MAPPING DIGITAL MEDIA:
PAKISTAN

OPEN SOCIETY
FOUNDATIONS

Mapping Digital Media: Pakistan

A REPORT BY THE OPEN SOCIETY FOUNDATIONS

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Mapping Digital Media

The values that underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-bearings for anyone trying to make sense of current changes across the media landscape.

The standards in the profession are in the process of being set. Most of the effects on journalism imposed by new technology are shaped in the most developed societies, but these changes are equally influencing the media in less developed societies.

The **Mapping Digital Media** project, which examines the changes in-depth, aims to build bridges between researchers and policymakers, activists, academics and standard-setters across the world. It also builds policy capacity in countries where this is less developed, encouraging stakeholders to participate in and influence change. At the same time, this research creates a knowledge base, laying foundations for advocacy work, building capacity and enhancing debate.

The Media Program of the Open Society Foundations has seen how changes and continuity affect the media in different places, redefining the way they can operate sustainably while staying true to values of pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service, and high professional standards.

The Mapping Digital Media project assesses, in the light of these values, the global opportunities and risks that are created for media by the following developments:

- the switch-over from analog broadcasting to digital broadcasting;
- growth of new media platforms as sources of news;
- convergence of traditional broadcasting with telecommunications.

Covering 60 countries, the project examines how these changes affect the core democratic service that any media system should provide—news about political, economic and social affairs.

The **Mapping Digital Media** reports are produced by local researchers and partner organizations in each country. Cumulatively, these reports will provide a much-needed resource on the democratic role of digital media.

In addition to the country reports, the Open Society Media Program has commissioned research papers on a range of topics related to digital media. These papers are published as the **MDM Reference Series**.

Mapping Digital Media: Pakistan Executive Summary

At least one side of digitization in Pakistan can be told through the story of the so-called "lawyers' movement." In March 2007, General Pervez Musharraf fired the country's Chief Justice, sparking a sustained campaign by his opponents for the restoration of an independent judiciary. This movement eventually became the military dictator's undoing.

Although the campaign was initiated by lawyers, it attracted human rights activists, students, and middle-class professionals, most of them wielding digital weapons of mass mobilization. Even the imposition of emergency rule and the blocking of privately owned television news broadcasts could not save the general. Anti-Musharraf activists used SMS to organize flash-mobs, while university and even school students deployed blogs, email lists, and SMS messages to co-ordinate protests, which were filmed by the participants themselves and shared on user-generated websites as well as CNN's audience-generated "*iReport*."

During the emergency, a blog cheekily named The Emergency Times live-streamed protests and inspirational multimedia messages from lawyers and activists, and crowd-sourced information for campaigns against certain political figures. At the same time, Pakistanis abroad were able to support the lawyers and activists through social media, especially Facebook. A year and a half later General Musharraf stepped down and went on a pilgrimage to Mecca, and then into exile, while a newly elected civilian government reinstated the Chief Justice.

Another side of the digital story is much less encouraging. Malala Yousafzai, a teenaged girl from the troubled Swat Valley district in northern Pakistan, ran a blog under a pseudonym called Diary of a Swat Schoolgirl. The blog drew attention to the threat that religious extremists posed to girls' education in Pakistan, and Malala, who at the time was just 14 years old, began appearing on television shows to champion education and women's rights. She was awarded Pakistan's first National Youth Peace Prize, but the Taliban accused her of promoting Western, secular values and said her campaign was an obscenity. In October 2012, Taliban militants boarded her school bus and shot Malala in the head. A shocked world has watched as she has almost miraculously recovered in a British hospital.

While the lawyers' movement is likely to give heart to those who hope to see the digital world make its contribution, however marginal, to the defense of independent public institutions, Malala's fate is a reminder that the freer expression offered by digital media sometimes comes with terrible threats to life, liberty, and limb. In Pakistan, whose population is nearly 200 million people, this is about historical, geographic, and a myriad other divides, but—as in so many other places—such is the soil where digitization must flourish, if at all.

Pakistan has long suffered from high inflation, led by soaring food prices, which has increased poverty levels. According to the United Nations' 2011 *Human Development Report*, half the population suffers deprivations of all types. Only half is literate. Even then there are only 12 million television sets (surely a desirable medium for those who cannot read)—one for every 14 people. This means that a lot of communal watching of mostly state-owned channels of the Pakistan Television Corporation (PTV) is going on in the countryside. At present, the only other terrestrial television channel is the privately owned ATV, in which PTV and the Pakistan Broadcasting Corporation (PBC) are majority (80 percent) shareholders. The sameness is deafening.

But urban Pakistanis are getting richer and spending money on alternatives. Thus PTV has ceded ground to more than 20 privately owned broadcasters with 89 domestic and 26 foreign channels, with national television viewing split evenly between terrestrial on the one hand, and cable and satellite on the other. This proliferation of channels has enabled Pakistani media to wield more influence over politics and public discourse than ever before. With this growing influence comes, however, a corresponding increase in attempts by the government to control media outlets. Indeed, state coercion and increasing censorship are among the greatest pressures on the media industry.

The most watched local private channel is Geo News: of the top 10 rated news programs in 2011, six belonged to the Geo TV Network, including four of the top five. PTV News gets 3 percent of viewers. This is almost certainly because the state broadcaster is widely perceived as a gray government mouthpiece, and it makes no effort to function as a public service broadcaster. Its organization, financing, and institutional cultures are bereft of any independence or balance.

For all these shortcomings, however, PTV strives to air content in many of Pakistan's regional languages and to promote Pakistani culture through entertainment and music programming that captures the diversity of Pakistan. Moreover, Radio Pakistan provides the only content approaching community news broadcasts in Pakistan through its local-language news bulletins.

Even in the urban centers of Karachi, Lahore, and Islamabad, Pakistan lags behind. There are still fewer than 3 million broadband subscribers. Aside from broadband, some 29 million people—only 16 percent of the population—have access to the internet. And the country still does not have a 3G network, even though the prime minister approved a 3G policy for Pakistan in November 2011. So, mobile internet access remains very limited. Even standard (2G) mobile phone usage (less than seven out of 10 of the population) is low by global standards.

Considering that Facebook is the most visited website in the country, it still attracts no more than 4.3 percent of the country's total population and 27.6 percent of those online. Only a third of internet users in the country's urban centers say they use the internet for news.

In short, Pakistan is not a very wired country. This does not, of course, stop those who are connected from being very connected indeed, as the lawyers' movement showed. Even blogs with a small number of unique visitors can achieve a substantial impact, not least because they are regularly consulted by mainstream journalists. Despite the growth of the independent blogosphere, the blogs of established media groups dominate the Pakistani blogosphere. The top blogs in Pakistan in terms of traffic are published by the largest Urdu-language daily newspaper *Daily Jang* and the English-language dailies the *Express Tribune, Dawn*, and *The News*. The English-language papers, in particular, maintain rosters of dozens of bloggers who are allowed to submit posts; increasingly, independent bloggers prefer to publish their posts on established news sites because these offer greater exposure and they can make some extra money.

Otherwise, journalism in Pakistan has been little affected by digitization. It was the liberalization of the broadcast media market in 2002 that has mostly affected the agenda and dissemination of news. The relaxation of cross-media ownership rules in 2007 turbo-charged the media expansion but also facilitated an extreme concentration of Pakistan's independent media. A few entities that were already well established have come to dominate the market by diversifying their offerings within and across media and enjoying the bulk of advertising revenue. The Independent Media Corporation (known as the Jang Group), for example, owns the largest-selling Urdu-language daily newspaper *Daily Jang* (launched in 1939) and Geo News. The group also owns music, entertainment, and sports television channels, the English-language daily, *The News*, an Urdu evening title, *Awam*, three other newspapers, and two magazines. Similarly, Pakistan Herald Publications Limited (the Dawn Media Group) owns the English-language daily *Dawn*, Dawn News TV, an FM radio station, monthly magazines, and industry publications.

This is not to say there has been a happy coincidence of commercial and political interests between state and private media. Since 2008, for instance, when the coalition led by the Pakistan People's Party (PPP) came to power, the licensing process has been increasingly politicized. For example, the Jang Group has been consistently critical of the PPP government and has been bitterly embroiled in a broadcast licensing battle with the regulator.

More than anything else, the proliferation of breaking news TV has reduced much of the news landscape, both on air and in print, to copy-cat reporting: TV chases (urban-biased) ratings, and newspapers chase TV.

The media market liberalization has been a huge job generator. Between 2002 and 2010 the number of journalists increased from 2,000 to 17,000. Even in the best of all possible worlds, skills, professional standards, and ethics are likely to suffer in such circumstances. To make matters worse, cash handouts from government officials are commonplace. In addition, journalists receive subsidized properties, business contracts, permits, and other perks such as accommodation or gifts to write favorable stories. The government is also able to

smooth the way for, and financially reward, media groups that are willing to promote or remain uncritical of official policies through ministry advertising allocations and Secret Expenditure Fund handouts.

While being a journalist might sound like a profitable pursuit, this is not true of all parts of the business. Quite the contrary: in 2011, the Committee to Protect Journalists (CPJ) named Pakistan, for the second year in a row, as the deadliest country in the world to be a journalist. Seventy-three journalists were killed in Pakistan between 2000 and 2011 and more than 2,000 were arrested, abducted or injured. Journalists face threats and violence from militant and extremist groups, political parties, the military, intelligence services, and criminal gangs.

As with other elements of the digital revolution, Pakistan has barely got as far as the steps of the broadcast technology citadel. While the Pakistan Electronic Media Regulatory Authority (PEMRA) has given cable operators a deadline to switch over to digital transmission, it has made no plans to digitize terrestrial transmission. While cable operators in large cities such as Karachi and Lahore have largely digitized their headends (main cable distributors) and started to install fiber-optic cables, they are not planning to digitize local loops and last-mile cables. This is because of the high costs involved and the end-users' inability to pay higher subscription fees for digital transmission and purchase new cable receivers, set-top boxes, or television sets. PEMRA has not launched any public awareness campaigns to explain the benefits of digitization, nor has it consulted with media organizations or civil society groups to draft policies or debate the implications of digitization.

Meanwhile the government and army are favored by broadcasting spectrum allocation policy. PTV and ATV have not switched over from analog to digital so there have been no new spectrum allocations for television broadcasters.

So, for the time being, the struggle for freer expression and diversity of content is fought primarily on the internet battlefield. Despite its decision not to pursue an internet filtering system capable of disabling up to 50 million websites (though it has still gone ahead with the tender), the PTA regularly censors websites on an ad hoc basis, without specifying why certain sites are targetted or publishing a comprehensive list of banned sites. As of July 2012, more than 15,000 sites remained blocked under the generic complaint of hosting pornographic or blasphemous content. The lawyers' movement demonstrated that the will and the ability to take the fight even to a military dictatorship do exist.

When General Musharraf, whose downfall was partly engineered by social media activism, returned to Pakistan in March 2013, he chose Facebook and Twitter to announce that he was doing so.

Context

Pakistan is a country of 190 million people (2012), 67.1 percent of whom are below the age of 30. The country is divided into four provinces—Sindh, Punjab, Balochistan, and Khyber Pakhtunkhwa—each with a unique ethno-linguistic identity, together with the Islamabad Capital Territory, the north-western Federally Administered Tribal Areas (FATA), the northern semi-autonomous Gilgit-Baltistan region, and Pakistan-administered Kashmir (known locally as Azad Jammu and Kashmir). Pakistan is urbanizing at the fastest rate in South Asia: half the population will live in cities by 2025, up from one-third at present.

Sindh and Punjab are comparatively more developed, comprising the country's industrial and agricultural hubs. In recent years, Balochistan has experienced deteriorating security owing to a separatist movement, a surge in sectarian violence, and reported human rights violations by security forces stationed in the province. Meanwhile, the rise of anti-state militant and violent extremist groups in FATA and parts of the Khyber Pakhtunkhwa province over the past decade has led to hundreds of terrorist attacks across the country's north-west. Pakistan has a turbulent political history, alternating between long stretches of military dictatorships and uncertain periods of democratic rule. Pakistan's last general elections were in 2013, marking the first time that a civilian government has transferred power to another via the ballot box.

Pakistan is a Muslim-majority country, with 75 percent of the population identifying as Sunni Muslim and approximately 20 percent as Shia Muslim. (The Sunni Muslim community is further subdivided into various sects.) The country's religious minorities, including Ahmadis, Christians, Hindus, Zoroastrians, and others comprise 5 percent of the population. Religious minorities have long been persecuted owing to discriminatory laws and biassed school curricula. In recent years, religious minorities, including Shia Muslims, have been targetted by violent extremist groups.

Owing to the worsening security situation and poor foreign investment, economic growth in Pakistan averaged only 3 percent per year from 2008 to 2012. High inflation, led by soaring food prices, has increased poverty levels: according to the UN's 2011 *Human Development Report*, 49.4 percent of the population suffers multiple deprivations as identified by the Multidimensional Poverty Index. Official unemployment in 2011 was 5.6 percent of the population; this figure was an estimate, however, which did not account for the large informal economy or the fact that under-employment levels remain extremely high.

That said, Pakistan's middle class has doubled to 70 million people in the past decade,[2] and consumer spending increased at an average rate of 26 percent between 2010 and 2012, compared with 7.7 percent for Asia as a whole.[3] Between 2006 and 2011, household incomes in the urban areas rose faster than inflation by an average of 1.5 percent per year, and the retail sector grew at 5.3 percent per year.[4] This growth explains high levels of media consumption and the exponential growth of the telecommunications sector.

2. S. Sherani, "Consumption conundrum," *Dawn*, 23 March 2012, at http://dawn.com/2012/03/23/consumption-conundrum (accessed 7 February 2013).

3. F. Mangi, "Pakistan loving Fat Burger as fast food boom ignores drones," Bloomberg.com, 7 January 2013, at http://www.bloomberg.com/news/2013-01-07/pakistan-loving-fatburger-as-fast-food-boom-ignores-u-s-drones.html (accessed 7 February 2013).

4. F. Tirmizi, "Why is the retail sector in Pakistan booming?," *Express Tribune*, 11 July 2012, at http://tribune.com.pk/story/406355/the-rise-of-the-pakistani-middle-class-why-is-the-retail-sector-in-pakistan-booming/ (accessed 7 February 2013).

Social Indicators

Population (number of inhabitants): 190.23 million (July 2012)[5]
Number of households: approx. 29.8 million

Figure 1.
Rural–urban breakdown (% of total population), 2010

Rural, 64   Urban, 36
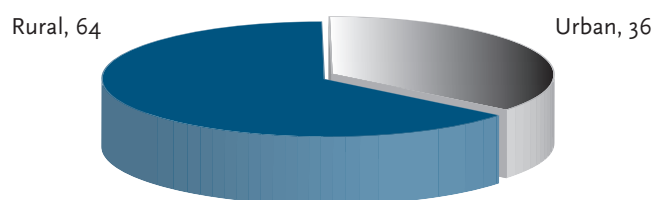
Source: Central Intelligence Agency (CIA), "The World Factbook," 2010, at https://www.cia.gov/library/publications/the-world-factbook/geos/pk.html (accessed 3 June 2013) (hereafter, CIA, "The World Factbook," 2010)

Figure 2.
Ethnic composition (% of total population), 2010

Baloch, 3.6   Other, 6.2
Urdu-speaking (Muhajir), 7.6
Saraiki, 8.4   Punjabi, 44.7
Sindhi, 14.1
Pashtun, 15.4
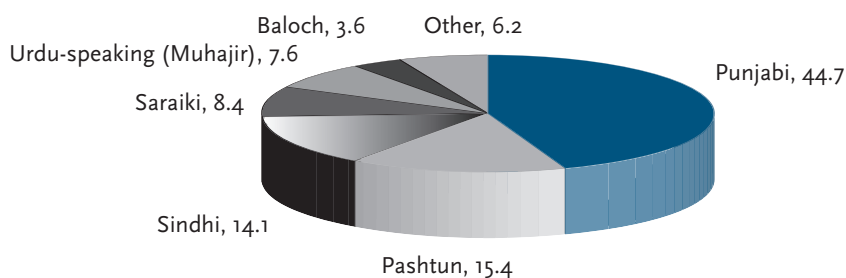
Source: CIA, "The World Factbook," 2010

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5.   Central Intelligence Agency (CIA), *The World Factbook: Pakistan*, 2010, at https://www.cia.gov/library/publications/the-world-factbook/geos/pk.html (accessed 7 February 2013).

Figure 3.

Linguistic composition (% of total population), 2010
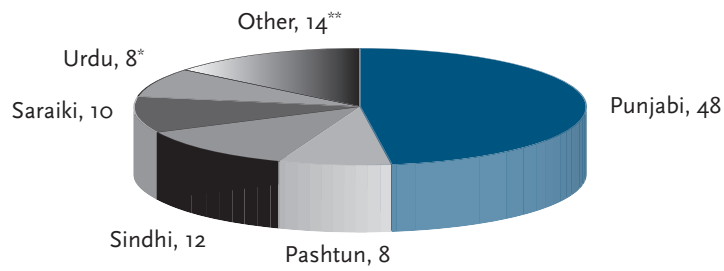
Notes: * Urdu is Pakistan's official language, spoken nationwide: this statistic refers to the exclusively Urdu-speaking percentage of the population. ** "Other" includes Hindko and Brahui as well as English, which is also an official language, as well as being the lingua franca of Pakistan's elite and used by most government ministries

Source: CIA, "The World Factbook," 2010

Figure 4.

Religious composition (% of total population), 2010
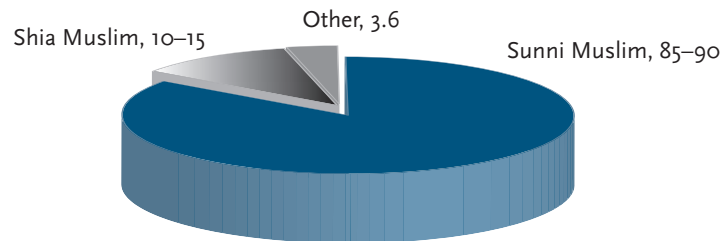
Source: CIA, "The World Factbook," 2010

Economic Indicators

Table 1.

Economic indicators

	2005	2006	2007	2008	2009	2010	2011	2012°	2013[f]	2014[f]
GDP (current prices, US$ billion)	110.0	127.3	143.1	164.8	163.6	176.8	210.7	231.8	238.9	246.2
GDP (current prices, US$), per head	721	819	904	1,024	972	1,029	1,202	1,296	1,308	1,322
Gross National Income (GNI), (current $), per head	2,190	2,350	2,510	2,570	2,660	2,760	2,870	n/a	n/a	n/a
Unemployment (% of total labor force)	7.6	6.2	5.3	5.2	5.4	5.5	5.9	7.6	9.2	10.6
Inflation (average annual rate, % against previous year)	9.2	8.0	7.8	10.7	17.6	10.1	13.6	11.0	8.1	9.5

Notes: o: outlook; f: forecast; n/a: not available

Sources: International Monetary Fund (IMF) (GDP, unemployment, and inflation); World Bank (GNI)

1. Media Consumption: The Digital Factor

1.1 Digital Take-up

1.1.1 Digital Equipment

Pakistani media consumers currently have low capacity to consume digital media offerings, which have significantly expanded over the past decade. Digital consumption of television remains low owing to the lack of infrastructure for transmission and consumption. According to the Pakistan Electronic Media Regulatory Authority (PEMRA), there are only 12 million television sets in the country—approximately one for every 14 people[6]—while private surveys put the number at about 18 million. Given that there are 86 million television viewers in Pakistan, this low number indicates that communal television watching is popular.[7] More than half of these viewers are only able to access state-run, analog terrestrial broadcasts (see section *2*), while 38 million viewers can access digital satellite channels that are primarily distributed via analog cables owing to the high cost of purchasing satellite dishes. In 2010, PEMRA introduced a fee structure and rules governing digital cable television transmission, and has called for a complete switch-over to digital cable by 2015.[8] However, digital cable television still has an extremely limited reach due to the high cost of set-top boxes and slow adoption of digital infrastructure by cable companies.

Details on radio set ownership are scarce. The National Institute of Population Studies (NIPS) found that 32 percent of households owned a radio set in 2006–2007.[9] However, according to PEMRA, actual access to radio is likely far higher, as radios in mobile phones and vehicles remain uncounted. A BBC survey in 2008 found that 30 percent of male and 20 percent of female radio listeners reported listening to the radio on a mobile phone.[10]

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6. PEMRA, "Annual Report 2010: To Facilitate Growth of Free and Fair Media," Islamabad, 30 June 2010, p. 23, at http://pemra.gov.pk/pemra/images/docs/pub-rep/annual_report_2010.pdf (accessed 12 February 2013) (hereafter, PEMRA, 2010).

7. Gilani and Gallup Pakistan, *Special Edition Cyberletter: TV Viewership in Pakistan*, Islamabad, June 2009 (hereafter, Gilani and Gallup Pakistan, *Special Edition Cyberletter: TV Viewership in Pakistan*).

8. ProPakistani, "Digital Cable TV system hits Pakistan," 3 March 2010, at http://propakistani.pk/2010/03/03/digital-cable-tv-system-hits-pakistan/ (accessed 16 August 2012).

9. PEMRA, 2010, p. 21.

10. AudienceScapes, "Radio in Pakistan," 2009, at http://www.audiencescapes.org/country-profiles-pakistan-country-overview-radio-statistics (accessed 4 July 2012) (hereafter, AudienceScapes, "Radio in Pakistan").

The total number of PCs in Pakistan is also unrecorded, but can be estimated at a few million given that there are 29 million internet users in the country.[11] The greatest potential for access to digital content currently rests with mobile phones: mobile teledensity is high at 69.8 percent of the total population.[12] As such, mobile phone companies are seeking to exploit current internet access gaps; for example, in May 2012, Nokia launched two low-priced, web-enabled mobile phones.[13] However, Pakistan does not have a 3G network, which restricts the spread of mobile internet access.

1.1.2 Platforms

In 2002, the Pakistani government introduced significant media reforms and liberalized the broadcast media market. As a result, the television market was bisected between state-owned terrestrial broadcasters and privately owned satellite and cable television channels. In the past decade, Pakistan has shifted from predominantly terrestrial broadcasting (69.6 percent of TV households in 2005) to a roughly even split between terrestrial and cable television by 2010 (see Table 2). According to one national survey, satellite and cable television access varies considerably by region; while 93 percent of television viewers in Karachi, Pakistan's largest city, have access to satellite channels via cable, viewers in remote, northern regions such as Hazara and Malakand in the Khyber Pakhtunkhwa province can only access terrestrial broadcasts.[14] A BBC survey further revealed that 69 percent of the urban population had access to satellite and cable television compared with 11 percent of rural respondents.[15]

Satellite service consumption dropped from 6.5 percent in 2005 to less than 4 percent of television-owning households by 2010, due to the success of low-cost, accessible cable television connections.[16] Multi-channel Multi-point Distribution Service (MMDS), a form of wireless cable via broadband networking, is available to a limited extent, providing access to over 80 channels for 330,500 subscribers.[17]

The largest private channels such as Geo News and Express News are livestreamed on the internet on their own or third-party websites as well as on mobile phones via unauthorized web applications. However, traffic is minimal due to low bandwidth across Pakistan and use is largely limited to expatriates. Channels have yet to take legal action against these illegal streams, which are too small to merit attention.[18]

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11. World Bank, "World Development Indicators and Global Development Finance," 5 June 2012, at http://www.google.com.pk/publicdata/explore?ds=d5bncppjof8f9_&met_y=it_net_user_p2&idim=country:PAK&dl=en&hl=en&q=internet+users+in+pakistan (accessed 29 June 2012).

12. Pakistan Telecommunication Authority (PTA), "Telecom indicators," November 2012, at http://www.pta.gov.pk/index.php?option=com_content&task=view&id=269&Itemid=658 (accessed 31 January 2013) (hereafter, PTA, "Telecom indicators").

13. *Express Tribune*, "Nokia launches two new phones in Pakistan," 15 May 2012, at http://tribune.com.pk/story/379103/nokia-launches-two-new-phones-in-pakistan/ (accessed 13 August 2012).

14. G. Murthy, "Television in Pakistan: Who's Watching?," AudienceScapes, 2009, at http://www.audiencescapes.org/country-profiles-pakistan-country-overview-television-PEMRA-GEO-TV-PTV-Media-Information-communication-cable-satellite-jang (accessed 12 August 2012).

15. R. Powell, "Pakistan: Media and Telecoms Landscape Guide," Infoasaid, June 2012, at http://www.cdacnetwork.org/sites/www.cdacnetwork.org/files/pakistan_media_and_telecoms_landcape_guide_19.04.11_0_0_0.pdf (accessed 3 June 2013) (hereafter, Powell, "Pakistan: Media and Telecoms Landscape Guide").

16. Médiamétrie/Eurodata TV Worldwide.

17. PEMRA, 2010.

18. Interview with Bilal Lakhani, publisher of *Express Tribune* and part of the family-owned business that owns Express News, Karachi, 26 July 2012.

According to media owners, less than 2 percent of overall television viewership is in the Pakistani diaspora, making this audience largely irrelevant to business. Still, most of the major news channels have established themselves in the United States, the UK, and the Middle East via satellite broadcasts or partnerships with local cable channels.[19]

Pakistan Telecommunications Company Limited (PTCL), the largely state-owned telecoms corporation, is the only company currently holding an operational IPTV license. Additionally, three private companies—Brands Promotion Centre, Cellevision, and Dialogue—have obtained mobile television licenses, and are providing this service through the cellular companies Telenor and Mobilink.[20]

Table 2.

Platform for the main TV reception and digital take-up, 2006–2010

	2005		2006		2007		2008		2009		2010	
	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH
Terrestrial reception	9,271	69.6	9,450	69.1	9,640	69.3	9,880	69.9	8,769	48.4	8,949	48.6
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Cable reception	3,180	23.8	3,350	24.5	3,440	24.7	3,470	24.5	8,690	48.0	8,840	48.0
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Satellite reception	870	6.5	860	6.3	830	5.9	800	5.6	640	3.5	620	3.3
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total	13,320	100.0	13,660	100.0	13,910	100.0	14,150	100.0	18,100	100.0	18,410	100.0
– of which digital	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Notes: * HH: Total number of households. ** TVHH: Total number of TV households. n/a: not available

Source: Médiamétrie/Eurodata TV Worldwide

Pakistan currently has 115 on-air FM radio stations, up from only 18 stations in 2005.[21] Despite the growth of cable television, FM radio has proved popular in both urban and rural areas, as indicated by a 22 percent increase in radio ad spend in a single year (2010–2011),[22] and another 9 percent increase in 2011–2012.[23]

Since 2005, there has also been a significant increase in internet usage. There are 50 operational internet service providers (ISPs)[24] and 29 million internet users, more than 16 percent of the total population. The

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19. Interview with Bilal Lakhani, publisher of *Express Tribune* and part of the family-owned business that owns Express News, Karachi, 26 July 2012.

20. PEMRA, 2010.

21. PEMRA, 2010.

22. *Aurora Magazine*, "Engines of Growth in 2012," Dawn Media Group, Karachi, December 2011, p. 14 (hereafter, *Aurora Mazazine*, "Engines of Growth in 2012").

23. *Aurora Magazine*, "The Great Digital Debate," Dawn Media Group, Karachi, December 2012, p. 113 (hereafter,*Aurora Magazine*, "The Great Digital Debate").

24. Internet Service Providers Association of Pakistan (ISKAP), "Internet Facts," 26 April 2012, at http://www.ispak.pk (accessed 29 June 2012).

most rapid growth in the number of internet users occurred between 2006 and 2008, after which the pace slowed significantly (see Table 3). There has, however, been a surge in the number of broadband connections: the Pakistan Telecommunications Authority (PTA), a government agency charged with the establishment, maintenance, and regulation of all telecoms, reports broadband customer growth of over 150 percent for the four years 2008–2011; in October 2012, the total number of registered broadband users stood at 2.25 million.[25] The PTA has also forecast a rapid growth of broadband subscribers to 12 million by 2015 and 19.5 million by 2020.

Fixed broadband dominated the market in 2010 with 59 percent of overall subscribers compared with wireless broadband (41 percent). However, according to the PTA, wireless internet subscribers overtook fixed broadband subscribers in 2011, claiming 50.5 percent of the market.[26]

The most explosive growth and potential can be seen in the mobile phone sector. With over 123 million subscribers, more than 69 percent of the country's population owns a mobile phone, creating massive potential for internet usage and radio consumption in the coming years. The market is split between the following privately run mobile service providers who together comprise the telecoms industry in Pakistan: Mobilink (30 percent market share), Telenor (25 percent), Ufone (20 percent), Warid (10 percent), and Zong (15 percent).[27]

Table 3.

Internet penetration (% of total population) and mobile penetration
(% of total number of mobile phone subscribers), 2005–2012

	2005	2006	2007	2008	2009	2010	2011	2012
Internet	6.3	7.0	10.0	15.7	16.5	16.7	n/a	n/a
– of which broadband*	n/a	0.2	0.9	1.5	3.1	5.0	7.0e	8.5e
Mobile telephony	21.7	39.0	53.5	56.3	58.1	62.7	67.8	70.0
– of which 3G	0	0	0	0	0	0	0	0

Note: n/a: not available. e: estimates by MDM editors on the basis of data from the Pakistan Telecommunications Authority (PTA) and International Telecommunication Union (ITU). * The broadband figures are percentages of users as a ratio of the total number of internet users.

Source: Calculated by MDM editors on the basis of data from the Pakistan Telecommunications Authority and ITU

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25.   PTA, "Telecom indicators."

26.   Pakistan Telecommunications Authority, *2011 Annual Report*, Islamabad, 2011.

27.   PTA, "Telecom indicators."

1.2 Media Preferences

1.2.1 Main Shifts in Media Consumption

While television has become the dominant medium in Pakistan, radio remains a key source of information in rural areas and Pakistan's underdeveloped provinces. For example, in Balochistan, 46 percent of respondents report listening to the radio at least weekly, rivaling rural television viewership at 47 percent.[28]

Owing to the growth of the broadcast media, newspapers and other print publications have seen an overall decline in recent years. While there are no reliable figures on print circulation, the Pakistan Bureau of Statistics (PBS) found that the average daily sale of all Pakistani daily newspapers fell from 9.9 million in 2007 to 6.1 million in 2008, reaching less than 4 percent of the population.[29] Nearly 80 percent of all newspapers and periodicals published in 2011 were in Urdu, while English print came in a distant second at 8 percent.[30]

Further, the number of publications peaked in 2007 at 1,820, and then reduced by more than half to 749 publications in 2011.[31] The most dramatic drop since 2007 was seen in weekly, fortnightly, monthly, and quarterly publications, although the number of daily newspapers also fell from 437 publications to 391 between 2007 and 2011. Experts in the field suggest that this drop in numbers is the result of a faltering economy, increased competition from television, and an overall change in the culture of reading.

