Global Partners & Associates
Democracy | Governance | Human Rights

The Contemporary Communications Environment

Mapping the Communication Platforms for Freedom of Expression

Lisa Horner

The Freedom of Expression Project

October 2006

www.freedomofexpression.org.uk / www.global-partners.co.uk

Contents

1) Introduction …… 2

2) How people access news information…… 3

2.1) Television……..... 3

2.2) Printed newspapers ……... 5

2.3) Radio…… 7

2.4) Internet ……... 9

2.5) Mobile and fixed telephony…… 10

3) Trusted sources of information……. 11

4) Ownership and regulation of media platforms and content …….. 14

4.1) The transnational media regime…… 15

4.2) Asia-Pacific…….. 19

4.3) Central and Eastern Europe and Central Asia…… 21

4.4) Latin America……. 22

4.5) Middle East and Northern Africa……. 24

4.6) North America…… 25

4.7) Sub Saharan Africa…… 27

4.8) Western Europe…….. 29

5) Conclusion …….. 31

References ……... 32

The Contemporary Communications Environment

Mapping the Communication Platforms of Freedom of Expression

1) Introduction

The aim of the *New Challenges and Opportunities for Freedom of Expression* project is to understand how the right to freedom of expression is affected by changes in communications technology, markets and regulation. The initial policy paper *Freedom of Expression in the Age of Networked Communications: An overview* by Becky Hogge, sets the scene for this discussion.

It is important to begin with a clear understanding of the environment in which freedom expression is sustained. This report therefore considers the following key issues:

- How people access information
- What sources of information they trust
- How these sources are controlled (through both regulation and ownership).

The terms 'freedom of expression' and 'communication' encompass a wide range of human activities that involve seeking, receiving and imparting information and ideas, ranging from cultural expression to political speech. However, owing to space and time restrictions, this baseline report will focus on how people access information about recent events in the local, regional and global arenas.

It is assumed that, where the facilities and technology are available, people access news through media such as the radio, television, newspapers and, more recently, the internet. The aim is therefore to map out which of these media people currently rely on to gather news information across the world, the extent to which they trust different sources of news information and who controls these sources through ownership and regulation.

2) How people access news information

The sources people use to access news information depend upon both their ability to access different media (influenced by factors such as literacy, availability and cost) and their preferences for various sources when several are available. This section considers trends in people's access to and preference for different media platforms at global and regional levels. Research shows that the medium through which most people across the world prefer to receive news is by television, followed by newspapers, the radio and the internet (Figure 1). However, differences in the ability to access these media, along with some cultural differences in preference, produce regional variations in this trend.

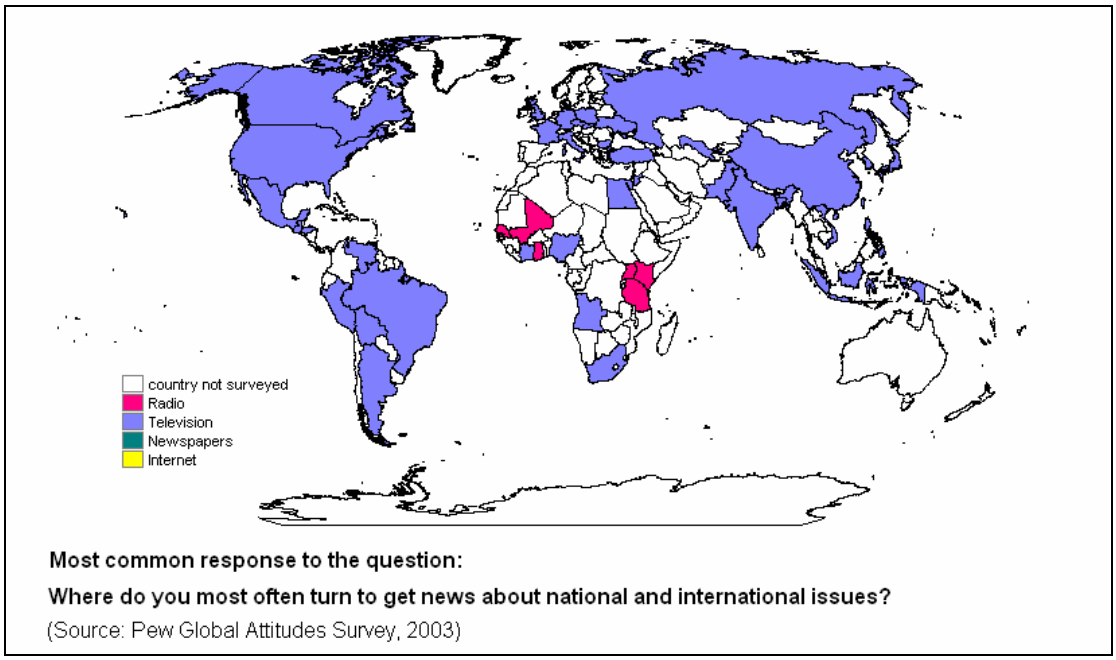


Figure 1

2.1) Television

Global polls suggest that television is the medium through which most people prefer to access news throughout the world (Globescan, 2006; Pew, 2003; Edelman, 2006; Telecom Express, 2006). For example, in the Pew 2003 *Global Attitudes Survey* of 44 countries, television was the source to which most respondents first turn to get news

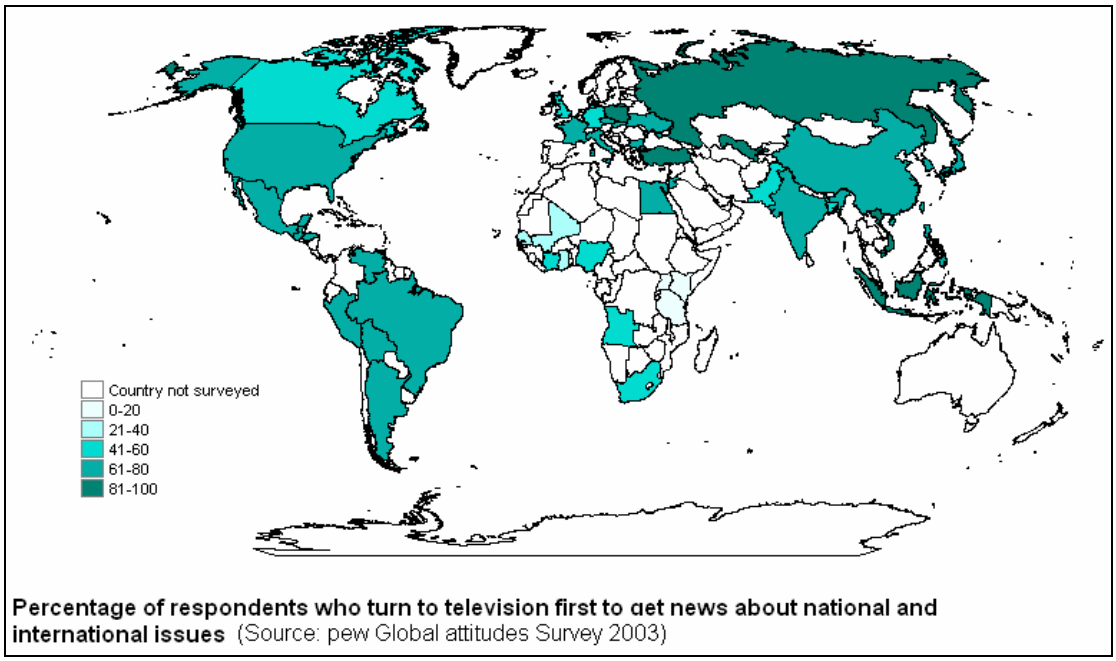


Figure 2

about national and international issues in most regions (Figures 1 and 2). The only exceptions were in sub-Saharan Africa where radio was cited above television in six out of ten countries. In two of the remaining four African countries surveyed, the survey only included people in urban areas where access to television is likely to be easier than in rural areas owing to a higher average income and infrastructure such as electricity.

National and global variations in access to television are related to levels of wealth. Whilst the number of television sets in the world's poorest countries increased from 26 million to 42 million between 2000 and 2005, these countries still only have a television penetration rate of 5.7% (ITU, 2006). The global distribution of television sets demonstrates marked inequalities and is illustrated in Figure 3. Taking global trends into consideration, the implication is that if people are able to access television, the majority use it as their main source of news information.

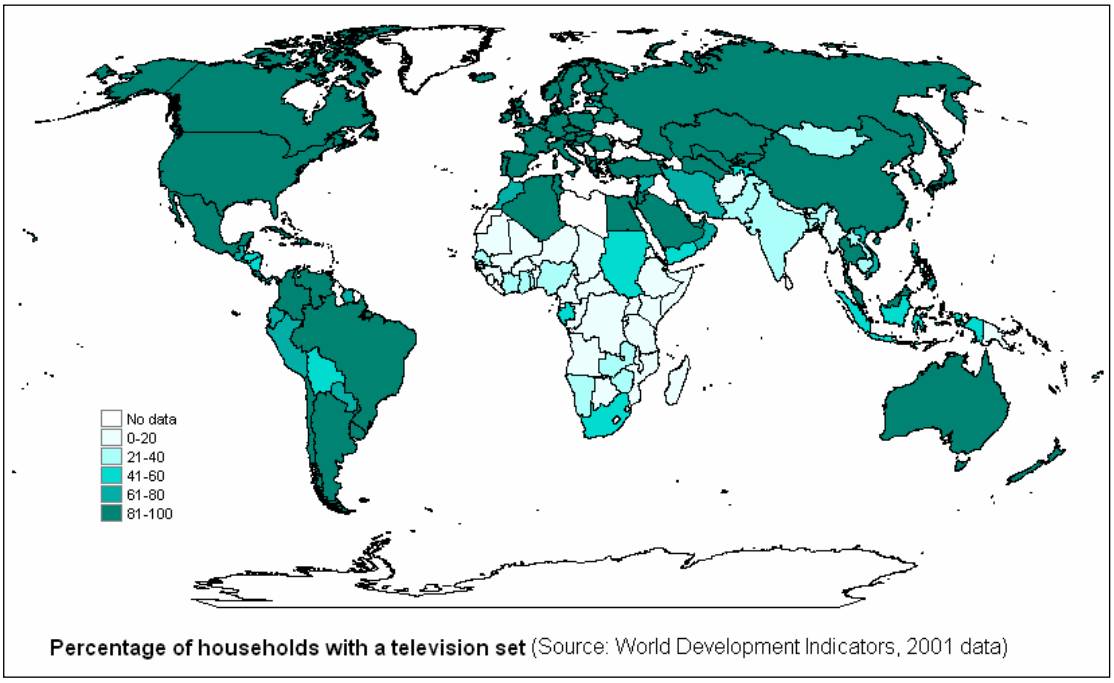


Figure 3

2.2) Printed newspapers

According to the Pew (2003) poll, newspapers are the second most popular source of news after television in the countries surveyed (Figure 4). The Globescan survey (2006) reports similar results. The most notable exception to this trend is in Sub Saharan Africa where radio and television are more important than newspapers as sources of news information (Pew, 2003). This may be related to low newspaper circulations outside of urban areas due to poor infrastructure and relatively low literacy rates (Moehler, 2006). Newspapers also appear to be relatively less popular in Latin America than other regions, with the Pew survey finding more people turning to radio rather than newspapers in four out of the eight countries surveyed.

