as an independent regulator. Its director Abaz Beli Dzafic says the Agency has achieved visible steps forward in the Montenegrin media reform, a key issue in the transition of Montenegrin society



Broadcasters are not directly involved in journalist training but Montenegro has separate organisations which offer training, such as the Montenegrin Media Institute.

All Montenegrin broadcasters distribute their programmes terrestrially and only national PBS has a satellite programme, while some regions of Montenegro - part of the capital Podgorica and the coastal region - have cable distribution. As far as foreign channels are concerned, viewers and listeners can receive RAI UNO and RAI DUE from Italy, many Italian radio stations, as well as major Croatian, Bosnian, Serbian and Albanian radio and TV stations. Montenegro is in the footprint of Astra, Hot Bird and Eutelsat. There are approximately 191,000 households in Montenegro, all of which have at least one TV and one radio receiver, and this represents quite a solid base for the broadcast media outreach and a diverse and pluralistic service.

The Broadcasting Agency of Montenegro was established in 2003 as an independent regulator, primarily responsible for designing and implementing broadcasting development strategy and legislation. Following the adoption of the Broadcasting Law and Law on the Public Service Broadcasters at the end of 2002, this Agency has adopted and publicised the Broadcasting Development Strategy (2004-2007) as well as the Broadcasting Frequency

(176 new allocations for analogue FM radio and 472 new allocations for analogue television in the UHF and VHF frequency bands) included in this plan have been reported to the International Telecommunication Union, as a possible amendment. The draft Allotment Plan for Digital Terrestrial Television and Radio was submitted to the ITU in late February and we will focus on its finalisation once coordination meetings have been held with regional representatives. Definition and monitoring of programme standards is another important function of the Agency. In this way, we can challenge the lack of self-regulation mechanisms and foster the introduction of high standards and good practices. We are currently establishing the Monitoring Sector of the Agency which will be staffed by highly trained personnel operating sophisticated equipment and software. Being receptive to cooperation with outside experts and responsive to feedback, the Agency is aiming for better understanding, acceptance and implementation of programme standards by broadcasters and journalists and, above all, by the audience.

The lack of sustainable funding and market-orientation in most broadcasters' operations has a significant impact on their further development. It affects the quality and duration of programmes, especially their own productions. We appreciate that this is true for both commercial and public service

adoption of the new broadcasting regulation and the transformation of state-owned national broadcasters into national public service broadcasters, these media have been entitled to no more than 75% of the broadcasting fee and tax. In line with European and international standards of public service governance, in the transformation of both national and local public service broadcasters we have been striving for the introduction of professional management - in finances, programming, human resources, etc. The Board of Directors (governors) includes independent members and members of civil society.

Montenegro's media still face many challenges and there is still a lack of understanding for long-term media reform. However, what has been achieved so far is significant: a transformation that has been implemented with clear media reform objectives in mind, and with clearly defined time frames.

www.ard.cg.yu

The Broadcasting Agency of Montenegro is a member of the AIB.





Have radio, will travel

Another roadside café breakfast, British cuisine at its best – eggs, bacon, sausages, beans, fried bread and a quart of industrial-strength tea. Okay for a Sunday morning, but this is the fourth time this week and my belt is beginning to show signs of stress. Mind you, all strictly in the line of duty and at least this should be the last cholesterol feast for some time.

So what has my diet got to do with radio? The ability of DRM to cover large areas from a single transmitter is one of its major benefits over alternative transmission platforms and there is no better way to demonstrate this than to go on a road trip. Or so the fellow from marketing told me. “Take the DRM car, go out and demonstrate the reception between the four corners of the UK, it’ll be like a holiday” he said. So, here I am on a sunny Friday morning. Just me, the DRM car, a DRM receiver, a camera and a gutful of indigestion, still trying to find the fourth corner of the UK. Let me rewind to the beginning and tell you the whole story.

VT Communications, as part of its ongoing commitment to the development and mainstream roll-out of DRM broadcasting, decided to run a commercial trial targeting the UK. This would allow interested broadcasters to assess the benefits of DRM technology, including real time text- and data-based information services, in addition to demonstrating the superb quality of reception that DRM makes available on the AM bands. This is the first commercial DRM broadcast into the UK and several broadcasters are participating. Virgin Classic Rock, Asian Sound Radio, Classic Gold Digital, Premier Christian Radio and CVC have all signed up for the trial.

Monitoring and proof of service reception form essential parts of this series of pilot transmissions. We already have an established base of monitoring stations throughout the UK together with a mobile monitoring capability provided by our “DRM Car”. This example of Ford’s finest is equipped with a laptop computer, an Icom PCR1000 receiver modified to output a 12kHz base band signal into the laptop’s audio card and a magnetically mounted GPS module for accurate location plotting. The software side is catered for by the professional Fraunhofer Group DRM receiver with measurement and recording courtesy of Deutsche Welle’s own monitoring software. The whole ensemble provides a sophisticated mobile DRM monitoring solution.

Interestingly, analysis of the first week’s monitoring results led us to change the service we were providing. The propagation path and antenna from Austria to the UK worked so well that we decided that it would be possible to use the “local” (Mode A, for ground wave) rather than the “distant” (Mode B) mode of DRM. Regular broadcasts using Mode A for High Frequency (HF) have never been contemplated before, but 10 days into the pilot we successfully changed to this

mode. The main advantage of making this change is that, for the same data rate, we could make the signal much more robust against interference. It was as if we had suddenly more than doubled the transmitter power. This meant reception was now possible in the most challenging scenarios, including the centres of large cities.

I began my tour of the UK in Bridport, Dorset. Bridport is close to VT Communications’ Rampisham transmission site, the home of our DRM development team, of which I am a member. Although neither a “corner” of the UK, nor even a city centre, the DRM signal from Austria was coming in loud and clear as I left Bridport, pumping the accelerator in time with the energetic offerings of Virgin Classic Rock, the programming available between 0600 and 1000 hours in the morning. The reception was really impressive along the South Coast, all the way to Southampton where I joined the M3 motorway.