Others map the rise and fall of print publications on to political developments in Pakistan and resultant reader engagement. According to Adnan Rehmat, the executive director of Intermedia Pakistan, a not-for-profit organization concerned with capacity-building in the local media, "The expanding current affairs television landscape in the run-up to the 2008 [general] elections fueled a massive interest in current affairs by the public. This genuine public interest was bankrolled through advertising by the corporate sector. The election and its result were the accumulative climax of political upheavals and thereafter reader interest waned."[32]

Mr Rehmat cautioned, however, that the government statistics could be flawed, as some publications may have emerged and registered, making them eligible for government advertising and part of the statistics cited, without actually printing a newspaper. According to an official in the Press Information Department (PID), the registration cost for publications also fluctuated heavily in this period, with charges for registration plummeting from PKR 10,000 (US$ 102) to PKR 500 (US$5) and then up to PKR 5,000 (US$51).[33] Currently registration is centralized and can be carried out with an affidavit on a stamp paper of PKR20 (20 US cents).

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28. AudienceScapes, "Radio in Pakistan."

29. Powell, "Pakistan: Media and Telecoms Landscape Guide."

30. Pakistan Bureau of Statistics, *Pakistan Statistical Yearbook 2011*, Islamabad, 2011.

31. Pakistan Bureau of Statistics, 2011.

32. Email interview with Adnan Rehmat, executive director of Intermedia Pakistan, 14 October 2012.

33. Interview with Laeeq Ahmad Bajwa, assistant press registrar of the Press Information Department, Lahore, 17 October 2012.

1.2.2 Availability of a Diverse Range of News Platforms

Although the 2002 liberalization of Pakistan's broadcast media market led to an unprecedented growth that is often described as a media boom, concerns about the diversity of news sources persist. Approximately half the population of Pakistan continues to have limited news access as terrestrial broadcasts by the state-owned PTV are the principal source of information in most rural, underdeveloped areas. That said, the rapid growth of cable and satellite television channels has made a wide range of news sources, both local and foreign, available in the major cities and towns. As of 2011, more than 20, Urdu- and regional-language private news channels dominated local content viewership.[34]

The deregulated media has played an important role in the process of democratic consolidation, a contribution that was most evident in 2007, when news channels played an instrumental role in mobilizing a civil society movement for the restoration of an independent judiciary following the deposition of the Supreme Court Chief Justice by General Pervez Musharraf, the military dictator. Since then, the emboldened media has exposed corruption among government officials, highlighted poor service delivery and other governance issues in urban centers, and brought attention to human rights violations by militant groups, the army, and the intelligence agencies. The independent news media have also played a vital role in relief efforts during humanitarian crises sparked by natural disasters or the mass displacement of people from north-western Pakistan owing to clashes between militant groups and the military. News reporting from flood-hit areas in 2010 and 2011, which affected up to 20 million people, helped the government and donor agencies to coordinate relief and reconstruction efforts. Similarly, news reports from internally displaced persons' (IDP) camps in Khyber Pakhtunkhwa, which housed families fleeing the army's counter-terrorism initiatives against militants, helped spread information about the threat of militancy to Pakistan.

Despite these advances, the high number of private news channels has not directly translated into a greater diversity of news content, owing to rampant cross-media ownership (see section *6.1.1*), government partisanship, and state interference in news programming. Additionally, in this highly competitive environment, television channels are engaged in a race for ratings and news producers at most television channels admit to replicating the news broadcasts of rival channels (by opting for identical news agendas, repeating what rivals report without independent verification, re-broadcasting another channel's footage, etc.), thereby further homogenizing the news. As the news director of one of the lower-ranked news channel put it: "I spend most of my time monitoring the news ticker on other channels to make sure I don't miss anything. Since the only thing the channel owners care about is ratings, we need to break the same news as everyone else, and I feel the pressure to compete."[35]

News content on radio is strictly regulated. Local FM stations are not allowed to broadcast news bulletins on topics of national interest under PEMRA law (Radio Broadcast Station Operations Regulation 2012),[36] but

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34. Medialogic, "TV Viewership & Monitoring Overview," Lahore, 2011 (hereafter, Medialogic, "TV Viewership & Monitoring Overview").

35. Interview with the news director of a privately owned news channel (confidentiality requested), Karachi, 5 July 2012.

36. At http://www.pemra.gov.pk/pemra/images/docs/regulations/Radio_Broadcast_Station_Operations_Regulation_2012.pdf (accessed 14 April 2013).

can re-broadcast bulletins produced by the state-owned Radio Pakistan and BBC Urdu Service (see section *2.1.3*). FM stations are also permitted to broadcast highly local news bulletins focussing on topics like traffic and weather updates. This limitation has prevented radio listeners from consuming diverse news sources.

While newspapers and other print publications have seen a decline in recent years, the online space has provided both mainstream and niche publications with an avenue for growth and new audiences. According to the Internet Service Providers Association of Pakistan (ISPAK), there were approximately 30,000 websites registered under the .pk domain in 2012.[37]

1.3   News Providers

1.3.1   Leading Sources of News

A report by International Media Support, an international non-profit organization that supports local media in more than 50 countries, describes Pakistan's media landscape as reflecting a:

> multi-linguistic, multi-ethnic and class-divided society … Urdu media, particularly the newspapers, are widely read by the masses—mostly in rural areas. The English media is urban and elite-centric, is more liberal and professional compared to the Urdu media. English print, television and radio channels have far smaller audiences than their Urdu counterparts, but have greater leverage among opinion makers, politicians, the business community, and the upper strata of society.[38]

1.3.1.1 Print Media

Although newspaper circulation figures have dropped significantly in recent years, print media remain a vital source of news for millions. Undated figures from the marketing research organization Gallup Pakistan say 60 percent of urban populations and 36 percent of rural populations read newspapers.[39] Additionally, the shift of some major publications to the internet has given them a new, potentially broader audience, albeit without any significant monetary gains. The PBS identified a total of 749 newspapers and periodicals being published in 2011, out of which 594 were in the Urdu language, 67 in English, and the rest published in regional languages (see *Table 4*).[40]

37.   Internet Service Providers Association of Pakistan (ISPAK), 2012.

38.   International Media Support (IMS), "Between Radicalisation and Democratisation in an Unfolding Conflict: Media in Pakistan," July 2009, p. 6, at http://www.i-m-s.dk/publication/pakistan-between-radicalisation-and-democratisation-in-an-unfolding-conflict (accessed 25 May 2013).

39.   Powell, "Pakistan: Media and Telecoms Landscape Guide."

40.   Pakistan Bureau of Statistics, 2011.

Table 4.

Total number of print publications by language, 2002–2011

Language	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Arabic	4	4	4	5	3	5	n/a	n/a	2	n/a
Balochi	8	11	13	17	8	8	8	12	13	12
Bi/trilingual	3	14	n/a	n/a	1	n/a	n/a	n/a	n/a	n/a
Brahvi	4	4	2	2	3	3	3	4	4	4
English	153	204	223	290	133	252	100	56	84	67
Gujrati	8	13	13	15	3	1	n/a	n/a	n/a	n/a
Punjabi	1	1	2	8	5	7	6	n/a	2	7
Pushto	8	9	14	35	34	33	14	18	17	17
Saraiki	1	4	4	5	1	1	1	n/a	5	n/a
Sindhi	33	53	58	80	35	12	22	16	26	17
Urdu	497	628	895	1,533	1,236	1,490	1,042	600	761	594
Other	n/a	n/a	51	7	2	8	3	n/a	38	31
Total	720	945	1,279	1,997	1,464	1,820	1,199	706	952	749

Note: n/a: not available

Source: Pakistan Bureau of Statistics, 2011

Calculations of print circulation figures are notoriously unreliable as publications often cite inflated numbers to attract advertisers, and there are no reliable independent audits. The circulation numbers released by the publishers are taken at face value, despite the existence of the largely inactive government body, the Audit Bureau of Circulation. The largest newspaper in Pakistan is the conservative, middle-market, Urdu-language *Daily Jang,* whose umbrella company, the Jang Group, claims nationwide daily sales of over 800,000 copies.[41] Other major Urdu dailies, primarily middle-market publications, include the *Daily Express* and the right-wing *Nawa-i-Waqt.* Unlike the local English press, Urdu dailies publish highly opinionated news reports. The largest English dailies include broadsheets (aimed at the higher end of the market) such as *Dawn,* which belongs to the Dawn Media Group, and claims a circulation of over 130,000,[42] and *The News* (Jang Group) citing a circulation of 140,000.[43] All the major dailies are owned by a small number of diversified media groups that also own television channels, radio stations, and other publications.

1.3.1.2 Radio

Despite the explosion of the FM radio market, radio consumption, particularly news content, has remained largely under the control of the state-owned PBC since private FM channels are not allowed by PEMRA to

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41. Jang Group Advertisement Tariff, at http://jang.com.pk/ad-tariff/newtariff/facts.htm (accessed 6 July 2012) (hereafter, Jang Group Advertisement Tariff 2012).

42. *Dawn*, "Our Publications," 2009, at http://archives.dawn.com/fixed/group/publicat.htm (accessed 16 July 2012).

43. Jang Group Advertisement Tariff 2012.

broadcast news.[44] The only popular alternatives to Radio Pakistan on short- and medium-wave transmitters are BBC Urdu and Voice of America (VoA), both of which broadcast programming in local languages. FM station content is largely limited to infotainment and entertainment programming; by one estimate, FM station programming comprises 70 percent music, 10 percent talk shows, 10 percent advertising, and 5 percent news.[45] While the reach of private stations is limited to urban centers due to a 50-km broadcast restriction imposed by PEMRA, they have gained in popularity and increasingly attract advertising revenue.

1.3.1.3 Television

In the past decade, television has emerged as the primary source of news, where a saturated market of more than 20 privately owned news channels has revolutionized the media landscape. For the most part, these are 24-hour news channels offering breaking news and headlines on the hour, as well as current affairs programming, documentaries, special reports, and political talk shows. However, growing competition from entertainment channels has led news channels to include morning shows that focus on society, culture, food rather than news content, and comedic political satire shows. Local news channels have also introduced crime reports that include dramatic re-enactments of registered crimes such as murder and domestic violence, filmed in the manner of drama serials. Moreover, in the Muslim holy month of Ramadan, many news channels broadcast religious programming.

PTV's terrestrial news broadcasts still dominate viewership (see section *2*), with PTV Home, PTV News, and the formerly state-owned ATV ranking among the top five in a list of all television channels in Pakistan (terrestrial and cable/satellite).[46] Cable and satellite ratings indicate that the most watched cable channel in Pakistan is the commercial Geo News, while private news channels Express News, Samaa TV, Dunya TV, Aaj TV, and Dawn News all rank high in terms of ratings and reach.[47] In the first quarter of 2011, Geo News held the highest market share of the news category with 31 percent of viewership, as calculated by electronically measuring results from 675 urban households for the consumed proportion of a given channel, measured against total TV consumption. Geo was followed by Samaa (13 percent), Dunya News (13 percent), and Express News (12 percent) (see *Figure 5*).[48]

Over the last decade, the state's monopoly over broadcasting has significantly diminished due to the rapid increase in the number of private television channels, FM radio stations, and expanded internet access. Since 2002, 89 private television channels have launched and 26 foreign channels have been granted landing rights (i.e. permission from PEMRA to distribute a foreign satellite channel in Pakistan), among them global news channels such as BBC, CNN, Sky News, and Al Jazeera. This represents a diversification of the media market

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44. BBC News, "Pakistan Profile: Media," 17 January 2012, at http://www.bbc.co.uk/news/world-south-asia-12965785 (accessed 6 July 2012).

45. Powell, "Pakistan: Media and Telecoms Landscape Guide."

46. Gallup Pakistan, "Gallup Pakistan Media Cyberletter," October 2012, at http://www.gallup.com.pk/News/cyberletter-updated1.pdf (accessed 12 June 2013) (hereafter, Gallup Pakistan, "Gallup Pakistan Media Cyberletter").

47. Medialogic, "TV Viewership & Monitoring Overview."

48. Medialogic, "TV Viewership & Monitoring Overview."

that has challenged the historic dominance of the state-owned PTV (see section *2*).[49] A 2008 BBC survey found that PTV News was no longer the most watched news channel in the country, and that television viewers in higher socio-economic classes were increasingly tuning in to private news channels rather than PTV.[50]

Additionally, despite frequent crackdowns by the media regulator, cable service operators illegally broadcast numerous foreign, particularly Indian, channels as well as CD channels (in-house channels that show foreign films and music). The popularity of private television channels can be gauged by the fact that satellite channels received 80 percent (PKR 15.624 billion, approximately US$ 160 million) of television ad spend in 2012, while the terrestrial channels received 20 percent (PKR 4.026 billion, US$41 million).[51]

The easy availability of foreign channels has led to a surge in the popularity of Indian entertainment channels: the top five channels in terms of ratings in 2011 included the three Indian channels Star Plus (ranked first), Sony (ranked third), and Colors (ranked fifth).[52] Meanwhile, the growth of independent Pakistani news channels has diverted audiences from traditional news sources such as PTV and the BBC Urdu Service.

Geo News, Pakistan's first private news channel, launched and operated by the Jang Group, ranked as the second-most popular cable channel in 2011, while other private channels that have launched in the past five years following the industry's deregulation, including Express News, Samaa TV, and Dunya TV, all ranked in the top 15.[53] These channels are either part of established media houses (for example, Express News, see section *6*) or new enterprises, such as Dunya TV.

Overall, in 2011, in-house channels (owned and managed by cable operators broadcasting entertainment content) captured 20 percent of market share, followed by foreign entertainment (19 percent), news (17 percent,) and regional-language channels (4 percent).[54]

Geo News was the first private 24-hour, Urdu-language news channel to be launched in 2005, dedicated to news and current affairs in direct competition with the then dominant state-run PTV News. Its broadcast facilities are based in Dubai, and the channel has come to dominate the local cable television news landscape, having faced little competition until the late 2000s. The channel operates several news bureaux across the country and also has reporters based in New York, Washington, DC, and London. A number of Geo News' current affairs and news programs are among the highest rated in the country (see section *1.3.2*). Over the years, Geo News has garnered a reputation for taking on the government, notably during the state of

49. PEMRA, 2010.

50. G. Murthy, "News Television in Pakistan: A Study in Socio-Economic Differences," AudienceScapes, 2009, at http://www.audiencescapes.org/country-profiles-pakistan-news-television-pakistan-whos-watching-cable-state-run-access-rural-urban (accessed 3 August 2012).

51. *Aurora Magazine*, "The Great Digital Debate," p. 113.

52. Medialogic, "TV Viewership & Monitoring Overview."

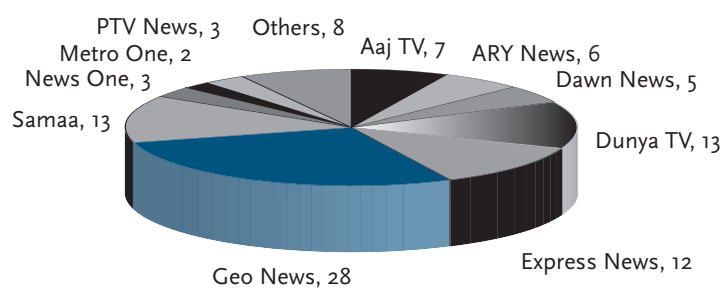53. Medialogic, "TV Viewership & Monitoring Overview."

54. Medialogic, "TV Viewership & Monitoring Overview."

emergency imposed by General Musharraf in 2007 and the lawyer-led civil society movement to restore an independent judiciary in 2009; on the first occasion the channel was taken off the air for nearly three months for its anti-government stance.

Express News, Samaa, and Dunya News compete for the spot of the second-most popular, private Urdu news channel after Geo News. Express News was launched in 2008 and has expanded its reportage to 12 bureaux across Pakistan, with a special focus on human-interest stories. Samaa TV (launched in 2007) and Dunya News (launched in 2008) have also become leading sources of news, particularly in the Punjab, Pakistan's most populous province. Both channels focus on news and current affairs with almost all content featured in Urdu. Since these news channels, like all private Pakistani channels, rely almost entirely on advertising for revenues, they are commercially focussed and produce news content with an eye to high ratings (see section *1.3.3*).

Figure 5.
TV channels' market share in news (%), 2011

Note: Market share is measured by calculating the consumed proportion of a given program, measured against total TV consumption based on households or persons.

Source: Medialogic, "TV Viewership & Monitoring Overview," Lahore, 2011

1.3.1.4 Online

Notably, local news websites dominate the list of top 10 sites, along with online classifieds, Pakwheels.com (an automobile-selling site), and Rozee.pk (a local jobs portal).[55] The local classifieds site OLX.com.pk ranks the highest, closely followed by Urdu-language news websites Daily Jang and Geo TV,[56] whose Urdu-language news section receives nearly 40 percent of overall traffic to the site.[57] The websites of local English dailies *Express Tribune* and *Dawn* are also among the top news sites visited from within Pakistan (see *Table 5*).

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55.   Alexa, "Top Sites in Pakistan," at http://www.alexa.com/topsites/countries/pk (accessed 31 January 2013).

56.   Alexa, "Top Sites in Pakistan," at http://www.alexa.com/topsites/countries/pk (accessed 31 January 2013).

57.   Geo.tv, "Estimated Website Traffic," June 2012, at http://geo.tv.websitetrafficspy.com/ (accessed 14 June 2012).

Table 5.

Top 10 local websites, 2013

	Local website	Rank overall in Pakistan	Type of site	Domain registry date
1	Olx.com.pk	11	Classifieds	2007
2	Jang.com.pk	13	News	1998
3	Geo.tv	17	News	2002
4	Express.com.pk	19	News	2001
5	Hamariweb.com	26	Diversified portal	2006
6	Rozee.pk	36	Jobs portal	2006
7	Tribune.com.pk	41	News	2010
8	Zemtv.com	48	News	n/a
9	Thenews.com.pk	51	News	1999
10	Dawn.com	55	News	1997

Note: n/a: not available

Sources: Whois.domaintools.com; Alexa.com (accessed January 2013)

1.3.2   Television News Programs

The significant decline of viewership for PTV News (see section *2*) means that the most popular news bulletins are on commercial, satellite and cable television channels. The most popular news programs on television include the primetime news bulletins, broadcast on most private news channels at 9 p.m., and pre-primetime bulletins and shows, broadcast from 6 p.m. until primetime. Of the top 10 rated news programs in 2011, a total of six belonged to Geo News, including four of the top five, highlighting the channel's dominant position in the media.[58]

The highest rated news shows include sports shows and satirical shows, rather than fact-based bulletins. The highest rated news program "*Hum Sub Umeed Say Hain*" (We Are All Hopeful) is Geo News' political satire and comedy show that features short, comical segments on the day's political developments. "*Khabar Naak*", rated fourth in 2011, is also a news-based comedy program. The second most popular show, "Super Eye," is a sports analysis show often featured between live sporting events on Geo. Another top-rated sports show, "Score," is also broadcast by Geo News.

Also among the top 10 programs on news channels are "*Shabbir tou Dekhay Ga*" (Shabbir Will Bear Witness) (Express News), "*Meri Kahaani Meri Zabani*" (My Story in My Own Words) (Samaa), "*Wardaat*" (Crimes) (Samaa), and "*Aisa Karega Tou Marega*" (Doing This Could Be Fatal) (Express News).[59] These shows represent a new format of human-interest and crime-related shows, involving a mix of re-enactments of fact-based crime stories and reality television formats.

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58.   Medialogic, "TV Viewership & Monitoring Overview."

59.   Medialogic, "TV Viewership & Monitoring Overview."

"*Aaj Kamran Khan Kay Saath*" (Today With Kamran Khan), hosted by a senior journalist, Kamran Khan, and "*Lekin*" (But), hosted by the journalist Sana Bucha, are the only two conventional news analysis and political talk show programs that feature in the top 10 (see *Figure 6*). However, many political talk shows hosted by senior journalists such as Hamid Mir, Najam Sethi, Mubashir Lucman and others are popular and influential, with significant agenda-setting powers.

Figure 6.
Top 10 programs on news channels, 2011
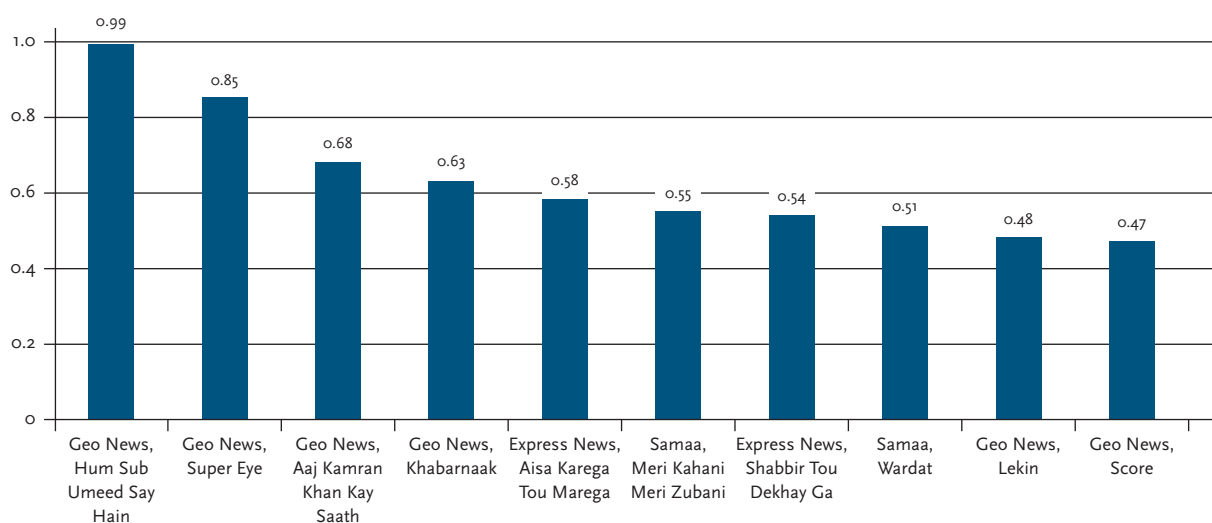
Note: Ratings calculated from the average proportion of TV households or persons watching a given program over a period of one year

Source: Medialogic, 2011

1.3.3   Impact of Digital Media on Good-quality News

Media professionals report that an increasing amount of news coverage is strategically planned to take advantage of the locations of Peoplemeters (electronic audience measurement tools that determine channel ratings) to boost ratings. There are approximately 680 Peoplemeters in Pakistan; approximately half of those are in Karachi, and the majority of the remainder is in major cities such as Lahore and Islamabad, leaving little opportunity for ratings to reflect the preferences of rural audiences.

Such practices have led to concentrated news coverage of some pockets of urban Pakistan at the expense of even-handed coverage of large swathes of the country. For example, the director of strategic planning at one of the top five news channels described how his channel had to cut back on news coverage of the devastating floods in 2010, which primarily affected the rural parts of the Sindh province, in favor of more urban programming: since Sindh (with the exception of Karachi) has few Peoplemeters, extensive coverage of the biggest news story in Pakistan at the time negatively affected the channel's ratings.[60] This urban bias has been exacerbated by the fact that Pakistan's media boom has occurred in an environment of deteriorating security,

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60.   Interview with the director of strategic planning at a private news and current affairs channel (confidentiality requested), Karachi, 4 July 2012.

especially in the less urbanized Khyber Pakhtunkhwa province and underdeveloped Balochistan province: while the former has witnessed a surge in militancy as a fallout of Pakistan's involvement in the US-led war against terrorism and the conflict in Afghanistan, the latter has hosted a separatist insurgency.

1.4   Assessments

The liberalization and growth of independent news media in Pakistan are an unprecedented development and have greatly affected news production and consumption, far more so at this stage than digitization in the form of growing internet access. The greater availability of news media via satellite and cable television and the internet has enabled more information to reach wider segments of the population, has led to greater government accountability, and has fostered a culture of news media consumption, with the ratings of Geo News shows rivaling those of local and foreign entertainment offerings. The introduction of regional-language television channels has also enhanced feelings of representation and inclusion among Pakistan's diverse ethnic groups. As media scholar Marcus Michaelsen concludes, "The media have certainly contributed to a re-initiation of Pakistan's democratic transition."[61]

However, after almost a decade of operations, Pakistan's broadcast news media are coming under scrutiny. One major complaint is that despite the growing number of television channels, the plurality of news sources has not increased, for the following reasons. The growth of broadcast media has had a negative impact on the circulation of print publications, which have historically varied in size (from national dailies to regional- or village-level weekly publications) and provided local news coverage in regional languages. The slow growth of the cable television infrastructure coupled with high costs for cable reception also means that more than half of all Pakistani viewers continue to rely on terrestrial broadcasts by the state-owned PTV for information. Government restrictions on FM radio stations broadcasting national news have also severely limited the diversity of radio broadcast news. Within the privately owned media sector, liberal cross-media ownership policies have concentrated news production in the hands of a few major family-run business groups (see section *6.1.1*).

In the television sector, which has experienced the biggest growth of news providers, the diversity of news content is significantly hampered by strong competition and the industry's commercial model, which has channels vying for advertising revenue on the basis of target rating points (TRPs or ratings; see section *6.2* for more information on channels' business models). Senior news producers at private television channels confess to copying news items broadcast by rival channels without any additional reporting or fact-checking in an attempt to keep up with breaking news. The ratings race leads to an echo effect as a result of which certain news items are overemphasized while other issues—particularly public-interest stories pertaining to governance, education, health care, public works, etc.—remain underreported. In sum, despite the explosion in the number of independent news providers, news coverage itself has not become sufficiently diverse or inclusive.

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61.   M. Michaelsen, *New Media vs. Old Politics: The Internet, Social Media, and Democratisation in Pakistan*, FES Media Asia Series, Friedrich-Ebert-Stiftung, Berlin, 2011, p. 36 (hereafter, Michaelsen, *New Media vs. Old Politics*).

2. Digital Media and Public or State-administered Broadcasters

2.1 Public Service and State Institutions

2.1.1 Overview of Public Service Media; News and Current Affairs Output

Until Pakistan's media landscape was liberalized in 2002, state-owned media monopolized the airwaves. State-owned media in Pakistan comprise PTV and PBC, which operates Radio Pakistan.

Although commercial media have proliferated in the past decade, significantly more Pakistanis are only able to access PTV. The state television network operates under the Ministry of Information and Broadcasting, and enjoys a near monopoly over terrestrial broadcasting (the infotainment terrestrial channel ATV used to be state-owned, but was privatized in 2005). Owing to this monopoly, PTV can be easily and cheaply accessed by the majority of television viewers, especially in rural areas, who do not have access to cable or satellite broadcasts: out of 86 million TV viewers in Pakistan, 48 million are only able to access terrestrial channels.[62] In an October 2012 survey, for example, PTV Home, PTV News, and ATV ranked first, third and fourth in a list of both terrestrial and cable/satellite channels.[63] Media analysts argue that the Pakistani government maintains its monopoly over terrestrial transmissions as a way to retain control of the media landscape, since cable connections can easily be shut down on its orders (see section 7).[64]

The Secretary of the Ministry of Information and Broadcasting is the chairperson of PTV's board of directors. The board and the managing director of PTV are appointed by the federal government. This governing structure compromises PTV's editorial independence and enables rampant political interference.

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62. Gilani and Gallup Pakistan, *Special Edition Cyberletter: TV Viewership in Pakistan*.

63. Gallup Pakistan, "Gallup Pakistan Media Cyberletter."

64. M. Mezzera and S. Sial, "Media and Governance in Pakistan: A controversial yet essential relationship," Initiative for Peacebuilding, October 2010, at http://www.initiativeforpeacebuilding.eu/pdf/pakistanOct.pdf (accessed 1 February 2013) (hereafter, Mezzera and Sial, "Media and Governance in Pakistan").

The corporation's financial model also undermines its independence: PTV receives advertising revenue in addition to license fees. A PKR35 (35 US cents) per month license fee is added to the electricity bills of all domestic consumers whose monthly consumption exceeds 100 units; commercial and industrial electricity consumers are charged varying fees up to PKR 175 (US$ 1.78). Critics of PTV's hybrid financial model argue that private corporations could use advertising revenue as a way to influence content and pressurize PTV to compete with commercial channels, reducing its independence.

PTV broadcasts two national channels, three regional channels, and one international channel, PTV Global, which is broadcast via satellite to the Pakistani diaspora in Europe, North America, and the Middle East.[65] The national channels include PTV Home, a primarily Urdu-language entertainment channel that can be accessed by 89 percent of the population, and PTV News, a news and current affairs channel that can be accessed by 78 percent of the population. Among the regional channels, PTV National carries news and infotainment programs in local languages, including Sindhi, Punjabi, Saraiki, and Pashto; AJK TV broadcasts news and infotainment programs for viewers in Pakistan-administered Kashmir; and PTV Bolan is a special channel for the western province of Balochistan, broadcasting in the major local languages, Balochi, Brahvi, and Pashto. Programming in regional languages makes the state-owned network more inclusive and representative than most commercial mainstream media conglomerates.

Despite the fact that they can be widely accessed, advertising expenditure (based on TRPs) indicates that PTV's channels are not popular among viewers: in 2011, terrestrial channels received only 21 percent (PKR4.1 billion (US$42 million) of television ad spend, while satellite channels received 79 percent (PKR 15.5 billion (US$ 158 million).[66] Where viewers can access cable channels, the viewership for PTV News, in particular, is extremely low, especially when compared with that of the top three commercial satellite news channels and PTV Home, the state's terrestrial entertainment channel. In 2011, Geo News received 28 percent of total news viewership, Samaa TV and Dunya News received 13 percent each, while PTV News only attracted 3 percent.[67] According to a senior anchor person at PTV News, "the channel reaches a lot of people but isn't being watched because it lacks credibility"[68] (see section *2.2.1*).

Like PTV, the state-owned radio broadcaster, Radio Pakistan, lacks independence owing to its governing structure. The director general of PBC, the chairperson of the board of the PBC, and board members are appointed by the federal government. Due to this configuration, the government determines Radio Pakistan's editorial and administrative policies.

PBC operates 30 broadcasting houses from where 64 stations—23 medium-wave, seven short-wave, and 34 FM—are broadcast across the country in 22 local and 11 foreign languages. To its credit, Radio Pakistan

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65. Pakistan Television Corporation (PTV), "About us: Pakistan Television Corporation Ltd.," at http://www.ptv.com.pk/introduction.asp (accessed 10 August 2012).