Newspaper circulation sales decreased in Europe, North America, Australia and Oceania in 2005, and commentators suggest newspapers are the main casualties of increasing internet use (see for example The Economist, 25/08/2006). However, the circulation of free daily newspapers is increasing in these areas, and overall newspaper sales increased at the global level by 0.6% in 2005, with an overall increase of 6% over the past 5 years

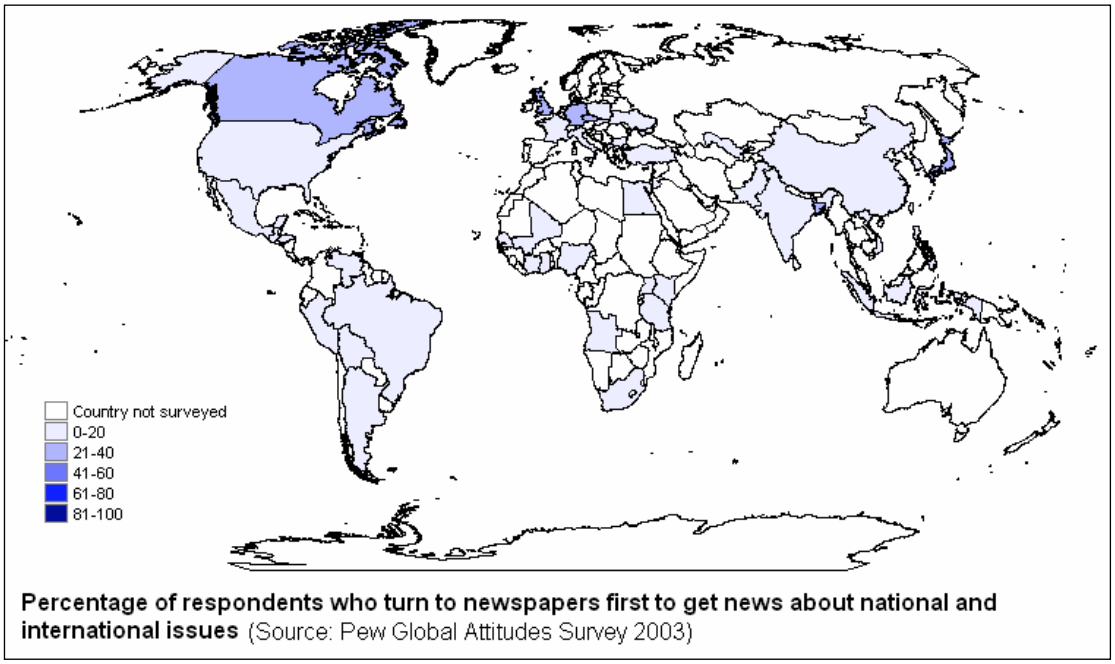
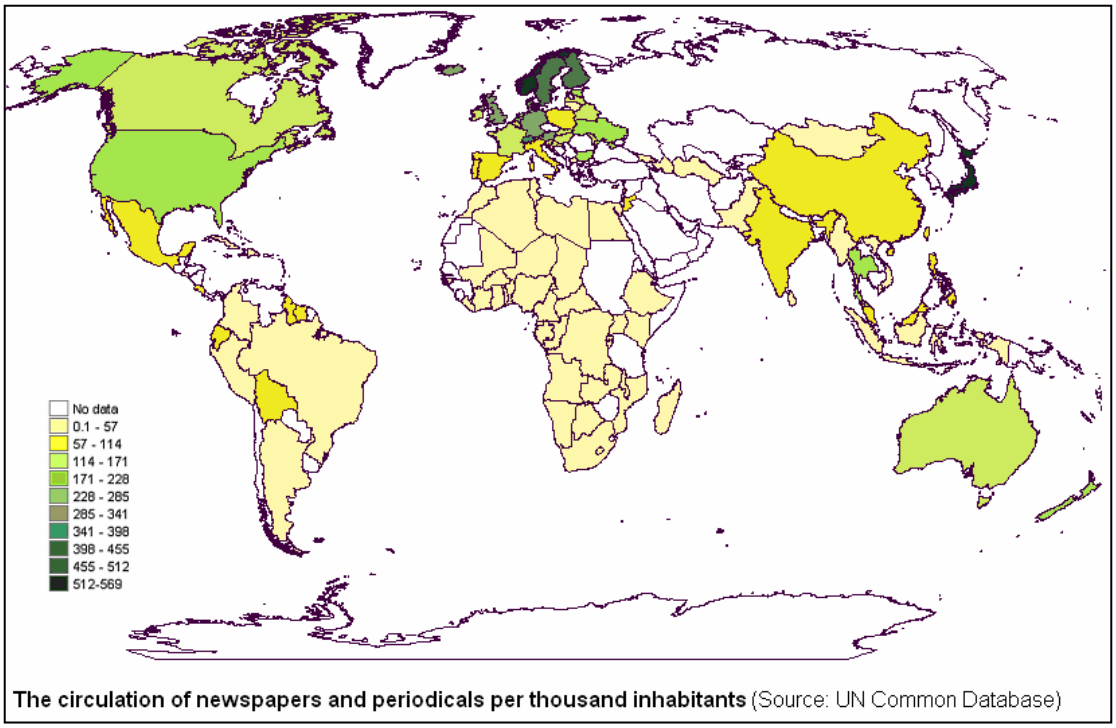


Figure 4

(WAN, 2006). This growth stems from rising sales in Asia, South America and Africa. Asia makes up the world's biggest newspaper market, publishing 70 out the world's best 100 selling daily papers, 62 of which are based in China, Japan and India. Variations in newspaper circulation across the world are illustrated in Figure 5[1]. Notwithstanding a decline in circulation in the developed world, overall newspapers are a buoyant industry.

[1] The latest data available for each country from the UN Common Database is used in Figure 5. Data is from 1997, 1998, 1999 or 2000.

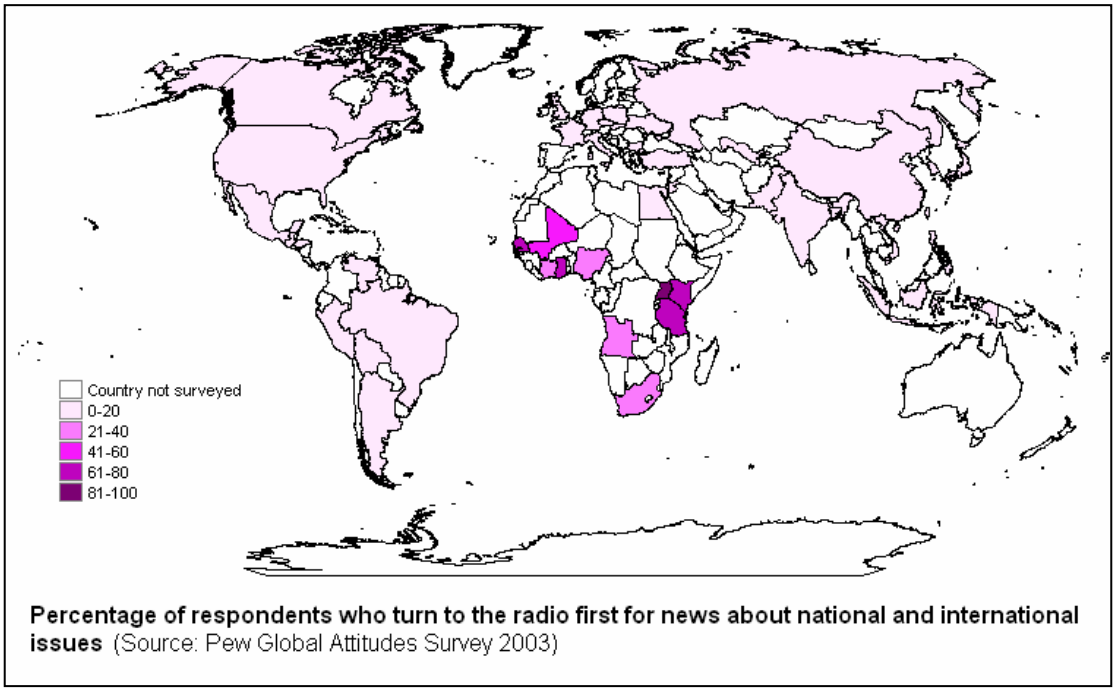


The circulation of newspapers and periodicals per thousand inhabitants (Source: UN Common Database)