Heading towards Cambridge, the trip around the M25 gave me the chance to check out the performance of the DRM service under bridges and through tunnels. Bridges were no problem whatsoever; tunnels were pretty good too, although I did get a short break in reception when I passed through a long tunnel with a bend in the middle. Cambridge reminds me of Amsterdam because of the vast swarms of cyclists that follow erratic and seemingly random courses over the roads, pavements and paths of this beautiful seat of academia, apparently unaware of the heavily braking automobiles in their midst. I must have aged ten years as I dodged my way out of Cambridge headed for Norwich: the end of my first day on the road.

I awoke at daybreak and decided to get an early start with the day’s drive. The day’s run was to take in Swaffam, Lincoln and the Humber Bridge on the way to Durham. Swaffam is the home of the EcoTech Centre, the first multi-megawatt wind turbine to be built in the UK back in 1999. It supplies enough power for 3,000 people and hopefully a large amount of background electrical noise to test the robustness of our DRM transmissions. Either the turbine is remarkably well shielded or DRM is really an extremely robust medium as Virgin Classic Rock was still triumphing over any potential interruptions to service.

Next destination, Lincoln via Sandringham. Norfolk is renowned as having a flat landscape, but it is positively mountainous when compared to the Fens. No challenge here for the resilience of the DRM coverage. The majority of the programming we are carrying is music based, so our DRM service is optimised for music; additional options become available if we are dealing with voice. The DRM configuration we are using (Mode A, using Advanced Audio Coding + (AAC+) with Spectral Band Replication (SBR) used to enhance the



Grahame Dobson,
DRM Systems Engineer
at VT Communications,
samples the first
commercial
Digital Radio Mondiale
broadcasts into the UK

audio quality) gives a perceived audio bandwidth of 11 kHz from a bit rate of 17.8 kbits/s. Whilst this is entirely appropriate for music on the move, it is extravagant for voice transmissions. DRM may be optimised for voice programme by using Coded Excited Linear Prediction (CELP) or Harmonic Vector eXcitation Coding (HVXC), both with SBR, which allows us to add more voice-quality channels within the same bit rate, great for multiple language or multiple audience transmissions.

Lincolnshire at last - vast open spaces and a multitude of RAF airbases. And, shock, horror, the first unexpected service interruptions that I experienced during my journey. Barely noticeable, I actually wondered if the prevalent military was exercising any influence on the airwaves. Northwards over the Humber Bridge, the DRM service returned to its previous impeccable reliability, with a change to Classic Gold Digital reflecting the change in the scenery. I spent a pleasant night in Pitlington, just outside Durham, and left early the next morning on my perversely circuitous route to Blackpool via Edinburgh. Newcastle upon Tyne stood between me and my destination and I became thoroughly lost whilst trying to find the city's stunning Millenium Bridge. In spite of burying myself in narrow, built-up streets, the reception remained essentially robust with just a couple of small dropouts logged.

The trip nearly came to an unplanned and untimely end at this stage. Like any ageing hippie, I could not resist the opportunity to visit Holy Island, also known as Lindisfarne. This island is connected to the mainland by a causeway, which allows car access at low tide. The tide must have turned during my visit as it was touch-and-go on the way back, the water lapping at the sills of the trusty DRM Mondeo. For some reason, probably panic related, I cannot recall the quality of the DRM reception at this location, but if VT Communications want me to go and sample it again, they can send me by boat.

Edinburgh was next, located towards the north of the DRM service high-strength coverage prediction, possibly the most challenging test of reception during my tour. With the needs of this class of location in mind, we had chosen to use the more robust 16 Quadrature Amplitude Modulation (QAM) DRM standard, rather than the bit-rate extending but less robust 64 QAM option. In fact it was this decision that initially led us to try DRM Mode A as Mode B with 16 QAM would not have allowed a high enough bit-rate to support AAC+ with SBR, an absolute requirement for the music programme audio quality we wished to achieve. We are currently employing a 42kW transmitter over in Austria. We would need to achieve an additional headroom of 6dB Signal to Noise Ratio (SNR) on the ground to support 64 QAM reliably. This would require a fourfold increase in transmitter power to around 190kW. The choice of 16 QAM appeared to be justified with Classic Gold Digital providing uninterrupted entertainment as I reached Queensferry, the

northernmost point of my excursion. A glorious photo opportunity with the Forth Railway Bridge in view and then off on my way back down south, making several stops on the way to record some audio samples for the nice man in marketing.

Blackpool at last. I rather assumed that I could have sat down to some fine fish and chips at the world renowned Harry Ramsden's. Silly me, I should have guessed that they stopped serving at eight o'clock... Friday and my last day on the road. So what about my "corner focused" mission? Well, to be honest there have been no great "corner moments" on my trip. Today will see me heading back to Bridport via Droitwich, the Brecon Beacons and the Severn Bridge, none of which is notable for its corner associations. Guess the marketing department is going to have to live with the fact that the United Kingdom is a rather irregular shape devoid of any obvious corners. Welcome to reality, marketing!

Back home now. The trip back from Blackpool did give me a chance to reflect on the suitability of DRM for UK broadcast coverage. DRM does provide extremely cost-effective land mass coverage and you do not have to target population centres to make programme delivery economically viable as you would with Digital Audio Broadcasting. DRM, in its short wave form, does not have the absolute audio quality of DAB, but it does encompass the additional digital services and as DRM decoders are now being incorporated into the same chips as DAB decoders, the actual technology should become invisible to the listeners. They will receive their programming over whichever system is the most appropriate for their location. This has to be a good thing, for it is the programming that is paramount and this trip has shown me that it is well within the capability of DRM to deliver it reliably over a wide area from a single, relatively low power transmitter.