66. *Aurora Mazagine*, "Engines of Growth in 2012."

67. Medialogic, "TV Viewership and Monitoring Overview 2011."

68. Telephone interview with X, senior news anchor at PTV News (confidentiality requested), 26 June 2012.

seeks to promote Pakistani culture through entertainment and music programming that reflects the country's diversity. In remote parts of Balochistan, Pakistan-administered Kashmir, and the northern Gilgit-Baltistan region, where there is no cable or satellite TV or private radio stations, Radio Pakistan is the only source of news programming.[69] PBC's 22 FM93 community stations, which have powerful 2,000–5,000-watt transmitters, target local communities by broadcasting music, talk shows, and youth- and women-oriented programs in local languages. This is the only programming in Pakistan that approaches the definition of community news broadcasts. Additionally, PBC operates nine commercial FM stations.

Unlike PTV, PBC is largely dependent on government budget allocations (a radio license fee and PBC's tax-exempt status were abolished in 1999).[70] The corporation's commercial FM stations generate approximately PKR 300 million (US$3 million), or 30 percent of the country's total radio advertisement expenditure, but PBC remains seriously underfunded, and the lack of financial resources has led to a significant deterioration of PBC's services.[71] PBC's annual operating cost—including salaries, pensions for 4,000 former employees, and utilities—is PKR5 billion (US$51 million), but its allocation only increased from PKR2.2 billion (US$ 22.5 million) in the 2011–2012 federal budget to PKR3.4 billion (US$ 34.7 million) in the 2012–2013 budget.[72] The shortfall will make it increasingly difficult for PBC to compete with proliferating commercial FM stations; already, PBC's transmitters are in disrepair, it struggles to pay salaries and pensions,[73] and its broadcast hours have significantly diminished in number as up to 60 PBC units are forced to go off-air during frequent power outages because the corporation cannot afford to run back-up generators.[74]

In addition to PTV and PBC, there are 25 non-commercial FM radio stations broadcasting student-oriented, infotainment programs on university campuses across the country. These stations are overseen by government university chancellors and managed by students; according to media regulations they can only broadcast music, student news, and other content relevant to campus activities. In the semi-autonomous FATA, the FATA Secretariat, a government agency, runs three radio stations, Radio Khyber, Radio Razmak, and Radio Miranshah (a fourth, Radio Wana, was attacked by militants in 2006). These stations provide news and infotainment programming aimed at countering the extremist rhetoric broadcast by illegal FM stations run by militant groups and extremist clerics. At their peak in 2009, up to 150 such stations were operational, but the government has since jammed many illegal broadcasts or confiscated unauthorized transmitters.[75]

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69. M. Solangi, "Letter: In defence of Radio Pakistan," *Express Tribune*, 27 February 2012, at http://tribune.com.pk/story/342490/in-defence-of-pakistan-radio/ (accessed 10 August 2012).

70. A. Haq, "Helping PBC through radio cess," *Dawn*, 11 March 2012, at http://dawn.com/2012/03/11/helping-pbc-through-radio-cess (accessed 10 August 2012).

71. A. Zia, "This is Radio Pakistan!," *News*, 28 April 2012, at http://www.thenews.com.pk/Todays-News-9-105413-This-is-Radio-Pakistan! (accessed 10 August 2012).

72. Telephone interview with Murtaza Solangi, director general of the PBC, 3 July 2012.

73. *Dawn*, "Now Radio Pakistan in dire straits," 28 December 2011, at http://dawn.com/2011/12/28/now-radio-pakistan-in-dire-straits-2 (accessed 24 July 2012).

74. A. Sennitt, "Pakistan: PBC financial crisis forces cuts in hours," 17 April 2010, at http://blogs.rnw.nl/medianetwork/pakistan-pbc-financial-crisis-forces-cuts-in-hours (accessed 7 August 2012).

75. D. Azami, "Pakistan's Taliban radio insurgency," *BBC News Online*, 22 June 2009, at http://news.bbc.co.uk/1/hi/world/south_asia/8108881.stm (accessed 10 August 2012).

2.1.2   Digitization and Services

PTV has not digitized its terrestrial broadcasts, though its national channels, PTV News and PTV Home, are also available as satellite channels. The liberalization of the media landscape has forced PTV to diversify its channel offerings; its regional channels PTV National, AJK TV, and PTV Bolan were launched in 2003, 2004, and 2005 respectively, while PTV News started broadcasting in 2006. PTV also plans to launch a new, sports-only channel to compete with satellite channels.[76] Moreover, PTV maintains an interactive website that live streams news and current affairs programming. This website is primarily accessed by the diaspora and does not feature among the top 100 websites in Pakistan, which include the websites of the largest Urdu- and English-language newspapers and privately owned television channels. Despite these initiatives, PTV's overall viewership has declined significantly since commercial satellite channels were launched in 2002.

Radio broadcasting in Pakistan (both state-owned and commercial) has yet to be digitized. But PBC has taken advantage of Pakistan's growing internet penetration: in 2009, it started livestreaming its broadcasts;[77] in 2010, PBC launched an interactive, bilingual website featuring audiovisual content;[78] in April 2012, PBC's first multimedia studio was established to produce in-house video content for the website radio.gov. pk.[79] Radio Pakistan is also active on Twitter, and boasts more followers than any other public-sector entity (7,786 followers on 9 August 2012, compared with PTV's 283).

2.1.3   Government Support

PEMRA's licensing regulations, introduced in 2002, protect state-owned media. Only PTV and the formerly state-owned ATV are allowed terrestrial transmissions, even after PTV channels have been digitized for satellite broadcasting. In 2010, PEMRA also sought to reduce the number of commercial television licenses being issued, citing market saturation, but PTV has since announced plans to launch three new channels in Pashto, Punjabi, and Sindhi to serve regional audiences.

Similarly, PEMRA rules limit the transmitter range of all commercial FM radio stations to 50 km (31 miles) and prevent private stations from broadcasting original national news programming (stations are allowed to re-broadcast PBC news bulletins and three 10-minute slots of BBC Urdu Service programming per day). These restrictions ensure Radio Pakistan's dominant position in rural areas and make it the primary source of news and information on radio. Beyond these preferential terms, the government has not created policies or provided funding to facilitate the digitization of PTV or PBC.

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76. Entropy World, "PTV launch new sports channel," 8 January 2012, at http://entropyworld.com/ptv-launch-new-sports-channel (accessed 7 August 2012).

77. A. Sennitt, "Pakistan Broadcasting Corporation launches live streaming," Radio Netherlands Worldwide, 22 December 2009, at http://blogs. rnw.nl/medianetwork/pakistan-broadcasting-corporation-launches-live-streaming (accessed 7 August 2010).

78. Associated Press Pakistan, "Radio Pakistan enters digital era: PBC DG," *Pakistan Today*, 21 April 2012, at http://www.pakistantoday.com. pk/2012/04/21/city/islamabad/radio-pakistan-enters-digital-era-pbc-dg/ (accessed 7 August 2012).

79. Radio Pakistan, "Launching of Radio Pakistan first Multi-Media Studio," 30 April 2012, at http://radio.gov.pk/newsdetail-20563 (accessed 8 August 2012).

2.1.4 Public Service Media and Digital Switch-over

As digitization has not started yet, it is not known what the role of the public service media will be in the digital switch-over.

2.2 Public Service Provision

2.2.1 Perception of Public Service Media

Pakistan's state-owned media has historically been used as the mouthpiece of various military dictators and civilian governments. In the 1980s, during Ziaul Haq's military dictatorship, Pakistani news consumers rejected the intensely censored state broadcasters and sought out independent programming through the BBC Urdu Service, as a result of which it was the dominant radio news service in the country by the late 1990s.[80] In the 1990s, audiences increasingly viewed foreign (primarily Indian) television channels and international news broadcasters such as BBC and CNN via illegal satellite dishes. In 1998, seeking to counter the popularity of Indian satellite channels, the government launched PTV World, an entertainment and culture channel accessible via satellite broadcast.[81]

Despite such initiatives, the overnight success of the privately owned news channels (see section *1.2.1*) following media liberalization in 2002 demonstrates the public's disinclination to consume news via the state broadcasters. Indeed, the public's suspicion of state broadcasts was evident in November 2007, when General Musharraf imposed emergency rule and ordered cable operators to block the transmission of all private local and international news channels, leaving PTV News as the only source of televised information. Rather than rely on government accounts of the emergency, Pakistanis flocked to purchase satellite dishes so that they could access private news channels such as Geo TV (which continued to broadcast from Dubai, UAE) and international news channels.[82]

The state broadcasters' perceived lack of credibility stems from the fact that state-owned media are subject to high levels of political interference. As a senior PTV News anchor person put it, "PTV has no autonomy and the managing directors of PTV are inevitably political appointees."[83] Murtaza Solangi, the former director general of Radio Pakistan, also believes that the state continues to see PTV and PBC as mouthpieces: "no political party is yet sold on the idea of converting this from a government-controlled body to a credible public interest broadcaster."[84]

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80.   Mezzera and Sial, "Media and Governance in Pakistan."

81.   D. Page and W. Crawley, "Satellites and South Asia," *Himal Southasian*, December 2000, at http://himalmag.com/component/content/article/2129-.html (accessed 4 February 2013).

82.   S.S. Hasan, "Beating Pakistan's TV news blackout," BBC News Online, 8 November 2007, at http://news.bbc.co.uk/1/hi/world/south_asia/7085043.stm (accessed 4 February 2013).

83.   Telephone interview with a senior PTV News anchor, Islamabad, 26 June 2012.

84.   Interview with Murtaza Solangi, managing director, Radio Pakistan, Islamabad, 17 December 2012 (he left this position in May 2013).

The same anchor person reported that PTV News receives many phone calls each day from President House and various government ministries dictating what kind of news coverage politicians and political developments should receive. Criticism of the government and the army is prohibited and PTV News producers are discouraged—or outright banned—from inviting members of the political opposition or known critics of government policies to participate in current affairs shows. In December 2011, an announcement that the prime minister was willing to fire PTV's managing director, Yousaf Baig Mirza, to placate the federal Information Minister Firdous Ashiq Awan highlighted PTV's vulnerability to political interference. Media coverage of the controversy suggested that Ms Awan was seeking Mr Mirza's removal because he had refused to accommodate her preferred appointees.[85]

Persistent state interference has led media analysts and members of the public to conclude that public service programming is seriously lacking. As Mr Rehmat put it: "Government control of TV and radio feels anachronistic at a time when there is a genuine demand for independent, public service broadcasting."[86] Leading the call for independent and inclusive broadcasting, non-profit media organizations such as Internews and the Pakistan Press Foundation have recommended that PEMRA issue licenses for community radio stations that are allowed to generate and broadcast local news. In 2005, following a devastating earthquake that killed 80,000 people in northern Pakistan, Internews successfully advocated for seven, two-year-long emergency broadcast licenses to inform and coordinate relief for disaster-affected populations (PEMRA did not extend the licenses once they expired).[87]

Public debate on the need for public service media was sparked in the spring of 2012, when the PBC warned that Radio Pakistan could collapse without increased funding. Much of the debate focussed on the shortcomings of commercial news coverage, which media professionals and commentators widely criticized for being too sensational or, at worst, fabricated in order to get high ratings (see section *4*). Public service programming, the argument went, was needed to fill the gap left by commercial news outlets.

Numerous op-eds on the PBC's plight, especially in the English-language print media, reiterated the need for public service media provision; most columnists also supported reviving the radio license fee and reinstating the PBC's tax-exempt status. Writing in *Dawn*, the columnist Hajrah Mumtaz called for more news and information of the sort that does not necessarily sell:

> If Radio Pakistan were to receive financial support from the Government or through a broadcast "cess" [tax], it would allow it to be operated on a non-commercial basis and this, in turn, would allow it to focus on material that is not necessarily commercially viable: public service messages and campaigns, for example, showcasing folk and classical music

85. Z. Tahir, "PM's 'assurance' to Awan: PTV MD likely to be removed," *Dawn*, 27 December 2011, at http://dawn.com/2011/12/27/pms-assurance-to-awan-ptv-md-likely-to-be-removed (accessed 4 February 2013).

86. Email interview with Adnan Rehmat, executive director of Intermedia Pakistan, Islamabad, 14 December 2012.

87. Internews, "When Information Saves Lives," at http://www.internews.org/sites/default/files/resources/9.13_HumanitarianReport.fnl2012web.pdf (accessed 31 July 2012).

performers, or reviving the lost format of radio dramas ... health and hygiene, farming, trade
and a promotion of liberal values. Radio Pakistan could be instrumental in educating people
on issues that do not have much commercial appeal but are of critical importance.[88]

Similarly, the economics professor Faisal Bari argued that public service media is needed to cover unsexy topics that "do not capture audiences, and do not draw the ratings needed," such as education, health, poverty, and lack of access to justice.[89]

Despite such appeals in the mainstream media, Parliament decided not to implement a radio broadcast tax or license fee, even though the National Assembly Standing Committee on Broadcasting and Information initially approved the PBC's recommendation to charge a 2 percent tax on mobile phone top-ups and a one-time fee on the purchase of new vehicles to supplement the PBC's budget allocation.[90] Parliamentarians eventually reasoned that the PBC could not be funded at the expense of Pakistan's burgeoning telecoms industry.

2.2.2   Public Service Provision in Commercial Media

Under Article 20(e) of PEMRA Ordinance (2002), commercial television channels and radio stations are required to broadcast public interest programs on the government or regulatory authority's directive, as long as the duration of the mandatory programs does not exceed 10 percent of total programming in a 24-hour period.[91] Although commercial media outlets regularly broadcast public service information about health, education, and government initiatives, this provision has primarily been used to coordinate relief and reconstruction activities during natural disasters. For example, during widespread flooding in 2010, 34 commercial FM stations partnered with the BBC Urdu Service to broadcast a series of lifeline radio programs for affected communities.[92] PEMRA also required private TV channels to broadcast messages from the Ministry of Health and other government departments advising affected communities how to prevent outbreaks of disease or soliciting donations from the public for flood victims.[93]

In the face of growing criticism of programming quality (as expressed by print media columnists, independent bloggers, in letters to the editor, and during media capacity building workshops), commercial media news outlets are increasingly trying to portray themselves as working in the public interest. For example, Pakistan's most popular private broadcaster, Geo TV, recently released the working draft of a code of conduct titled "Geo Asool." The code states that Geo TV pledges to "promote 'public interest'" by "report[ing] and present[ing]

88.   H. Mumtaz, "A giant in decline," *Dawn*, 9 April 2012, at http://dawn.com/2012/04/09/a-giant-in-decline/ (accessed 8 August 2012).

89.   F. Bari, "Media for society," *Pakistan Today*, 5 March 2012, at http://www.pakistantoday.com.pk/2012/03/05/comment/columns/media-for-society/ (accessed 8 August 2012).

90.   Z. Gishkori, "To revive Radio Pakistan, mobile users and car buyers may face more tax," *Express Tribune*, 23 February 2012, at http://tribune.com.pk/story/340619/to-revive-radio-pakistan-mobile-users-and-car-buyers-may-face-more-tax/ (accessed 7 August 2012).

91.   PEMRA Ordinance (2002), at http://www.pemra.gov.pk/pemra/images/docs/legislation/Ordinance_2002.pdf (accessed 9 August 2012).

92.   Powell, "Pakistan: Media and Telecoms Landscape Guide."

93.   PEMRA, 2010, p. 39.

stories of significance that add value and enrich people's lives" and "empowering our viewers with knowledge … so that they are able to form opinions and take informed decisions."[94] However, Geo TV and other private broadcasters have yet to articulate specific criteria or standards for public service programming.

2.3 Assessments

Owing to the proliferation of privately owned television channels, PTV has lost the bulk of its viewers in urban and semi-urban areas. However, the state's monopoly over terrestrial broadcasts means that PTV continues to be the main television channel available to rural viewers. However, widespread power outages, lasting up to 16 hours per day, have led to decreased viewership of PTV in rural areas as well.

Radio Pakistan remains the primary source of news and information on radio across the country. This is largely owing to the fact that privately owned FM radio stations are restricted from broadcasting national or international news, and therefore focus on music and entertainment programming. However, a lack of funding has reduced the quantity and quality of Radio Pakistan broadcasts, which raises questions about the state broadcaster's future.

Overall, the growth of privatized media has reduced public consumption of state-owned media, which have served historically as the mouthpiece of military dictators and corrupt civilian governments, and therefore lacks credibility.

For all its shortcomings, state-owned media continue to strive toward inclusive and representative programming, broadcasting content in many of Pakistan's regional languages. PTV and PBC also promote Pakistani culture through entertainment and music programming that captures the diversity of Pakistan. Moreover, Radio Pakistan provides the only content which approaches community news broadcasts through its local-language news bulletins.

There is no consensus across the media industry and news consumers over what constitutes public service programming. It is often understood by media regulators, journalists, NGOs, and members of the public to be the same as high-quality, unbiased journalism; principles of inclusivity, independence, educational value, etc. are not considered part of a genuine public service mandate. Public calls for public service programming have been limited to support for increased funding for Radio Pakistan.

There are no public service broadcasters in Pakistan, with the exception of some non-commercial radio stations at university campuses that cater to student audiences. The culture of public service programming in Pakistan remains poorly developed, primarily because the only media entities that include public service

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94. Geo TV, "Geo Asool: Geo Manifesto Working Draft, Version 1.0," 12 July 2012, at http://www.geo.tv/asool/Geo_Manifesto.asp (accessed 27 July 2012).

in their mission statements, the state-owned PTV and PBC, lack independence. Political interference and political appointments prevent state-owned media from delivering unbiassed national news coverage and dedicating adequate resources to public service programs or messages. The public service offerings of state-owned media are also compromised owing to increased competition from commercial outlets: rather than produce public service programming in regional languages, PTV and Radio Pakistan increasingly mimic the entertaining and sensationalized offerings of privately owned media.

3. Digital Media and Society

3.1 User-Generated Content (UGC)

3.1.1 UGC Overview

In recent years, the internet has grown in size and influence. With up to 29 million users (16 percent of the population) having some access to the internet in 2012,[95] up from 17.5 million at the start of 2009,[96] the medium is playing a larger role in the dissemination of news through independent blogs. At the same time established media groups are increasingly seeking to engage online consumers through blogs and via social networks. That said, most UGC in the country is uploaded to social networks such as Facebook, Twitter, LinkedIn, Pinterest, and Tumblr (see section *3.1.2*).

Pakistani blogs enjoy high levels of traffic. The blog-publishing sites rank at fifth (Blogspot.com) and 12th (Blogger.com) in Alexa's list of the most popular websites in Pakistan. Wordpress, another blogging platform, is ranked at 15th.[97] To acknowledge the growing popularity and variety of blogs in Pakistan, the technology publication *CIO Pakistan*, a part of the international business technology group IDG, teamed up with Google Pakistan to launch the annual Pakistan Blog Awards in 2010. Awards were distributed in 40 categories —including current affairs, online community, infotainment, marketing, fashion, culture, technology, and sport—and winners were chosen from among 275 nominations;[98] in 2011, the number of entries soared to 700.[99]

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95. World Bank, "World Development Indicators and Global Development Finance," 5 June 2012, at http://www.google.com.pk/publicdata/explore?ds=d5bncppjof8f9_&met_y=it_net_user_p2&idim=country:PAK&dl=en&hl=en&q=internet+users+in+pakistan (accessed 29 June 2012).

96. A. Attaa, "Internet users in Pakistan hit 17.5 million mark," *ProPakistani*, 24 January 2009, at http://propakistani.pk/2009/01/24/internet-users-in-pakistan-hit-175-million-mark (accessed 20 July 2012).

97. Alexa, "Top Sites in Pakistan," at http://www.alexa.com/topsites/countries/pk (accessed 29 June 2012).

98. Pakistan Blog Awards, "About," at http://pakistanblogawards.com/about (accessed 14 August 2012).

99. S. Qazi, "What's in a blog?," *Herald*, 18 June 2012, at http://herald.dawn.com/tag/pakistan-blog-awards (accessed 27 August 2012).

Table 6.

Top 10 social networks and websites featuring user-generated content

	Site	Rank in Pakistan
1	Facebook	1
2	Blogspot.com	5
3	LinkedIn	8
4	Twitter	11
5	Blogger.com	12
6	Daily Jang	13
7	Wordpress	15
8	Pinterest	23
9	Tumblr	34
10	Express Tribune	42

Source: Alexa, "Top Sites in Pakistan," at http://www.alexa.com/topsites/countries/pk (accessed 6 February 2013)

Independent blogs are increasingly influential and often serve a watchdog role over the government and traditional media. Although the blogs receive a small number of unique visitors, they have a wide impact as they are regularly consulted by mainstream media journalists and producers. Popular blogs that routinely shape and critique mainstream media narratives include the media watch blogs Café Pyala and Pakistan Media Watch, the current affairs blogs Teeth Maestro and Copy Paste Material, and culture blogs such as Karachi Feminist's Oil is Opium.

The top blogs in terms of earnings from advertising revenues are technology-related, such as Redmondpie, Sizlopedia, and ProPakistani, and blogs featuring tutorials and tips for new bloggers, including Wpbeginner and Mybloggertricks.[100] Urdu-language blogs are also on the rise, though the limited availability of Urdu fonts online has discouraged UGC in the national language. (Urdu books and newspapers employ an italicized version of the Arabic script called *nastaliq*, but most blogs and websites offer the same fonts used by Arabic and Persian websites; since Pakistanis are unfamiliar with these fonts, they remain hesitant to communicate online.)[101] Owing to limited broadband availability, photo and video blogs have yet to gain in popularity.

Despite the growth of the independent blogosphere, the blogs of established media groups dominate the Pakistani blogosphere. The top blogs in Pakistan in terms of traffic are published by the largest Urdu-language daily newspaper, *Daily Jang*, and the English-language dailies *Express Tribune, Dawn*, and *The News* (see *Table 7*). The English-language papers, in particular, maintain rosters of dozens of bloggers who are allowed to submit posts through online forms; increasingly, independent bloggers prefer to publish their posts on

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100. M.A.Waheed, "Top 10 Earning Blogs and Bloggers in Pakistan," Internet Khazana, 14 March 2012, at http://www.internet-khazana.com/blog/2012/03/14/top-10-earning-blogs-and-bloggers-in-pakistan (accessed 22 August 2012).

101. Michaelsen, *New Media vs. Old Politics*, p. 39.

established news sites because these offer greater exposure as well as compensation for all contributions. Notably, the only mainstream news portals that rank among the top 10 sites in Pakistan featuring UGC are the Urdu-language *Daily Jang* newspaper and the English-language daily *Express Tribune*, which indicates how much more popular social networks are than blogs in Pakistan.

Table 7.

Top five blogs

Blog	% of overall news website traffic	Approximate no. of visitors per day
blog.jang.com.pk	2% of 98,000 visitors per day	19,600
blogs.tribune.com.pk	14% of 77,000 visitors per day	11,000
dawn.com/blog	n/a of 72,000 visitors per day	n/a
blogs.thenews.com.pk	9% of 42,000 visitors per day	3,700
blogs.dunyanews.tv	1% of 40,000 visitors per day	400

Note: n/a: not available

Sources: Alexa, "Top Sites in Pakistan," at http://www.alexa.com/topsites/countries/pk (accessed 6 February 2013); Website Traffic Spy, at http://websitetrafficspy.com (accessed 6 February 2013)

In addition to blogs, established news sites are using social networks to solicit UGC and promote interactivity online. The Jang Group, which owns the *Daily Jang* and *The News* as well as the Geo News television channel, has established separate Facebook pages for each of its news brands: Geo News' English-language page has over 192,000 followers and its Urdu-language page has more than 406,000 followers; the *Daily Jang* has over 289,000 Facebook followers; and *The News* has more than 94,000 followers. Geo News also operates a Twitter account that has over 38,000 followers. The account's Klout score, which measures an account's social influence by using social network data, is 51 out of 100.[102]

Similarly, the Express Media group manages Facebook and Twitter accounts for its English-language daily *Express Tribune* (186,000 and 42,000 followers, respectively) as well as its Express News television channel (218,000 and 30,000 followers, respectively). The Dawn Media Group, too, maintains separate Facebook pages for its Dawn.com website (152,000 followers) and the Dawn News television channel (178,000 followers). Dawn.com's Twitter account boasts 33,000 followers and has a Klout score of 64.[103]

3.1.2   Social Networks

In Pakistan, social networks are far more popular than blogs and news websites as a venue for sharing UGC. With more than 8 million registered users in February 2013, Facebook is the most visited website from within the country, attracting 4.3 percent of the country's total population and 27.6 percent of the online

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102. Klout, "Klout Score," at http://klout.com/corp/klout_score (accessed 19 January 2013). Klout measures an individual or entity's influence based on the ability to drive action on social networks. The Klout score is a single number that represents the aggregation of multiple pieces of data about social media activity.

103. All statistics in these two paragraphs were collected on 6 February 2013.

population.[104] The social network's user base in Pakistan grew by more than 563,000 in the six-month period between December 2011 and June 2012. Almost half of all Pakistani Facebook users fall in the 18–24 age bracket. In comparison, the second-most popular social network, LinkedIn, has 1.5 million registered Pakistani users, representing 0.84 percent of the country's total population and 5.34 percent of the online population.[105] Both Pinterest and Tumblr have small but growing numbers of users in Pakistan.

The popularity of the microblogging service Twitter has grown rapidly in recent years. In June 2010, Twitter became the 10th-most visited website in Pakistan, compared with 14th in the previous year.[106] Jehan Ara, president of the Pakistan Software Houses Association, describes Twitter as an important outlet for initiating debates and knowledge sharing.[107] Twitter's user base in Pakistan expanded significantly following the launch in March 2012 of an Urdu-language version of the website:[108] there were approximately 3 million users in June 2012[109] compared with 1.9 million in July 2011.[110] Twitter is also the preferred social network of Pakistani politicians, who increasingly use tweets as a way to make official statements, map political trends, and engage with the public, particularly by soliciting feedback on policies and proposals.[111] Two major political parties, the Punjab-based Pakistan Tehrik-e-Insaf (PTI) and the Pakistan Muslim League-Nawaz, have created dedicated social media wings.

In May 2010, Millat Facebook, Pakistan's first indigenous social network, was launched as part of a protest against Facebook for hosting cartoons of the Muslim Prophet Muhammad on a controversial page titled "Everybody Draw Mohammad Day."[112] As a result the Lahore High Court banned Facebook in Pakistan for 10 days on the charge that it was circulating blasphemous content, and Millat Facebook sought to take advantage of the social networking vacuum as well as to appeal to devout Muslim users. However, Millat Facebook's reach remains extremely limited, and it is ranked 18,268th in Pakistan by Alexa.

3.1.3   News in Social Media

Mainstream media outlets are increasingly using blogs and social networks to distribute their news content more widely, as described above. The emerging importance of news consumption via social media can be

104. Socialbakers, "Pakistan Facebook Statistics," at http://www.socialbakers.com/facebook-statistics/pakistan (accessed 6 February 2013).

105. Socialbakers, "Pakistan LinkedIn Statistics," at http://www.socialbakers.com/linkedin-statistics/pakistan (accessed 6 February 2013).

106. M. Kugelman, *Social media in Pakistan: Catalyst for communication, not change*, Norwegian Peacebuilding Resource Centre, Oslo, August 2012, p. 2 (hereafter, Kugelman, *Social media in Pakistan*).

107. Michaelsen, *New Media vs. Old Politics*, p. 44.

108. BBC News, "Twitter Arabic, Farsi, Hebrew and Urdu version launch," 7 March 2012, at http://www.bbc.co.uk/news/technology-17286684 (accessed 30 August 2012).

109. S. Solangi, "Social media: A new paradigm in Pakistani politics," *Daily Times*, 16 June 2012, at http://www.dailytimes.com.pk/default. asp?page=2012%5C06%5C16%5Cstory_16-6-2012_pg3_6 (accessed 19 January 2013).

110. N. Abbas, "Pakistan needs to tweet more," *Dawn,* 10 July 2011, at http://dawn.com/2011/07/10/pakistan-needs-to-tweet-morev (accessed 19 January 2013).

111. T. Siddiqui, "Parliamentarian twitterati," *Express Tribune*, 19 May 2012, at http://tribune.com.pk/story/381100/parliamentarian-twitterati (accessed 30 August 2012).

112. R. Tanveer, "Missing Facebook?," *Express Tribune*, 26 May 2010, at http://tribune.com.pk/story/16222/missing-facebook (accessed 28 August 2012).

gauged by the fact that the daily *Express Tribune* received 20 percent of its overall traffic from Facebook and Twitter in the first half of 2012. However, the majority of internet users use digital media for personal communication and entertainment. A report on internet usage in the urban centers found that 88 percent of survey respondents used the internet to check email, 56.2 percent went online to access social networks, 54 percent used the internet to download music, and 53 percent spent their time online chatting.[113] The report noted that only 35 percent of those questioned said that they used the internet for news updates.

3.2   Digital Activism

3.2.1   Digital Platforms and Civil Society Activism

Digital and social media have been successfully used in Pakistan to mobilize civil society and organize protests. Indeed, the use of social media in Pakistan to coordinate political resistance predates the Arab Spring: in 2007–2008, a pro-democracy civil society movement was fueled by the use of digital media. In March 2007, General Musharraf fired the Supreme Court Chief Justice, thus sparking a lawyers' movement for the restoration of an independent judiciary. Although the movement was initiated by lawyers, it rapidly gained support among human rights activists, students, and other middle-class professions, especially after General Musharraf imposed emergency rule in November 2007 and briefly blocked the broadcasts of all privately owned television news channels. Sustained pro-democracy protests and campaigns brought about General Musharraf's resignation, general elections in 2008, and the reinstatement in 2009 of the Chief Justice by the newly elected civilian government.

During this period, anti-Musharraf activists used SMS networks to organize flash-mobs; university students used a combination of blogs, email lists, and SMS messages to organize protests; and protestors used cameras on their mobile phones to document and archive their actions on Flickr and YouTube (some of these citizen journalism artifacts were used by CNN's "iReport" to bolster its coverage of the emergency rule). A blog named The Emergency Times became the backbone of a parallel online movement by publishing emergency-related news, live-streaming protests, posting live SMS2blog updates from rallies and other pro-democracy meetings, inspirational multimedia messages from lawyers and activists, and crowdsourcing information needed to launch campaigns against particular political figures. Meanwhile, members of the Pakistani diaspora were able to support and amplify these initiatives through Facebook. In short, civil society actors used digital and social media to mobilize and coordinate protestors and funnel information about the movement to both the domestic and international mainstream media, thus increasing its impact.[114]

In recent years, digital and social media have also been used to coordinate humanitarian and relief efforts. For example, when summer floods in 2010 affected more than 20 million people across Pakistan, citizen journalists and volunteers used blogs, Facebook pages, interactive maps, and Ushahidi-like platforms to spread

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113. Insights Research Consultants, "Net Navigation," Synergyzer, at http://www.synergyzer.com, 2010 (accessed 3 June 2013).