Figure 5

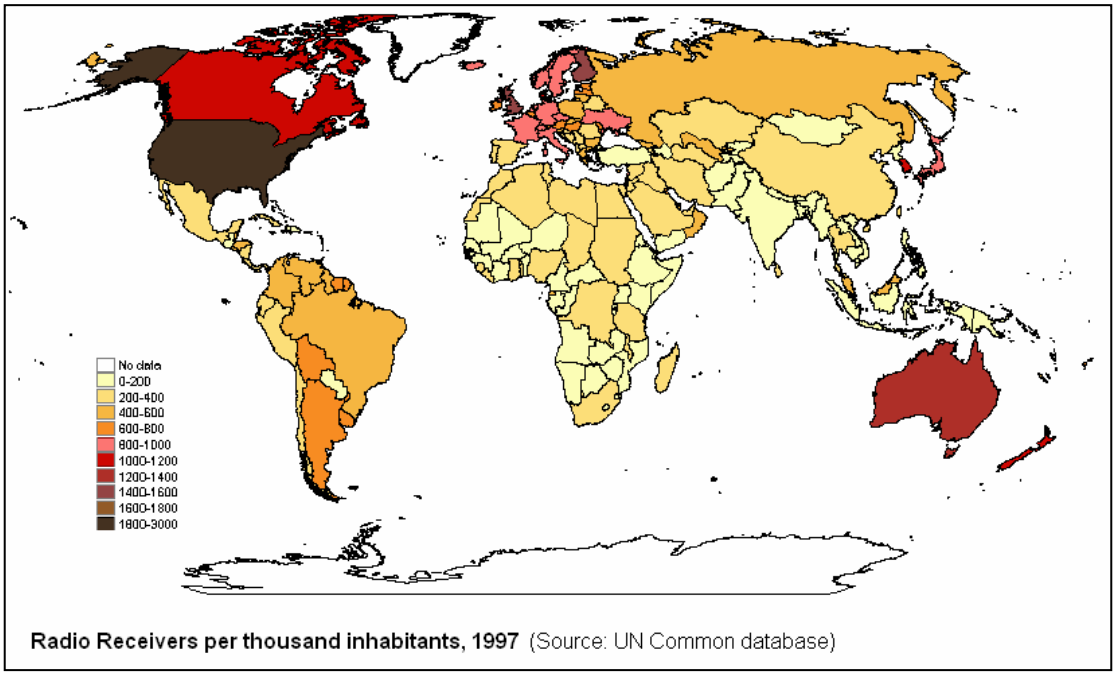
2.3) Radio

The Pew (2003) survey suggests that radio is the third most common means of accessing news information in all regions apart from Latin America, where it is in joint second place with newspapers, and Sub-Saharan Africa, where it is the most common source of news in six out of the ten countries surveyed (Figures 6 and 7). These findings for Africa are supported by the Afrobarometer (2003) survey of 12 African countries which revealed that 54% of respondents get news from the radio on a daily basis, compared to 21% watching television news and 13% reading a newspaper every day (quoted in Moehler, 2006). The liberalisation of broadcasting in many African countries has contributed to a growth in the number of independent radio stations from 10 in the whole continent in 1985 to over 80 in South Africa alone by the end of 2003 (ibid). Radio continues to be a more common source of news than the internet in 41 of the 44 countries surveyed by Pew (2003). The three exceptions were China, Japan and South Korea.



Percentage of respondents who turn to the radio first for news about national and international issues (Source: Pew Global Attitudes Survey 2003)

Figure 6



Radio Receivers per thousand inhabitants, 1997 (Source: UN Common database)

Figure 7

2.4) Internet

The internet is less commonly cited as a main source of news information than other media, with only South Korea, China and Japan being found as exceptions in the Pew (2003) survey as noted above. According to the survey, South Korea has the highest percentage of people using the internet as their main source of news information at 12%. The Globescan (2006) survey found similar results. It is important to note that, whilst people may not actively go to the internet to access news, internet users often receive news through portals such as MSN and Yahoo which they may be using to access other services (Paterson, 2006). However, studies suggest that people use online news sources to supplement, rather than replace, traditional news mass media (Garrett, 2005).

The number of internet users throughout the world is increasing rapidly, and the importance of the internet as a source of news information may grow as users increase. There are now over one billion users making up 15.6% of the world's population, and the global consumption of online media has increased by 200% in the last 5 years (WAN, 2006). However, regional disparities in internet access are larger than for other media platforms (Figure 8) with, for example, only 3.6% of the African population on-line

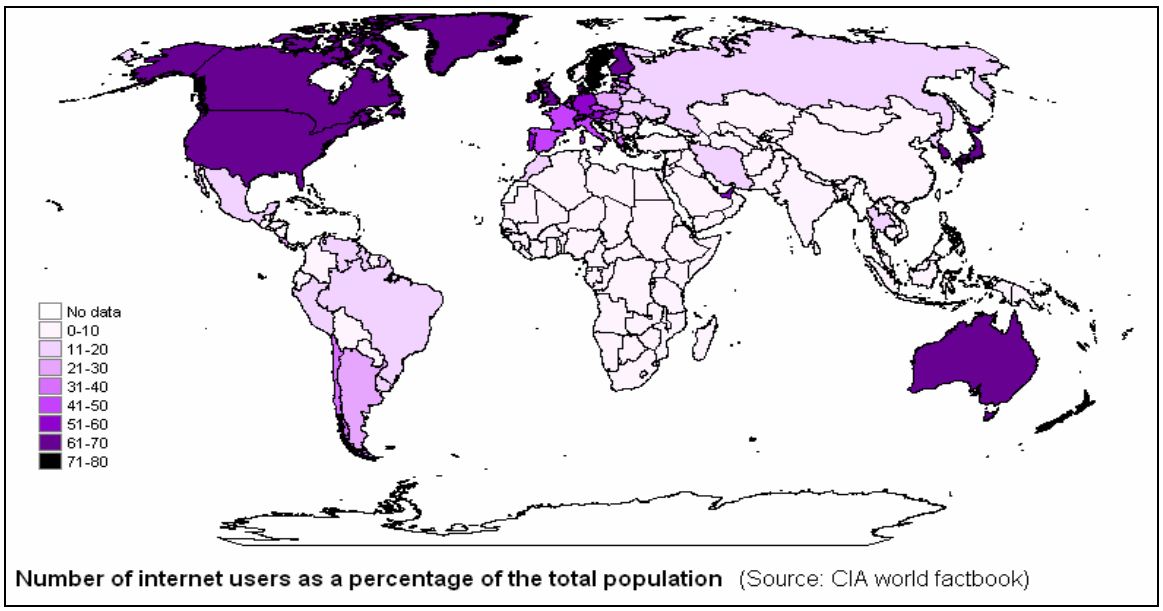


Figure 8

compared to 69.1% of North Americans (Internet World Statistics, 2006).

In countries with relatively low levels of internet penetration, internet use is growing fastest amongst the young, yet growth rates in use by adults over 50 have outstripped growth in use by young adults in the USA and Western Europe (Pew, 2006). Levels of internet use are strongly related to levels of income and education, and men are still the predominant users across the world, although this gender gap is decreasing (Pew, 2006).

2.5) Mobile and fixed telephony

Telephones are not widely used at present to access news information in the conventional sense, but many observers believe that the mobile phone will emerge as a dominant platform in a converged communications world, either through the phones themselves or through related wireless technologies. Telephones are also directly related to communication activities and freedom of expression outside of conventional news gathering. Since 2002, the number of mobile telephone users has exceeded fixed-line users in every region of the world, with 28% of the world's population subscribing to mobile phone lines by the end of 2004 (ITU, 2006). Between 2000 and 2004 the annual growth rate in mobile phone subscription was 45%. This growth has been even more dramatic in poorer countries, with an average annual growth rate of 78% between 2000 and 2003. Thus, whilst a digital divide exists in internet access and use, the same is not true for access to mobile telephony and, by the end of 2004, 58% of the world's mobile phone subscribers were in developing countries (ITU, 2006). This may have important implications for access to the internet if progress is made in the development of wireless technologies.

The use of Voice over Internet Protocol (VoIP) is rising dramatically on a global level, with an increase of 35% in international traffic between 2003 and 2004 (ITU, 2006). Commentators suggest that this trend will continue, although in many areas this will depend on internet penetration and the regulation of VoIP services.

3) Trusted sources of information

As might be expected, people prefer to access news from sources that they most trust. The 2006 Globescan survey of ten countries revealed that, in most countries, national television is the most trusted news source, followed by national and regional newspapers, local newspapers, public radio, and international television. Brazil was the only country surveyed where newspapers were found to be more trusted than television. The internet, and internet blogs in particular, were the least trusted source of news information. The survey found that people tend to trust the media more than the government, although the reverse is true in the UK and USA. Interestingly, a survey found that people in the UK trust newspaper and television news as much as their family and friends (Telecom Express, 2006).

In contrast to the Globescan survey's finding that people place most of their trust in television, the Edelman 2006 *Annual Trust Barometer* found that trust in television is declining and is the main casualty of the rise of the internet as opposed to newspapers as is often assumed. For example, in the USA, respondents citing television as their most trusted source of information decreased from 39% to 29% over the past three years, with trust in the internet rising from 10% to 19% and trust in newspapers remaining roughly the same at around 20%. However, the survey is of 'opinion leaders' in 11 countries, and these varying results may reflect differences in trust of media sources along class and occupation lines. The survey found that levels of trust in the media in general are low, with exceptions being China and South Korea.

In terms of specific sources of news from each media platform, the Globescan survey found that people place most trust in country-specific media, for example Fox News and CNN in the USA, the BBC and ITV in the UK, Rede Globo and O Globo in Brazil and AAJ TAK and DD in India. Whilst awareness of global brands was low, the most trusted were international broadcasters such the BBC and CNN. Brands such as Google, Yahoo and Microsoft were often mentioned after these broadcasters, which is interesting considering the general lack of trust of the internet as a source of news. Studies suggest

that people always turn to news sources that they perceive as being unbiased, but where all sources are considered as biased, they choose sources that support their own views and opinions (Garrett, 2005).

Where overall trust of the press is concerned, there are geographical differences in the levels of trust across the world. Data from the *World Values Survey*[2] reveal that, on average, people in 60 percent of the countries surveyed have 'not very much' confidence in the press (Figure 9). According to this data, levels of confidence are negatively related to the income level of the country, with those countries that have more confidence in the press having an average GDP per capita of $11,000 compared to $22,000 for those with less confidence. The survey data also reveals similar statistics and geographical patterns for levels of confidence in television.