VT Communications provides innovative, totally managed end to end solutions and systems integration in over 100 countries from 29 locations to customers in the broadcast, defence and government sectors worldwide. VT Communications transmits over 1,000 hours of both short and medium wave broadcasts every day utilising its global network providing broadcasters with exceptional coverage of the world's most populous regions. Broadcast customers include BBC World Service, NHK, RCI, Radio Netherlands, ABC and VOA. VT Communications is a founder member of Digital Radio Mondiale. For further information about VTC's DRM digital services and sound samples from Grahame's UK tour contact nick.gilboy@vtplc.com. www.vtplc.com

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How people see the world is deeply influenced by the news media. The fact is that the crucial decisions of what we see on our TV screens or hear on the radio are most often made by men. If statistics can be believed, on average men are seven times more likely than women to reach the highest levels of media management. The International Women's Media Foundation was born out of the desire to readjust that balance – here Erin Henk explains how the IWMF carries out its mission to strengthen the role of women in the news media worldwide

No media is truly free unless women share an equal voice



Two years ago, Gbemisola Olujobi, editor of the Living Section at *The Guardian* newspaper in Lagos, Nigeria, applied for a fellowship sponsored by the Washington, D.C.-based International Women's Media Foundation (IWMF). The fellowship, which had only recently been offered by the IWMF, gave Olujobi the chance not only for a change of scenery, but the opportunity to sharpen her journalistic skills. She had begun to tire of journalism in Nigeria, where women are often relegated to stories about fashion and childcare. Olujobi competed against applicants from around the world. She spent three months at the *San Francisco Chronicle*, where she covered the expatriate Nigerian community and won the *Chronicle's* award for "Best Story Reflecting the Bay Area Demographics" for her coverage of a San Francisco art exhibit on the Nigerian musician Fela Anikulapo-Kuti. Olujobi told the IWMF that her experience re-ignited her drive to continue working in journalism. "I just want to be a journalist for the rest of my productive life," she said in an interview shortly after her fellowship ended. "I would have thrown something precious away if I didn't get this fellowship."

The IWMF's *Fellowship for International Journalists* is among several new programmes initiated by the foundation, now celebrating its fifteenth anniversary year. Founded in 1990 by a group of veteran US journalists, the IWMF is guided by an international board of women and men in the media. Its mission is to strengthen the role of women in the media worldwide, based on the belief that no press is truly free unless women share an equal voice. The IWMF has conducted programmes on five continents and in more than 22 countries. In many areas, the IWMF programmes are the only opportunities offered exclusively to women in the media. Programmes have helped women journalists in Latin

America, the Caribbean, Eastern Europe and Asia develop the skills women in the media need to advance in their profession.

In Africa, where the IWMF has operated with an intense focus since 1997, the IWMF has two major programmes. The *Maisha Yetu* ("Our Lives" in Swahili) project aims to enhance the quality and consistency of media coverage of HIV/AIDS, TB and malaria in Africa with responsible, accurate and relevant reporting and media messages. In September 2004 the IWMF

published *Deadline for Health*, a qualitative and quantitative study of coverage of public health in five African countries. *Maisha Yetu*, which is funded by the Bill & Melinda Gates Foundation, is now in its second phase. Six "Centres of Excellence" have been established in media houses in Botswana, Kenya and Senegal. The IWMF is working through local trainers to help the media houses improve their coverage of health issues and also develop a "best practices" guide that can be adopted by other media houses in Africa.

The IWMF also pioneered leadership training for women journalists in Africa with the Carole Simpson Leadership Institute (CSLI). Named after a veteran US broadcaster, CSLI brings African women in the media together for several days to help them develop their management skills and career plans. In addition to these programmes, the IWMF has also offered African women journalists training in radio broadcasting skills and computer-assisted reporting, as well as beat reporting on topics such as business, politics and elections.

In addition to the *Fellowship for International Women Journalists*, which Gbemisola Olujobi received, the IWMF recently launched the *Public Health Fellowship Programme*, which is open to editors and radio producers in select countries in Africa and Asia.

The IWMF also advocates for worldwide press freedom. In addition to supporting journalists in danger around the world, the IWMF sponsors the annual *Courage in Journalism Awards*. The only awards programme exclusively for international women journalists, the *Courage Awards* recognise the bravery of women journalists who go to extraordinary lengths to report the news. Many *Courage* winners have braved conflict situations, prison sentences, torture, rape and death threats to themselves and their families because they are determined to report accurately on government malfeasance, human rights abuses and war. Some fifty women from 35 countries have won *Courage Awards* since they were inaugurated in 1990.

The ranks of *Courage* winners include Chris Anyanwu, former editor in chief of *The Sunday Magazine* in Lagos, Nigeria, who was given a life prison sentence because her reporting angered Nigeria's late military leader, Sani Abacha. Anyanwu won the *Courage Award* in 1995, while she was in prison, where she almost went blind after being kept in a dark cell for three years. She was released after Abacha's sudden death and finally accepted her award in person in 1998.

Jineth Bedoya Lima, who won the *Courage Award* in 2001, was a 27-year-old reporter for *El Espectador* in Bogota in 2000, when she was kidnapped, tortured, gang raped and left by the side of the road, presumably by groups tied to right-wing paramilitary forces. Bedoya continues to cover her country's paramilitary forces for *El Tiempo*, another Bogota-based newspaper. She was kidnapped again, along with her photographer, in 2003 by FARC guerillas in the guerilla-controlled settlement of Puerto Alvira. She was later released.

In instances like these, the *Courage Awards* draw attention to the lack of press freedom around the world and also offer the winners much needed protection. In a recent interview with the IWMF about the impact of her *Courage Award*, Chris Anyanwu said that winning

Continued on page 44



During the last Asia Media Summit in Kuala Lumpur Wilfried Solbach of the Asia-Pacific Institute for Broadcasting Development (AIBD) had the chance to talk to Kunda Dixit, Editor of the Nepali Times, about the electronic media scene in his country

The eyes of the world are on Nepal

The kingdom of Nepal has a very lively media scene. What are the reasons for this?

In 1990 when democracy was restored in Nepal the new constitution guaranteed a free press. It took media activists five years of lobbying the government to allow the first non-government FM licence. This happened in 1996, the station was Radio Sagarmatha on 102.4 in Kathmandu. That was a milestone. It was a pioneering radio station, it was run by a bunch of environment journalists and it became a true public service broadcaster and took over the role of what the government broadcasting station should have been doing: truly reflect the voice of the people, the community in the capital, its environmental, social and cultural concerns. It really expanded the public sphere beautifully and not only did it itself become a pioneering radio station but it opened the floodgates for other licences to come in. By last year we had 57 FM radio stations and 25 more stations were in the pipeline and about to get their licences. So Nepal was regarded not only by Nepalis but also by outside media specialists as a real showcase of how a developing country can use non- government community and public broadcasting on FM channels for democracy and development.