114. H. Yusuf, "Old and New Media: Converging during the Pakistan Emergency (March 2007–February 2008)," MIT Center for Civic Media, 12 January 2009, at http://civic.mit.edu/blog/humayusuf/old-and-new-media-converging-during-the-pakistan-emergency-march-2007-february-2008?page=0%2C4#4 (accessed 14 August 2012) (hereafter, Yusuf, "Old and New Media").

information about emergency relief efforts, coordinate donations and advertise charitable campaigns, and document the extent of flood damage. Some individuals who visited flood-affected areas used cameraphones and photoblogs to map the progress of relief expeditions.[115]

Certain marginalized groups also use digital media to document human rights violations and state oppression. For example, residents of the western province of Balochistan use digital media to air grievances against the Pakistani state. Since 2005, Baloch groups have been waging a nationalist insurgency to protest against the province's underdeveloped conditions; state security forces have tried to suppress this insurgency through the abduction, torture, and extrajudicial killings of Baloch separatists and human rights activists, and have successfully censored most mainstream media coverage of the province. To counter the media vacuum, Baloch activists have launched online newspapers, blogs, Facebook groups, and video-sharing channels to facilitate communication, document human rights violations, and share photographs of missing persons'believed to have been abducted by state security forces.[116] Similarly, religious minority groups, particularly from the widely persecuted Shia and Ahmadi communities, have launched websites and blogs to document instances of sectarian violence and campaign for their rights.

Digital media is also increasingly used to galvanize social movements around particular issues or launch awareness campaigns. For example, in March 2012, the online rights group Bytes for All used blogs, Twitter, Facebook, and online petitions to create awareness about the PTA's attempt to procure an internet filtering system capable of blocking up to 50 million websites.[117] Most effectively, online activists were able to contact international technology companies and secure their commitment not to bid for the PTA tender. As Pakistan's mainstream media reported widely, the PTA was compelled to withdraw its tender. Similarly, Citizens For Democracy, an umbrella group of professionals, trade unions, and political parties, uses social media to document the misuse of Pakistan's controversial blasphemy laws and hosts debates about the laws, which are too sensitive to discuss in the mainstream media, on its blog and Facebook page (see section 4). The group has also used digital media to gather signatures for open letters and petitions addressing government officials.[118]

Civil society members have effectively used digital media for mainstream media monitoring purposes. As the veteran journalist and television talk show host Talat Hussain put it, "If there's one sphere that judges [those of] us [in the mainstream media], it's the bloggers. They're taking the mickey out of us—they have blogs and websites on us."[119] Indeed, blogs such as the anonymous Cafe Pyala and Pakistan Media Watch regularly document and critique unethical practices by professional journalists, inaccurate or poorly fact-checked news reports, and improper editorial decisions by mainstream media outlets. For example, in December 2010,

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115. Kugelman, *Social media in Pakistan*, p. 3.

116. S. Ahmad and N. Dad, "Pakistan: Fighting for Human Rights in Balochistan Online," *Global Information Society Watch 2011: Internet Rights and Democratisation,* Association for Progressive Communications and Hivos, Goa, 2011, pp. 214–216.

117. Bytes for All, "Pakistan Internet Filtering Scare: Citizens Await Answers," 30 March 2012, at http://content.bytesforall.pk/node/47 (accessed 29 August 2012).

118. Michaelsen, *New Media vs. Old Politics*, p. 60.

119. Interview with Talat Hussain, columnist and television talk show host, Karachi, 15 July 2012.

Cafe Pyala exposed the first case of WikiLeaks being used for propaganda purposes when four Pakistani newspapers published a news story about leaked diplomatic cables in which US diplomats criticized the Indian government and mocked Indian army generals. Cafe Pyala raised questions about the authenticity of these WikiLeaks, noting that none of the stories carried journalist bylines and were instead credited to the Online Agency (an Islamabad-based news service, which was subsequently found to have planted the stories on behalf of Pakistan's intelligence agencies).[120]

Moreover, in January 2012, an online movement resulted in Maya Khan, a morning show host on the privately owned Samaa TV, being fired after airing a show in which she chased down couples in Karachi's parks and demanded to know whether they were married. Outraged by this moral policing and invasion of privacy, many net-connected Pakistanis used blogs, tweets, and Facebook status updates to criticize Ms Khan and Samaa TV. Loosely organized under the banner of Citizens for Free and Responsible Media, online activists used Facebook to share PEMRA's online feedback form and encouraged people to officially complain against Samaa TV to the media regulator, and uploaded a petition against media vigilantism on Change.org. which gathered 4,800 signatures in 48 hours. Activists also organized an email and SMS campaign, which aimed to flood the channel owner's email and phone inboxes with messages calling for Ms Khan's show to be taken off air.[121] Responding to this cyber-activism, Samaa TV first asked Ms Khan to apologize to her viewers, and eventually fired her from the channel.

3.2.2   The Importance of Digital Mobilizations

Although Pakistani civil society increasingly—and successfully—deploys digital and social media in political protests, social movements, and humanitarian initiatives, the overall impact and potential of digital mobilizations remains contested.

Online activists argue that digital media have extraordinary potential to mobilize the public and bring about social change; they point to the fact that Facebook is the most visited website in Pakistan and that blogging sites such as Blogger and Wordpress rank highly as well. Many also reject the perception that social media are populated by an urban, English-speaking elite. For instance, Beena Sarwar, a veteran Pakistani journalist and active member of Citizens for Free and Responsible Media, describes how middle- and working-class youngsters from the outskirts of Karachi and small towns in southern Punjab participated in the online movement against Ms Khan.[122] And, as described above, Pakistani politicians are increasingly convinced of the reach and impact of digital mobilizations, especially since the cricketer turned politician and chairman of PTI, Imran Khan, generated unprecedented support among urban, middle-class young people primarily through the use of social media (he boasted almost 350,000 followers on Twitter on 23 August 2012).

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120. Cafe Pyala, "Leaking Away," 9 December 2010, at http://cafepyala.blogspot.co.uk/2010/12/leaking-away.html (accessed 21 August 2012).

121. B. Sarwar, "No to vigil-auntyism: Thousands protest media's moral policing in Pakistan," 25 January 2012, at http://beenasarwar.wordpress.com/2012/01/25/no-to-vigil-auntyism-thousands-protest-medias-moral-policing-in-pakistan (accessed 18 August 2012).

122. Telephone interview with Beena Sarwar, independent journalist and online activist, 22 June 2012.

But according to one analysis, there are too many constraints on digital media for it to become a tool for change or civil society mobilization. This analysis highlights the low penetration rate of broadband internet, which means that most internet users cannot avail themselves of many key features of social media, for example, streaming videos. It also makes the argument that the feisty, anti-government, and largely socially progressive mainstream media outlets "co-opt the ability of new media to serve as a force for change."[123]

State censorship also limits the impact of digital media. Despite its decision not to pursue an internet filtering system, the PTA regularly censors websites on an ad hoc basis, without specifying why certain sites are targetted or publishing a comprehensive list of banned sites. As of July 2012, more than 15,000 sites remained blocked under the generic complaint of hosting pornographic or blasphemous content.[124] In June 2013, Citizen Lab, a research group at the University of Toronto, released a report stating that the Pakistan government uses Netsweeper technology to categorize and filter billions of websites.[125] And despite repeated calls by digital rights activists for the PTA to make its online censorship criteria more transparent and its web monitoring methods more systematic, the decision to block online content rests with a shadowy inter-ministerial committee that is not officially acknowledged or accountable to the public. Net censorship particularly affects marginalized groups that rely on digital media for much of their activism: since 2006, the Pakistan government has exploited a Supreme Court ruling calling for the blocking of all blasphemous online content to crack down on anti-state Baloch nationalist websites, thousands of which have been routinely blocked by the PTA. In July 2012, the government blocked two websites—one managed by members of the Shia community and the other by Ahmadis—documenting violent incidents and discrimination against minority communities.[126]

However, not all digital mobilizations in Pakistan have a positive impact. Violent extremist organizations and militant groups increasingly use social networks and video-sharing platforms to spread hate-inciting and propaganda messages and recruit new members.[127] Online video-sharing is particularly common: violent extremist groups upload amateur videos of suicide bombings, militant attacks against Pakistan army convoys, training sessions in militant camps, and video footage of tribal villages allegedly destroyed by American drone strikes to various extremist websites, YouTube, and other video-sharing sites.[128] Militant groups also use viral text-messaging campaigns to call for violence against religious minorities or to rouse anti-West sentiments. Increasingly, extremist organizations such as the anti-Shia Lashkar-e-Jhangvi and anti-India Lashkar-e-Taiba (LeT), among others, maintain Facebook and Twitter accounts for both incitement and recruitment

123. Kugelman, *Social media in Pakistan*, p. 4.

124. S. Saleem, "Blocked, Denied, Censored: 15,756," BoloBhi, 18 July 2012, at http://bolobhi.org/press-release-public-statements/press-releases/blocked-denied-censored-15756 (accessed 29 August 2012).

125. Express Tribune, "Pakistan government using Netsweeper for internet filtering: Report," 20 June 2013, at http://tribune.com.pk/story/565879/pakistan-government-using-netsweeper-for-internet-filtering-report (accessed 21 June 2013).

126. Bytes for All, "Locking up cyberspace for minorities in Pakistan," 5 July 2012, at http://content.bytesforall.pk/node/58 (accessed 27 August 2012).

127. I. Ahmed, "Newest friends on Facebook? Pakistan militants," *Christian Science Monitor*, 8 July 2010, at http://www.csmonitor.com/World/Asia-South-Central/2010/0708/Newest-friends-on-Facebook-Pakistan-militants (accessed 15 August 2012).

128. Michaelsen, *New Media vs. Old Politics*, p. 46.

purposes. Abu Jindal, a member of LeT, the group held responsible for the 2008 terrorist attacks in Mumbai, recently told his Indian interrogators that the organization maintains a trained web team to manage its web servers, online video-sharing, and social media presence.[129] Similarly, Hizbut Tahrir, a global Islamist group that is outlawed in Pakistan, uses SMS messages and Facebook to appeal to young, middle-class Pakistanis.

Ultimately, the impact of digital mobilizations, whether positive or negative, will depend on the spread of web-enabled smartphones and the government's efforts to control social media access via mobile phones. Between 2007 and 2012, most protest, social, and humanitarian mobilizations succeeded through the combined use of digital and social media by a small percentage of net-connected Pakistanis and a much larger group of activists equipped with mobile phones. For example, during the 2007–2009 pro-democracy lawyers' movement, a combined use of digital technologies and mobile phones helped bridge the digital divide in a country where, at the time, only 17 million people had internet access. Due to the popularity of SMS text messaging, a secondary readership was established, as calls for organized political action distributed through emails or Facebook inevitably included synopses that were copied as SMS text messages and circulated well beyond cyberspace.[130] This two-tier use of digital media and mobile phones could enable digital mobilizations to become extremely influential in the future.

3.3   Assessments

Owing to the popularity of social networks and the growing appeal of blogs and microblogging, established news media outlets are increasingly using digital media to disseminate information and engage online consumers. Indeed, the mainstream media increasingly co-opt the role played by social media elsewhere by hosting independent bloggers and maintaining Twitter accounts known for criticizing the government and supporting socially progressive campaigns. That said, most Pakistanis continue to use social networks and other digital media for personal rather than news consumption, and mainstream media is still primarily consumed through television, radio, and print.

Members of Pakistani civil society are more and more using digital media to organize political resistance, humanitarian interventions, social movements, and awareness campaigns, in particular, the mobilization of a pro-democracy civil society movement in 2007–2009 that led to the ousting of General Musharraf.

Since then, one of the most powerful deployments of digital media in Pakistan has been as a civil society tool to monitor mainstream media content. Many of the most effective social media campaigns have been media monitoring efforts, like the online movement that led to Ms Khan being fired from Samaa TV. This aspect of digital mobilization may have the greatest potential, given that the mainstream media have not yet developed a self-regulation code and the government's media regulatory authority is primarily concerned with licensing

129. N. Chauhan, "Lashkar-e-Taiba has dedicated internet team: Abu Jundal," *Economic Times*, 2 July 2012, at http://economictimes.indiatimes.com/news/politics/nation/lashkar-e-taiba-has-dedicated-internet-team-abu-jundal/articleshow/14573585.cms (accessed 25 July 2012).

130. Yusuf, "Old and New Media."

(see section *7.1.2.1*). Media monitoring by the public is thus one of the only checks Pakistan's burgeoning media industry faces.

However, the impact of digital mobilizations continues to be limited by the slow spread of broadband internet and increasingly common state censorship. The positive effects of digital media as a tool for change are also countered by its frequent adoption by violent extremist groups that use social networks, online video-sharing, and SMS campaigns to incite hate and recruit new members.

4. Digital Media and Journalism

4.1 Impact on Journalists and Newsrooms

4.1.1 Journalists

The rapid increase in the number of 24-hour news and current affairs channels on satellite/cable television as well as online editions of newspapers has brought significant changes in the pace of the newsroom.[131] Journalists, producers, and editors consistently describe the pressure of producing content to feed the 24/7 news cycle. As Mr Hussain put it, "If there is not enough content, you have to contrive and create some. You push shallow content as hard content—anything that happens becomes news."[132] Similarly, at a workshop on investigative journalism, Arif Nizami, editor of the English-language daily paper *Pakistan Today*, said, "There is too much emphasis on the number of reports submitted rather than their content, which adversely affects the quality of the report."[133] This is especially apparent in Urdu-language dailies and national, Urdu-language television channels, where beat reporters are under tremendous pressure to file as many stories as possible.

Print media professionals say that they are being forced to compete with television channels, and report spending much more time in the newsroom watching television for breaking news. Consequently, print news stories are becoming summaries of the previous night's television news. In English-language and high-quality Urdu-language daily papers, this trend has prompted some editors and reporters to use print media to improve the context of television news. According to Gibran Peshimam, political editor at the *Express Tribune* and former editor of the Karachi city pages at *The News* daily, "Print reporters are now under pressure to do value-added work; they take basic facts from television news reports and start doing more investigations so that their stories offer something new."[134] Mr Peshimam describes how the work of the print reporter increasingly involves desk research rather than field reporting as a result. This shift has led to certain news stories being better contextualized, but it has also led to an overall reduction in the number of topics covered by the news media.

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131. Since only a handful of FM radio channels are permitted by PEMRA to produce original news bulletins, this discussion is limited to print, television, and online media.

132. Interview with Talat Hussain, columnist and television talk show host, Karachi, 15 July 2012.

133. G.B. Ahmad, *State of Investigative Journalism in Pakistan*, Individualland, Islamabad, January 2012, p. 42 (hereafter, Ahmad, *State of Investigative Journalism in Pakistan*).

134. Interview with Gibran Peshimam, political editor at *Express Tribune*, Karachi, 15 September 2012.

Indeed, some editors believe the race to keep up with television is reducing newspapers' independence and agenda-setting ability as well as the total amount of original reporting on varied issues. "We no longer decide our own point of view on an issue," complains Tahir Najmi, editor of the Urdu-language *Daily Express*, "We publish whatever is running on television. Even if we think that something is a non-issue and deserves no more than a single-column mention on the city pages, if it runs as a ticker or news bulletin on television, we are forced to move it up to the front page. Our professional approach has been completely compromised [by the growth of the television industry]."[135]

Television journalists, meanwhile, complain of the need to produce content that will boost ratings rather than work that has journalistic value. Producers admit to re-broadcasting news first aired by a rival channel without conducting independent reporting or verifying the information, in an effort to keep ratings high. This practice was highlighted in June 2012, when most television news channels broadcast reports about five women in Kohistan being killed on the orders of a *jirga* (tribal council) for appearing in an online video in which they can be seen singing and clapping at a wedding. The media hype surrounding this incident caused the Supreme Court to launch an investigation into the women's whereabouts on its own initiative.[136] When it transpired that the women were alive, the broadcast media were widely criticized for failing to investigate the issue before broadcasting reports.[137]

When channels do produce news reports, journalists and producers have to find ways to make them more sensational or entertaining. As the chief executive officer of one of the top-ranking news channels says, "News reports have to be spiced up with a musical soundtrack, animations, clever montages … I often think I should be hiring musicians, not journalists."[138] Crime reporting has been particularly affected by the ratings race, as investigative reporting is often presented in the form of dramatized re-enactments wherein actors recreate murders, rapes, and abductions. "News reporting has become like producing a serialized entertainment drama," says Zahid Hussain Siddiqui, director of news at Samaa TV.[139] This trend distracts from reporters' ability to fact-check stories or to include a variety of sources.

The pressure to boost ratings has also compromised editorial decision-making. Producers report that they increasingly generate news reports about urban localities that are likely to host Peoplemeters, the devices that measure viewership and determine ratings, and thus advertising revenues, even if stories with more journalistic value are occurring elsewhere. If a channel's ratings spike following coverage of a locality, the producer assumes there is a Peoplemeter in the vicinity and generates multiple news bulletins in an effort to skew ratings. According to a senior news producer who has worked at three news channels that rank in the

135. Interview with Tahir Najmi, editor of *Daily Express*, Karachi, 12 July 2012.

136. Z. Gishkori and S. Nizami, "Kohistan video: Human rights activists meet two out of five girls," *Express Tribune*, 7 June 2012, at http://tribune.com.pk/story/390203/kohistan-video-human-rights-activists-meet-two-out-of-five-girls (accessed 23 August 2012).

137. O.A. Mangalwala, "Kohistan jirga: The dirty picture," *Express Tribune*, 9 June 2012, at http://blogs.tribune.com.pk/story/12029/kohistan-jirga-the-dirty-picture (accessed 23 August 2012).

138. Interview with the CEO of one of the top five television news channels (confidentiality requested), Karachi, 4 July 2012.

139. Interview with Zahid H. Siddiqui, director of news at Samaa TV, Karachi, 4 July 2012.

top 10, story development meetings focus more and more on mapping the location of Peoplemeters rather than identifying pressing issues worthy of journalistic investigation.[140]

Despite widespread cross-media ownership, newsroom convergence is still not common, and reporters are rarely required to produce content across more than one medium. In fact, the greatest change in some news organizations has been the creation of a dedicated web (or online) desk to manage the websites of daily newspapers and television news channels. These desks are staffed with online producers, multimedia editors, graphic designers, and software engineers, along with a small number of reporters, and are tasked with aggregating and web publishing news content produced for print, television, and radio across the media group. Online producers are also responsible for commissioning and editing UGC and moderating user feedback, for example in the comments section of blogs.

Print, television, and online journalists also describe a mounting reliance on social media, especially Twitter, for monitoring breaking news and disseminating news stories or multimedia news packages. As Mr Peshimam put it, "I monitor my Twitter stream all day and often read about breaking news via tweets, even before it's covered on television."[141] Although it speeds up the news cycle, this use of social media is contributing to the echo chamber effect whereby all news organizations, across media, focus on the coverage of certain news stories at the expense of others.

4.1.2   Ethics

Journalism ethics are frequently compromised in Pakistan's competitive, poorly regulated media market. The most common questionable practice is the re-publishing or re-broadcast of information without verifying its accuracy or cross-checking with sources (see section *4.1.1*). This practice is especially common among television news channels, which are under pressure to break news to earn higher ratings.

The shift to digital formats and online publishing has also increased plagiarism and unethical leaks. Entire news articles and photographs are commonly re-published by rival news organizations without attribution; in particular, print journalists complain that their stories are lifted by television reporters. To a large extent, this occurs because journalists are not well versed in copyright law and, according to one study, are unaware of digital tools such as watermarks and digital signatures that could help them enforce copyright, especially on visual work.[142]

Self-serving leaks, meanwhile, are increasingly common at television channels, and often take the form of unaired behind-the-scenes footage being shared anonymously via YouTube. For example, in August 2011, a compilation of video clips from Geo TV featuring the popular "televangelist" Dr Aamir Liaquat was leaked

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140. Interview with a freelance journalist and former senior news producer at three news channels (confidentiality requested), Karachi, 7 July 2012.

141. Interview with Gibran Peshimam, political editor at *Express Tribune*, Karachi, 15 September 2012.

142. Bytes for All, "Digital Security and Journalists: A Snapshot of Awareness and Practice in Pakistan," Internews Centre for Innovation and Learning, May 2012, p. 12, at https://www.internews.org/sites/default/files/resources/Internews_PK_Secure_Journalist_2012-08.pdf (accessed 13 December 2013) (hereafter, Bytes for All, "Digital Security and Journalists").

online. In the leaked videos, Mr Liaquat can be seen using abusive language, making vulgar gestures, mocking clerics, and singing Bollywood songs.[143] Bloggers speculated that Geo TV itself leaked the videos (at the time of the leak, Mr Liaquat was working for ARY News) in an attempt to reduce the popular presenter's appeal, and thus a rival channel's ratings; however, this was never confirmed and it has to be said that there was at least some public interest justification. Similarly, in June 2012, another behind-the-scenes video was leaked on YouTube showing the Dunya TV news anchors Meher Bokhari and Mubashir Lucman planting questions and taking instructions from politicians and the channel's managers on how to pose questions during an interview with a real-estate tycoon.[144] Subsequently, Dunya TV lodged a criminal case against unidentified thieves for stealing the unedited footage from the channel's Islamabad offices.[145]

The rapid growth of the media industry has also corruption among journalists. To be clear, corruption is not a consequence of digitization: the veteran journalist Zamir Niazi describes how military and civilian governments since the 1960s have paid off journalists to promote the military establishment's or ruling party's official stance in the press.[146] This form of corruption is colloquially known as *lifafa* (envelope) journalism. Though not a new phenomenon, corruption has increased with the proliferation and growing influence of the broadcast media.

Corruption occurs at the highest levels: the Ministry of Information and Broadcasting admitted that it maintains an unaudited Secret Expenditure fund, which it claims is used to ensure the "welfare of journalists" and which was worth up to PKR 120 million (US$1.2 million) in the 2012–2013 financial year (the fund was worth PKR 153.5 million, or US$1.5 million, in 2011–2012).[147] Initially, in September 2012, the government refused to share details about how the fund is spent with the Supreme Court, raising concerns that it is misused to buy off journalists. Following further investigations and hearings, the Supreme Court in April 2013 released a list to the public of all the journalists who had benefitted from the fund through perks such as plane tickets and hotel accommodation as well as non-specific "financial assistance" (the court is still withholding details of 174 payments worth approximately US$1 million).[148]

Questions about government officials and journalists engaging in corrupt practices were also raised after the leak of the Dunya TV video mentioned above featuring Mr Bokhari and Mr Lucman planting an interview: the leaked video comprised excerpts from an exclusive interview with Malik Riaz, a property tycoon who

143. M. Kari, "Dr Aamir Liaquat: Defamation of faith's Dr Jekyll," *Express Tribune*, 16 August 2011, at http://blogs.tribune.com.pk/story/7508/dr-aamir-liaquat-defamation-of-faiths-dr-jekyll (accessed 1 September 2012).

144. S. Popalzai, "Video leak: Lucman, Bokhari run 'planted show' with Malik Riaz," *Express Tribune*, 14 June 2012, at http://tribune.com.pk/story/393636/video-leak-lucman-bukhari-run-planted-show-with-malik-riaz (accessed 23 August 2012).

145. Z. Qureshi, "Dunya TV lodges FIR of TV footage theft," *Pakistan Observer*, 13 June 2012, at http://pakobserver.net/201206/17/detailnews.asp?id=160621 (accessed 1 September 2012).

146. Z. Niazi, *Web of Censorship*, Oxford University Press, Karachi, 1994.

147. *Express Tribune*, "Secret fund: Govt refuses to share details with SC," 13 September 2012, at http://tribune.com.pk/story/435871/secret-fund-govt-refuses-to-share-details-with-sc (accessed 13 September 2012).

148. *Dawn,* "SC releases list of journalists paid 'secretly'," 22 April 2013, at http://dawn.com/2013/04/22/explosive-list-of-bribed-journalists-to-be-made-public-today (accessed 1 June 2013).

accused the son of the Supreme Court Chief Justice of corruption. The video revealed that during the course of the interview, both the news anchors and Mr Riaz received phone calls from serving politicians, including the prime minister's son. This evidence of the close and potentially improper ties between media and politics provoked a Supreme Court inquiry into the matter: on 15 June 2012, the Chief Justice convened a full court meeting, the first ever in Pakistan's history to be aired live on television, and interrogated Dr Abdul Jabbar, the head of PEMRA, about its oversight of the industry.[149]

While none of the allegations of corruption against journalists has been proven, it is widely accepted that the *lifafa* culture endures. According to Matiullah Jan, a correspondent and anchor for Waqt News, in addition to secret fund payments, journalists receive subsidized properties, business contracts, government permits, and other perks such as official accommodation from government officials in exchange for writing favorable stories.[150] (Mr Jan himself presented a show about these and other corrupt practices among journalists titled "*Apna Gareban*" (Accountability of Media) on Dawn News, but was forced to cancel the show in July 2011 after only 10 episodes were aired owing to pressure from the media industry, advertisers, and cable network operators.) Talat Hussain states that "there is a cosy relationship between media houses and political groups," adding that media groups have become "players in power politics" by being "co-opted by political groups who [determine] channels' [political] alignment, policies, how much space [on air] is granted to whom."[151]

Corruption also extends beyond the political realm. NGOs and private companies reportedly pay off journalists to promote their latest campaigns and products.[152] On an everyday basis, too, journalists are offered bribes and other incentives to cover certain activities. "There is low-level, direct pressure on the reporters," says the news director of one of the news channels ranked in the top 10. "They get calls from parties, extremist groups, unions, etc. who pay the reporter directly to cover a certain rally or press conference."[153] One reason such corruption thrives is because journalists across all media receive low pay and face persistent job insecurity; for example, in 2009, ARY Digital Network was accused of not paying salaries for three consecutive months.[154]

149. M. Zaidi, "Thou shalt not judge," *Herald*, 10 July 2012, at http://herald.dawn.com/2012/07/10/thou-shalt-not-judge.html (accessed 23 August 2012).

150. Interview with Matiullah Jan, a correspondent and anchor with the television channel Waqt News, Islamabad, 9 August 2012.

151. Interview with Talat Hussain, columnist and television talk show host, Karachi, 15 July 2012.

152. Pakistan Media Watch, "Lifafa Journalism," 3 September 2011, at http://pakistanmediawatch.com/2011/09/03/lifafa-journalism/ (accessed 1 September 2012).

153. Interview with the news director of a privately owned news channel (confidentiality requested), Karachi, 5 July 2012.

154. D. Gokulan, "Employees of TV Channel Allege Non-payment of Salaries," 4 February 2009, at http://www.khaleejtimes.com/DisplayArticle08.asp?xfile=/data/theuae/2009/February/theuae_February91.xml&section=theuae (accessed 1 June 2013).

4.2   Investigative Journalism

4.2.1   Opportunities

The liberalization of the broadcast media in 2002 and the resultant proliferation in television news channels increased the number of journalists from 2,000 to 17,000 between 2002 and 2010.[155] Although liberalization has created more opportunities for journalism, there are mixed perceptions in the media about whether this growth has improved the quality of journalism: while the radio journalist Shireen Akhtar believes that "new recruits are better educated and motivated to bring a change in the country through journalism,"[156] the Geo News reporter Ghulam Mustafa believes that "journalistic quality has dropped immensely because of the recruitment of non-professionals."[157]

Journalists also report that increased access to the internet has made it significantly easier to research, contextualize, and fact-check their investigative news reports. Seventeen out of 20 beat reporters working in print, television, and radio across the four provinces interviewed for this study stated that they used the internet to do story-specific research, with an additional reporter saying that he reads newspapers from across Pakistan and the world online. Reporters and producers working for the television channels of large media groups also describe how digital formats have made it much easier to edit and archive video footage and repackage it for special reports and web publishing.

Journalists also increasingly share and circulate their work online: the impact of increased internet access has been felt most greatly by reporters based in small towns and villages working for Urdu-language dailies, who until recently were mailing in their news reports to bureaus based in large cities, but now correspond with editors over email, making their stories more timely. Mussarat Ullah, a Peshawar-based staff reporter with Dunya TV, adds that he uploads any completed news reports that are not broadcast by his channel to the internet so that viewers can have access to more and various news content.[158]

4.2.2   Threats

In 2011, the CPJ named Pakistan the deadliest country in the world to be a journalist for the second year in a row: seven journalists were killed in 2011, and eight in 2010.[159] Three more journalists were killed in connection with their work between January and September 2012.[160] Seventy-three journalists have been killed in Pakistan between 2000 and 2011, and more than 2,000 have been arrested, abducted or injured during this period.[161]

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155. D. Nakamura, "Pakistan's press piles on president," Washington Post, 21 October 2010, at http://www.washingtonpost.com/wp-dyn/content/article/2010/10/21/AR2010102102292.html (accessed 29 August 2012).

156. Interview with Shireen Akhtar, producer for radio station FM 105, Karachi, 19 July 2012.

157. Interview with Ghulam Mustafa, journalist with Geo News, Karachi, 21 July 2012.

158. Interview with Musarrat Ullah, staff reporter with Dunya TV in Peshawar, 19 July 2012.

159. G.B. Ahmad, *State of Investigative Journalism in Pakistan*, Individualland, Islamabad, January 2012, p. 38 (hereafter, Ahmad, *State of Investigative Journalism in Pakistan*).

160. Committee to Protect Journalists.

161. Intermedia Pakistan, Pak Institute for Peace Studies, and Pakistan Federal Union of Journalists, *Media Safety in Conflict Situations: Report of International Conference on Media and Professionalism: Keeping Journalists and Journalsim Safe in Hostile Environments*, Islamabad, 12–13 December 2011, p. 5 (hereafter, *Media Safety in Conflict Situations*).