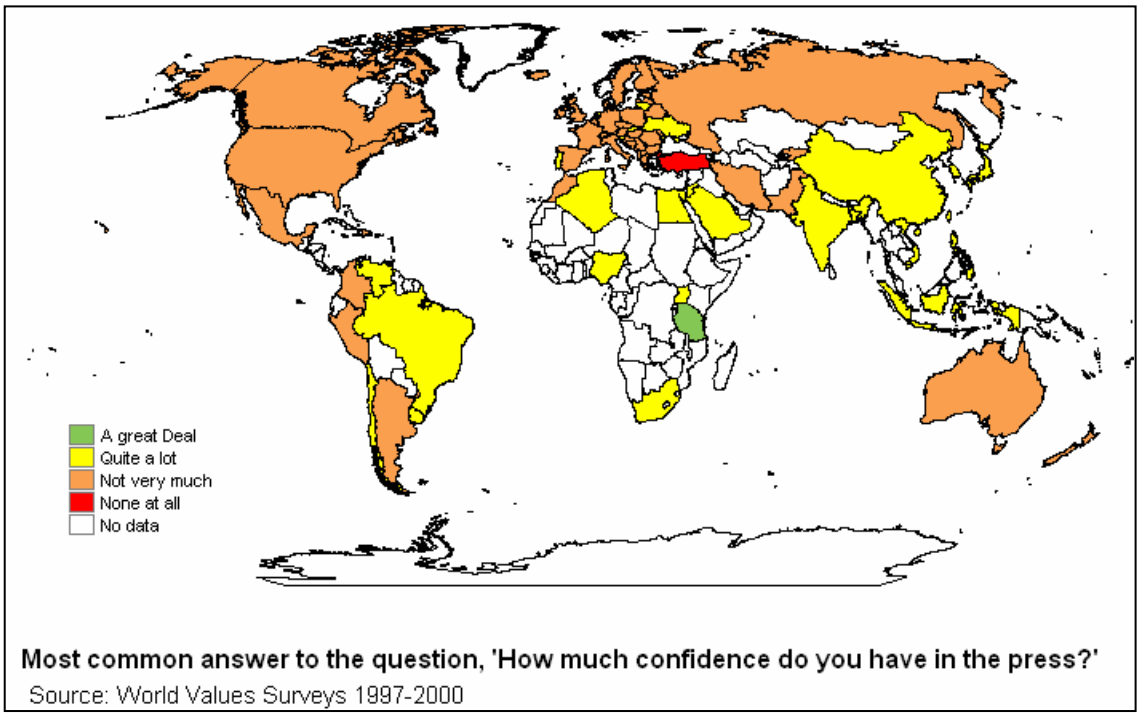


Figure 9

[2] The latest data available for each country from the World Values Survey was referred to here. This includes data from the second and third waves of the survey (1997-2000). GDP data is from the CIA World Factbook.

In terms of demographic differences, young people are more likely to value the opportunity to access news via the internet or mobile sources, trust the international media more than the national media and say they are unable to access the news that they want from the mainstream media (Globescan, 2006). Trust is driven by perceptions of journalistic standards such as accurate and neutral reporting, and distrust leads to people changing the media brands or platforms they go to for information (ibid).

4) Ownership and regulation of media platforms and content

It is not within the scope of this paper to make judgement on the advantages and disadvantages of different forms of media ownership and regulation. However, it is important to note that commentators and actors within the field of media regulation often hold views that fall in between two main extremes of opinion: those who consider that any intervention within media markets is distortional and that market forces are the best means of achieving a competitive media sector that fosters freedom of expression, and those who believe that government regulation is necessary to promote diversity in media content and prevent its manipulation according to state and private interests. Traditionally, the USA takes the former stance and Europe the latter, and this is reflected in the ownership and regulatory policies of each region. Different ownership structures do not in themselves result in certain influences on media content. For example, two different states may own a large proportion of national media companies, yet one could have an efficient regulatory structure that encourages diversity and discourages direct state interference in media content whilst the other could directly use the media to promote state ideology. It is therefore important to consider the politics and power relationships underlying ownership and regulatory regimes rather than making ideologically-based inferences.

Many commentators agree that global trends point towards the deregulation of media and increasing concentration in ownership, especially by multinational conglomerates. However, there is much debate about the exact nature of these trends, their strength and the implications they have for media diversity and freedom of expression. It is useful to think of global trends as the emergence of a transnational media regime that is underlain by a patchwork of national and regional policies and cultures which result in spatial variations in the ownership and regulation of media, and in their impact on freedom of expression (Bennett, 2004). This section outlines the dominant trends within the current

transnational media regime, also considering underlying regional patterns in media ownership and regulatory structures.

4.1) The transnational media regime

The main trends in the contemporary transnational media regime are[3]:

- The deregulation of media markets
- The emergence of a tier of large media conglomerates operating on a global scale and across different media platforms, underlain by a second tier of regional and national media giants.
- The depoliticisation of commercial media content and specific introductions of 'infotainment'.
- Struggles by public service media to compete with commercial media and a related adoption of less 'highbrow' content formulae.
- The increasing significance of the internet as a media platform, and debate by governments about how internet content should be regulated.

These trends are not uncontested by commentators. For example, Compaine (2002) argues that the concentration of media ownership within and between countries has been over-exaggerated and that recent mergers and acquisitions represent a simple rearranging of media furniture. Bennett (2004) warns against popular images of global media corporations as imperialistic, with many recent mergers having proven to be unprofitable, resulting in divestures and the breaking up of conglomerates occurring at a similar rate to mergers and acquisitions. Djankov et al (2001) show that, at the global level, state ownership of broadcast media is still more common than private ownership, with states controlling on average 60% of television stations and 72% of the top radio stations in the 92 countries they surveyed.

[3] The identification of these five trends are a synthesis of observations made by a number of commentators including Raboy (2003), Curran (2002), Bennett (2004), McChesney (2003) and Vick (2006).

However, whilst regional variations exist, the emergence of a transnational media regime as described above is undeniable. Trends towards the increasing commercialisation of media and concentration in ownership by a smaller number of media corporations are evident in most regions of the world, beginning towards the end of the 1980s when a 'flurry' of media mergers took place in the West as companies feared competition from new entrants to newly liberalised markets (Curran, 2002). In the UK, four private media groups own 85% of the country's daily newspapers; in the USA, six companies control most of the media; In Australia, Rupert Murdoch's News Corporation owns 60% of the circulation of daily papers; Mexico's Televisia and Brazil's Globo are two of the world's biggest media monopolies (UNDP, 2002).

The penetration of national markets by global companies is also discernable as more countries are moving to relax restrictions on foreign ownership, with Australia being the latest to do so (Financial Times 10/10/06). For example, General Electric currently owns 38 television stations in 23 markets and Bertelsmann's RTL group owns 34 stations operating in 40 countries (Free Press website). Two decades ago media companies were very rarely found within the top 1,000 global corporations (McChesney, 2001), but in 2006, General Electric, Time Warner, Walt Disney, News Corp, Comcast, Vivendi Universal and Viacom were in the top 400 largest companies in the world (Forbes, 2006), The media industry is currently the 19th biggest global industry in terms of sales and employment, ranked above the chemicals, drugs and biotechnology and aerospace and defence industries (Forbes, 2006). Concentration in ownership results in media content coming from fewer sources, posing a potential threat to news diversity.

Patterson (2006) shows how a similar process of concentration is also occurring on the internet where a duopoly exists in news gathering. He estimates that 50 percent of online news content depends on feeds from the Associated Press and from Reuters. Exacerbating this trend is the growing dominance of news aggregator sites that present internet users with news gathered from other sites with the main aim of ensuring that the audience stays on that site, and thereby with the site's advertising (ibid). Such sites are amongst the most trusted sources of news on the internet (see Section 3), including MSN,

Google and Yahoo. However, it is important to note here that trends towards the deregulation of mass media markets do not necessarily apply to all forms of internet content, and many governments are increasing regulation of internet content and use in the name of national security and the war on terror (Privacy International, 2003). Countries identified by the Open Net Initiative as actively filtering internet content are illustrated in Figure 10. Most countries have fairly open and competitive markets for the provision of internet services (Figure 11), but many have introduced legislation requiring internet service providers (ISPs) to act in a certain manner, for example building in user-surveillance capabilities into internet services (Privacy International, 2003). Where governments still maintain a monopoly over the fixed-line telecommunications sector, they are able to exert more direct control over the ISPs that depend on the use of their infrastructure to operate (see section 4.7).

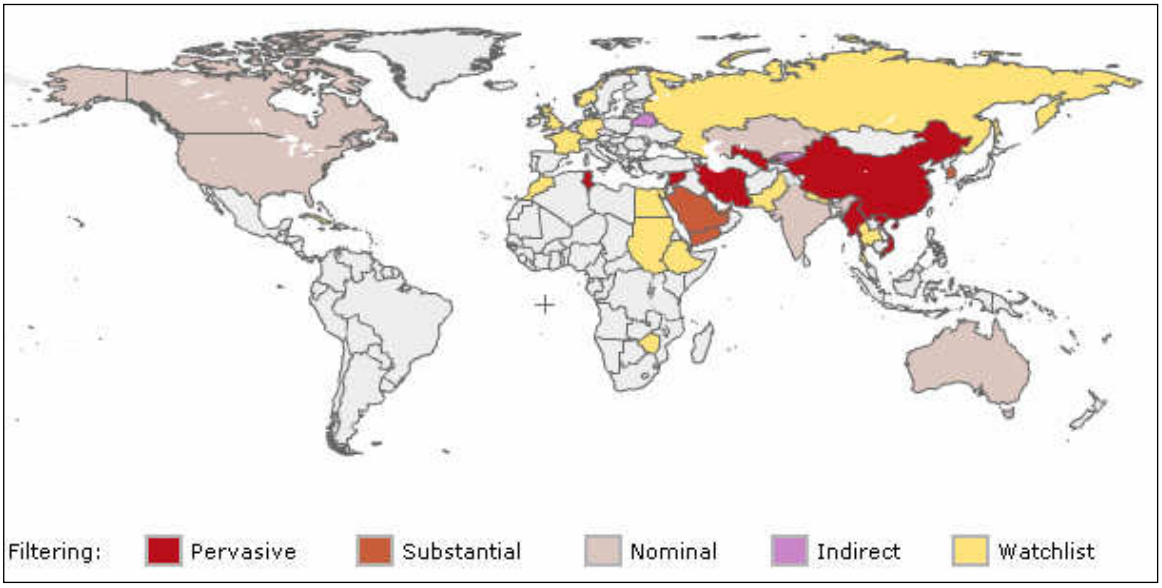


Figure 10 – Countries engaging in internet content filtering

(Source: Open Net Initiative. An interactive version of the map can be viewed at www.opennet.net)

Whilst state control over the internet is possible, the complex nature of the global regulation and control of the infrastructure and protocols upon which internet content rests can make national regulation of internet content and access difficult. Global internet governance is dispersed across a wide range of international and national actors, largely taking the form of international agreements and norms accepted by agents involved in

different aspects of running and controlling the internet. For more information about global internet governance, see IGP, 2004.