Looking around in Asia it is obvious that most governments are very hesitant to grant licences to community or non-governmental broadcasters.

Nepal's new constitution gave that freedom and basically said that the radio waves were public property. And that was the main argument of the lawyers who went to the government and finally took the control away from the government.

The government being progressive and democratically elected had no option but to grant that freedom. Just look at our neighbour India - the world's largest democracy - and yet, despite all its other media being totally free, radio is under the iron grip of the government in India. Slowly FM frequencies are given out in India but only to commercial enterprises which have to pay huge royalties. So only the big conglomerates can afford to have FM. They are also not allowed to broadcast news. The big difference to Nepal is that in Nepal they were allowed to broadcast news and current affairs.

When the floodgates were open in Nepal for FM licences commercial broadcasters also came in. But the big impact has been from decentralized community radios. So today you find these radios all over the country. Recently I came back from a very remote area in Nepal where the only connection to the outside world is an airstrip. This part of the country has no road connection to the rest of the country due to the mountainous terrain. Having a radio in a place like that has totally transformed the local scene. People regard it as their own radio station, it is our voice. It deals with local issues which are relevant to local farmers, shepherds and yak herders.



Nepalis are very good with feedback, so these stations get letters by the sack load, even the commercial stations. People want to know when to plant corn, when the vaccination for the water buffaloes is happening - in other words, information that affects their daily lives and that they don't get from the official channels.



Did the success of the FM radio stations have any influence on the state broadcasters in Nepal?

The state-run radio is still largely short and medium wave. The signal reaches nationwide but due to the lack of clarity of the signal it wasn't very popular. It was regarded as "the capital speaking", propaganda, official version of events, news that were not really relevant to most people, ministers' speeches - the usual state controlled fare.

When the state broadcaster, Radio Nepal, opened an FM station it became completely commercial to supplement the cut in subsidies from the government. So the impact of the community broadcasters on the state radio was that the state radio became more commercial. When Radio Nepal was the only broadcaster its programmes were much better. Their programming had been revolutionary: there was one programme on agriculture which went out for nearly 20 years and the person who ran it became a household word all over Nepal.

Did the political instability in Nepal impact on the media?

The political instability led to the move by the king on 1 February 2005 to clamp down on the media - so there was direct censorship. We in the print media were affected of course but this move had much more direct impact on the community radios. All their achievements over the last five years came to nothing with one stroke - banning all news and current affairs on FM radio. These radios had been relying on information, studio chats and phone-ins: all this had to be stopped and only music is allowed to be broadcast. I am sure that the Nepali government has realised that this is untenable. The Nepali people have become too used to freedom and getting their information from radio. Moreover, the ban is counterproductive as people listen now to the clandestine Maoist radio because they don't get the information from their local FM radios. Furthermore, all the reports which were carried by the local stations on Maoist atrocities or human rights violations by the rebels have been stopped. So this clampdown has helped the rebels, it hasn't helped the government.

Kunda Dixit, thank you.

Overpage Nepal: a country silenced

it put her jailers on notice that the world was interested in her fate. "It made them more careful," she said. Jineth Bedoya Lima said that winning the *Courage Award* "was a guiding light for staying in Colombia. It was one of the things that kept me going."

Winners of the 2005 *Courage in Journalism Awards* were announced in June. They are:



- Sumi Khan, an investigative crime reporter for *Shaptahik 2000* magazine in Bangladesh who was brutally beaten and attacked with a knife by unknown assailants one night on her way to file a story. Khan is based in Chittagong, Bangladesh, one of the most dangerous places for a reporter in the world.

- Shahla Sherkat, editorial director of *Zanan* magazine in Iran. Sherkat has battled obstacles, including threats of prison sentences, to publish a feminist magazine in Iran.

- Anja Niedringhaus, a German photojournalist who has covered the world's conflict regions, including Bosnia, the Gaza Strip and, most recently, Iraq, for the European Press Agency and the Associated Press.

Each year, the IWMF also pays tribute to a pioneering woman journalist with a *Lifetime Achievement Award*. This year's winner is US political columnist Molly Ivins. The *Courage* awardees will be honoured in October and November 2005, at ceremonies in both New York and Los Angeles.

In 2005, the IWMF also inaugurated the *Elizabeth Neuffer IWMF Fund*, named for 1998 *Courage in Journalism Award* winner Elizabeth Neuffer. Neuffer was a *Boston Globe* foreign correspondent whose coverage of human rights abuses in Bosnia and Rwanda won her the award. She was killed in a car accident in Iraq in 2003. The IWMF, along with Neuffer's friends and family, established the fund in her honour. It supports both a nine-month fellowship for an international woman journalist and a yearly forum on human rights and journalism.

In the United States, the IWMF has developed programmes to help women in the media become leaders in their newsrooms. These programmes have ranged from one- to two-day leadership training workshops to programmes geared specifically towards teaching women journalists of colour how to strengthen their presence in the newsroom. Most recently, the IWMF launched a week-long *Leadership Institute for Women Journalists*. The institute brings women in mid-level media management in the US together to focus on how they handle the key demands of newsrooms. The 2005 *Leadership Institute for Women Journalists* took place in Chicago in July.



Since its launch in 1990, the IWMF has raised awareness of women's roles in the media. IWMF forums, studies and reports explore the obstacles women journalists face when trying to advance in their careers. The organisation also examines the impact on the news business and the community when women's voices are absent from decision-making about news and how it is covered. The IWMF's seminars and training sessions give women journalists leadership development opportunities and training in the techniques of a free press and in the business of the media. The IWMF has built a network of women journalists from more than 100 countries which helps women in media share their strategies for success and access resources to help them achieve their goals. www.iwmf.org

A country silenced: Nepal after the coup

Nepal's King Gyanendra is systematically dismantling his country's once-thriving independent press through pervasive censorship, military and police intimidation, and coercive financial pressure, according to a report issued by the Committee to Protect Journalists (CPJ) in April. The report describes the deteriorating press conditions since the king dismissed the multi-party government and declared a state of emergency on 1 February, saying his action was necessary to deal with an ongoing Maoist insurgency. Dozens of journalists have been detained, CPJ found, and sweeping bans against critical news reporting have been imposed. The king's forces have shut down news reporting on the country's 46 FM radio stations, they have shut off lucrative government advertising in private media, and have left thousands of journalists jobless (for the full report see www.cpj.org). The CPJ has called on the king to lift his sweeping restrictions on the press and to end the government's harassment of journalists.