These poor rankings reflect the fact that Pakistani journalists face threats and violence from militant and extremist groups, political parties, the military, intelligence services, and criminal gangs, all of which have escalated significantly since 2007. On a day-to-day basis, many journalists endure physical surveillance, phone tapping, computer hacking, intimidation of their family and friends, and threats over their job security. According to a survey of journalists by the media advocacy group Bytes for All, 73.1 percent of respondents say that their work as a journalist or blogger has caused them concerns, with 40.7 percent of respondents saying that being personally threatened is the biggest threat faced by Pakistani journalists.[162]

The majority of the dead journalists (57 percent according to the CPJ) had covered politics. Speaking at a conference on media safety, Absar Alam, a political talk show host on Aaj TV and the director of Open Society Foundation Pakistan, said "political parties ... are not averse to sanctioning violence against the journalists who criticize their policies."[163] Political parties not only directly intimidate or use violence against individual journalists, but also pressure media owners into publishing or broadcasting news content that serves their party agenda. This is particularly true in Karachi, Pakistan's largest city, where ethno-political violence is rampant and political parties use threats and violence to control the media coverage of rival parties. For example, in January 2011, Wali Babar, a Karachi-based reporter for Geo TV who reported on ethno-political violence, was shot and killed. A state official subsequently told Geo TV's management that a political party was responsible for Mr Babar's death.[164]

Journalists are also under threat from Pakistan's security establishment, specifically the intelligence agencies. On 29 May 2011, Saleem Shahzad, the Pakistani correspondent for *Asia Times Online*, disappeared after writing a two-part article about the terrorist organization Al Qaeda's infiltration of the Pakistan navy, and his tortured body was found two days later. Before disappearing, Mr Shahzad had alerted serveral colleagues to the fact that he had been receiving death threats from the Inter-Services Intelligence (ISI).[165] In September 2010, Umar Cheema, an investigative reporter with *The News*, was abducted and assaulted by intelligence officials, but mustered the courage to report it on television.[166]

Pakistan-based extremist and militant groups also target journalists, both in retaliation for military operations against militant hide-outs as well as to protest media outlets' reluctance to publish or broadcast their press releases and statements. In December 2009, for example, three people were killed and 20 wounded when a suicide bomber attacked the Peshawar Press Club.[167] At least 12 journalists were killed in 2001–2012 in the FATA along the border with Afghanistan, where most militant groups are based (according to tribal

162. Bytes for All, "Digital Security and Journalists," p. 9.

163. *Media Safety in Conflict Situations*, p. 40.

164. S. Ricchiardi, *Challenges for Independent News Media in Pakistan*, Center for International Media Assistance, Washington, DC, 30 July 2012, p. 22 (hereafter, Ricchiardi, *Challenges for Independent News Media in Pakistan*).

165. Ricchiardi, *Challenges for Independent News Media in Pakistan*, p. 20.

166. Ricchiardi, *Challenges for Independent News Media in Pakistan*, p. 26.

167. K. Brulliard and H.N. Khan, "Suicide attack kills 3 outside Pakistani press club," *Washington Post*, 23 December 2009, at http://www.washingtonpost.com/wp-dyn/content/article/2009/12/22/AR2009122200219.html (accessed 25 September 2012).

journalists, intelligence agencies are responsible for an unspecified number of these deaths).[168] In June 2012, the Pakistan Taliban claimed responsibility for a gun attack against the Karachi offices of the privately owned Aaj TV channel; a Taliban spokesman explained that the channel was attacked for failing to adequately cover their activities.[169]

The security situation for journalists is particularly dire in Pakistan's western province of Balochistan, where separatist groups have been waging an insurgency since 2006. Balochistan-based journalists are targetted by separatists, intelligence and military officials, political parties, and violent sectarian organizations active in the province. As a result, 22 journalists were killed in Balochistan in 2009–2012. Speaking at a media workshop in July 2012, the Quetta Press Club general secretary, Abdul Khaliq Rind, described the province as a "battleground" and said: "You cannot look at media's work in isolation. You cannot write about any group. It is very difficult for all of us."[170]

The threat against journalists is exacerbated by their lack of training and equipment, especially in conflict-hit areas, and the constant pressure from media organizations to break news at the expense of their safety. As Mr Alam put it:

> Top management is not concerned about the kind of practices they are introducing ... Media organizations in Pakistan generally do not offer life insurance cover to journalists. Basic safety equipment is not provided. Journalists in Pakistan are pushed by their managers ... to go after the story without thinking of their life and well-being. This is happening because of a rat race for ratings.[171]

Outside conflict-hit areas, journalists are not trained how to avoid phone and computer hacking and other forms of surveillance. Indeed, 90.4 percent of journalists have never received basic digital security training.[172]

Pakistan's long-standing record of impunity in journalist murders further compromises the media industry's security. Since 2002, the government has commissioned six high-level investigations into journalist killings, but only one case led to a prosecution.[173] For example, in January 2012, the judicial inquiry commission tasked with identifying Mr Shahzad's killers failed to identify those responsible, despite strong indications of ISI's involvement in his death. Noting that the police did not adequately question Pakistan's intelligence officials during the criminal investigation into Mr Shahzad's murder, the report concluded that the Pakistani state, militant groups, and "foreign actors" could all have had the motive. Human Rights Watch criticized the

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168. I. Junaidi, "Fata journalists on razor's edge," *Dawn*, 1 March 2012, at http://dawn.com/2012/03/01/fata-journalists-on-razors-edge (accessed 24 September 2012).

169. B. Khan, "Taliban claim responsibility for attack on Aaj TV," Aaj.tv, 26 June 2012, at http://www.aaj.tv/2012/06/tehrik-e-taliban-claim-responsibility-for-attack-on-aaj-tv (accessed 24 September 2012).

170. *Dawn*, "22 Balochistan journalists killed in four years," 9 July 2012, at http://dawn.com/2012/07/09/22-balochistan-journalists-killed-in-four-years (accessed 22 September 2012).

171. *Media Safety in Conflict Situations*, p. 40.

172. Bytes for All, "Digital Security and Journalists," p. 12.

173. Committee to Protect Journalists.

special investigation, pointing out that the judicial inquiry team failed to interview Mr Cheema, the other journalist who was abducted and tortured by the ISI.[174]

The multifaceted threats against journalists are often cited by media commentators as the reason why little investigative journalism is done in Pakistan. It is more likely, however, that this is the case because the concept and practice of investigative journalism are poorly developed in Pakistan. As Mr Hussain said, "Investigative journalism is a term we love, but the truth is it was not done properly even when we were doing it for newspapers alone and had the time to put our minds to it. Now, everyone is in a blazing hurry to break news, so what can become of investigative journalism in this age?"[175]

During a series of workshops on investigative journalism in January 2012, editors and reporters unanimously conceded that most journalists in Pakistan lack a proper understanding of the tenets and methodologies of investigative journalism. Most participants stated that the pressure to produce news reports was a disincentive to doing investigative journalism. A senior journalist, Imtiaz Gul, said: "Daily beat reporters cannot dig deeper. The pressure of producing a report or two daily is taxing and … becomes a compulsion."[176]

Others claimed that the ethos and values of news organizations did not encourage or emphasize investigative work. As a participant, Usman Cheema, put it, "If people running the news organization appreciate such work and motivate their reporters, the quality of the reporters' work will automatically improve."[177]

Many editors and news producers, including Mr Siddiqui, also complained about reporters' lack of training and awareness of media ethics and practices,[178] which is apparent, among other things, in the infrequent submission of "Right to Information" petitions since they were mandated in Article 19-A of the constitution in the 18th Amendment, passed in 2011.[179]

Investigative journalism is also constrained by the financial model of the media industry, whereby the bulk of financing and print and the entirety of financing in television and radio come from advertisers. Speaking off the record, publishers, television channel CEOs, news producers, and editors complain that they cannot publish or broadcast news reports that might anger government or private-sector advertisers. For example, one news director complained that she could not broadcast reports about one of Pakistan's main power companies, despite the ongoing energy crisis in the country, because it was a major advertiser on the channel.[180] "Commercialism is a problem," adds Mr Najmi. "You can't criticize someone who might advertise in your paper."[181]

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174. Human Rights Watch, "Pakistan: Shahzad Commission Results Marred by Free Ride for ISI," 30 January 2012, at http://www.hrw.org/news/2012/01/30/pakistan-shahzad-commission-results-marred-free-ride-isi (accessed 25 September 2012).

175. Interview with Talat Hussain, columnist and television talk show host, Karachi, 15 July 2012.

176. Ahmad, *State of Investigative Journalism in Pakistan*, p. 38.

177. Ahmad, *State of Investigative Journalism in Pakistan*, p. 41.

178. Interview with Zahid H. Siddiqui, director of news at Samaa TV, Karachi, 4 July 2012.

179. Ahmad, *State of Investigative Journalism in Pakistan*, p. 10.

180. Interview with a news director of a privately owned news channel (confidentiality requested), Karachi, 5 July 2012.

181. Interview with Tahir Najmi, editor of *Daily Express*, Karachi, 12 July 2012.

4.2.3   New Platforms

Despite the constraints described above, investigative stories find a much greater viewership and readership thanks to the proliferation of media outlets. Cross-media ownership (see section 6) allows media groups to promote their investigative work (and other special features) across platforms; for example, when the Dawn Media Group reported on a discrepancy in electoral roll numbers, it published news reports and editorials in the *Dawn* newspaper, broadcast news bulletins and special reports on Dawn News TV, and uploaded an interactive guide to electoral numbers online at Dawn.com. Furthermore, media groups such as Dawn, Express, Jang, and others maintain Facebook and Twitter accounts to promote news content widely (see section *3.1.1*). The growing trend of television channels maintaining online archives of print media and dedicated YouTube channels for popular news and talks shows is also giving journalistic content a longer shelf-life.

Digital media, including camera-equipped mobile phones, blogs, and social networking sites, have reduced the cost while increasing the convenience of investigative reporting. Citizen journalists are thus able to contribute and disseminate investigative work or evidence (see section *4.2.4*) that can form the basis of further investigations by the mainstream media, state, or judiciary. Civil society groups are also using the internet to promote issue-specific citizen journalism. For example, in January 2011 the NGO, Interactive Resource Centre, in partnership with South Asian Partnership Pakistan and Church World Service Pakistan/ Afghanistan, launched Maati.tv, an online television outlet. Maati's content is generated by correspondents at educational institutions in districts across the Punjab province who contribute three-minute-long documentaries on social and development issues.[182] However, such initiatives have limited reach; although Maati.tv had more than 11,000 "likes" on Facebook in June 2013, it received only a handful of submissions for its pre-election campaign titled "My Democratic Pakistan," which sought photo essays, vlogs (video blogs), and video clips highlighting Pakistani culture and tolerance in the run-up to general elections in May 2013.

Aside from citizen journalism, growing internet access makes content that is not published or broadcast by mainstream media outlets owing to pressure from the state, advertisers, political parties or internal biases increasingly available to the public. Bloggers occasionally break news stories that mainstream media outlets try to bury despite the fact that such activities could lead to their websites being blocked by the PTA (see section *4.2.4*). Media professionals themselves upload content that media groups are reluctant to publish or broadcast directly to blogs and video-sharing sites. For example, a group of professional journalists manage Saach.tv, a news website that aims to "address the many shortcomings of mainstream television channels" and "restore basic values of news—objectivity and fairness."[183] Both print and multimedia content that is not accepted by mainstream outlets increasingly finds an outlet through Saach.tv.

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182. A. Usman, "Maati TV—Pakistan's first web television," *Express Tribune*, 4 January 2011, at tp://tribune.com.pk/story/99039/maati-tv-- pakistans-first-web-television

183. Saach.tv, "About us," at http://www.saach.tv/about-us (accessed 27 September 2012).

4.2.4 Dissemination and Impact

Although the number of bloggers in Pakistan is soaring—the BBC reported that there were 3.4 million bloggers in the country in June 2011—the amount of original reporting or investigative journalism being done by citizen journalists remains extremely limited.[184]

In recent years there have been a few significant examples of original reporting by bloggers, indicating that there is potential for such contributions by new entrants. For example, one of the most popular sources of information about the takeover of the northern Swat Valley by militants in spring 2009 was a blog by a teenage girl, Malala Yousafzai, which was posted under a pseudonym on the BBC Urdu website as "Diary of a Swat Schoolgirl," and eventually translated into English. Ms Yousafzai primarily wrote about the militants' campaign to ban girls' education and the forced closure of her school.[185] The blog drew attention to the threat posed by militancy to girls' education in Pakistan, and Ms Yousafzai soon began appearing on television shows to champion education and women's rights. For her online advocacy, she was also awarded Pakistan's first National Youth Peace Prize. On 9 October 2012, she was shot by Taliban militants who accused her of promoting Western, secular values. The attack, which she survived, led to national and international condemnation of the Pakistani Taliban, and has sparked a global activist movement on behalf of girls' education.[186]

Who killed Benazir Bhutto?

On rare occasions, bloggers have also broken investigative news stories. For example, in December 2007, Awab Alvi, who blogs at Teeth Maestro, obtained and posted four images that helped clarify the cause of death of the former Pakistani prime minister, Benazir Bhutto, who was assassinated on 27 December 2007. Immediately after her death, the government claimed that she had died of a fatal head injury resulting from a suicide bomb attack, while members of her entourage claimed she had been shot. While the controversy raged, Mr Alvi found photographs clearly showing |Ms Bhutto being shot, which one of her supporters briefly posted on the social networking site Orkut. Mr Alvi annotated these pictures to highlight the cause of death, and circulated them widely on the internet. The images were eventually broadcast and analyzed by both the Pakistani and international media and sparked an accountability movement that eventually forced the Pakistani government to revisit its account of her death.

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184. Tech Info, "Pakistani bloggers surging to 3.4 million: BBC," 20 June 2011, at http://www.techinfo.pk/pakistani-bloggers-surging-to-3-4-million-bbc.html (accessed 19 September 2012).

185. Powell, "Pakistan: Media and Telecoms Landscape Guide."

186. A. Baker, "Malala Yousafzai, the Fighter," *Time*, 19 December 2012, at http://poy.time.com/2012/12/19/runner-up-malala-yousafzai-the-fighter/ (accessed on 17 February 2013).

In August 2009, bloggers reported on the death of Saad Khan, a 32-year-old who drowned while filming a reality television show commissioned and sponsored by the multinational company Unilever Pakistan and the Pakistani media-buying house Mindshare. The news of Mr Khan's death was first broken on Twitter, and subsequently investigated and reported on by bloggers and through Facebook status updates. The news did not, however, appear in the mainstream media, likely because Mindshare is well connected across the industry and Unilever Pakistan is a major advertiser. Following widespread coverage of the death in the blogosphere, some television channels such as Geo TV eventually reported on the story.[187]

While investigative citizen journalism continues to be the exception, members of the public increasingly circulate videos featuring violent incidents or documenting abuses of power via the internet. Some of these anonymous contributions have led to judicial inquiries and prosecutions, usually after the viral video has been broadcast and further investigated by mainstream media outlets. For example, in April 2009, a video clip captured on a mobile phone camera showing militants flogging a woman in Swat went viral and was repeatedly broadcast after the Pakistani journalist Samar Minallah forwarded it to television channels.[188] The video led to more mainstream media coverage of militant atrocities and helped galvanize public support for a military operation against militants in Swat. In May 2010, a mobile phone video showing police in Faisalabad assaulting a woman was posted on YouTube, leading to departmental inquiries and punishment of the policemen involved.

Later that year, in August, a YouTube video showing the killing of two brothers in the presence of police officers was circulated online and subsequently broadcast by television channels, prompting a high-level Supreme Court inquiry into the matter.[189] The following month, a mobile phone video appeared online showing the extrajudicial killing of alleged militants in Swat Valley by Pakistan army soldiers. The video led human rights organizations to further investigate charges of extrajudicial killings in Swat by military officials, and also led the US government to suspend military aid to those army units accused of human rights violations.[190] As such, the circulation of videos online has fueled investigative reporting in Pakistan.

4.3   Social and Cultural Diversity

4.3.1   Sensitive Issues

Pakistan is an ethno-linguistically diverse country, and while different ethnic groups have political grievances, systematic ethnic discrimination is not common. The exception to this is the situation in the western,

187. S. Saleem, "Saad Khan: Death by Reality TV," Mystified Justice, 4 September 2009, at http://sanasaleem.com/2009/09/04/saad-khan-death-by-reality-tv/ (accessed 25 September 2012).

188. S. Masood, "Video of Taliban Flogging Rattles Pakistan," *New York Times*, 3 April 2009, at http://www.nytimes.com/2009/04/04/world/asia/04swat.html?_r=0 (accessed 26 September 2012).

189. Freedom House, "Freedom on the Net 2011: Pakistan," 2011, p. 264, at http://www.freedomhouse.org/sites/default/files/FOTN2011.pdf (accessed 9 October 2012) (hereafter, Freedom House, "Freedom on the Net").

190. E. Schmitt and D. Sanger, "Pakistani Troops Linked to Abuses Will Lose Aid," *New York Times*, 21 October 2010, at http://www.nytimes.com/2010/10/22/world/asia/22policy.html?pagewanted=all (accessed 25 September 2012).

underdeveloped province of Balochistan, where Baloch nationalists have periodically waged separatist movements since Pakistan gained independence in 1947. The latest insurgency began in 2003, suffered a brutal crackdown by General Musharraf in 2006, but resumed in 2008. Baloch separatist groups complain of marginalization and mistreatment, especially by the Pakistan army, which they accuse of abductions and extrajudicial killings.[191] In 2011, Human Rights Watch documented the killing of at least 200 Baloch nationalists by the military, intelligence agencies, and the paramilitary Frontier Corps.[192] The Baloch are also resentful that they do not benefit from the revenues yielded by their province's natural gas and oil reserves. This resentment occasionally takes the form of attacks against ethnic Punjabis, residents of Pakistan's most populous and prosperous Punjab province who also comprise the majority of army ranks.[193] Owing to the poor security situation in the province, the Pakistan army carefully monitors all media coverage and public debate about Baloch grievances and the human rights conditions in Balochistan.

Ethno-linguistic tensions and violence also prevail in Karachi, Pakistan's largest city and commercial capital, where Urdu-speaking migrants from northern India and ethnic Pashtuns have clashed over access to the city's limited land and other resources since the 1980s. In 2011, more than 800 people died as a result of fighting between armed gangs affiliated with Karachi's major political parties, the Muttahida Qaumi Movement (MQM), the Awami National Party (ANP), and PPP, which represent Urdu-speaking migrants, Pashtuns, and Sindhis, respectively.[194]

Far greater sensitivities exist over religious identity. Ninety-five percent of the Pakistani population is Muslim (75 percent Sunni and 25 percent Shia), and the remaining 5 percent includes Hindus, Christians, Parsis, Sikhs, Buddhists, and Ahmadis, who consider themselves Muslims but are prohibited by the constitution from identifying themselves as such.[195] Sectarian tensions and violent incidents are common between the two main sects of Islam, Sunni and Shia, as well as between the Barelvi and Deobandi sub-sects of Sunni Islam.[196] According to the South Asia Terrorism Portal, an online database, there were 631 sectarian incidents in Pakistan between 2007 and 2011 that led to the deaths of over 1,649 people.[197] Religious minorities also face political, social, and economic marginalization, and are formally persecuted by the state through discriminatory legislation. Public school curricula describe minorities as heretical while extremist organizations distribute anti-minority pamphlets with impunity. As a result, intolerance and violence against

191. S. Koster, "Thousands are going missing in Pakistan," *Global Post*, 21 September 2012, at http://www.globalpost.com/dispatch/news/regions/asia-pacific/pakistan/120920/balochistan-missing-person-united-nations (accessed 10 October 2012).

192. Human Rights Watch, "World Report 2012: Pakistan," at http://www.hrw.org/world-report-2012/world-report-2012-pakistan (accessed 10 October 2012) (hereafter, Human Rights Watch, "World Report: Pakistan").

193. B. Baloch, "16 Punjabis killed in Balochistan attacks," *Nation*, 15 August 2010, at http://www.nation.com.pk/pakistan-news-newspaper-daily-english-online/politics/15-Aug-2010/16-Punjabis-killed-in-Balochistan-attacks (accessed 10 October 2012).

194. Human Rights Watch, "World Report: Pakistan."

195. US Department of State, Bureau of Democracy, Human Rights, and Labor, "International Religious Freedom Report for 2011," at http://www.state.gov/j/drl/rls/irf/religiousfreedom/index.htm?dlid=192933#wrapper (accessed 10 October 2012) (hereafter, US Department of State, "International Religious Freedom Report for 2011").

196. H. Yusuf, "Sectarian Violence: Pakistan's Greatest Security Threat?," Norwegian Peacebuilding Resource Center, Oslo, July 2012, at http://www.peacebuilding.no/var/ezflow_site/storage/original/application/949e7f9b2db9f947c95656e5b54e389e.pdf (accessed 10 October 2012).

197. South Asia Terrorism Portal, "Sectarian violence in Pakistan: 1989–2012," at http://www.satp.org/satporgtp/countries/pakistan/database/sect-killing.htm (accessed 2 June 2012).

religious minorities are widespread. Media coverage of theological debate, sectarian tensions, and religious minorities' beliefs and practices has to be carefully handled in order not to incite further violence.

Most violence against religious minorities is sparked by accusations of blasphemy. Pakistan has strict blasphemy laws that decree the death penalty for "defiling Prophet Muhammad," life imprisonment for "defiling, damaging, or desecrating" the Qu'ran, and 10 years' imprisonment for "insulting another's religious feelings."[198] Public debate about blasphemous content, the blasphemy laws or the validity of blasphemy accusations is extremely charged and highly contentious, often leading to violence. In January 2010, Salman Taseer, then governor of the Punjab province, was assassinated by his bodyguard for defending a Christian woman accused of blasphemy and criticizing the blasphemy laws.[199]

Since Pakistan is a Muslim-majority state, public discussions of sex and sexuality—especially homosexuality— remain taboo, and these issues are rarely touched upon by the mainstream media. However, there is growing cultural tolerance for transgenders, whose rights have been guaranteed by Pakistan's Supreme Court and who regularly feature in the media.[200]

4.3.2   Coverage of Sensitive Issues

The Code of Conduct of PEMRA includes the following provisions that indirectly guide media coverage of the sensitive issues mentioned above. No program shall be aired which passes derogatory remarks about any religion or sect or community or uses visuals or words contemptuous of religious sects and ethnic groups or which promotes communal and sectarian attitudes or disharmony; contains an abusive comment that, when taken in context, tends to or is likely to expose an individual or a group or class of individuals to hatred or contempt on the basis of race or caste, national, ethnic or linguistic origin, color or religion or sect, sex, sexual orientation, age or mental or physical disability; is likely to encourage and incite violence; and contains material which is against the ideology of Pakistan or Islamic values. These codes, however, are weakly and sporadically enforced.

Instead, a strong culture of self- and state-censorship guides the media's coverage of sensitive issues. As the veteran journalist and rights activist Beena Sarwar put it, "there are two major no-go areas for the media: one is religion and one is the Pakistan Army."[201] Twenty journalists working for print, television, and radio outlets in the four provinces were surveyed for this report and asked which subjects they are scared to report on, or resort to self-censorship if compelled to cover: eight listed religion and blasphemy laws; three listed army and intelligence agencies; three listed political interference and corruption; two listed the security situation in Balochistan; one listed terrorism; and one listed tribalism (two respondents said they felt comfortable reporting on all issues).

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198. U.S. Department of State, "International Religious Freedom Report for 2011."

199. M. Azeem and S.I. Raza, "Blasphemy law claims another life," *Dawn*, 5 January 2010, at http://dawn.com/2011/01/05/salman-taseer-injured-in-attack (accessed 10 October 2012).

200. R. Baig, "A first for Pakistan's third gender," *Af-Pak Channel*, 30 March 2012, at http://afpak.foreignpolicy.com/posts/2012/03/30/a_first_for_pakistans_third_gender (accessed 10 October 2012).

201. Telephone interview with Beena Sarwar, independent journalist and online activist, 22 June 2012.

Where self-censorship may not suffice, the state steps in. Coverage of religious issues, especially accusations of blasphemy or debates on content that is deemed blasphemous, most frequently leads to state censorship of the media, especially digital media. For example, in February 2006, the PTA directed all ISPs in Pakistan to block websites (with a focus on Google and Blogspot) displaying caricatures of the Prophet Muhammad, originally published in a Danish newspaper.[202] Similarly, in 2010, the Lahore High Court banned Facebook for hosting blasphemous content after the site refused to remove a page titled "Everybody Draw Mohammad Day."[203] The ban also resulted in the blocking of 10,548 other websites, including pages on YouTube, Flickr, and Wikipedia, and Blackberry services.[204] In September 2012, the government placed an indefinite ban on YouTube after the site refused to remove an anti-Islam film titled "Innocence of Muslims," which sparked protest riots across the Muslim world.[205] In each of these cases, mainstream print and broadcast outlets were restricted from publishing or airing the controversial materials and refrained from highlighting any voices in support of these.

The PEMRA code which relates to coverage of the Pakistan army and its military operations, prohibits programming that "contains aspersions against the judiciary and integrity of the armed forces of Pakistan." But on this subject, too, self- or state-censorship is the norm, with journalists shying away from negative coverage of the army's operations, budget, human rights record, etc. The killing of Mr Shahzad (see section *4.2.2*) highlighted the dire consequences of doing investigative reporting on the military. Moreover, the most systematically censored content in Pakistan are the online magazines and blogs of Baloch nationalists and separatist organizations that routinely condemn extrajudicial abductions and killings carried out by state security forces in their province.[206] For example, The Baloch Hal, the first English-language news website focussing on Baloch grievances, has remained banned since a year after its inception in 2009.[207] Mainstream newspapers and television channels also avoid conducting any investigative reporting in Balochistan.

Increasingly, media coverage of the Supreme Court, judges, and *sub judice* cases is being regulated and restricted. Since 2009, the Supreme Court Chief Justice and provincial high courts have muzzled media criticism of the judiciary through threats of contempt of court proceedings;[208] in October 2012, the Lahore High Court directed PEMRA to prohibit the airing of television content that contained "malicious content" against the judiciary or judges.[209]

202. S. Ahmad, "Internet and Human Rights in Pakistan: Universal Periodic Review, 14th Session, Pakistan," Association for Progressive Communication, Bytes for All, Freedom House, Islamabad, 2012 (hereafter, Ahmad, "Internet and Human Rights in Pakistan").

203. I. Ahmed, "Pakistan bans Facebook, Youtube over 'Draw Mohammad Day, '" *Christian Science Monitor*, 20 May 2010, at http://www.csmonitor.com/World/Asia-South-Central/2010/0520/Pakistan-bans-Facebook-Youtube-over-Draw-Mohammad-Day (accessed 10 October 2012).

204. Ahmad, "Internet and Human Rights in Pakistan."

205. H. Tsukayama, "YouTube blocked in Pakistan," *Washington Post*, 17 September 2012, at http://www.washingtonpost.com/business/economy/youtube-blocked-in-pakistan/2012/09/17/30081fa2-00ea-11e2-b257-e1c2b3548a4a_story.html (accessed 10 October 2012).

206. A.R. Shamsi, "Waking up to the war in Balochistan," *BBC News Online*, 29 February 2012, at http://www.bbc.co.uk/news/world-asia-17029159 (accessed 10 October 2012).

207. The Baloch Hal, "The Baloch Hal banned," 9 November 2010, at http://www.thebalochhal.com/2010/11/the-baloch-hal-banned (accessed 10 October 2012).

208. Human Rights Watch, "World Report: Pakistan."

209. *Express Tribune*, "Court tells PEMRA to stop TV shows maligning judiciary," 17 October 2012, at http://tribune.com.pk/story/452506/court-tells-pemra-to-stop-tv-shows-maligning-judiciary (accessed 17 October 2012).

4.3.3 Space for Public Expression

The proliferation of media outlets since 2002 has certainly increased the amount of media coverage of Pakistan's different ethnic groups, religious minorities, and their concerns. But significant gaps remain. Privately owned regional-language channels—for example, Apna TV in Punjabi, Waseb TV in Saraiki, KTN in Sindhi, and Khyber News in Pashto—cater to different ethno-linguistic groups. However, these channels receive less advertising revenue than national, city-based, Urdu-language channels and operate under severe budget constraints. Moreover, the state-owned Pakistan Television Network (which broadcasts terrestrially across the country) has failed to launch four regional-language channels that it announced in 2005 as part of a plan to decentralize state media and make it focus more on Pakistan's provincial-level languages and issues.[210]

As a result, media professionals and members of the public complain that the mainstream media (print, television, and radio) do not give adequate coverage to groups that are based beyond urban, media-saturated centers. Speaking on this urban bias at a media conference, Amir Rana, director of the independent think-tank Pak Institute for Peace Studies, said, "There is little space [in our media] not only for alternative ideas or narratives but also for issues of a common citizen ... The narratives that we have seen in the mainstream media in Pakistan are basically controlled by three media centers in Pakistan: Islamabad, Karachi, and Lahore. There is little space in the mainstream media for views, perspectives, and information from other parts of Pakistan."[211]

Along similar lines, in response to a question on whether Pakistan's independent media give equal coverage to all voices from all parts of Pakistan, only four of the 20 journalists surveyed for this report said that media coverage is fair and even. "Balochistan is completely ignored by the national media," complained Irshad Mastoi, bureau chief of the Online International News Network in Balochistan.[212] Similarly, Muhammad Rizwan, a Lahore-based *Express Tribune* reporter, said, "Critics say the media belongs to upper and central Punjab and Karachi, and that the rest of the country does not exist [for the media]—I think they are right."[213] Nadir Khawaja, a *Roznama Ausaf* reporter, stated, "The ratings system has created a massive problem for the underdeveloped areas in Pakistan. Places like FATA, Kohistan, Dir, and Chitral are not given enough coverage because the media has no interest in them; the media only gives coverage to areas where they see business."[214] More than half of the journalists surveyed agreed that the security situation in Balochistan is inadequately covered by the media.

There have been significant improvements in recent years in the media coverage of religious minorities. "The [independent] media has done a commendable job of highlighting injustices against minorities," says Ms

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210. Dawn, "PTV to launch 4 channels," 25 September 2005, at http://archives.dawn.com/2005/09/25/nat3.htm (accessed 10 October 2012).

211. *Media Safety in Conflict Situations,* p. 9.

212. Interview with Irshad Mastoi, bureau chief of Online International News Network, Quetta, 18 July 2012.

213. Interview with Muhammad Rizwan, *Express Tribune* reporter, Lahore, 20 July 2012.

214. Interview with Nadir Khawaja, *Roznama Ausaf* reporter, Peshawar, 18 July 2012.

Sarwar.[215] But she adds that media coverage about minorities focusses on events and incidents, rather than processes: "The insidious undercurrents in society [against minorities] are not consistently covered by the media." Mr Peshimam also concedes that "there are no basic quotas for minority coverage and there is no consistent coverage of minority issues by the media."[216]

The media have been widely criticized for being insensitive toward religious minorities. In one controversial incident, the popular "televangelist" Aamir Liaquat hosted a religious talk show in which Muslim clerics declared that members of the persecuted Ahmadi community are "deserving of death." Within 48 hours of the broadcast, two Ahmadi leaders had been shot dead in separate incidents in the Punjab and Sindh provinces.[217] Similarly, in July 2012, a prime-time talk show during the Muslim holy month of Ramadan was slammed for broadcasting the conversion to Islam live on television of Sunil, aged 20, a Hindu. During a special transmission on ARY TV, the talk show host Ms Khan oversaw the conversion ceremony to the cheers of a live studio audience.[218] Responding to the broadcast, Ramesh Kumar, a leader of the Pakistan Hindu Council, said that such programming would encourage intolerance, adding "We are already intimidated against … Please don't do things that make us more alienated."