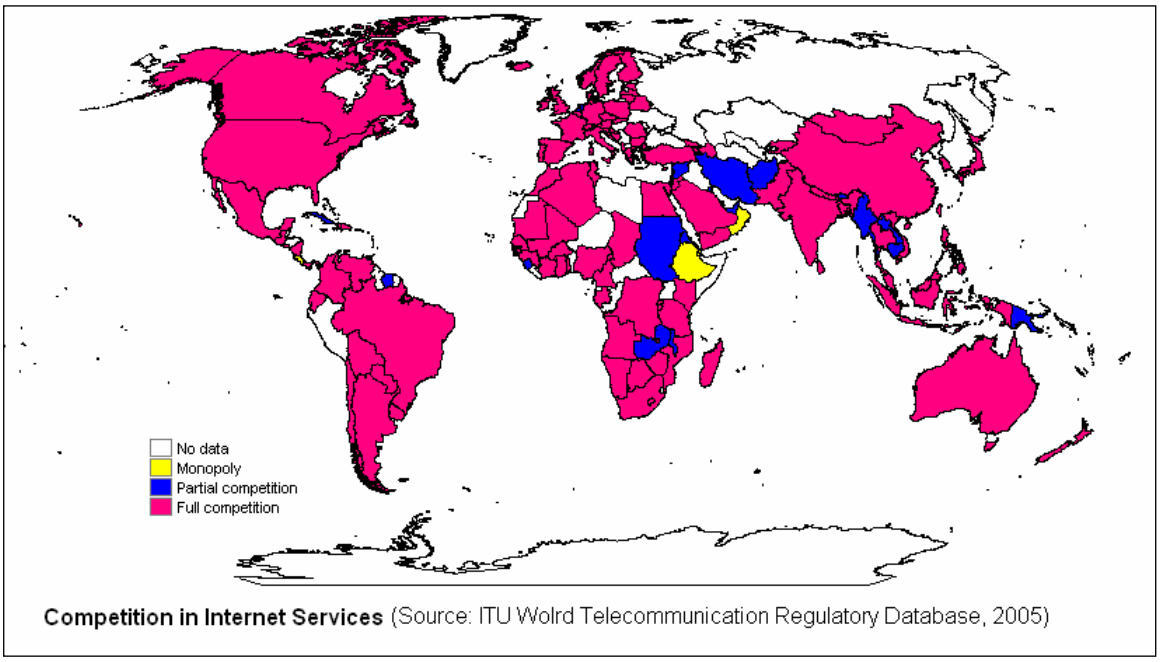
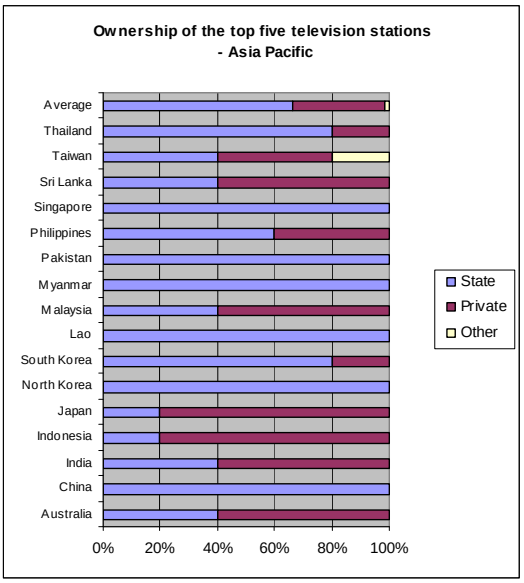


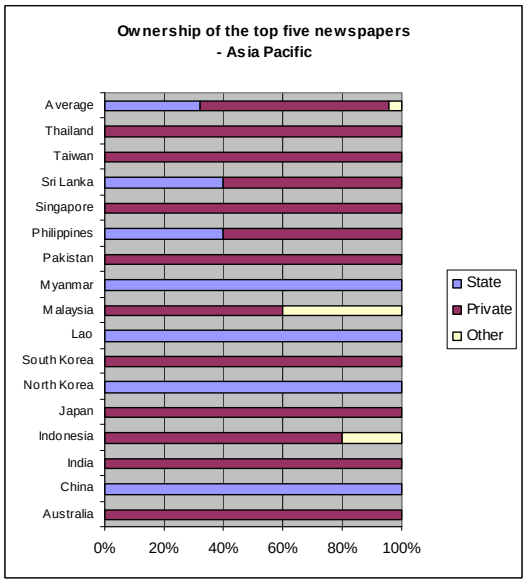
Figure 11

Whilst the deregulation of media markets and national and global concentrations in media ownership are discernable trends, it is important to consider whether they actually matter (Curran, 2002; Meier, 2002) or, in other words, what are their implications for freedom of expression? As already noted, this will depend on the politics underlying the media structures and will vary nationally and regionally. For example, the deregulation of the Indian television sector increased the vibrancy of Bollywood production, but has resulted in the domination of local news channels by news feeds from international agencies (Bennet, 2004). Similarly, relaxation of rules limiting foreign ownership of the media in Brazil led to increased diversity within the music sector and facilitated the increased export of Brazilian music to foreign markets (Waisbord, 2002). However, the lack of unbiased television news in the USA has been attributed to ownership concentration and a lack of regulation (McChesney, 2003), and Jones (2003) shows how Murdoch's News Corporation produces higher quality news in the UK through Sky News than it does in

the USA through Fox as a result of the different regulatory environments in the two countries. Whilst it is beyond the scope of this paper to provided detailed regional and national analyses, dominant regional trends in terms of media ownership and regulation will now be examined to provide some insight into the degree of penetration of the transnational media regime into different areas, and the implications this has for freedom of expression.

4.2) Asia-Pacific[4]





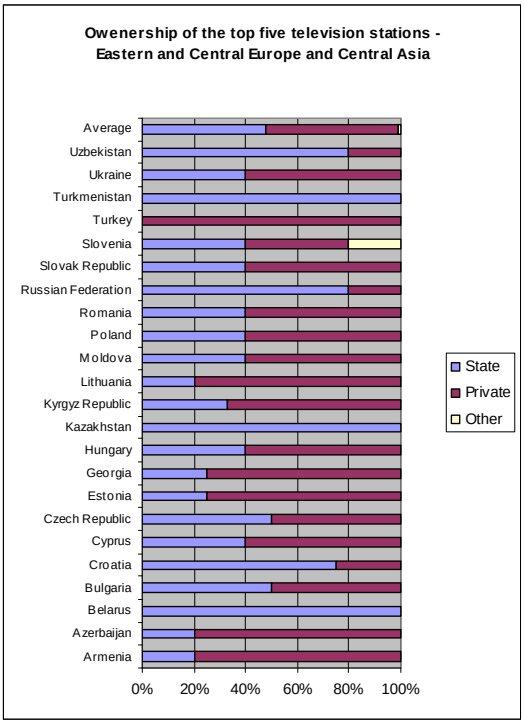
Whilst the press in most countries in Asia are owned privately, there is still a high degree of state ownership of broadcast media. Asia is home to some of the worst-ranked countries in terms of media freedom by Freedom House, including Burma, North Korea and China (Freedom House, 2006). In most countries, political control over state-owned media is the norm, and in countries such as Sri Lanka, Thailand, Cambodia and Indonesia state intervention in both state and privately-owned media are increasing (IFJ, 2006; Freedom House, 2006). This is particularly true with regards to political content, and

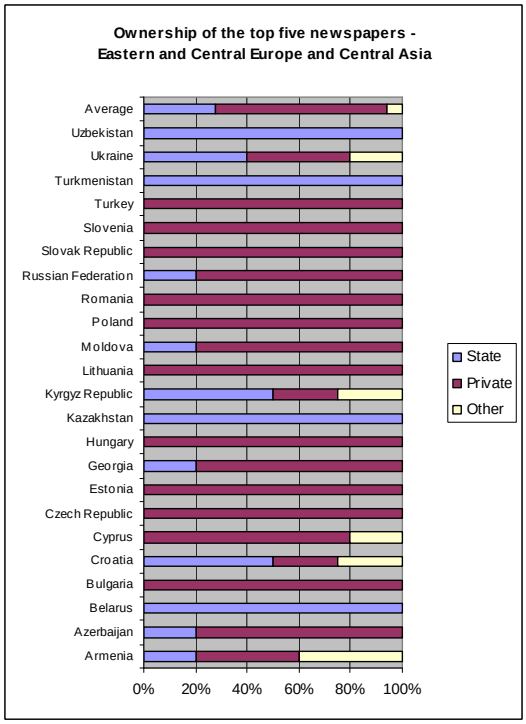
[4] Data presented in the graphs of media ownership are drawn from Djankov et al. (2001). Information about internet control and regulation in sections 4.2-4.8 is drawn from Privacy International (2003) unless otherwise stated.

general trends have pointed towards increased proscription of content, induced self-censorship and increased exercise of state influence through media ownership (Gomez, 2004; Agrawal, 2002). However, these trends obviously vary across the region. Where countries are undergoing deregulation, the concern of governments is often to increase public access to media platforms rather than to consider how changing ownership structures will impact on freedom of expression (Agrawal, 2002). The increasing commercialisation of media in the region has led the Asia Media Forum (2006) to express concern about the breakdown of boundaries between editorial and advertising functions (Asia Media Forum, 2006).