The CPJ has voiced grave concern over the safety of abducted journalists - by both Maoist rebels and the government. The Maoists have bombed TV towers, telecom plants, power houses and government installations in their campaign against the monarchy in Nepal. They have fought since 1996 in a civil conflict that has claimed more than 11,000 lives to date.

The International Press Institute (IPI) has put Nepal under observation until the restoration of press freedom there. It said that there has been no change in the government attitude towards the press in Nepal even after the lifting of the state of emergency at the end of April.

As reported by the Nepalese newspaper Kantipur, in May the government tightened its grip on the media by preparing an amendment to Nepal's Media Act to incorporate strict legal provisions of media ownership, news broadcast and fines and punishment for publishing, translating and important banned material. Editorials in Nepalese publications urged opposition to the proposed media law amendment, and the Federation of Nepalese Journalists launched protests. The South Asian Free Media Association (SAFMA) also strongly condemned the law that aims to control free press. Nepalese journalists have been holding street protests almost daily against the media clampdown, with many of them being arrested by police, held overnight and then released.

In July FM radio stations intensified their nationwide protest programme by attempting to defy the government ban on news coverage. Other measures used by the stations have included broadcasting silence, blowing of conch shells and reading the news through loudspeakers in the main squares of all major towns.

In August, Nepal's Supreme Court ruled that a government notice forbidding Nepal FM 91.8 to broadcast news was illegal. Nepal FM had continued broadcasting news despite receiving the notice, and the Ministry of Information and Communication had threatened to revoke its licence, claiming that the broadcasting of news was beyond the rights granted by the licence. The station's owners, Rainbow FM Pvt Ltd, decided to seek a ruling by the Supreme Court, which found in their favour.

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When it comes to building a brand new, state-of-the-art transmission facility, timing is everything. After 12 years of successful out-sourcing, Turner Broadcasting Systems, Europe have decided to bring their transmission in-house. Michelle Olley finds out what – and who – lies behind Turner's latest broadcasting project



In-house and in control

It's been a long time coming, but Turner Broadcasting's London HQ is about to join Atlanta, Buenos Aires and Hong Kong in becoming a major transmission centre for the company's UK, Pan European, Middle Eastern and South African output. Turner's company-wide decision to digitise its assets involves building a new facility in the lower ground floor of their West End, Great Marlborough Street offices and hiring an additional 40 members of staff. 12,000 hours worth of the company's entertainment content including films and cartoons for Cartoon Network, Boomerang, Toonami and TCM (Turner Classic Movies) will be digitised, enabling Turner's network of channels throughout Europe, the Middle East and Africa (EMEA) to be broadcast from video servers under automation control. Turner currently broadcasts in fourteen different languages, to over 100 countries.

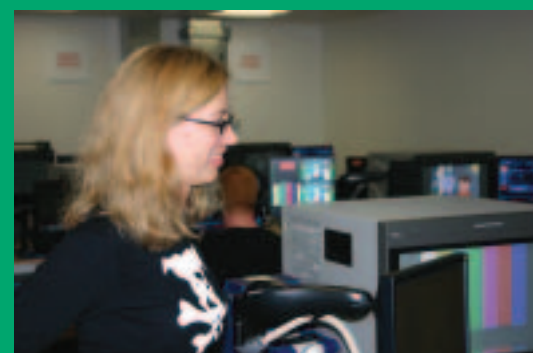
At the announcement of the project last year, Turner's Senior Vice President and General Manager of Turner Entertainment Networks, Tina McCann said: "Digitising the library will put Turner in a strong position to take advantage of emerging revenue streams and new work flows such as VOD, Broadband, Integrated Payout and Production. We have been extremely satisfied with Ascent's service but bringing the system in-house will give us total control and flexibility over the entire channel creation process." McCann leads the project with Gabby Redfern, Vice President of Network Operations, and Steve Fish, Vice President of Engineering. Redfern and Fish were involved in the building of the original facility for Turner in 1993 at the Chrysalis TV facilities, which later became Todd AO, and then Ascent Media.

Gabby Redfern moved to the company in 2000 from Todd AO. One of her first assignments was to develop a company strategy for payout. Says Redfern: "For the past 12 years we have operated our

channels playing out from video tapes. There was no doubt in my mind we needed to digitise our content and migrate to a new technology solution. One of my responsibilities was to analyse the business requirements to put the company technically in the best position possible to take advantage of potential growth."

Another challenge for Redfern was creating an introduction and education phase for other departments in the UK office. The latest 'tapeless' technological advances involve complex system integrations that require an understanding of how material is transmitted and distributed. If you've never been involved in the day-to-day output of Broadcast Operations, it's unfair to expect people to grasp the processes, and the changes, immediately without a clear and thorough briefing. Once she had the company approval, Gabby was then responsible for building up a department team of over 40 people from scratch, including transmission operators, Ingest operators, engineers and administrative back-up.

The build of the project will take five years from conception to completion. Steve Fish, VP of Engineering, is the man who is making Redfern's vision a reality. "I designed Turner's original facility at Todd, and other suites at Chrysalis, but this is the one I've been wanting to design for many years. It's the first time all the technology's been available to allow us to go for completely seamless transmission. We are not broadcasting anything off videotape and the whole thing is designed to be broadcast from data source all the way through, without re-ingesting or going back, so in that respect we are pushing very close to the edge. There are a few facilities around the world who have some elements of these systems running but not quite as integrated as this."



Concerns over viability of DVB-H...

...following RadioScape's field trials for Digital Multimedia Broadcasting (DMB) in the UK

The facility will broadcast 13 channels, with the capacity to increase its output up to 30, with a design life of ten years and built-in HD readiness. It is tapeless and aimed at true media management under completely automated control, extendable to handle multi-audios, multiple subtitles and to be more flexible in media management for repurposing in the future. Says Fish: "Some of the distribution mechanics that we're starting to test will be more valid next year and the year after. We're trying to flatten workflows and generally manage stuff so that we don't end up with dozens of copies that are harder to manage. It's single point of entry for data but it's also managing when you copy or create a version of something, so you have got it managed as you create it. You request it, create it and manage it all within the system, unlike a tape which you lose track of very quickly."