To counter and engage with mainstream media rhetoric, religious minorities are turning to the internet, increasingly going online to air their grievances, document violence against them, and mobilize protests or e-campaigns. For example, the Ahmadi community maintains a website called Alislam.org, and Shia Muslims operate numerous websites documenting incidents of sectarian violence. However, the persecution of religious minorities extends to cyberspace. Not only do terrorist groups, among them anti-Shia sectarian outfits, maintain their own websites and Twitter feeds through which they incite hate against minorities, but the government also seeks to censor minority voices online. In July 2012, for instance, the PTA temporarily blocked both an Ahmadi and a Shia website, the latter move leading to protests in Karachi.[219]

4.4   Political Diversity

4.4.1   Elections and Political Coverage

In October 2012, the PEMRA (Content) Regulations 2012 articulated guidelines for broadcast media coverage of political issues for the first time. The regulations are aimed at political talk shows in particular, calling for hosts to stay on topic, be respectful toward guests and commentators on the show, and ensure

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215. Telephone interview with Beena Sarwar, independent journalist and online activist, 22 June 2012.

216. Interview with Gibran Peshimam, political editor at *Express Tribune*, Karachi, 15 September 2012.

217. D. Walsh, "A superstar televangelist in Pakistan divides, then repents," *New York Times*, 31 August 2012, at http://www.nytimes.com/2012/09/01/world/asia/a-star-televangelist-in-pakistan-divides-then-repents.html?pagewanted=all (accessed 2 September 2012).

218. Agence France-Presse, "Live conversion on Maya Khan show stirs anger," *Express Tribune*, 27 July 2012, http://tribune.com.pk/story/413770/live-conversion-on-maya-khans-show-stirs-anger/ (accessed 2 September 2012).

219. H. Yusuf, "Silencing Pakistan's Minorities," Latitude, IHT Global Opinion, 23 July 2012, at http://latitude.blogs.nytimes.com/2012/07/23/pakistans-religious-minorities-are-silenced-online (accessed 26 May 2013).

that political programming is objective and features representatives from all concerned parties. Additionally, the regulations discourage broadcast media from airing parodies and offensive or derogatory jokes, songs, gestures, subtitles, and dialogues against individuals or organizations. Content that maligns or slanders individuals or groups is also outlawed.[220] The latter regulations target satirical, infotainment programs that nightly mock Pakistani politicians and are extremely popular. Media observers believe the regulations, which were issued months before the May 2013 general elections, were aimed at preventing mainstream politicians from being criticized or ridiculed during their election campaigns.

Prior to these regulations, the PEMRA Code of Conduct simply prohibited broadcast media outlets from airing advertisements of a "wholly or mainly political nature" and broadcasting those portions of parliamentary or provincial assembly proceedings that the chairman or speaker may have ordered to be expunged. In the absence of more stringent restrictions, the media's coverage of politics has only grown in terms of both size and influence with digitization.

In recent years, political actors have enjoyed ever greater opportunities to air their views and engage in debate via the broadcast media. News bulletins featuring telephone interviews as well as dedicated political talk shows on all current affairs and news channels provide ample opportunities for politicians to express themselves and build followings. As Mr Hussain put it, "The media is the Pakistani politician's soapbox."[221] He describes the close relationship between media houses and political parties and argues that news channels have the ability to "reinforce and amplify the existing power structure; that's why [politicians] are banging down our doors for interviews and press conferences [because] the media allows them to become important without a constituency or any political background."

The growing importance of media access and coverage to politicians is reiterated by a senior news anchor at the state-owned PTV News channel. He describes how government ministers prioritize interviews with the media, and make an extra effort to appear on privately owned television channels such as Geo TV rather than state television because "they know they can better reach the public in the cities this way, and shape their opinions through the media."[222] Moreover, the fact that journalists face the greatest threat from political parties (see section *4.2.2*) implies that favorable and extensive media coverage is seen as essential for a party's continuing political appeal.

Owing to the media's power to influence public opinion, the media's coverage of the general elections in February 2008 was heavily regulated. The elections followed the imposition of emergency rule in November 2007 by General Musharraf and were the first free elections following media liberalization. Prior to the emergency declaration, Musharraf promulgated the amended PEMRA Ordinance (2007), a new regulation

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220. M. Asad, "New PEMRA rules allow: TV discussion on sub judice issues," *Dawn*, 16 October 2012, at http://dawn.com/2012/10/16/new-pemra-rules-allow-tv-discussion-on-sub-judice-issues/ (accessed 20 October 2012).

221. Interview with Talat Hussain, columnist and television talk show host, Karachi, 15 July 2012.

222. Telephone interview with X, senior news anchor at PTV News (confidentiality requested), 26 June 2012.

that imposed curbs on media freedom, particularly restrictions on live broadcasting. The fact that these curbs did not seem to have the internet in mind might, in retrospect, have been viewed by Musharraf as a serious omission from his point of view, given the role it would play in his subsequent downfall.

The amended Ordinance barred the publishing or broadcasting of "anything which defames or brings into ridicule the head of state, or members of the armed forces, or executive, legislative or judicial organs of the state."[223] Although emergency rule was lifted on 15 December 2007, the media were prohibited during the elections from covering election rallies, broadcasting live call-ins, live talk shows, or any other live content that could portray the military government in a negative light.[224] These restrictions lapsed under the new PPP-led government following the 2008 elections.

Media coverage of the 2013 general elections was significantly less restricted: the Election Commission of Pakistan (ECP) released a code of conduct for media that emphasized neutral coverage of all political parties, and required media organizations to clearly identify paid content and political advertising as such. The ECP also encouraged broadcast media to create programming that allowed the public to engage with politicians through call-in shows, etc. Privately owned media were also urged to broadcast voter education programs.[225] Media organizations and civil society groups criticized the ECP for not consulting media stakeholders before drafting the code, and complained that its clauses were too vague and could thus be arbitrarily and inconsistently applied.[226] In the run-up to the elections, media outlets violated the code with impunity, most frequently by broadcasting political ads featuring defamatory content or personally targeting politicians.[227] Following the elections, some NGOs and political parties called for more effective implementation of codes for media coverage of elections by PEMRA and the ECP in the future.

4.4.2 Digital Political Communications

The proliferation of broadcast media outlets since 2002 has certainly increased the number—if not the diversity—of political voices. Mr Peshimam explained that media coverage remains focussed on mainstream (primarily national) political parties: "This means that there is more plurality in terms of coverage of mainstream political parties, and you get to see fresh faces of ministers and activists who previously wouldn't have had access to national platforms." But he adds that "non-mainstream parties still don't get a voice."[228] The independent broadcast media do not give adequate coverage to more rural or remote parts of Pakistan

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223. Human Rights Watch, "Pakistan: Media Restrictions Undermine Election," 17 February 2008, at http://www.hrw.org/news/2008/02/15/pakistan-media-restrictions-undermine-election (accessed 16 October 2012).

224. Salman Masood and David Rohde, "Pakistan's News Media No Longer Silent, but Musharraf Has Muted His Critics," *The New York Times*, 11 December 2007, at http://www.nytimes.com/2007/12/11/world/asia/11pmedia.html?ex=1355029200&en=e332a7d79a7519d9&ei=5088&partner=rssnyt&emc=rss&_r=0 (accessed 15 April 2012).

225. Frontier Post, "ECP tells media to be neutral during elections," April 2013, at http://www.thefrontierpost.com/article/3021/ (accessed 1 June 2013).

226. W. Naeem, "ECP's media code vague, restrictive," Express Tribune, 6 November 2012, at http://tribune.com.pk/story/466473/2013-election-coverage-ecps-media-code-vague-restrictive (accessed 1 June 2013).

227. Pak Observer, "PEMRA directed to stop TV channels from airing personally targeted ads," 7 May 2013, at http://pakobserver.net/201305/07/detailnews.asp?id=205950 (accessed 1 June 2013).

228. Interview with Gibran Peshimam, political editor at *Express Tribune*, Karachi, 15 September 2012.

beyond the big cities (see section *4.3.3*). As a result, political actors who do not have access to these media centers have yet to find representation on national, Urdu-language television channels.

Even in the cities, smaller political parties struggle for adequate media representation. In Karachi, for example, MQM, the largest political party, dominates the airwaves through connections with media channel owners, journalists, and cable operators as well as through intimidation in some cases (see section *4.2.2*). Its rival party, the considerably less influential ANP, thus routinely complains that television channels are biassed in their coverage of violent clashes between the two parties, describing murdered ANP activists as drug sellers in order to "spoil [the party's] reputation."[229]

Regional-language channels have also failed to provide a platform for non-mainstream political actors.Since these smaller channels have to compete for advertising revenue with national, city-based, Urdu-language channels, they also seek interviews with mainstream political party representatives. According to the director of strategic planning at one of the top five news channels, "The launch of regional channels has not helped the political decentralization process since no-name politicians cannot attract advertising revenue."[230]

On the other hand, FM radio channels have made an effort to get local politicians on air to discuss issues relevant to the local community. In the run-up to the February 2008 elections, Radio Khyber invited 36 candidates standing for National Assembly seats from Pakistan's tribal belt to share their electoral manifestos with the public via radio interviews.[231] Hassan Khan, the director of programs and current affairs at the Pashto-language Khyber News FM station, has also tried to get local political representatives on air, but concedes that audiences are more interested in music and talk shows than political programming.[232]

Beyond political parties and representatives, certain politically influential actors who previously would not have been able to access a mass audience are getting a voice through the broadcast mainstream media—for good or for bad. For example, as US ambassador to Pakistan, Cameron Munter appeared on Dunya News TV and Geo TV,[233] as has Hafiz Muhammad Saeed, the chief of Jamaatud Dawa, the social welfare arm of the banned militant group, Lashkar-e-Taiba, which is believed to have masterminded the terrorist attacks in Mumbai, India, in November 2008.[234]

229. *Express Tribune*, "Shahi Syed says Karachi violence result of reconciliation policy," 13 July 2012, at http://tribune.com.pk/story/407538/targeted-killings-shahi-syed-says-karachi-violence-result-of-reconciliation-policy (accessed 17 August 2012).

230. Interview with X, director of strategic planning at a private news and current affairs channel (confidentiality requested), Karachi, 4 July 2012.

231. H. Yusuf, "Tuning into radio," *The News*, 13 March 2008, p. 6.

232. Interview with Hassan Khan, director of programs and current affairs at Khyber News FM Radio, Islamabad, 12 August 2012.

233. Dunya News TV, "Special interview with US Ambassador Cameron Munter," Lahore, 26 November 2011, at http://www.youtube.com/watch?v=YaTV-tFhVv0 (accessed 18 October 2012); Geo TV, "*Capital Talk*," Islamabad, 24 July 2012, at http://www.youtube.com/watch?v=_7lmvm6fp_g&feature=related (accessed 18 October 2012).

234. Dunya News TV, "Khari Baat Lucman Ke Saath" (Straight Talk with Lucman), Islamabad, 24 May 2011, at http://www.youtube.com/watch?v=eO_bcCI_nxk (accessed 18 October 2012); Pakistan Media Watch, "Geo Projecting Terrorism?," 20 August 2011, at http://pakistan-mediawatch.com/2011/08/20/geo-projecting-terrorism (accessed 18 October 2012).

While the broadcast mainstream media focusses on established political actors, blogs and social networks have empowered some new political entrants. For example, Imran Khan has used Facebook, Twitter, and other forms of social media to establish a significant constituency among young, urban, middle-class voters (see section *3.2.2*). With 487,000 "likes" in October 2012, his official Facebook page has attracted 100,000 more followers than his party's official website; he is also the most-followed Pakistani on Twitter.[235] To cater to its online activists, PTI maintains a 25-member social media team comprising volunteers around the world. Following PTI's example, the country's main opposition party, the Pakistan Muslim League (N) (PML-N), has also created a dedicated media wing that focusses on improving the party's Facebook presence.[236]

Political parties' online activism points to the lively political debate under way on the internet. While Pakistanis have always had a deep interest in politics, until a few years ago political debate was restricted to private spaces in homes and workplaces, with some members of the public trying to engage through letters to the editor of print publications. Call-in political talk shows on private news channels have enabled audience members to participate in public debate at the national level. But the liveliest free debate occurs online. The blogs of mainstream media outlets are the most popular in the country, and they host lively comments sections where political issues are hotly debated (see section *3.1.1*). Several independent blogs dealing with contemporary politics, such as Five Rupees, have also become extremely popular, and are followed by mainstream media journalists. The growing popularity of Twitter, in particular, fuels political discussion online: the most active Twitterati in Pakistan are politicians (including Mr Khan, the Punjab Chief Minister Shahbaz Sharif, and the PPP politician Sharmila Farooqi) and journalists, such as popular news anchors and political talk show hosts.[237]

4.5   Assessments

Overall, there are mixed perceptions about whether digitization has improved the quality of journalism. Journalists rightly point out that the proliferation of the media industry has created new opportunities for doing journalism, and that the intense competition has facilitated professionalism and creativity. However, the competition has also had a negative impact on news reporting.

Journalists are feeling immense pressure to generate content to feed the 24/7 news cycle. Print media professionals are increasingly compelled to compete with television channels, while television journalists complain of the need to constantly produce content that will boost ratings (rather than work that has journalistic value). The overall quality and accuracy of reporting have thus been negatively affected, as media professionals increasingly re-broadcast or re-publish breaking news without conducting independent

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235. W. Khan, "Can Social Media Propel Rock Star Politician Imra Khan to Power in Pakistan?," NBC News, 17 October 2012, at http://worldnews. nbcnews.com/_news/2012/10/17/14321961-can-social-media-propel-rock-star-politician-imran-khan-to-power-in-pakistan?lite (accessed 21 October 2012).

236. A. Manan, "Discovering Facebook: PML-N prepares new plan to win youth vote," *Express Tribune*, 2 November 2011, at http://tribune.com. pk/story/286288/discovering-facebook-pml-n-prepares-new-plan-to-win-youth-vote (accessed 18 October 2012).

237. M. Haider, "Tweeting from Pakistan," Dawn, 5 September 2012, at http://dawn.com/2012/09/05/tweeting-from-pakistan (accessed 3 June 2013).

reporting or verifying the information. Moreover, the pressure to achieve high ratings has also spurred a culture of sensational or entertaining news reporting: stories are presented with the aid of music, re-enactments, parodies, and animation. The quality of news reporting is also affected by the industry's financial model, which keeps media outlets exclusively dependent on advertising revenue: journalists thus complain that they cannot publish or broadcast news reports that might anger government or private-sector advertisers.

Corruption has also significantly blossomed with the proliferation and growing influence of the broadcast media. In addition to government cash handouts, journalists receive subsidized properties, business contracts, permits, and other perks such as accommodation or gifts to write favorable stories.

Increased internet access has facilitated news reporting; journalists report that it is notably easier for them to research, contextualize, and fact-check their investigative news reports with internet access. Journalists also now share and circulate their work online, including in situations when a news report has been suppressed by a media organization. The number of bloggers and social media users who further circulate news content online is also soaring; however, the amount of original reporting or investigative journalism being done by citizen journalists remains extremely limited. That said, numerous videos documenting abuses of power have been shared online in recent years, leading to judicial inquiries and prosecutions. Journalists in the mainstream media follow discussions on Twitter and in the Pakistani blogosphere quite closely, and are willing to further investigate or highlight stories that initially emerge online.

The proliferation of news media in Pakistan has not coincided with an increase in investigative journalism, largely owing to the fact that media growth has been in television and radio. While television journalists are faced with hyper-competition and a ratings-based financial model that discourages investigative work, FM radio stations are prevented by media regulatory law from producing independent news bulletins. These constraints, coupled with the fact that a culture of investigative journalism has never thrived in Pakistan, have prevented digitization from ushering in a new era of investigative journalism.

Although new media outlets provide much greater coverage of marginalized groups than the state-owned channels of the pre-digitization era, the coverage is not even or consistent. Religious minorities, residents of Balochistan and other remote parts of Pakistan, and non-mainstream or little-known political actors have yet to find a voice on the broadcast media. This is owing to a combination of factors: media groups' inability to generate advertising revenue outside major urban centers; the race for ratings that discourages reports that are only relevant at a local level to certain communities; a strong culture of self- and state-censorship that guides media coverage of sensitive issues; and the poor security situation in various parts of the country, especially Balochistan and the northwestern tribal belt.

Unfortunately, liberalization and increasing internet access have certainly aggravated security threats against journalists, a factor that impedes both the quality of investigative journalism and the coverage of marginalized groups. Pakistan is one of the most dangerous countries in the world to be a reporter, and journalists face threats and violence from militant and extremist groups, political parties, the military, intelligence services, and criminal gangs.

That said, growing internet access and the popularity of social networks have allowed bloggers and ordinary citizens to expose injustices through online videos and occasionally break news reports that the mainstream media suppresses. Moreover, marginalized groups, political movements, and religious minorities are increasingly launching online magazines and websites to air their grievances. Social media also offer new political entrants an opportunity to reach urban voters without having to rely on the king-making powers of the broadcast media.

5. Digital Media and Technology

5.1   Broadcasting Spectrum

5.1.1   Spectrum Allocation Policy

The Frequency Allocation Board (FAB) is responsible for the allocating of frequency spectrum to the government, the military, television and radio broadcasters, and telecoms services. The FAB is not authorized to license radio or television broadcasters and only assigns new broadcasters with a spectrum allocation. The licensing authorities for broadcasting and telecoms are PEMRA and the PTA, respectively. In fact, broadcasters do not have to directly apply to FAB for spectrum allocation; it is done on their behalf by PEMRA during the licensing process. Since plans for a digital switch-over are not yet being implemented in Pakistan, this section deals primarily with existing practices in frequency allocation for public and commercial FM radio stations and the telecoms sector.

The government and the army are favored by broadcasting spectrum allocation policy. At present, the only terrestrial television channels in Pakistan are those broadcast by the state-owned Pakistan Television (PTV) and the privately owned ATV, of which PTV and the official Pakistan Broadcasting Corporation are majority (80 percent) shareholders.[238] PTV and ATV have not switched over from analog to digital so FAB has not had to make new spectrum allocations for television broadcasters. Digital satellite spectrum allocation for privately owned satellite television channels is governed by the International Telecommunication Union.

In terms of frequency allocation for radio broadcasters, too, the public sector has the advantage. PEMRA currently offers radio licenses for three categories: public-sector, educational, and commercial. The license application process and frequency allocation for public-sector and educational broadcasters is straightforward and efficient, and the license fee is low (approximately PKR 250,000, US\$ 2,500, compared with more than PKR 30 million, US\$ 300,000, for commercial broadcasters, according to Muhammad Iqbal, PEMRA's assistant general manager).[239]

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238. Shalimar Recording and Broadcasting Company, "SRBC Shareholders," at http://www.srbc.com.pk/shareholders.asp (accessed 2 December 2012).

239. Interview with Muhammad Iqbal, assistant general manager, PEMRA, Islamabad, 3 July 2012.

Moreover, unlike educational and commercial broadcasters who have to go through PEMRA to receive a frequency allocation, the government and the army are directly involved in the frequency allocation process. In some cases, the army has been allocated frequency even in the absence of a radio license from PEMRA. For example, in 2009, the army established FM radio stations in Pakistan's conflict-hit areas in an effort to counter militant propaganda: FM 96 Radio Pakhtoonkhwa (previously known as Radio Swat) in Swat Valley, FM 96 Pakhtoonzar in the Waziristan tribal agency, and FM 96 Vash Noori in the western province of Balochistan all operate without a license.[240] According to Mr Rehmat, the government and the military are also favored in terms of white space allocation to ensure minimal interference.[241]

This preferential treatment for public-sector broadcasters is significant, especially in light of the army's plans to launch FM radio stations to compete directly with commercial broadcasters: in April 2012, the army announced a nationwide network of FM radio channels under the banner of Apna Pakistan, which would broadcast infotainment programs aimed at promoting a "state vision" and "social harmonization."[242]

At present, the licensing and frequency allocation policy disadvantages commercial broadcasters in several ways. Commercial radio broadcasters have to bid for a license, which is awarded to the highest bidder, a process that makes launching FM radio stations prohibitively expensive. Once PEMRA approves a license for a commercial FM radio broadcaster, the case is referred to FAB, which allocates spectrum frequency based on availability. As such, the commercial broadcaster has no control over frequency allocation, even though there is a commercial advantage to procuring lower analog frequencies (for example, in the 80s) because these can be picked up by the majority of radio receivers. Additionally, the FM radio license and the proposed location of the transmitter have to be approved by the Pakistan army, which can reallocate frequency at this stage.

Preferential treatment in terms of frequency allocation and use for public-sector entities has also been observed in the telecoms sector. ISPAK has accused the PTCL of illegally using 3G wireless spectrum without a license since 2010, causing losses of US$ 300 million to the exchequer (PTCL was a state-owned company until 2006; currently, 62 percent of PTCL shares are owned by the state). In September 2011, FAB confirmed PTCL's illegal use of non-allocated spectrum and fined the company PKR82 million (approximately US$ 800,000). PTCL challenged FAB's finding in the Islamabad High Court and obtained a stay order. Neither FAB nor the PTA have filed an appeal against the stay order or pursued the case further, leading to PTCL's continued illegal use of 3G spectrum, which has yet to be made available to ISPs through a competitive bidding process. According to ISPAK, this amounts to frequency allocation discrimination and puts PTCL at a commercial advantage, as other broadband operators have paid millions of dollars for spectrum allocation.[243]

240. *Express Tribune*, "Apna Pakistan: Military set to expand media outreach across country," 15 April 2012, at http://tribune.com.pk/story/364901/apna-pakistan-military-set-to-expand-media-outreach-across-the-country (accessed 2 December 2012).

241. Email interview with Adnan Rehmat, executive director of Intermedia Pakistan, Islamabad, 17 August 2012.

242. *Express Tribune*, "Apna Pakistan: Military set to expand media outreach across country," 15 April 2012, at http://tribune.com.pk/story/364901/apna-pakistan-military-set-to-expand-media-outreach-across-the-country (accessed 2 December 2012).

243. H.M. Rind, "PTCL's illegal use of frequency continues unabated," *The News*, 18 September 2012, at http://www.thenews.com.pk/Todays-News-3-132468-PTCLs-illegal-use-of-frequency-continues-unabated (accessed 2 December 2012).

5.1.2   Transparency

The FAB allocates spectrum on the basis of the Public Procurement Regulatory Authority Rules 2004, which govern all public procurement processes and regulate over-arching issues such as fairness, transparency, qualifications, record-keeping, and timeliness. The frequency allocation procurement process is completed by FAB and not the broadcaster or telecoms operator bidding for spectrum (which only deals with PEMRA). The indirect nature of frequency allocation compromises transparency and leads to biased allocation.

5.1.3   Competition for Spectrum

Spectrum is allocated by FAB's board, which includes officials from Pakistan's defense, interior, telecoms, information technology ministries, and PEMRA. The composition of the board ensures that the government and the military are given preferential treatment in terms of frequency allocation.

Moreover, in the case of commercial FM radio licenses, it is unclear whether FAB allocates frequency in each case, as per stated protocol. According to Mr Rehmat, FAB has provided a list of unused frequencies to PEMRA, which allocates frequency to radio broadcasters once license applications have been approved. The lack of clarity about which institution is allocating frequency may lead to mistakes or make the system vulnerable to corruption.

5.2   Digital Gatekeeping

5.2.1   Technical Standards

Currently, PTV and ATV's terrestrial broadcasts are in analog format. According to Nasir Ayub, PEMRA's Deputy Regional Officer, Pakistan has not acquired technical standards such as DVB, ATSC standards, and ISDB.[244] Consequently, there have been no public debates about the adoption of technical standards for news-carrying platforms.

Such debate is unlikely since PEMRA has yet to engage the public with the digital switch-over, which it stated in its 2010 annual report it would complete by 2015, though little headway has been made to digitize terrestrial broadcasts and cable transmission. According to cable operators, PEMRA likely announced the 2015 deadline to give the impression it was keeping up with international developments, but the fact that it has not pursued this goal indicates that the announcement was premature.[245] PEMRA has not launched any campaigns to raise public awareness about digital services. As a result, according to one survey, 88 percent of low-income homes and 70 percent of high-income homes are unaware about the forthcoming digital switch-over and the advantages of digital television.[246] (see section *7.1.1.1*).

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244. Interview with Nasir Ayub, deputy regional officer, PEMRA, Islamabad, 29 August 2012.

245. Interview with Khalid Arain, president of the Cable Operators Association of Pakistan, Karachi, 12 December 2012.

246. A. Khan, "Digital Television Age: A Policy Perspective from Pakistan," 12 August, 2010, at http://papers.ssrn.com/sol3/papers.cfm?abstract_id=1657768 (accessed 2 December 2012) (hereafter, Khan, "Digital Television Age").

5.2.2 Gatekeepers

Cable operators licensed to distribute digital satellite channels are the main gatekeepers influencing viewers' access (see section *5.3.1* for more information about cable operators). At present, PEMRA has not licensed direct-to-home (DTH) transmissions and does not require cable operators to allow viewers to subscribe separately to individual channels, which makes them extremely influential. Owing to the technical limitations of analog networks, only 23 percent of households receive the maximum number of the more than 100 channels currently available in Pakistan.[247] Bound by few must-carry rules or regulations about anti-competitive distribution, cable operators decide which channels to carry. Their decisions are typically based on factors such as channel popularity, bandwidth taken by the channel, and the channel's willingness to pay higher carriage fees or bribes.

Indeed, cable operators take advantage of the fact that, as the main distributors of television programming, they are uniquely positioned to influence a channel's reach and ratings. According to Mr Rehmat, media owners pay cable operators millions of rupees to disrupt competing channels' broadcasts. Channels also bribe cable operators to obtain favorable placings in their bouquets. The most popular spot is before or after Geo TV, which is the most popular private television channel.

According to PEMRA rules, cable operators have to give 48 hours' notice in writing to it and subscribers before changing the order of channels or making any additions or deletions from a bouquet. However, operators regularly change the order of channels and the composition of a bouquet, much to the frustration of viewers and the disadvantage of less influential or affluent channels. "It makes a big difference where they put you," explains the chief operating officer of one of the top five independent channels. "It takes too much loyalty for a viewer to seek out a specific channel, so smaller channels suffer because they don't have as good a relationship with cable operators as others."[248]

According to Khalid Arain, the president of the Cable Operators Association of Pakistan, larger cable operators are now looking to consolidate the market by buying out smaller operators, or those that continue to operate exclusively in analog.[249] This consolidation will cause the network to digitize more rapidly; however, it is likely to reduce public access to private television in the short term, as small cable operators that currently offer analog transmissions and bouquets with fewer channels, and therefore drastically cheaper rates, are squeezed out of the market.

5.2.3 Transmission Networks

As the digital switch-over for terrestrial broadcasting has not started, it is too early to assess the role of transmission companies in digital licensing and related spectrum allocation. However, there is evidence of some operators in cable distribution using technical and other influences in ways that distort market access.

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247. Khan, "Digital Television Age."

248. Interview with the chief operating officer of one of the top-ranking broadcast media groups (confidentiality requested), Karachi, 2 July 2012.

249. Interview with Khalid Arain, president of the Cable Operators Association of Pakistan, Karachi, 12 December 2012.

Although they are licensed as content distributors, cable operators are starting to compete with news channels. Many operators have obtained licenses to broadcast in-house CD channels (on which operators are allowed to curate legal content). However, cable operators primarily air illegal content, especially entertainment programming and pirated films from India, which broadcasters are prohibited from airing under PEMRA rules.[250] Since Indian soap operas and films are the most popular among Pakistani television audiences (see section 1), this practice directly affects the viewership of news channels. According to media owners, cable operators have also started to receive advertising revenue for in-house channels and are therefore inclined to give these preference in terms of channel placement and promotion on their distribution networks.

As their business concerns grow, cable operators increasingly pressure news channels to promote their own interests. For example, in August 2012, the Supreme Court took up a petition against cable operators for airing Indian channels and "obscene" content. According to a number of social media reports, cable operators convened a meeting with television channel owners and placed a moratorium on media coverage of the Supreme Court's hearings and verdict, as well as discussions on political talk shows about the airing of Indian content. Channels defying this moratorium were threatened with blocks or poor placement on distribution networks.[251] In a demonstration of their stranglehold over Pakistan's television industry, cable operators protested the removal of Indian channels from their bouquets by blocking transmissions of six Pakistani entertainment channels, including ARY Digital, Geo Entertainment, Hum TV, Express Entertainment, TV One, and KTN Entertainment, causing losses of billions of rupees to private broadcasters.[252]

5.3   Telecommunications

5.3.1   Telecoms and News

Independent television news channels in Pakistan are digital satellite channels that are distributed by cable operators. Headends are licensed by the PTA to downlink satellite channels and distribute them to area cable operators (increasingly via digital fiber optic cable in dense urban areas). In turn, area cable operators provide analog cable services to homes via copper (coaxial) cables. According to Mr Iqbal, there are 3,100 cable operators nationwide.[253]

Cable operators are awarded distribution licenses by PEMRA following a competitive bidding process. PEMRA manages cable operators' tariff schedule (the monthly subscription fee for analog services stands today at PKR 400 (US$4) and for digital services PKR 550 (US$ 5.50). According to PEMRA regulations,

250. *Express Tribune,* "Blank Screens: Popular TV channels taken off air", 17 November 2012, at http://tribune.com.pk/story/467107/blank-screens-popular-tv-channels-taken-off-air/ (accessed on 16 February 2013).

251. PkPolitics, "Pak Media Owners Succumb to Cable Mafia Demands," 8 August 2012, at http://pkpolitics.com/2012/08/08/pak-media-owners-succumb-to-cable-mafia-demands (accessed 3 December 2012).

252. U. Ahmed, "Six Pakistani entertainment channels off-aired, operators want Indian channels back: PBA," The Kooza, 18 November 2012, at http://www.thekooza.com/six-pakistani-entertainment-channels-off-aired-operators-want-to-restore-indian-channels-says-pba/ (accessed 3 December 2012).