Most countries in Asia have pushed for increased access to the internet for their populations, recognising its potential for economic and social progress. Notable exceptions are the authoritarian states of North Korea, where there are no ISPs and only selected individuals are allowed to go online, and Burma, where even possession of a personal computer is frowned upon and it is illegal to create a link to an unauthorised website. However, whilst internet use is spreading rapidly across much of the region, government regulation of use and content is increasing in the name of anti-terrorism and national security. For example, the Indian government is authorised to monitor all electronic communications, South Korea has closed down 'political' websites and includes euthanasia and homosexuality as harmful topics that should be censored and Australia and New Zealand have passed laws requiring internet users to hand over encryption keys. The elaborate internet monitoring and censorship system created by the Chinese government is well-documented (see for example Open Net Initiative and Human Rights Watch websites).

4.3) Central and Eastern Europe and Central Asia



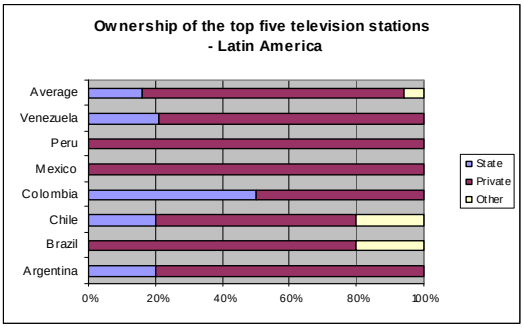


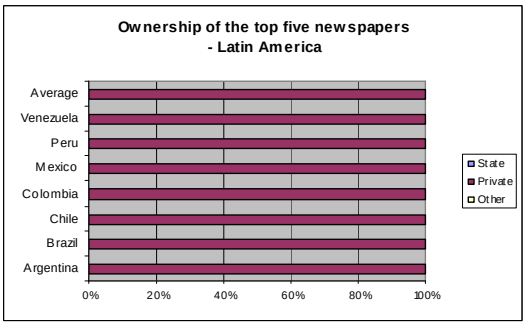
Following the collapse of the Soviet Empire, many state-owned media in Eastern and Central Europe and Central Asia started to make a transition to public service broadcasting (Article19, 2005; EUMAP, 2005). This was accompanied by the promotion of a commercial media sector, yet a lack of regulation of the liberalisation process led to a media free-for-all in many countries, with foreign companies rushing to acquire lucrative media outlets at low prices. Levels of foreign ownership of media in the region are therefore high, for example with seven out of ten of the national daily newspapers in Hungary being owned by Western companies, and 70 percent of the market share in print media in Bulgaria owned by the German WAZ group (Article19, 2005). A lack of transparency in media ownership in the region and complex ownership structures make it

difficult to tease out who has control over media content and the implications of this for democracy and freedom of speech (Article 19, 2005; EFJ, 2003). In many countries, the state exerts control over the media through old legislation that prohibits defamation of politicians, for example with high profile figures in Albania using such laws to avoid investigation into allegations of corruption (Article 19, 2005). State control in some countries is increasing as government actors acquire ownership stakes in media companies, for example with the Russian government buying shares in media outlets through the state gas giant Gazprom (BBC, 2006). In some of the more authoritarian regimes in the region, such as Belarus and Turkmenistan, the state exerts more direct control over the media, and Freedom House (2006) describes the situation for the press in Central Asia and in some of the Caucasus countries as 'deeply troubled'.

Trends concerning internet regulation in the region are discussed in section 4.4.

4.4) Latin America



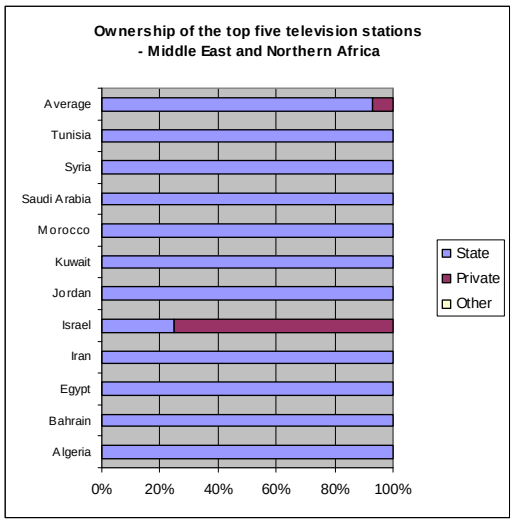


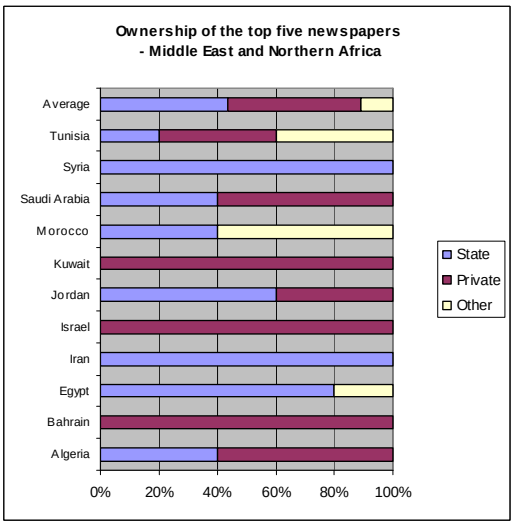
Across Latin America, government censorship was the norm under the populist leaders and military dictators of the post-World War era, and broadcasting was seen as a means through which marginalised communities could be integrated into the national economy and culture (Fox and Waisbord, 2002). However, with the adoption of free market economics from the late 1970s, the development of commercial media began to be prioritised over public broadcasting. The auctioning of television and radio frequencies to the highest bidders under privatisation schemes resulted in the consolidation of media duopolies in many countries, most notably in the larger economies of Brazil, Mexico and

Venezuela. For example, in Venezuela the media market is dominated by two large family-owned multimedia companies, Grupo Phelps and Grupo Cisneros (UNDP, 2002). The penetration of global media corporations into national and regional markets has occurred with the relaxation of ownership regulation, but rather than taking over local markets, global media companies tend to partner with local giants. Rather than quashing local content, foreign investment has given its production a boost and the airing of local content generally attracts larger audiences than foreign content (Fox and Waisbord, 2002). The overall trend in Latin America has been a gradual transition from family-owned to more global corporations driven by profit opportunities rather than politics (Waisbord, 2002). This has not created a more democratic media environment as proponents of free-market economics might expect as the media market serves some audience more than others, governed by the perceived desires of 'consumers' rather than 'citizens'. However, Waisbord (2002) emphasises that this scenario is not necessarily worse than it was when the government exercised greater control over the media, with television continuing to be sensationalistic and newspapers generally serving wealthier members of society.

The internet is not as heavily regulated in Latin America as in other regions. Whilst it is becoming more common for countries to pass legislation requiring ISPs to build in surveillance capabilities, it is usually necessary to have a judge's order before personal data can be passed on. Content restrictions and filtering requirements, largely relating to preventing children from accessing pornography in public places, have been introduced in some countries including Argentina, Colombia and Peru.

4.5) Middle East and Northern Africa

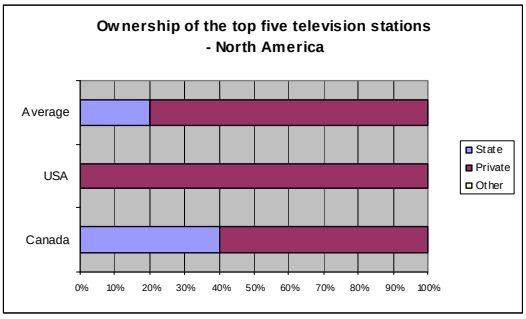


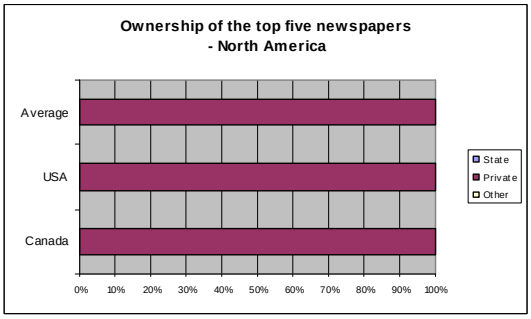


Print and broadcast media in the Middle East and Northern Africa are generally owned and heavily controlled by the state (Stanley Foundation, 2006). Before the establishment of MBC and Al Jazeera, television news in the region was produced in closed, national markets. The establishment of Al Jazeera, and more recently Al Arabiya, have given the approximately 70 percent of Arabs who choose to receive news via the television access to transnational, largely independent news (Wired Magazine 12/07/04; Stanley Foundation, 2006). Despite being partly owned by Saudi Arabia and Qatar respectively, Al Arabiya and Al Jazeera are largely independent and produce politically neutral content. However, they tend to avoid reporting on controversial domestic issues, focussing more on regional and transnational coverage (Stanley Foundation, 2006). Moreover, they are not above state censorship at the receiving end as illustrated by recent reactions of the Egyptian and Syrian governments to coverage of their internal affairs (ibid).

The approaches taken by Middle Eastern and North African states to the internet have varied across the region. Many, such as Saudi Arabia and Iran, regard the medium with suspicion and have promoted the diffusion of internet technology less than other countries such as the UAE, Bahrain and Jordan which have adopted it to promote economic growth. In most countries, internet use and content are heavily controlled by the state in a similar way to the mass media. However, some countries such as Kuwait, Morocco, Algeria, Egypt and Jordan have taken a more liberal approach to the internet than to traditional mass media, and content has been available on internet sites that would not be permitted to be printed or broadcast. However, this is likely to be because of relatively low levels of internet penetration in the region, and increasing access may be accompanied by increased control.