Even though all the systems are as cutting edge - "bleeding edge, some of it" - as can be integrated in 2005, Fish is still keeping an eye out for the distribution methods of the future. "It's difficult to predict exactly where distribution mechanisms are going to go in the next ten years - but every one of those mechanisms requires some kind of compressed content to be delivered, be it VOD, telephone streaming or something new. What we've tried to do is create a system where it doesn't matter so much what the distribution system ultimately is, we can handle it. People are going to invent new mechanisms but we've designed it so that

it's as future-proof as we know how to make it. We've got a few years before the technology becomes something completely new. There are some pieces of hardware that have to go in to make the trans codes correct but there's a core there. We've already ingested it, we've already got it stored and we're as ready as we can be."

Turner Broadcasting System (TBS) Europe delivers some of the world's most successful and well-known news and entertainment brands - CNN, Cartoon Network, TCM (Turner Classic Movies), Toonami and Boomerang - across almost 100 countries in Europe, Africa and the Middle East. Alongside its TV channels TBS is at the forefront of developing its brands through the internet, broadband, wireless, DVD, E-commerce, merchandising, cinema, publishing and every other available platform. Turner Broadcasting System Europe Limited is a Time Warner Company.
www.turner.com

"DMB is viewed by many as the next logical step in the evolution of DAB," says Dr. Les Sabel, RadioScape's VP of Technology. "More importantly, it could also represent the next step in the evolution of mobile phones delivering the vision of video and data on the move that 3G promised but cannot deliver in a cost effective and efficient manner. A one-to-many broadcast technology, such as DMB, provides a broadband pipe of multimedia services that the one-to-one approach of 3G can only provide in small numbers and expensively."

These field trials also raised concerns about the viability of an alternative to DMB called DVB-H (Digital Video Broadcast - Handheld). The DVB-H system is based on DVB-T (Digital Video Broadcast - Terrestrial), which was originally designed for static operation while DAB was designed from the outset for mobile operation with low power consumption, a target that DVB-H tries to achieve through the use of time slicing in its MPE-FEC layer.

However the key issue raised by the field trial was the question of the power requirement for the transmission of DVB-H. DVB-H has a significantly larger bandwidth having 5, 6, 7, 8 MHz options. Generally, in the UK at least, 8 MHz channels are used. Given that DAB uses a channel bandwidth of 1.7MHz, DVB transmissions require at least 6dB more power for an equivalent error rate (given the same modulation scheme).

Also DVB can use advanced digital modulation schemes such as QPSK (Quadrature Phase Shift Key), 16QAM (Quadrature Amplitude Modulation) and 64QAM, however, while this allows more data to be transmitted, it also requires increased transmission power. Higher order modulation schemes such as QAM are also much less tolerant of fading effects and hence require additional fading margin which in turn also means higher transmission power.

According to Sabel, the field trials show that good DMB reception can be achieved with existing DAB transmitters that only use low amounts of power to cover a large footprint. He says: "I have yet to see any comparative, quantitative evidence for DVB-H but, recent discussions indicate that for DVB-H to achieve the same footprint, network providers will typically require a five times greater density of transmitters. This will make DVB-H very expensive to establish and run -

let alone the possibility of public concerns over yet more transmission towers."

There is also the key issue of spectrum availability. DVB-H spectrum is not currently available in many countries as it is being used for other services such as terrestrial television broadcasts. In most countries it will take several years before this spectrum becomes available. The spectrum for DAB/DMB networks, on the other hand, has already been established in many countries around the world along with transmission towers and capacity especially in Europe, Canada and Asia Pacific. Mobile receivers for DMB have already been launched by LG and Samsung with test transmissions already underway in Korea and China providing real world experience of broadcasting and consumer reaction and usage. At present, there have not been any announcements of commercial DVB-H and it may be some time before these happen giving DMB a major head start.

DMB is a proven working technology that is already being deployed in several countries with the backing of major consumer electronics companies. DVB-H has some major companies supporting it but it faces the twin challenges of current lack of spectrum and the significant transmission power requirements that these field trials have uncovered. So what does the future hold for TV reception on the move? It is clear that DMB will be the first mobile TV system to be deployed, going live in Korea in the second half of 2005 and having significant commercial trials in the UK. In the final analysis it will be market pull, as demonstrated by consumer acceptance of DMB which will determine whether DVB-H will be financially viable and the eventual mix of mobile TV delivery systems which are deployed.

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. Founded in 1996, RadioScape is headquartered in London with offices in Singapore, Japan and Hong Kong.
www.radioscape.com
RadioScape is a member of the AIB.

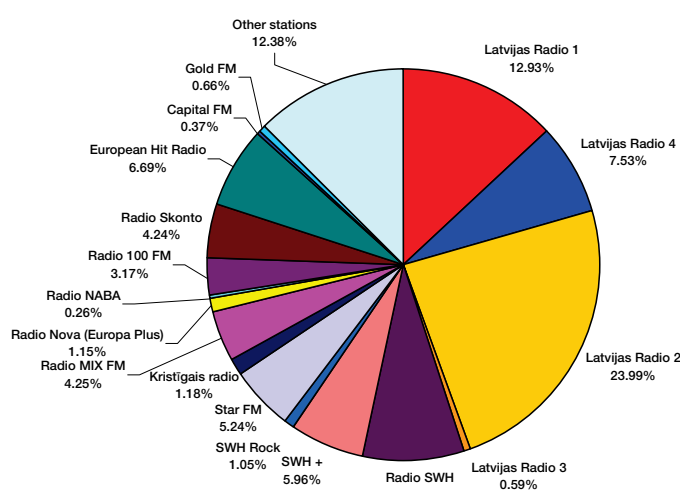


The organisations we call public radio and public television in Latvia today were monopolies until independence was restored in the country in 1990. Their financing was provided centrally from funds of the totalitarian state, and such problems as under-financing or competition did not exist. Neither was there a radio and television market demanding the most competitive programme formats, promotion and positioning, and there was no struggle for existence. Totalitarian radio and television had nothing to do with truthfulness or pluralism, and there was no freedom of expression, no excuse to transmit the popular music or rock music from the free world, since radio and television were compelled to serve the ideological interests of the ruling communist party of the occupants.