253. Interview with Muhammad Iqbal, assistant general manager, PEMRA, Islamabad, 3 July 2012.

licensed cable TV distributors must carry state television channels PTV 1 and PTV World, a Qur'anic channel, and an Islamic educational channel in their transmissions, and state channels are to be assigned priority serial order (among the top five numbers) in channel bouquets.

Although more than 100 channels are currently being broadcast in Pakistan, only 23 percent of households receive the maximum number of channels, owing to the technical limitations of analog networks and poor last-mile infrastructure.[254] Approximately 40 percent of households receive 50–70 channels, and 37 percent receive fewer than 50 channels.

In its 2010 annual report, PEMRA announced that cable operators in urban areas would have to digitize all headend connections by December 2012 or face license suspension. However, in light of financial constraints faced by cable operators, PEMRA has indefinitely extended that deadline. According to Mr Ayub, cable operators are gradually switching to fiber-optic cables, with up to 50 percent of main operators in urban areas offering digital services.[255] In areas where the switch-over is under way, cable operators are providing customers with media converters to convert digital transmission into analog for existing set-top boxes and televisions. With the gradual digitization, cable operators are also starting to provide bundled cable TV, internet, and telephone services.

In the telecoms sector, news media content is distributed over the internet in the form of online news access and television streaming. Pakistan's domestic fiber backbone providers are the telecoms companies PTCL, Wateen, Mobilink, and Multinet. Ten broadband companies are providing services to more than 2 million users, and the total number of internet users in Pakistan crossed the 25 million mark in 2012 as a result of the increasing usage of internet-enabled mobile phones (according to ISPAK, there are 15 million mobile internet users nationwide).[256] Mobile phone subscribers access the internet through various services, including EDGE technology (Enhanced DataRates for GSM Evolution), GPRS (general packet radio service), and BlackBerry. Since 2010, cellular service providers have incentivized mobile internet access by introducing bundle packages that offer competitive rates for voice calls, SMS, and internet access. They have also streamlined phone access to social networking and microblogging sites such as Facebook and Twitter to attract youth customers.

The increased affordability of smartphones is likely to further drive mobile internet traffic in Pakistan. The Chinese-made Baidu and Alibaba are examples of popular smartphones priced at less than PKR 15,000 (US$ 150). In 2012, the Pakistani company QMobile has also introduced an android phone which is available for less than PKR 10,000 (US$ 100).[257]

254. Khan, "Digital Television Age."

255. Interview with Nasir Ayub, deputy regional officer, PEMRA, Islamabad, 29 August 2012.

256. M. Yasir, "Internet users cross 25m mark," *Daily Times*, 20 September 2012, at http://www.dailytimes.com.pk/default.asp?page=2012%5C09%5C20%5Cstory_20-9-2012_pg5_15 (accessed 2 December 2012).

257. K. Baig, "Cheap is smarter: Let the smartphone price wars begin," *Express Tribune*, 20 August 2012, at http://tribune.com.pk/story/424168/cheap-is-smarter-let-the-smartphone-price-wars-begin/ (accessed 2 December 2012).

Digital satellite channels are also beginning to be distributed via mobile devices. PEMRA has issued an IPTV license to the formerly state-owned PTCL and mobile TV licenses to Brands Promotion Centre, Cellevision, and Dialogue. The cellular service operators Telenor Pakistan and Mobilink are currently providing mobile TV services to their customers. Telenor's mobile TV package offers 13 channels, including regional-language news channels, and has plans to expand.[258] Neither PEMRA nor the PTA has issued must-carry rules specifically for mobile television. As mobile TV services expand, telecoms companies will be better situated to control news access through their choice of channels to offer customers. At present, however, the small size of the mobile TV market means that the telecoms sector does not exert influence in terms of television news distribution and access.

Pakistan still does not have a 3G or 4G network, even though a 3G policy was approved by the prime minister in November 2011. In the absence of 3G, mobile internet access and mobile TV take-up in particular remain limited. As Nadir Ali Qureshi, Manager Operations for cellular service provider Ufone, put it, "Mobile TV and content streaming will have immense potential once we enhance our network capabilities to 3G and 4G. Currently, on the existing set-up, these services do not have any significant business impact."

5.3.2   Pressure of Telecoms on News Providers

PEMRA relies on cable operators to censor content on independent television channels, and regularly orders operators to block the transmission of certain channels. For example, in August 2010, PEMRA ordered cable operators to block the broadcasts of Geo TV and ARY TV after they aired a story about a protestor throwing a shoe at President Asif Zardari during the latter's visit to Birmingham, UK. When some cable operators in Karachi refused to block the channels, their offices were set on fire by the president's supporters.[259]

But cable operators are not only proxies for top-down government control of independent channels. Political parties from across the spectrum approach cable operators in their constituencies to block broadcasts that are critical of their policies, or to demand greater media coverage. In February 2012, for example, the private television channel Dunya News aired reports about the government-run Punjab Institute of Cardiology distributing counterfeit drugs that led to the deaths of more than 130 patients. Soon after, Dunya News' senior management, anchor persons, and journalists began receiving threats. Cable operators also reported that officials of the Punjab government, which is led by the opposition PML-N party, were pressing them to block Dunya News transmissions and the channel went off-air in the Punjabi city of Rawalpindi for several hours.[260]

The extent to which political parties expect cable operators to help them exert pressure on television channels became clear in March 2012, when activists of the ANP, which represents segments of the city's Pashtun population and has a long-standing rivalry with the MQM, the largest party in Karachi, cut the cables of

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258. T. Johnsen, "Mobile TV in Pakistan," at http://www.wirtel.co.uk/mobile_tv_in_pakistan_telenor.htm (accessed 2 December 2012).

259. R. Greenslade, "Pakistan TV blocked over Zardari shoe-throwing," *Guardian*, 12 August 2010, at http://www.guardian.co.uk/media/greenslade/2010/aug/12/press-freedom-asif-ali-zardari (accessed 2 December 2012).

260. Dunya News, "Punjab Government threatens Dunya News for PIC scoop," 9 February 2012, at http://dunyanews.tv/index.php/en/Pakistan/94812-Punjab-Govt-threatens-Dunya-News-for-PIC-scoop (accessed 2 December 2012).

various operators after they refused to block Geo TV transmission, leaving many parts of the city without television access.[261] Following that incident, the Cable Operators Association held protests and demanded government protection for operators' cable infrastructure.[262]

5.4   Assessments

Pakistan's spectrum allocation process favors the government, the military, and other public-sector entities over commercial operators. Media broadcasters do not directly engage with the FAB, which allocates spectrum; rather, the media and telecoms licensing authorities procure spectrum on behalf of applicants. This two-tiered process and the composition of FAB's board, which includes government and military representatives, make the frequency allocation process non-transparent.

Terrestrial broadcasts have yet to be digitized and technical standards for digital broadcasting have yet to be introduced. Although PEMRA's annual reports acknowledge the digital switch-over deadline, its policies and spectrum regulation do not provide for future digitization.

Moreover, PEMRA does not make any spectrum allocations for public interest, development-oriented or community media outlets. In a country of 180 million people with a less than 50 percent literacy rate and widespread poverty, the failure to draft spectrum allocation policies to foster media access and inclusivity is a serious oversight.

Since there are no public interest broadcasters or community outlets (other than the state-owned PTV and Radio Pakistan), public interest considerations have not been weighed in the allocation and regulation of the digital dividend and white spaces. PEMRA's only public interest affordance has been to license FM radio stations to universities and other educational institutions and to license virtual university television channels. These broadcasters are categorized as non-commercial and thus have to pay fewer application processing fees and significantly cheaper licensing fees. Such channels are not given any preferential treatment in terms of spectrum allocation.

On the whole, FAB is not transparent about the use of white space, which is largely overseen by the army. The public's lack of awareness about digital media transmission also makes it unlikely that there will be any public debates about the deployment of the digital dividend in the public interest.

261. S. Hasan, "Irked political workers cut off cable TV," 21 March 2012, at http://tribune.com.pk/story/352853/irked-political-workers-cut-off-cable-tv (accessed 3 December 2012).

262. S.Y. Kazmi, "Cable operators demand protection in Pakistan," Demotix, 20 March 2012, at http://www.demotix.com/news/1115841/cable-operators-demand-protection-pakistan-karachi#media-1115789 (accessed 2 December 2012).

6. Digital Business

6.1   Ownership

6.1.1   Legal Developments in Media Ownership

Under PEMRA Ordinance (2002), which first legislated for the liberalization of broadcast media, the federal government restricted cross-media ownership, prohibiting broadcast media licenses for existing media owners (whether print or broadcast). Many media owners worked around this restriction by obtaining temporary uplink permissions from PEMRA, under which they established and broadcast digital satellite television channels (even though the uplink permissions were meant for existing channels seeking satellite access). To address this manipulation of its rules, as well as criticism that strict rules about media ownership were compromising media freedom and plurality, PEMRA lifted the ban on cross-media ownership with the promulgation of PEMRA (Amendment) Ordinance (2007).

In the 2007 ordinance, PEMRA supplemented Section 23(2), which limited cross-media ownership, with the following clause: "Provided that if a licensee owns, controls or operates more than one media enterprise, he shall not indulge in any practice which may impede fair competition and provision of a level playing field." The clause enabled existing media owners to obtain broadcast or distribution services licenses, provided they did not behave anti-competitively.[263] The bill also stated that PEMRA and the government were responsible for defining the parameters of media ownership concentration and anti-competitive practices, but did not list any criteria that might be evaluated to check media concentration.

As a result, satellite television channels mushroomed in 2008 as print media owners obtained broadcast licenses and existing broadcast media groups diversified, launching specialized news, entertainment, music, and sports channels: 30 new television channels were licensed in 2008 compared with 17 in 2007, and three in 2006.[264]

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263. Ministry of Information and Broadcasting, "Pakistan Electronic Media Regulatory Authority Rules 2009," Government of Pakistan, 12 December 2009, at http://www.pemra.gov.pk/pemra/images/docs/legislation/PEMRA_Rules_2009.pdf (accessed 5 December 2012).

264. PEMRA, 2010, p. 23.

To check media proliferation and concentration, PEMRA Rules (2009) defined limits for media ownership. The maximum number of licenses that can be issued to a company or individual that directly or indirectly owns or operates a media enterprise stands today at four satellite television channels, four FM radio stations, and two landing rights permissions (from PEMRA to distribute a foreign satellite channel within Pakistan).[265] According to Section 13(2) of the new rules, licensees with interests in multiple media enterprises are required to appoint separate editorial boards and monitoring facilities, establish separate management structures, and maintain separate accounts for each medium. The rules also prevent recipients of broadcast licenses or landing rights permissions from applying for distribution service licenses, and vice versa. Mergers, transfers, and share disposal by license holders is also prohibited without PEMRA's approval.

Although the 2009 rules impose parameters for cross-media ownership, they are unlikely to check media concentration in Pakistan for two reasons. First, PEMRA grants licenses according to an open bidding procedure, whereby the highest bidder obtains the license for a specific category or sub-category. Well-established media organizations and business conglomerates inevitably outbid individuals and smaller entities, thereby undermining media plurality. Second, PEMRA's criteria for evaluating license applications—including financial viability, technical feasibility, credibility and track record, prospects of technical progress—are biassed in favor of existing media groups. PEMRA does not yet license public interest or community television channels or radio stations, and a clause that requires Pakistani nationals to hold majority shareholding and management control in any company bidding for a broadcast license prevents NGOs, which are largely funded by foreign donors, from launching development-oriented media outlets.

6.1.2   New Entrants in the News Market

Owing to the relaxation of cross-media ownership rules and higher advertising expenditure by the banking and telecoms sector, there has been a proliferation of broadcast media outlets in Pakistan since 2008. Approximately 60 digital satellite channels (that remain operational in 2012) have gone on air since January 2008. Eight of these are exclusively news and current affairs channels, including Express News, Royal News, City 42, Capital TV, Din News, Business Plus, and the Punjabi-language Awaz News TV. Many infotainment channels such as Metro One, Kohinoor TV, and Aruj TV intersperse entertainment programming with news bulletins.[266] In several cases, 24/7 news channels were launched when existing media groups decided to take advantage of relaxed cross-media ownership laws and diversified their media offerings; for example, ARY TV launched ARY News, ARY Zauq (a food channel), ARY Musik (a music channel), QTV (a religious channel), and Fashion TV (an international channel for which ARY TV has the broadcast rights in Pakistan).

Approximately 67 FM radio station licenses have been issued between 2008 and 2012, though some of these remain non-operational. This figure includes more than 20 non-commercial licenses which have been issued to universities across the country to produce educational programming. Since FM radio stations are restricted in the amount of news content they can broadcast (with allowances for Radio Pakistan and three daily BBC

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265. PEMRA, 2010, p. 23.

266. Metro One TV, at http://metro.tv.com.pk/ (accessed on 3 June 2013).

Urdu news bulletins), the mushrooming of radio stations across the country has not had a major impact on Pakistan's news market.

Despite the fact that the market for print publications is dwindling (see section *1.3.1*), several newspapers have been launched since 2008. These include the Urdu-language dailies (*Nai Baat*, *Jehan*, *Aaj Kal*), English-language dailies (*Express Tribune*, *Pakistan Today*, *Business Today*), and one Sindhi-language publication (*Sindh Express*). Growth in the print sector also resulted from changes in cross-media ownership rules and most publications were launched by existing media groups seeking to diversify: for example, *Aaj Kal* was launched in February 2008 by the same group that owns the English-language daily, *Daily Times*.[267]

6.1.3 Ownership Consolidation

As a result of these media ownership laws, a few media groups have come to dominate the media landscape, the largest of which have been operating since before the country's founding in 1947 and were influential players in the independence movement. The Independent Media Corporate (Jang Group), for example, owns the largest-selling Urdu-language *Daily Jang* (launched in 1939) as well as the most popular satellite news channel Geo News. The group also owns music, entertainment, and sports television channels, the English-language daily paper *The News*, an Urdu evening title, *Awam*, three other newspapers, and two magazines. Similarly, Pakistan Herald Publications Limited (the Dawn Media Group) owns the English-language daily paper *Dawn*, Dawn News TV, an FM radio station called City FM 89, and monthly magazines and industry publications, including *Herald*, *Spider*, and *Aurora*. Other major media groups are the Waqt Media Group with three newspapers, a television channel, and multiple magazines, and the Lakson Group (Express Media Group), with Urdu- and English-language dailies and three television channels.

Media concentration in the hands of a few media groups has been beneficial to the business elite. Owing to rampant cross-media ownership, advertisers are gravitating to large groups with whom they can negotiate advertising strategies and competitive tariffs across several media. For example, in 2009–2010, the total advertising expenditure increased by 12 percent to PKR 30.08 billion (US$ 300 million), with 58 percent of the budget going to television. Of this, Geo News received 13.91 percent of ad spend and Geo Entertainment received 9.81 percent, allowing the Independent Media Corporation to dominate the television market (the terrestrial channel ATV received the second-biggest share of television ad spend at 12.7 percent). At the same time, the group's *Jang* newspaper dominated the print market by receiving 34 percent of the print advertising budget and 64 percent of all advertising revenues for magazines.[268]

In 2010, the top 10 companies with the largest advertising budgets comprised 56 percent of the total.[269] This means that a handful of advertisers are the primary source of financing for a few large media groups. Media

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267. *Daily Times*, "Daily Times Group launches Daily Aaj Kal," 12 February 2008, at http://www.dailytimes.com.pk/default.asp?page=2008%5C02%5C12%5C5Cstory_12-2-2008_pg1_10 (accessed 10 December 2012).

268. Gallup Pakistan and Gilani Research Foundation, "Cyberletter: Media Advertising Spend Edition," 30 June 2010, at http://www.gallup.com.pk/News/Media%20Cyberletter.pdf (accessed 6 December 2012).

269. Gallup Pakistan and Gilani Research Foundation, "Cyberletter: Media Advertising Spend Edition," 30 June 2010, at http://www.gallup.com.pk/News/Media%20Cyberletter.pdf (accessed 6 December 2012).

owners therefore pressure journalists to protect the interests of the business elite that fund and facilitate their enterprises. For example, in June 2012, a leaked behind-the-scenes video of a political talk show revealed Dunya TV news anchors taking instructions via mobile phone calls from the channel's management on how to pose questions during an interview with a real-estate tycoon, Malik Riaz, to ensure that he had ample time to make certain revelations (see section *4.1.1* for details).[270] Similarly, the news director of one of the top 10 television ad spend recipients complained that she could not broadcast reports about one of Pakistan's main power supply companies despite the energy crisis in Pakistan because it was a major advertiser on the channel.[271] She added, "Channel owners put pressure on senior producers to manipulate the news so that they can gain favors. The excuse they use is that they need the money."

Advertisers' focus on national mainstream media groups with multiple outlets also threatens the viability of smaller, regional-language channels that target particular ethnic or linguistic groups. In 2009–2010, only the Sindhi-language KTN (among more than 15 regional-language channels) made it into the top 10 recipients of television advertising expenditure, with 5.12 percent of the total ad spend.[272] An increasing number of regional-language channels are operating at a loss, and media commentators predict that some channels might have to shut down in the near future. The closure of regional-language channels would seriously compromise the plurality and diversity of Pakistan's media landscape.

6.1.4   Telecoms Business and the Media

The telecoms industry's business involvements in the media sector are minimal. Media companies and operators are currently exploring possibilities for media content distribution via mobile phones. Several news providers, including Geo News, ARY News, Express News, Samaa TV, and the English-language daily *Pakistan Today* offer SMS news alerts on a subscription basis on all mobile networks. The cellular providers Mobilink and Telenor Pakistan also have mobile TV licenses and are streaming television content from select channels. However, since the PTA has not licensed a 3G network, the market for mobile media distribution remains extremely small. However, the telecoms industry, especially cellular operators, are expected to emerge as major players in the media sector. According to Musadiq Sanwal, the editor of Dawn.com, the website of the daily newspaper *Dawn*, cellular operators are seeking to charge media companies for delivering content (SMS, MMS, telestreams, audio files, etc.) to subscribers over mobile phones as well as retain a significant portion of revenues generated from this distribution.[273] Such arrangements could further compromise the feasibility of media outlets and indirectly affect media diversity and the quality of journalism.

270. S. Popalzai, "Video leak: Lucman, Bokhari run 'planted show' with Malik Riaz," *Express Tribune*, 14 June 2012, at http://tribune.com.pk/story/393636/video-leak-lucman-bukhari-run-planted-show-with-malik-riaz/ (accessed 23 August 2012).

271. Interview with news director of a privately owned news channel (confidentiality requested), Karachi, 5 July 2012.

272. Gallup Pakistan and Gilani Research Foundation, "Cyberletter: Media Advertising Spend Edition," 30 June 2010, at http://www.gallup.com.pk/News/Media%20Cyberletter.pdf (accessed 6 December 2012).

273. Interview with Musadiq Sanwal, editor, Dawn.com, Karachi, 10 December 2012.

6.1.5 Transparency of Media Ownership

Most print media outlets have a long history of publishing and their ownership is transparent. Most broadcast media outlets have been licensed by groups that were already active in the media sector, specifically in newspaper publishing, and their ownership is therefore similarly transparent. Some broadcast media licenses have been obtained by business conglomerates, which publicly declare their holdings (for example, the Express Media Group is owned by the Lakson Group, a business conglomerate that owns more than 15 companies in many sectors, including consumer goods, fast-food restaurants, internet services, textiles, and paper and board).

The ownership of FM radio stations is less transparent than print and television since the cost of commercial radio licenses is lower than that for television and attracts new players. Since PEMRA requires broadcast media owners to be Pakistani nationals, there are also some concerns that international investors are obtaining television and radio licenses through local stand-ins. However, according to Taher Khan, Chairman of the Interflow Group, which includes one of Pakistan's largest advertising agencies as well as Airwaves Media, which comprises three television channels,- there are "few proxy owners" in the market.[274]

Rather than ownership, broadcast media outlets' lack of transparency revolves around their financing, business models, and business interests. Writing in *Express Tribune*, Javed Jabbar, a former federal minister who drafted an early version of the PEMRA Ordinance (2002), commented on this problem:

> The public has no free, convenient access through websites to information [about the internal financial realities of news media] in so important a sector. Data about the ... media remains invisible. For example: employment terms (except for Wage Board Awards in print media), relationships with media-buying houses, which purchase time and space in bulk volumes, role of ratings agencies, which measure viewership and popularity of programs and channels, circulation of print media and the connection with advertising tariffs, value of government-controlled advertising, amounts paid to media by overseas entities to promote public service campaigns, the cartel-like media owners' associations, cross-media dominance, and cross-sectoral interests of news media proprietors in other fields.[275]

6.2 Media Funding

6.2.1 Public and Private Funding

Advertising provides almost all revenue for broadcast media and the bulk of revenues for print publications (according to media outlet owners, just under 25 percent of print revenues comes from subscriptions). Overall advertising expenditure in the media has been growing over the past decade. According to *Aurora*, a

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274. Interview with Taher Khan, chairman, Interflow Group, Karachi, 8 December 2012.

275. J. Jabbar, "Who should own news media?," *Express Tribune*, 6 August 2012, at http://tribune.com.pk/story/418266/who-should-own-news-media/?print=true (accessed 23 September 2012).

bi-monthly marketing magazine, total advertising expenditure in the 2010–2011 financial year was PKR32 billion (US$ 300 million), a figure that has grown at an average rate of 23 percent each year for the past 10 years (inflation over this period has been approximately 9 percent).[276]

In recent years, television has received the greatest share of total ad spend (58 percent, or PKR 18.6 billion, US$ 187 million, in the 2011 fiscal year). This share has seen the greatest increase in ad spend over preceding years compared with other media (there was a 28 percent increase in television ad spend share between the 2010 and 2011 fiscal years). Interestingly, the share of total ad spend for terrestrial channels, which are the most widely viewed in Pakistan, is disproportionately low given their viewership statistics. In 2010, terrestrial channels only received 25 percent of television ad spend; [277] still, the PTV Network receives significant revenues through license fees, which are approximately PKR3.5 billion (US$36 million) annually, or one-fifth of the total advertising revenue from the private sector for the television market.[278]

Despite receiving both license fees and ad revenues, PTV frequently operates at a loss.[279] Bilal Lakhani, the publisher of *Express Tribune*, clarifies that since television channels have mushroomed in recent years, the increase in ad spend for television has not translated into higher revenues for individual channels. He adds that revenues for television from other sources (international content sales, mobile subscriptions, etc.) are negligible, amounting to less than 1 percent of total revenues.[280]

Television channel CEOs and COOs argue that the introduction of DTH satellite television is essential for the future of Pakistan's broadcast media market. DTH would enable subscribers to receive signals directly from satellites, without having to rely on middlemen such as cable operators. This would allow broadcast media outlets to supplement their income with subscription revenues, thereby reducing their reliance on advertising and placing themselves in a stronger financial situation. Equally importantly, DTH would insulate media outlets from channel blocks and poor placement that constitute forms of censorship by the cable operators on behalf of the government. PEMRA initially issued DTH licenses to two companies, ARY and Cross Currents, in 2003, but then prevented them from making the DTH service operational. The matter has been referred to the Sindh High Court, where a case is pending. Media owners fear that the government is delaying proper DTH licensing in an effort to retain control over the market.

On the radio front, the share for FM radio stations of total advertising expenditure is also increasing, rising by 22 percent to reach PKR1.3 billion (US$10 million), or 4 percent of total ad spend in 2010–2011. However, the share of advertising expenditure for print media is in decline: in the 2011 fiscal year, print publications

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276. K. Alam, "Despite rapid growth, Pakistan's media remains financial lightweight," *Express Tribune*, 6 July 2012, at http://tribune.com.pk/story/404162/despite-rapid-growth-pakistans-media-remains-financial-lightweight (accessed 6 December 2012) (hereafter, Alam, "Despite rapid growth").

277. Gallup Pakistan and Gilani Research Foundation.

278. *Daily Times*, "Govt to raise TV license fee in electricity bills," 21 January 2010, at http://www.dailytimes.com.pk/default.asp?page=2010%5C01%5C21%5Cstory_21-1-2010_pg7_16 (accessed 3 June 2013).

279. I. Khan, "PTV's profit termed fake," 5 November 2010, at http://archives.dawn.com/archives/79937 (accessed 3 June 2013).

280. Interview with Bilal Lakhani, publisher, *Express Tribune*, Karachi, 8 July 2012. .

received PKR8.5 billion (US$85 million), or 27 percent of total ad spend, down 5 percent from the previous year.[281] This drop is part of a gradual shift, as the rate of increase of ad spend in print publications has been slowing in recent years: for example, in 2009–2010, the print ad spend increased by only 4 percent over the preceding year.[282] Advertisers are shifting budgets from print to television owing to declining circulation figures and the popularity and reach of private television channels. Moreover, print publications have yet to benefit from the growing number of online readers, since internet advertising has yet to take off: in 2012, only 1 percent of the total advertising expenditure of US$ 500 million went towards online advertising.[283]

Government advertising expenditure accounts for a significant proportion of total ad spend in the country. Although the budget for government ad spend is not publicly available, the COO of one of the most popular television channels estimates it to be PKR5 billion (US$50 million), of which up to 45 percent is used for print advertising.[284] The government uses this advertising to keep media outlets in check, since the revocation of government ad spend could bankrupt media outlets. In 2006–2007, the Dawn Group complained that General Musharraf had responded to criticism of his policies by cutting advertising equivalent to two-thirds of total government advertising.[285] There have been signs that the government is increasingly cautious in its use of advertising as a way to control media outlets; for example, in October 2010, the ruling PPP decided to boycott the Jang Group, Pakistan's largest media group, for presenting what it said was biassed coverage of the party and its policies.[286] The boycott prevented parliamentarians, party office-bearers, and PPP activists from appearing on Geo TV programs, but did not explicitly restrict government advertising for the group. Still, many media groups comply with government requests for positive coverage or news blocks in order not to risk losing advertising expenditure.

Industry insiders predict that the total ad spend will continue to grow in coming years, rising to PKR40 billion (US$ 400 million) in the 2012 fiscal year.[287] But some of this expenditure is likely to be diverted away from media outlets toward outdoor advertising, which increased by 50 percent to PKR3 billion (US$30 million) or 9 percent of the total ad spend in 2011. The ongoing energy crisis, which leaves many homes without power for up to 20 hours in the summer, has led to significant drops in broadcast media consumption and convinced advertisers that outdoor advertising is more reliable.

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281. Alam, "Despite rapid growth."

282. Gallup Pakistan and Gilani Research Foundation.

283. Business Recorder, "2013: The boom year for online advertising in Pakistan," 4 April 2013, at http://www.brecorder.com/br-research/44:miscel-laneous/3217:2013-the-boom-year-for-online-advertising-in-pakistan/ (accessed 3 June 2013).

284. Interview with the chief operating officer of one of the top-ranking broadcast media groups (confidentiality requested), Karachi, 2 July 2012.

285. CPJ, "In Pakistan, a media group cries foul over government advertising," 27 March 2007, at https://cpj.org/news/2007/asia/pak27mar07na.html (accessed 5 December 2012).

286. *The Nation*, "PPP decides to boycott Geo, Jang Group," 17 October 2010, at http://www.nation.com.pk/pakistan-news-newspaper-daily-english-online/politics/17-Oct-2010/PPP-decides-to-boycott-Geo-Jang-Group (accessed 5 December 2012).

287. Alam, "Despite rapid growth."

6.2.2 Other Sources of Funding

In recent years, the largest media groups have received significant amounts of funding from international governments and donor agencies seeking to boost media capacity and promote development campaigns, or in the form of advertising revenues. For example, since 2006, Geo News has aired VoA broadcasts three times a week, earning PKR 351 million (US$3.5 million) per year from the collaboration, according to one estimate.[288] The Geo TV network and Jang Group are also receiving very substantial funds from the UK Department for International Development (DfID) to promote education reform through a media campaign titled "Zara Sochiye."[289] In September 2012, the US State Department spent US$ 70,000 to air an advertisement on seven Pakistani television channels that showed the US president, Barack Obama, condemning an anti-Islam film, which caused unrest across the Muslim world.[290]

The US State Department has also sought more discrete ways to engage Pakistani broadcasters as part of an effort to improve the United States' image in Pakistan. In 2011, the State Department provided funding (including salaries) and production support for Pakistani channels to establish a bureau in Washington, DC. Dunya News and Express News signed up to the project and their reporters were housed at the offices of America Abroad Media (AAM), a non-profit media organization.[291] However, the channels were widely criticized for not being transparent about the fact that their reporters were drawing salaries from the US government via AAM.[292]

A large amount of money received by media outlets, especially television channels, remains undocumented. Pakistan's information ministry makes payments to media groups and individual journalists from a Secret Expenditure Fund amounting to PKR 140 million (US1.4 million) in the 2012–2013 budget.[293] Other bribes, facilitation payments, and financial support offered by political parties, business lobbies, and other groups seeking preferential coverage also remain unaccounted for.

6.3   Media Business Models

6.3.1   Changes in Media Business Models

The media sector has seen a drop in revenue resulting from the slowdown of the banking and telecoms sectors, which were major advertisers, increased competition, and prolonged power outages. CEOs and COOs of

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288. T. Hussain, "US aims to improve image in Pakistan," *The National*, 30 April 2011, at http://www.thenational.ae/news/world/americas/us-aims-to-improve-image-in-pakistan#full (accessed 7 December 2012) (hereafter, Hussain, "US aims to improve image in Pakistan").

289. Zara Sochiye, "Frequently Asked Questions," at http://zs.org.pk/faqs.asp (accessed 7 December 2012).

290. *BBC News Online*, "Pakistan TV shows US ads condemning anti-Islam film," 20 September 2012, at http://www.bbc.co.uk/news/world-asia-19664392 (accessed 7 December 2012).

291. Hussain, "US aims to improve image in Pakistan."

292. I. Ahmed, "US funding for Pakistani journalists raises questions of transparency," *Christian Science Monitor*, 2 September 2011, at http://www.csmonitor.com/World/Asia-South-Central/2011/0902/US-funding-for-Pakistani-journalists-raises-questions-of-transparency (accessed 7 December 2012).

293. *Express Tribune*, "Media accountability: Information ministry to brief SC on secret funds," 17 October 2012, at http://tribune.com.pk/story/452625/media-accountability-information-ministry-to-brief-sc-on-secret-funds (accessed 7 December 2012).

top-ranking media channels report an overall drop in viewership as well as a defection from news channels to entertainment programming, especially illegal in-house cable operator channels broadcasting Indian content. In an effort to compete with such content, the larger media groups are further diversifying and launching more entertainment channels. For example, the Express Media Group launched an entertainment channel, Express Entertainment, in January 2012 and an infotainment channel, Hero TV, in June 2012.