4.6) North America





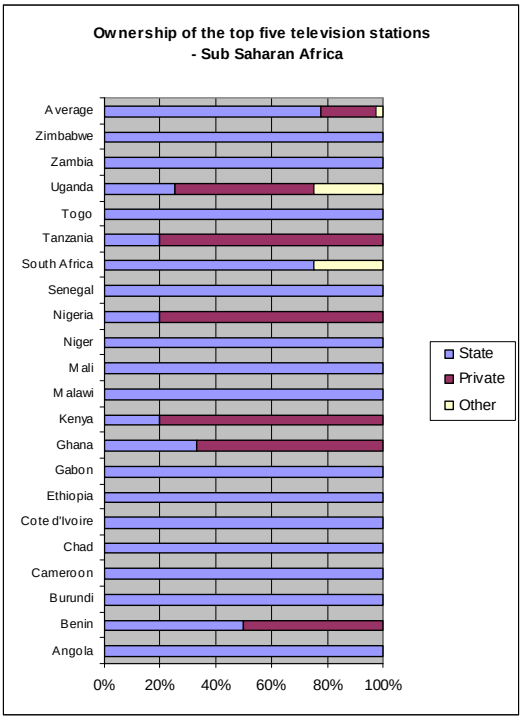
All of the print and broadcast media in the USA are privately owned, and legislation passed over the past two decades have entrenched the primacy of private control over government regulation (McChesney, 2003). Bagdikian (2006) describes how five corporations own most of the newspapers, radio stations and television stations in the USA, along with other media platforms such as books and film studios. Whilst it is widely agreed that the result has been media content that is skewed towards the conservative-right of the political spectrum (see for example McChesney, 2003), Meier (2002) stresses that the effects of media ownership dynamics on media content and freedom of expression have not been adequately researched. Concern is often expressed

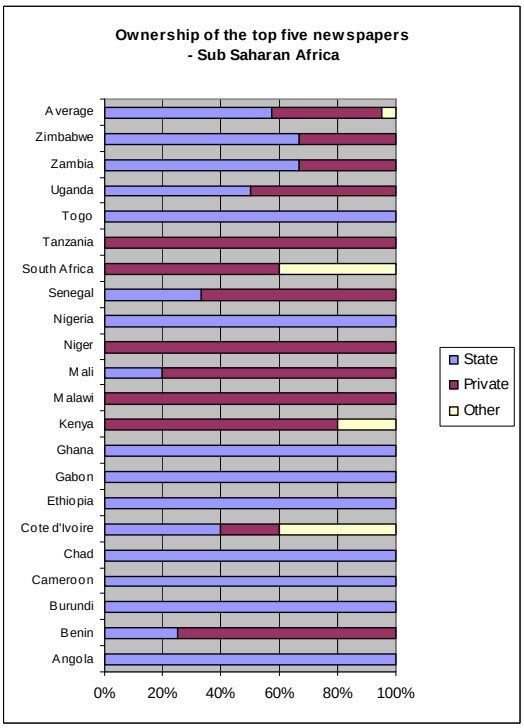
about the excessive control exerted by private corporate interests over the media in the USA (see for example FreePress.com and StopBigMedia.com), but evidence also suggests that the government exerts control over media content, for example with political commentators receiving grants from federal agencies and the increased distribution of news feeds from the government under the Bush administration (Freedom House, 2006).

In Canada, concentration of media ownership amongst large commercial media corporations has also been occurring, resulting in cutbacks in local news programming (see for example www.yourmedia.ca). However, the Canadian broadcast regulator does tend to favour local broadcasters in the issuing of licenses, and the foreign ownership of media companies is strictly limited by law.

Following the September 11 2001 attacks in the USA, much public discourse in North America has drawn direct links between terrorism and new communications and privacy technology. As a result, the promotion of open source information and encryption technologies is being increasingly restricted and the US government now has unprecedented powers of surveillance over the population. For example, the USA PATRIOT Act allowed for increased electronic internet surveillance and the 2002 Homeland Security Act allows ISPs to provide personal data and details of communications to the government if they believe there is an emergency. In Canada, anti-terrorism legislation has facilitated greater electronic surveillance of terrorist suspects and the disclosure of information related to terrorism. The Canadian state does not require the filtering out of pornography in public-access internet, unlike the USA where this became law in 2003.

4.7) Sub Saharan Africa





Media in Sub Saharan Africa have traditionally been heavily controlled by the state, yet donor pressure led to a degree of liberalisation in the 1990s, spurred on by the 1997 WTO agreement on basic telecommunications (Hills, 2003). The effects of this liberalisation are easily discernible in many African countries. For example, there were only 10 independent radio stations in all of Africa in 1985, compared to 80 in South Africa alone by 2003 (Moehler, 2006). However, state ownership of the media in Africa is still significant and media environments have often remained embedded in the *ancien regime* of state control despite official changes in legislation and regulation (Wilson and Wong, 2003). For example, six members of the Southern African Development Community (SADC) still have laws surviving from colonial times that prohibit the criticism of the

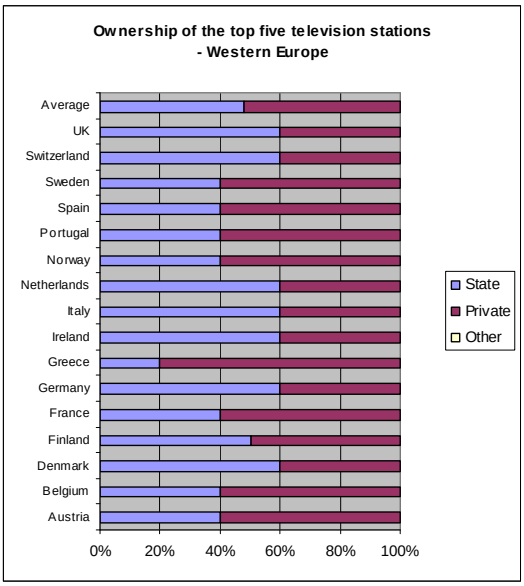
state in the media (Hills, 2003). South Africa can be said to be leading regulatory reform in Africa, building on a Public Service Broadcasting (PSB) model to forge a new 'African way', with Malawi, Namibia and Botswana following in its footsteps (Hills, 2003).

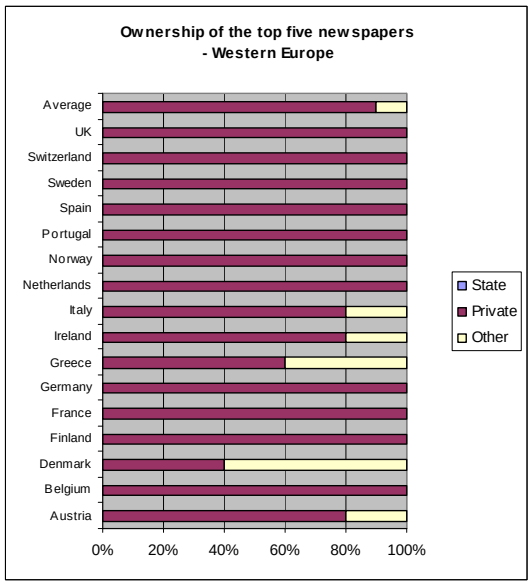
In broadcasting, one tendency has been for public broadcasters to pool resources for commercial reasons, for example with the formation of the African Broadcast Network in 2001 to link broadcasters in Ghana, Nigeria, Kenya, Zambia and Zimbabwe through the provision of common content and programming. This presents the danger of limited diversity in terms of media content and, whilst television networks are expanding across the continent, of the three free-to-air networks in Africa, two buy predominantly foreign content (Honeyman, 2003). Whilst regulatory bodies often set quotas for local content, the implementation of these varies, and increasing liberalisation means that high levels of foreign content in African television services are set to continue. This is exacerbated by the lack of financial resources available for investment in the media as it is cheaper for public broadcasters and local firms to buy in content from abroad rather than produce it locally.

Internet service provision in many African countries is competitive, but many states still have a monopoly over the telecommunications sector including control over the fixed telephone lines through which the internet is transmitted. Where this is the case, states still maintain effective control over the internet, and have in some cases exercised this control, for example through raiding ISP offices and shutting off internet connections when VOIP and VSAT threaten the revenues they gain from their telecommunications monopoly. State regulation of internet content has been increasing during the US-led 'war on terror', with countries including South Africa, Kenya and Tanzania introducing restrictive legislation. For example, South Africa's 2003 Regulation of Interception of Communications Act requires service providers to indefinitely retain the personal data of customers and make it available to law enforcement agencies when requested to do so. Self-regulation of content by ISPs in countries with poor human rights records is also common, for example with ISPs in Zimbabwe refusing to host certain 'political'

websites, including that of the Movement for Democratic Change. In some countries such as Tunisia, ISPS are liable for any content that is deemed offensive or harmful. Focus In Africa has tended to be on increasing access to ICTs rather than to safeguarding freedom of expression on the internet, and trends towards increasing regulation of internet content are exacerbated by the fact that ICT policies are often developed separately from those governing the media, often leaving the former more stifled in terms of political debate than the latter.

4.8) Western Europe





Whilst members of the EU are subject to certain pan-European media standards, for example through the EU's *Television without Frontiers* initiative, the implementation of these standards varies across countries and the European Commission recommends that rules concerning media ownership should be decided at the national level by individual member states (EUMAP, 2005). In many countries, newspapers have generally been privately owned and subject to less regulation than broadcasting in which a state monopoly existed in most countries well into the second half of the twentieth century. There is a strong tradition of PSB in the region and this model is defended in

international negotiating arenas such as the WTO where it is often considered to distort media markets (Bennett, 2004). Whilst many attribute these differences in regulation to the ubiquity of broadcast media and the fact that broadcast spectrum was a finite resource, Vick (2006) points out that they are also related to changes in prevailing political-economic ideology. The modern press originated in the mid-nineteenth century when laissez-faire economics were dominant, whilst broadcast technologies increased in importance during the social-liberal backlash against the market-liberal ideology of the early twentieth century. Whilst the PSB model and relatively high state ownership of broadcast media remain the norm in Western Europe, the trends of deregulation and commercialisation of media associated with the transnational media regime can be discerned in the region. Concentration of ownership, cross-ownership of different media outlets and opaque ownership structures are on the increase (EUMAP, 2005). EUMAP (2005) warns that the PSB model will come under increasing threat as a result of technological changes in media platforms, and fears that this may have negative implications for media diversity and freedom of expression.