Now the situation has changed drastically. With the advent of commercial broadcasting, the broadcasting industry has developed from a simple and easily predictable monopoly into a complex activity where Latvian public radio and Latvian public television are two among many players that equally struggle for survival. At present, the Latvian radio and television market consists of 101 operators: 36 radio stations, 28 TV stations and 37 cable radio and television providers. That is quite a number for a small country with one of the lowest GDPs in Europe.

Between 1998 and 2001, to withstand the growing pressure of commercial broadcasters and to stop losing audiences, Latvian Radio positioned its programmes more precisely. Today, the success of public radio in Latvia is a remarkable fact even in the European context, since there, too, PSR is experiencing hard times in the face of mounting competition from commercial broadcasters. Latvian public radio has four services: Latvijas Radio 1 providing information, analysis and entertainment (audience share 12%), Latvijas Radio 2 – Latvian pop music channel (27%), Latvijas Radio 3 – classical and contemporary music channel (1%), Latvijas Radio 4 – the service for linguistic minorities (8%). Latvian Radio also covers transmission costs for the alternative music service Latvijas Radio 5 (Radio Naba), produced by students of Latvian University.

Market shares of Latvia's radio stations (SHR%), winter 2004 - 2005



The output of the five programme services is well-balanced with the limited resources currently at the disposal of Latvian Radio. In November of this year Latvian Radio will celebrate its 80th anniversary, currently controlling 48% of the radio market share and thus a leader among the radio stations in Latvia. Despite the pressures of financial and organisational problems and acute competition, Latvian Radio is still appreciated by the audiences, as it produces programming relevant to Latvian culture.

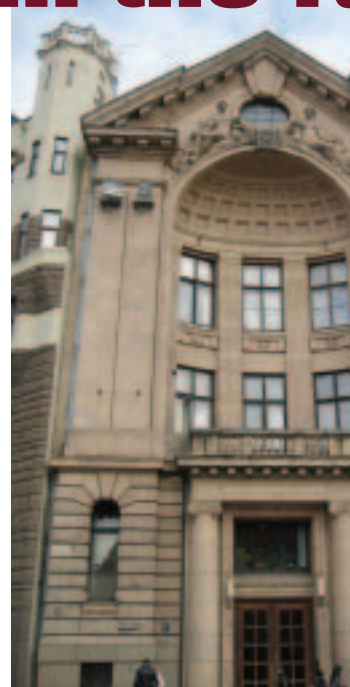
Public radio and TV is partly financed from state funds (covering 67% of production, maintenance and transmission costs), with

the remaining 33% coming from various business activities (such as studio rentals, etc.) and commercial advertising. Several years spent in discussions with government and parliament about the re-introduction of public financing from licence fees have led to nothing. However, the financial situation of the public broadcasters is likely to change as a result of a new broadcasting bill that is currently being discussed. This new bill proposes that the public broadcasters will have to abandon commercial advertising after several years; in return, there is a promise to allot a larger amount from the national budget. The project, however, may threaten the independence of public broadcasters even more.

During the winter season of 2004/2005, 88% of the Latvian population listened to their radio at least once a week. On weekdays 86%, and on Saturdays, Sundays and holidays 70% tuned in. The average listener used radio for 4 hours and 32 minutes per day. The data of market shares controlled by various media suggests that

80 years in the radio

Latvia, a European Union member state with a population of 2.3 million, has existed a little more than 35 years in total as an independent country - between 1918 and the Soviet occupation in 1940, and between 1990 and today. Here Uldis Duka, Director of the public radio channel Latvijas Radio 2 (LR2), and Aivars Ginters, Head of International Relations at public Radio Latvia, give an overview of the radio market in their country

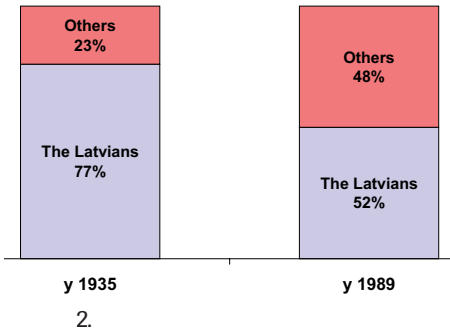


radio has 12% of the total market; that is more than the average European radio market share. A possible explanation is the credibility and popularity of radio in our country. Most of the radio market niches are already occupied, consequently the forecasts do not predict any significant changes. Several radio stations have been bought by global media enterprises, however, in practice the Latvian public seems to be quite conservative, since the programming policies (and the pretty rigid format) adopted by those channels that have become part of global media through acquisitions, have not, as yet, brought any improvement in terms of audience figures.

An obvious choice for Latvian radio listeners is pop music in Latvian. After a serious crisis, during which audience figures plummeted as a result of pressure from commercial broadcasters, „Latvijas radio 2” changed its format in 1998 and chose to broadcast pop music in Latvian. The format change proved to be a success and, with market share of 27%, „Latvijas radio 2” is now the most popular channel in the country. And without doubt, „Latvijas radio 2” helped the entire organisation of Latvian public radio to recover, reversing the loss of audiences that had taken place before.

Why is Latvian pop music so popular? During the communist rule Latvia suffered from a massive influx of migrants. A Russification policy was implemented with the purpose of altering the ethnic balance so that, at the end of the day, the Latvians would become a minority in their own country. This was, and still is, an important factor that has influenced our culture and our media. Singing was one of the manifestations of popular resistance to the regime, and that is one of the explanations for the popularity of Latvian radio

The ethnic breakdown of Latvian population



is among the weakest in the EU, and their inflation rate is the highest. Therefore the changeover of receiving equipment will take some time. As the number of radio receivers per household reaches the previous level, it is likely that the competition in the radio market will increase since each member of the household will be able to select a programme he or she likes.