Regional variation in the regulation of internet markets across Europe has resulted in varying levels of access to internet technologies, for example with the UK broadband market being restricted until very recently by the monopoly of DSL in comparison to much larger market in Germany facilitated by lower tariffs. In terms of the regulation and control of internet content, Europe is following the global trend of increased monitoring and regulation in the name of counter-terrorism. The EU directive on telecommunications privacy of 2002 allowed member states to adopt laws on data retention, and many countries including Belgium, Denmark, France, Spain and Switzerland have rapidly pushed forwards in this area. Many countries, including, the UK, Switzerland, the Netherlands, Russia and Belgium, all have laws requiring ISPs to take measures to enable surveillance of internet users. Cryptography is legal in most European countries apart from Belarus and Russia, and in the UK police are able to demand copies of encryption keys. Belarus has been deemed by the Open Net Initiative to have a restrictive online media environment, and during the 2006 elections a number of political websites were reportedly filtered. A draft bill introduces measures such as the

obligatory registration of websites, with any sites that violate content of licensing requirements liable to being shut down (Open Net Initiative website).

5) Conclusion

The aim of this report was to provide insight into the contemporary communications environment through assessing how people across the world access information, what sources of information they trust and how these sources are controlled. It has shown that the dominant and most trusted news medium across the world is television, followed by newspapers and the radio. Whilst the internet is not currently used as a main source of news information, internet use across the world is increasing and the impact this will have on general access to information and use of traditional mass media is not yet clear.

A transnational media regime is emerging, characterised by the deregulation of media markets and the increasing concentration of media ownership amongst global, regional and national media conglomerates. However, it is important to recognise that this regime is underlain by a patchwork of regional and national variations in media preferences, ownership and regulation. The same is true for the internet which, whilst acting as a global resource that has less regard for national boundaries than traditional mass media, is still subject to national control measures. Changes in communication technologies, markets and regulation are therefore likely to take different forms and have varying effects in different countries according to underlying politics and communications infrastructure. The information in this report can be used as a baseline from which these changes and their implications for freedom of expression can be explored in more detail.

References

Agrawal, B. 2002 'Towards and Information Society: The need for a policy perspective' in Mansell, R, Samarajiva, R. and Mahan, A. *Networking Knowledge for Information Societies: Institutions and Intervention* Delft University Press: Denmark (Available at http://lirne.net/resources/netknowledge)

Article 19 2005 *Freedom and Accountability: Safeguarding free expression through media and self-regulation* Article 19: London (Available at http://www.article19.org/pdfs/publications/self-regulation-south-east-europe.pdf)

Asia Media Forum 2006 *Asia Media Report: A crisis within* (Available at http://www.asiamediaforum.org/node/472)

Bagdikian, B. 2006 *The New Media Monopoly* Beacon Press: Boston

BBC 2006 *Country Profile: Russia* (Available at http://news.bbc.co.uk/1/hi/world/europe/country_profiles/1102275.stm)

Bennett, W.L. 2004 'Global Media and Politics: Transnational communication regimes and civic cultures' Annual Review of Political Science 7 pp125-148

Compaine, B. 2002 'Global Media' Foreign Policy November/December 2002 (Available at www.foreignpolicy.com)

Curran, J. 2002 'Global Media Concentration: shifting the argument' Open Democracy 23/05/2002 (Available at http://www.opendemocracy.net/media-globalmediaownership/article_37.jsp)

Djankov, S, McLiesh, C, Nenova, Shleifer, A. 2001 *Who Owns The Media?* World Bank Policy Research Working Paper No 2620 (Available at http://ssrn.com/abstract=267386)

Economist 25/08/2006 'Who Killed the Newspaper?' (Available at http://www.economist.com/opinion/displaystory.cfm?story_id=7830218)

EFJ 2003 *Media Power in Europe: The Big Picture of Ownership* European Federation of Journalists: Brussels (Available at http://www.ifj.org/default.asp?Index=3671&Language=EN)

Eldelman 2006 *Annual Trust Barometer 2006* (Available at http://www.edelman.com/image/insights/content/FullSupplement.pdf)

EUMAP 2005 *Television across Europe: Regulation, policy and independence* Open Society Institute EU Monitoring and Advocacy Program: Budapest. (Available at http://www.eumap.org)

Financial Times 10/10/2006 'Australia Tweaks Media Ownership Bill'

Forbes 2006 *The Forbes Global 2000* (Available at http://www.forbes.com/2005/03/30/05f2000land.html)

Fox, E. and Waisbord, S. 2002 'Latin American Media: A long view of politics and markets' in Mansell, R, Samarajiva, R. and Mahan, A. *Networking Knowledge for Information Societies: Institutions and Intervention* Delft University Press: Denmark (Available at http://lirne.net/resources/netknowledge)

Freedom House 2006 *Map of Press Freedom* (Available at http://www.freedomhouse.org/template.cfm?page=251&year=2006)

Garrett, R.K. 2005 *Media Deregulation and the online news market* (Available at http://web.si.umich.edu)

Globescan 2006 *BBC/Reuters/Media Center Poll: Trust in the Media* (Available at http://www.globescan.com/news_archives/Trust_in_Media.pdf)

Gomez, J. 2004 *Dumbing Down Democracy: Trend in internet regulation, surveillance and control in Asia* Paper presented at the Center for Southeast Asian Studies Seminar series, 11/03/2004 (Available at http://www.fnfasia.org/articles/dumbingdemocracy.pdf)

Hills, J. 2003 'Regulatory Models for Broadcasting in Africa' in *Broadcasting Policy and Practice in Africa* Article 19:London (Available at http://www.article19.org/pdfs/publications/africa-broadcasting-policy.pdf)

Honeyman, R. 'African Regulation of Satellite Broadcasting in the Era of Convergent ICTs' in *Broadcasting Policy and Practice in Africa* Article 19:London (Available at http://www.article19.org/pdfs/publications/africa-broadcasting-policy.pdf)

Human Rights Watch website: free Expression and the Internet http://hrw.org/doc/?t=internet

IFJ 2006 *Journalism in Trouble Times: The Struggle for press freedom in South Asia 05-06* International federation of Journalists: Brussels (Available at http://www.ifj-asia.org/files/ifj_south_asia_press_freedom_report_2005-2006.pdf)

IGP 2004 *Internet Governance: The state of Play* Internet Governance Project (Available at http://www.internetgovernance.org/pdf/ig-sop-final.pdf)

Internet World Statistics 2006 www.**internetworldstats**.com/

ITU 2006 *ICT and Telecommunications in Least Developed Countries: mid-term review for the decade 2001-2010* International Telecommunications Union (Available at http://www.itu.int/ITU-D/ldc/pdf/ICTand%20TELinLDC-e.pdf)

Jones, P. 2003 'Regulating for Freedom: media lessons from Australia' Open Democracy 18/09/2003 Available at (http://www.opendemocracy.net/media-globalmediaownership/article_1492.jsp)

McChesney, R. 2001 *Policing the Thinkable* Open Democracy 25/10/2001 (Available at http://www.opendemocracy.net/media-globalmediaownership/article_56.jsp)

McChesney, R. 2003 'Theses on Media Deregulation' Media Culture and Society 25 pp125-133

Meier, W. 2002 'Media Ownership: Does it matter?' in Mansell, R, Samarajiva, R. and

Mahan, A. *Networking Knowledge for Information Societies: Institutions and Intervention* Delft University Press: Denmark (Available at http://lirne.net/resources/netknowledge)

Moehler, D. 2006 *Private Radio and Media Effects in Africa* (Available at http://web.mit.edu/polisci/research/temp/moehler_private_radio_media_effects_02-07-06.pdf)

Open Net Initiative website http://www.opennet.net

Patterson, C. 2006 *News Agency Dominance in International News on the Internet* Centre for International Communications Research: Papers in International and Global Communication No 01/06

Pew 2003 *Views of a Changing World 2003* Pew Global Attitudes Project survey (Available at http://pewglobal.org/reports/display.php?ReportID=185)

Pew 2006 *Truly a World Wide Web: Globe going digital* Pew Global Attitudes Project survey (Available at http://pewglobal.org/reports/display.php?ReportID=251)

Privacy International 2003 *Silenced: An international report on censorship and control of the internet* Privacy International and the Green Net Institute (Available at http://www.privacyinternational.org/article.shtml?cmd[347]=x-347-61390&als[theme]=Silenced%20Report)

Raboy, M. 2003 'Media and Democratisation in the Information Society' in O'Siochru, S. and Girad, B. (eds) *Communicating in the Information Society* UNRSID: Geneva (Available at

http://www.unrisd.org/80256B3C005BCCF9/(httpAuxPages)/26BE21C65B15A339C1256E550056A85F?OpenDocument&panel=additional)

Stanley Foundation 2006 *Open Media and Transitioning Societies in the Arab Middle East: Implications for US Security Policy* (Available at http://www.stanleyfdn.org/reports/OpenMedia06.pdf)

Telecom Express 2006 *Television is as trustworthy as friends: Survey* (Available at http://www.telecomexpress.co.uk/)

UNDP 2002 *Human Development Report 2002: Deepening Democracy in a Fragmented World* Oxford University Press: New York (Available at http://hdr.undp.org/reports/global/2002/en/)

Vick, D. 2006 'Regulatory Convergence?' Legal Studies 26(1) pp26-64

Waisbord, S. 2002 'Grandes Gigantes: Media concentration in Latin America' (Available at http://www.opendemocracy.net/media-globalmediaownership/article_64.jsp)

WAN 2006 *World Press Trends 2006* World Association of Newspapers: Paris

Wilson, E. and Wong, K. 2003 'African Information Revolution: a balance sheet' Telecommunications Policy 27 pp155-177

Wired Magazine 12/07/2004 *The Road to Tech Mecca* (Available at http://www.wired.com/wired/archive/12.07/dubai.html?pg=3&topic=dubai&topic_set=)