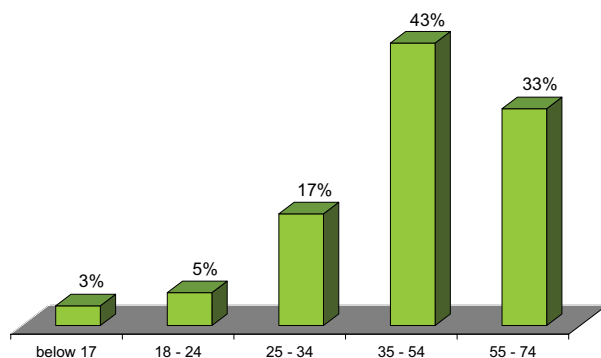
There is a similar trend concerning the ownership of TV equipment. After the changeover from SECAM to PAL, the number of TV sets owned by Latvian households decreased. However, competition in the TV market is much fiercer than in the radio sector. The main players are LNT and TV3, while Latvian public TV has lost the dominant position it once held.

the radio business



When analysing the development of the Latvian media market one has to take into account an interesting detail. During the last decade, the number of radio receivers in Latvian households has decreased. As AM broadcasting was discontinued and FM networks were deployed, listeners could no longer use their old radios and had to buy new equipment. However, the purchasing power of the Latvians

Breakdown of LR2 audience by age, winter 2004/2005
(Source: TNS/BMF)



Radio Latvia was established in 1925 as "Latvijas Radiofons". Today Latvian Radio has 320 full-time employees and produces programming for 4 national radio channels, 24 hours per day. Annual expenditure is 6 million EUR. Channel formats: LR1 - generalist in the Latvian language; LR2 - popular music in the Latvian language; LR3 - contemporary and classical music; LR4 - generalist in the Russian language and various languages spoken by ethnic minorities (Estonian, Polish, Lithuanian etc.); LR5 - alternative rock music, new music. After transmission each item is saved as a digital audio file. There are no local services at present. All programmes are available on FM and via the Internet. www.latvijasradio.lv

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Global connectivity with customer care

In July of this year, R.R. Satellite Communications Ltd joined the Association for International Broadcasting as a new member. With the company's reputation as one of the world's fastest growing satellite ground service providers and an experienced comprehensive world-class provider of end-to-end transmission via satellites and production services to the global broadcasting industry, *The Channel* takes a closer look at RRSat's portfolio of activities



RRSat's clients include television broadcasters, programme producers, production companies, event and conference organisers, news and sport agencies. Since January 2002 RRSat has been in compliance with the requirements of the quality standard ISO 9001 2000 for the following activities: uplink, downlink and turnaround services via satellites for television, radio and data channels; integration and operating mobile and stationary uplink and downlink satellite systems. RRSat is also a member of numerous international professional organisations, and is internationally recognised for its sophisticated and reliable technical capabilities.

RRSat provides Uplink, Downlink and Turnaround services using Teleports, Flyaway and Transportable Uplink and Downlink systems with dishes for C-Band, KU-Band and Ka-Band (2.4m to 12m). RRSat provides these global satellite distribution services via the most advanced digital MCPC platforms to more than 150 TV channels and enables direct-to-home coverage. RRSat specialises in the management and distribution of audio, video and data signals via satellite for broadcasters, businesses and communication companies worldwide.

Satellite specialisation

RRSat owns and manages playout, uplink, downlink and teleport facilities, in Israel and in the USA. In addition RRSat has fibre links between Israel - London - New York - Russia and Singapore enabling RRSat to provide customers with a total managed service for global,

end-to-end connectivity over all six continents. Altogether, RRSat operates 15 MCPC platforms with world coverage.

Playout centre

RRSat provides full playout for 50 TV channels. The playout centre has state of the art equipment consisting of Leitch

servers (Leitch Nexio-NX4000 TXS and VR440 fully rounded with backup output 1 to N), an Achieve system, LTO-2 tapes, an automation system made by Pebble Beach, MPEG-2 compression level - Harmonic MPEG2 DVB, VTR's for any kind of format for ingest of the video streams on to the servers, Monitors, Measuring and monitoring equipment for QC, Leitch matrix, DVB/ASI format. The playlists are provided from the client's headquarter. RRSat's playout centre is operated and monitored 24/7 by certified technicians (controllers) and provides playout for channels like FASHION TV, GOD TV and many more.

Channel distribution

For broadcasters sending channels direct-to-home or to cable headends, RRSat combines a high level of service and reliability with access to and booking facilities for Europe's largest inventory of satellite transponders. RRSat provides turnaround to 150 TV channels on 24/7/365 basis.

RRSat is committed to enabling both established and new broadcasters and channel owners to deliver their programming efficiently and reliably. The company has invested in state-of-the-art digital broadcasting technology and has the knowledge base to help broadcasters and channel owners to select the right compression and multiplexing options for their needs. Customer service ranks high on the list of priorities - from the launch right through to the expansion and beyond.

Teleport facilities

R.R. Satellite Communications teleport facilities offer global satellite coverage through the Intelsat, Eutelsat, PanAmSat, Eurasiasat, Arabsat, Nilesat, Thaicom, Telstar, New Skies and Amos satellites. C, KU and K band teleport services are provided from our teleports in Tel-Aviv, Jerusalem, Herzliya and Reem. Antennas up to 12 meters across are dedicated to occasional services to ensure high availability and maximum flexibility when a story breaks. The teleport is manned 24 hours a day for constant, superior customer care. RRSat staff consists of senior engineers and there are always 8 technicians on duty 24 hours a day.

The teleport is equipped with a custom air conditioning system and fully redundant power supply through a company owned high-voltage transformer, diesel generator and redundant UPSs. The RRSat teleport is also equipped with a fire alarm system and is under 24-hour surveillance. RRSat provides comprehensive digital DTH services to the USA via Telstar-5 and AMC-4, to Europe via Hotbird-3 and Hotbird 6, Eutelsat W2, EurAsiaSat 1, to Australia via Optus B3 and from USA to Europe via Telstar-12. Additional MCPC platforms are Thaicom 3, APR 1 (Insat 2E), Amos-1, W5, AB1, AsiaSat 2 + 3, Pas 10, Intelsat 907 and a variety of others.

Founded in 1981, **RRSat** operates under licence from the Israeli Ministry of Communications. The company is headed by Mr. David Rivel and has two strategic partners: the Intergama Investment Group and Kardan Group - both major public holding companies, traded on the TASE. RRSat is exhibiting at IBC 2005 at RAI Amsterdam in booth 1.216. www.rrsat.com

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