Print publications, meanwhile, are seeking to improve and better monetize their online editions. For example, both Dawn.com and the website of *Express Tribune* daily have mobile phone applications that are supported by advertising, which provides a new revenue stream for their respective media groups.[294] Both websites also launched beta versions of Urdu-language online editions in 2012 with an eye to attracting new audiences, particularly young readers in small towns and rural areas. As Mr Sanwal put it, "Management now knows that the future is in the internet."[295]

6.4   Assessments

The relaxation in 2007 of cross-media ownership rules facilitated the extreme concentration of Pakistan's independent media landscape. A few entities that were already well established in the media sector have come to dominate the market by diversifying their offerings within and across media and jointly monopolizing the bulk of advertising revenue. Seeing the growing clout of these media organizations and their increased cooperation with Pakistan's business elites through the process of exchanging advertising revenue for favorable coverage, some politicians and political parties have ventured into the media market (for example, Jahangir Khan Tareen, who is a member of the Central Executive Committee of the PTI, also owns the Seraiki-language channel Rohi TV). However, politicians have found it easier to coerce and influence the media market through government and private-sector ad spend and direct censorship through cable operators, rather than ownership.

The financial model of liberalized media has undermined its independence and the quality of journalism. Since media owners are almost entirely reliant on advertising revenue to continue operations, they use their media outlets to provide positive coverage of or defend the vested interests of a business elite. The media's independence and credibility is also damaged by the fact that many outlets are owned by major business conglomerates with multi-sectoral companies and investments. These outlets are seen as a tool for large business groups to promote and defend their own interests.

At the moment, the media industry offers no examples of sustainable financing models for the production of relevant public news content. The market is largely reliant on advertising revenue, which means that

294. *Express Tribune*, "Old vs new: Can newspapers survive the social media challenge?," 24 September 2012, at http://tribune.com.pk/story/441309/old-vs-new-can-newspapers-survive-the-social-media-challenge (accessed 7 December 2012).

295. Interview with Musadiq Sanwal, editor, Dawn.com, Karachi, 10 December 2012.

media groups censor or promote certain content to benefit their advertisers and regularly fall victim to sensationalism and poor reporting in an effort to secure high ratings. Other financing options, such as funds from international governments and donor agencies, further compromise the media groups' independence and credibility, particularly in Pakistan's charged political environment where media outlets are perceived as proxies for international government agendas.

7. Policies, Laws, and Regulators

7.1 Policies and Laws

7.1.1 Digital Switch-over of Terrestrial Transmission

Although PEMRA has given cable operators a deadline to switch over to digital transmission, it has made no plans to digitize terrestrial transmission. Cable operators in large cities such as Karachi and Lahore have largely digitized their headends and started to install fiber-optic cables, but this is primarily a good business move: digitization enables them to offer a greater number of channels as well as the internet and squeeze out smaller competitors (who cannot afford to digitize) in an increasingly crowded market. At present, cable operators are not planning to digitize local loops and last-mile cables, other than in urban business districts or affluent residential areas. This is because of the high costs involved and most end users' inability to pay higher subscription fees for digital transmission and purchase new cable receivers, digital-analog convertors, or television sets. Although PEMRA stated in its 2010 annual report that cable operators which did not switch to digital might face fees or license suspensions, it has taken no action against those who continue to operate in analog.

PEMRA also has made no plans to provide subsidies to those who cannot afford new equipment. Civil society groups are increasingly active in terms of internet regulation (see sections *7.1.2* and *7.3*), but largely lack awareness of the advantages of digital switch-over and are thus not advocating for new, equitable policies in this regard; given the authorities' increasing efforts to control and censor television and internet content, civil society groups are focussing digital activism on existing regulation and oversight mechanisms.

7.1.1.1 Access and Affordability

As the process of digital switch-over of terrestrial television has not taken off yet, there are no legal provisions on access to and affordability to access digital content.

7.1.1.2 Subsidies for Equipment

As the process of digital switch-over of terrestrial television has not taken off yet, no discussion about subsidizing purchase of digital devices has taken place to date. However, there are strong indications from industry players that households will resist investing in digital equipment, either because they do not feel the need of more channels or simply because they are too poor to make such purchases.

Cable operators that distribute digital satellite television channels report that customers are unwilling to pay higher prices for digital transmission because they are satisfied with the current quality of service. Poor households are unlikely to be able to afford the conversion from analog to digital as it will require them to purchase new set-top boxes. But PEMRA has made no provisions to provide financial assistance to households that cannot afford to receive digital transmissions.

7.1.1.3 Legal Provisions on Public Interest

As the process of digital switch-over of terrestrial television has not taken off yet, there are no legal provisions on public interest in the digital switch-over process.

7.1.1.4 Public Consultation

The digital switch-over of terrestrial television has not taken off and no discussion about this process has taken place whatsoever.

7.1.2   The Internet

7.1.2.1 Regulation of News Content on the Internet

News delivery is not specifically regulated on internet and mobile platforms. Laws governing the internet include the Pakistan Telecommunications (Re-organization) Act 1996, the Electronic Transactions Ordinance, and the Payment Systems and Electronic Fund Transfers Act, which largely regulate e-commerce, internet fraud, and other online transactions.[296] A draft version of an Electronic Data Protection and Safety Act has yet to be ratified by Parliament. Similarly, a deeply flawed Prevention of Electronic Crimes Ordinance (2007), was submitted to a committee for review in 2009, but has not been brought before Parliament again.[297] The ordinance, which was promulgated three times and sought to criminalize cyber-crime and cyber-terrorism, included many clauses undermining freedom of expression and privacy rights, and was therefore rejected by parliamentarians and digital activists alike.

Internet content is legislated primarily under the Pakistan Penal Code, including sections 295-A, 295-C, 298, and 298-A, which pertain to blasphemy; the Anti-Terrorism Act; and the Defamation Ordinance (2002), which includes provisions on slander and libel. Internet and mobile content are monitored and regulated by the PTA.

In recent years, the PTA has acted on government or court orders to block access to websites, search engines, and various Web 2.0 applications such as YouTube and Facebook. Authorities claim that these blocks seek to restrict access to blasphemous or pornographic content, but they are often attempts to censor political

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296. Pakistan Telecommunications Authority (PTA), "Annual Report: 2011," p. 18, at http://www.pta.gov.pk/index.php?option=com_content& view=article&id=361&Itemid=590 (accessed 15 April 2013) (hereafter, PTA, "Annual Report 2011").

297. M. Javaid, "A world without law," *Herald*, 17 January 2012, at http://herald.dawn.com/2012/01/17/a-world-without-law.html (accessed 15 December 2012) (hereafter Javaid, "A world without law").

content. Such blocks affect news delivery because they directly block news content or websites; for example, in July 2011, the American magazine *Rolling Stone* was blocked after it published a critical article on the Pakistan army's expenditure.[298] In October 2010, the army ordered the PTA to block a video showing a Pakistan Army officer beating a civilian from popular content-sharing websites. YouTube was also blocked in February that year after a video showing President Asif Zardari yelling at a public gathering was uploaded to the site.[299] In September 2010, more than 240 URLs, including web pages of international news organizations such as the *New York Times* and CNN, were blocked as the government tried to control news coverage about an American pastor's campaign to burn copies of the Qur'an.[300] On a more regular basis, the PTA blocks hundreds of websites of Baloch and Sindhi activists who call for political autonomy, document human rights abuses against fellow activists, and link to news stories about their movement.[301] For example, in November 2010, PTA blocked The Baloch Hal, the first English-language news website about Balochistan, one year after it launched.[302]

News media are also affected when the PTA blocks blasphemous online content, thereby curtailing access to sites such as Google, YouTube, Facebook, where news is distributed and consumed. For example, starting on 17 September 2012, the Pakistan government banned YouTube indefinitely after the site refused to remove a clip from an anti-Islam film that mocks the Muslim prophet Muhammad.[303] Similarly, in May 2010, the PTA blocked Facebook, YouTube, and Flickr and Wikipedia pages when a Facebook user created a page titled "Everybody Draw Muhammad Day." The ban was lifted after Facebook removed the page, but the Lahore High Court directed the Government to monitor "objectionable" and "blasphemous" content on various platforms, including Bing, Google, Yahoo, YouTube, and MSN.[304] In March 2007, too, Supreme Court orders to filter blasphemous content led to disruptions of Google, Yahoo, BBC, CNN, and other news websites over four days.

In some cases such as the blocking of The Baloch Hal, the authorities have justified their actions by citing Section 99 of the Pakistan Penal Code, which allows the government to restrict information that could undermine the national interest.[305] But in the absence of specific legislation regarding internet and mobile content, the government has been seeking means by which to have greater control in terms of monitoring and restricting content. In 2010, the Lahore High Court ordered the PTA and the Ministry of Information

298. J.C. York, "Pakistan escalates its internet censorship," Al Jazeera, 26 July 2011, at http://www.aljazeera.com/indepth/opinion/2011/07/2011725111310589912.html (accessed 15 December 2012).

299. Open Net Initiative, "Pakistan," 6 August 2012, at http://opennet.net/research/profiles/pakistan (accessed 15 December 2012) (hereafter, Open Net Initiative, "Pakistan").

300. Freedom House, "Freedom on the Net."

301. S.Ahmad and N. Dad, "Fighting for Human Rights in Balochistan Online," Global Information Security Watch, at http://www.giswatch.org/sites/default/files/gisw_-_pakistan.pdf (accessed 14 December 2012).

302. Freedom House, "Freedom on the Net."

303. *Express Tribune*, "Christmas cheer? YouTube to be unblocked in '24 hours,' tweets Rehman Malik," 28 December 2012, at http://tribune.com.pk/story/485918/christmas-cheer-youtube-to-be-unblocked-in-24-hours-tweets-rehman-malik (accessed 28 December 2012) (hereafter, *Express Tribune*, "Christmas cheer?").

304. Open Net Initiative, "Pakistan."

305. Freedom House, "Freedom on the Net."

Technology to create a permanent system to monitor and filter "blasphemous and objectionable content" online. Soon after, it was reported that the PTA was developing regulations for filtering internet content, and PTCL, which manages the Pakistan Internet Exchange, the country's largest internet exchange point, was experimenting with transparent proxy servers in order to censor content in a more targeted manner.[306] In February 2012, the National ICT Research and Development Fund floated a tender for a URL filtering system capable of blocking 50 million websites in an effort to block "undesirable, blasphemous, objectionable, obscene" content.[307] The plan was shelved following opposition by a multi-stakeholder digital rights campaign, but digital activists fear the authorities are continuing to develop sophisticated ways to block online content.[308] In December 2012, the Interior Minister, Rehman Malik, announced in an official tweet that the PTA was in negotiations to acquire "a powerful firewall software to totally block pornographic and blasphemous material."[309] Subsequently, in June 2013, Citizen Lab, a research group at the University of Toronto, released a report stating that the Pakistan government is using Netsweeper technology to categorize and filter billions of websites.[310]

There are also growing concerns about future news delivery on mobile platforms. Article 54 of the Telecommunications (Re-organization) Act empowers the government to shut down telecoms systems without legal authorization or court approval.[311] The government has increasingly used its power to shut down cellular networks in the name of national security, arguing that terrorists use mobile phones to coordinate attacks. For example, in November 2012, cellular services were suspended for 14 hours in 50 cities on a religious holiday.[312] Similarly, in September 2012, the government suspended mobile phone services in 15 cities on an official day of protest against an anti-Islam film.[313] While the suspension of cellular services is not targeted at news content, it does affect news delivery via SMS or mobile internet. This practice will have significant implications for news delivery and access in the future, particularly after Pakistan launches 3G and 4G networks.

Additionally, Article 31(d) of the Act criminalizes the dissemination of "false, fabricated, indecent, or obscene" information. Although this clause is not widely invoked, digital activists fear it could be used to prevent live coverage of developing news events or any incident during which it is difficult to verify facts. They also think the clause could be used to ban op-eds, satire, political comedy, and other content that is not strictly fact-based.[314]

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306. Open Net Initiative, "Pakistan."

307. S. Shackle, "Excessive internet bans worrisome for Pakistan," *Dawn*, 5 November 2012, at http://dawn.com/2012/11/05/excessive-internet-bans-worrisome-for-pakistan/ (accessed 15 December 2012).

308. Telephone interview with Jehan Ara, president of the Pakistan Software Houses Association for IT & ITES (P@SHA), 30 July 2012.

309. *Express Tribune*, "Christmas cheer?."

310. *Express Tribune*, "Pakistan government using Netsweeper for internet filtering: Report", 20 June 2013, at http://tribune.com.pk/story/565879/pakistan-government-using-netsweeper-for-internet-filtering-report (accessed 21 June 2013).

311. Article 19, "Pakistan: Telecommunications (Re-organization) Act: Legal Analysis," January 2012, at http://www.article19.org/data/files/media library/2949/12-02-02-pakistan.pdf (accessed 14 December 2012) (hereafter, Article 19).

312. *Express Tribune*, "Muharram security: Cell phone services to remain suspended today," 25 November 2012, at http://tribune.com.pk/story/470940/muharram-security-cell-phone-services-to-remain-suspended-today (accessed 15 December 2012).

313. *The News*, "Mobile services frozen in fifteen cities," 21 September 2012, at http://www.thenews.com.pk/article-68558-Mobile-services-frozen-in-fifteen-cities (accessed 15 December).

314. Article 19.

7.1.2.2 Legal Liability for Internet Content

Pakistan has no specific legislation regulating internet content or digital communications, and there are no provisions regarding legal liability. "We want things like legal liability defined in the law because right now, everyone is held liable and blanket bans are the default," explains Jehan Ara, president of the Pakistan Software Houses Association for IT & ITES (P@SHA).[315] In January 2013, in a legal first, the cleric Tahir Ashrafi announced that he would initiate legal proceedings against Let Us Build Pakistan, a blog that had accused him of fueling sectarianism. In the absence of specific cyber-crime laws, lawyers pointed out that Mr Ashrafi's best option would be to file a civil suit on the charges of slander and libel against the publisher of the content under the Defamation Ordinance (2002). Under this law, action could be taken against the blogger, the owner of the site or any organization affiliated with the blog.[316] In May 2012, a judge filed a criminal case against Facebook and three other websites on the basis of a petition filed by the Namoos-e-Risalat Lawyers Forum for carrying "blasphemous materials" on the anniversary of the launch of a page titled "Everybody Draw Muhammad Day," which contained cartoons of the Prophet. The court ordered the authorities to block the relevant pages and to begin an investigation, though there have been no further developments on the case.[317]

7.2   Regulators

7.2.1   Changes in Content Regulation

The main media regulators in Pakistan are PEMRA, which oversees television and radio, and the PTA, which oversees telecoms and the internet. The structure and ambit of these regulators have not significantly changed much in the past five years, although, the PTA has established and empowered an inter-ministerial committee tasked with monitoring and blocking internet content, especially websites containing blasphemous, pornographic or anti-state material.

In September 2006, the Ministry of Information Technology announced the creation of the Inter-Ministerial Committee for the Evaluation of Websites (IMCEW), which comprises representatives from the PTA, the Ministry of Information Technology, the Ministry of the Interior, the federal cabinet, the Pakistan army, and the three branches of the national intelligence agencies. In the absence of specific legal frameworks defining which government body or court is authorized to regulate internet content, the IMCEW directly orders ISPs to block websites. The IMCEW has not responded to calls for greater transparency from digital activists even as internet blocking has become more frequent. Digital rights groups such as Bytes for All and BoloBhi have requested that the IMCEW's membership be made public, and that the committee provide an up-to-date list of all blocked websites and reasons for their being blocked.[318]

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315. Telephone interview with Jehan Ara, president of the Pakistan Software Houses Association for IT & ITES (P@SHA), 30 July 2012.

316. G. Ashraf, "Legal first: Twitter feud turned defamation suit," *Express Tribune*, 22 January 2013, at http://tribune.com.pk/story/497217/legal-first-twitter-feud-turned-defamation-suit/ (accessed 3 June 2013).

317. N. Messieh, "Case filed against Facebook and 3 other websites in Pakistan for hosting 'blasphemous materials,'" The Next Web, 22 May 2012, at http://thenextweb.com/asia/2012/05/22/case-filed-against-facebook-and-3-other-sites-in-pakistan-for-hosting-blasphemous-materials (accessed 13 June 2013).

318. S. Saleem, "Blocked, Denied, Censored," BoloBhi, 18 July 2012, at http://bolobhi.org/press-release-public-statements/press-releases/blocked-denied-censored-15756/ (accessed 26 December 2012).

7.2.2 Regulatory Independence

There is no independent regulation of the digital environment. Government authorities such as PEMRA and the PTA are tasked with all monitoring and regulation, and the chairpersons of these authorities are government appointees. PEMRA remains closely tied to the Ministry of Information and Broadcasting through appointments; for example, Chaudhry Rashid Ahmad, appointed PEMRA's chairman in January 2013, previously served as the federal secretary for information at the ministry. Officials from the ministries of Information and the Interior as well as the PTA are also members of the authority. And while many PTA officials are required to have a technical or engineering background, their appointments are frequently made on the basis of political connections. In March 2013, for example, the Lahore High Court dismissed the appointment of a new PTA chairman by the government in response to petitions alleging the government did not follow proper procedure in the appointment by neglecting to advertise the position or interview multiple candidates for the role.[319]

In recent years, the PTA has shown some willingness to engage with digital rights groups such as BoloBhi and Bytes for All and industry associations such as software houses association P@SHA and ISPAK to ensure that draft legislation complies with international law governing internet access and data protection. However, processes for gaining such input from the public have not been formalized.

7.2.3 Digital Licensing

Since Pakistan has not initiated digitization of terrestrial TV, this section focusses on satellite television, cable, and FM radio licenses issued by PEMRA since liberalization in 2002. The bulk of television and radio licenses were granted during the tenure of General Musharraf between 2002 and 2008. According to media channel owners, the licensing process until 2008 was largely fair and transparent, with PEMRA granting licenses to companies that could afford license fees and demonstrate feasibility or, once the market became more saturated, to the highest bidders.[320]

However, since 2008, when the PPP-led coalition came to power, the licensing process has been increasingly politicized. For example, the Independent Media Corporation, which owns the largest-selling *Jang* newspaper and Geo Television Network, and has been consistently critical of the PPP government, has not been granted additional television licenses or an FM radio license since 2008. Media management personnel attribute this to government obstructionism.[321] Similarly, the Hashoo Group, a major business conglomerate, announced in 2011 that it would be launching a television network under the banner of Pearl Communications.[322] However, PEMRA has yet to approve licenses for Pearl television channels. Media channel owners and

319. F. Baloch, "Sent Packing by the Court: As PTA Chairman departs, industry breathes easier," *Express Tribune*, 16 January 2013, at http://tribune.com.pk/story/494504/sent-packing-by-the-court-as-pta-chairman-departs-industry-breathes-easier/ (accessed 3 June 2013).

320. Interviews with Bilal Lakhani, publisher of *Express Tribune* and part of the family-owned business that owns Express News, Karachi, 26 July 2012, and Taher Khan, chairman, Interflow Group, Karachi, 8 December 2012.

321. Interview with chief operating officer of one of the top-ranking broadcast media groups (confidentiality requested), Karachi, 2 July 2012.

322. *The Nation*, "Media house of Hashoo Group," 7 June 2011, at http://www.nation.com.pk/pakistan-news-newspaper-daily-english-online/business/07-Jun-2011/Media-house-of-Hashoo-Group (accessed 17 December 2012).

managers claim that this is owing to business rivalries between the chairman of the Hashoo Group and President Zardari.[323] Following his dismissal as the CEO of Pearl Communications, Dr Shahid Masood, in an email that was widely circulated, also cited the channel's inability to obtain a license as the main reason for its failure to launch.[324]

The licensing process for cable operators is more transparent, with licenses going to the highest bidders, though not necessarily equitable in terms of enabling even access throughout the country. Civil society actors and industry representatives increasingly complain that PEMRA does not sufficiently scrutinize cable license applicants to ensure high-quality service delivery and to prevent market saturation.[325]

Internet and telecoms service providers, including mobile phone network operators, receive licenses through the PTA. The process of obtaining a license for an ISP or mobile phone network is largely transparent, though it involves bureaucratic delays and the payment of considerable license fees, often on the basis of an open bidding process.[326]

Cybercafes are currently not regulated by any government authority and therefore do not require operating licenses. However, in July 2012, the government of the Punjab province introduced the Punjab Cyber and Gaming Cafe (Regulation) Act 2012, which has not yet been approved by the provincial assembly. The draft seeks to regulate cybercafés by requiring them to register with an agency and maintain logs on visitors to the cybercafés and their use of the facilities.[327]

7.2.4   Role of Self-regulatory Mechanisms

There are currently no industry-wide mechanisms for self-regulation by broadcast media (television and FM radio). In July 2012, following accusations in the media that senior news anchors were receiving bribes to promote government campaigns and individuals' business interests, two senior journalists, Hamid Mir and Absar Alam, filed a petition in the Supreme Court seeking the formation of a media accountability commission that would investigate sources of funding for media groups and news anchor persons as well as draft a code of conduct for the broadcast media.[328] Acting on the petition, the Supreme Court has pressed PEMRA to better enforce its Code of Conduct and clarify its various clauses (for example, the Supreme Court directed PEMRA in August 2012 to clearly define obscenity, since PEMRA regulations ban channels from broadcasting "obscene" material).[329] The Supreme Court's involvement in media regulation has led to

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323. Interviews with Bilal Lakhani, publisher of *Express Tribune* and part of the family-owned business that owns Express News, Karachi, 26 July 2012 and chief operating officer of one of the top-ranking broadcast media groups, Karachi, 2 July 2012.

324. Press Pakistan: Journalist Networking Forum (Google Groups), "Disappointment spreading within Pearl TV employees?," 30 May 2011, at https://groups.google.com/forum/?fromgroups=#!msg/PressPakistan/1wRMNiUNs9k/X4K7A8QwNCsJ (accessed 17 December 2012).

325. Interview with Khalid Arain, president of the Cable Operators Association of Pakistan, Karachi, 12 December 2012.

326. Freedom House, "Freedom on the Net."

327. A.S. Khan, "Punjab moves to control, regulate cyber cafes," *The News*, 9 July 2012, at http://www.thenews.com.pk/Todays-News-2-119345-Punjab-moves-to-control-regulate-cyber-cafes (accessed 17 December 2012).

328. S.M. Khan, "Hamid Mir, Absar Alam move SC to form media accountability commission," *Express Tribune*, 19 July 2012, at http://tribune.com.pk/story/410465/hamid-mir-absar-alam-move-sc-to-form-media-accountability-commission (accessed 17 December 2012).

329. *Express Tribune*, "Supreme Court's directives: PEMRA meeting to define term 'obscenity,'" 25 August 2012, at http://tribune.com.pk/story/425940/supreme-courts-directives-pemra-meeting-to-define-term-obscenity-on-august-27 (accessed 17 December 2012).

more calls by civil society actors for the media to self-regulate, even though previous efforts to develop a consensual code of conduct have failed.

In January 2011, the Pakistan Broadcasters Association (PBA), which acts as a clearing house and enforces rules of business between television channels, media buying houses, and advertising agencies, produced a draft code of conduct for television channels, but this has not been adopted or implemented by broadcasters.[330] In 2009, 16 news channels endorsed a voluntary code of conduct regarding the live coverage of terrorist attacks (addressing issues such as utilizing a time-delay mechanism; carefully monitoring live coverage during hostage situations; censoring graphic images, including footage of corpses or people injured in attacks; and interviewing eyewitnesses and the family members of victims).[331] Although the voluntary code helped establish industry protocol for the coverage of terrorist attacks, it has not been further developed to promote responsible and ethical media coverage across the board.

In the absence of industry-wide self-regulation, individual media groups are starting to develop in-house codes of conduct. For example, the Geo Television Network in 2012 launched Geo Asool (or Geo Laws), which it describes as a "social contract with [its] viewers."[332] Geo Asool were drafted by a committee comprising the media group's management, journalists, news anchor persons and so forth, and invited feedback from the public. The Asool include the network's manifesto, best practice guidelines, a handbook for journalistic ethics that all Geo employees are expected to abide by, and plans for media monitoring and code implementation. However, many media professionals are skeptical about such self-regulation initiatives. "Asking for a 'consensus code of conduct' has become fashionable now," explains senior journalist Matiullah Jan. "This is an excuse by the media to justify their wrongdoings [by pointing to] the absence of a 'consensus code of conduct'. The problem with the media industry is that it is not facing organized public opinion pressure, which is the fundamental requirement for the enforcement of any code of conduct."[333]

With regards to print media, the Press Council of Pakistan (PCP) is tasked with devising and enforcing a voluntary code of ethics for newspapers and magazines. However, the council is largely powerless: in August 2012, conceding that a lack of resources and staff prevented it from carrying out its regulatory role, it debated requesting the government for funds, neglecting the fact that government funding would rob it of its independence.[334] The culture of media self-regulation remains extremely underdeveloped in Pakistan.

330. Asia Pulse, "Kaira hopes Pakistan Broadcasters Association would adopt code of conduct voluntarily," 27 January 2011, at http://www.thefree library.com/Kaira+hopes+Pakistan+Broadcasters+Association+would+adopt+code+of...-a0247763058 (accessed 17 December 2012).

331. *Dawn*, "Channels frame rules for terrorism coverage," 5 November 2009, at http://archives.dawn.com/archives/41935 (accessed 17 December 2012).

332. Geo Asool, at http://www.geo.tv/asool (accessed 17 December 2012).

333. Interview with Matiullah Jan, correspondent and anchor with television channel Waqt News, Islamabad, 9 August 2012.

334. *Dawn*, "Press council to be party to oppose code of ethics plea," 3 August 2012, at http://dawn.com/2012/08/03/press-council-to-be-party-to-oppose-code-of-ethics-plea/ (accessed 18 December 2012).

7.3 Government Interference

7.3.1 The Market

As described in section *7.2.3*, the politicization of the licensing process, especially for television channels, has distorted the media market in favor of pro-government or politically neutral media groups. The government is also able to facilitate and financially reward media groups that are willing to promote or remain uncritical of government policies through government advertising allocations and Secret Expenditure fund handouts. Government advertising expenditure accounts for a significant proportion of total ad spend in the media, and officials use the reduction or withdrawal of advertising revenue as a way to pressure media groups (see section *6.2.1*).

Similarly, the Ministry of Information and Broadcasting maintains an unaudited secret fund worth PKR 120 million (US$1.2 million) in the 2012–2013 financial year for the welfare of journalists (see section *4.1.2* for more information). Speaking off the record, media channel owners claim that secret fund and other non-documented government handouts are substantial enough to keep certain political talk shows and other programs on air, even when they do not receive high ratings.

District and provincial state representatives (including members of parliament, senior police officials, and other government officials) are able to distort the broadcast media market at the local level by maintaining close ties with cable operators. Local authorities dictate what channels cable operators include in their bouquets and frequently order them to temporarily block the transmission of those channels that are critical of their policies (see section *5.3.2*).

7.3.2 The Regulator

PEMRA and the PTA increasingly work on behalf of the government, the military, and intelligence officials to censor politically-sensitive content, even if it does not violate the regulators' codes of conduct and other rules. With regards to the broadcast media, PEMRA orders cable operators to block the transmission of certain news channels or fines FM radio stations when they broadcast content that is critical of the government or the military (see section *5.3.2*). Similarly, as described in section *7.1.2.1*, a shadowy inter-ministerial committee based at the PTA orders ISPs to block news websites and online social media networks that publish or stream anti-government or anti-army content. The PTA enforces these online bans without offering any public listing of blocked websites or official reasons for them being censored.

7.3.3 Other Forms of Interference

Media outlets and individual journalists and news anchor persons receive threats from government and military officials, intelligence agencies, and political party representatives. According to the CPJ, 57 percent of journalists killed in Pakistan (ranked the deadliest country in the world to be a journalist in 2010 and 2011) cover politics. Moreover, as described in section *4.2.2*, several journalists, including the *Asia Times Online* correspondent Saleem Shahzad, have been abducted and tortured or killed reportedly by members of the intelligence agencies. Speaking off the record, media outlet owners report that they frequently receive

threatening phone calls from members of the security establishment advising against the broadcast or publication of certain content.

7.4   Assessments

There are currently neither any policies for digital switch-over, nor any guidelines about the procedure or timeline for future digitization. PEMRA has simply notified cable operators to digitize their headends by 2015 (this deadline too is fluid, and cable operators in semi-urban and rural areas who do not expect to profit from the switch-over are not planning to digitize their services).[335] Notably, there are no concrete plans to digitize terrestrial transmissions. PEMRA has not launched any public awareness campaigns to explain the benefits of digitization, nor has it consulted with media organizations or civil society groups to draft policies or debate the implications of digitization. PEMRA's electronic media licensing process is also biassed in favor of commercial projects, and there are currently no plans to extend licenses for community or development-oriented programming.

As media access and consumption grow, the state authorities are making greater efforts to control and censor content. Media channel owners and journalists are facing increased threats and pressure to provide favorable coverage by government and military officials, intelligence agencies, and political parties. The failure to comply with government and army demands about what content to broadcast increasingly results in television channels being blocked by cable operators acting on PEMRA's orders. In recent years, the judiciary has also used contempt of court powers to prevent the media from airing programming critical of the judiciary, debating court decisions, or commenting on ongoing cases.[336]

State authorities have made even greater efforts to control and censor content online. The government's approach to net freedom was made clear in 2012 with the official call for tenders for a URL filtering and blocking system capable of disabling up to 50 million websites. As of July 2012, more than 15,000 websites had been blocked by the PTA.[337] Although government officials claim that only pornographic and blasphemous material is censored, blocked websites often contain politically sensitive, anti-government or anti-military content.

There are currently no platforms or mechanisms in place for public consultation with respect to new media technologies. Certain industry associations and digital rights groups such as BoloBhi and Bytes for All have succeeded in engaging with the PTA in order to provide feedback on draft legislation regarding cyber-crime and legal liability online in order to ensure that it conforms with international standards. However, the

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335. Interview with Khalid Arain, president of the Cable Operators Association of Pakistan, Karachi, 12 December 2012.

336. Human Rights Watch, "Pakistan: Judges Muzzling Critics in the Media," 27 November 2012, at http://www.hrw.org/news/2012/11/27/pakistan-judges-muzzling-critics-media (accessed 26 December 2012).

337. S. Saleem, "Blocked, Denied, Censored," BoloBhi, 18 July 2012, at http://bolobhi.org/press-release-public-statements/press-releases/blocked-denied-censored-15756/ (accessed 26 December 2012).

government's pursuit of internet blocking technologies and slow progress toward revising draft legislation indicate that civil society groups are not considered as serious stakeholders and the public consultation process is of low priority.

Liberal cross-media ownership laws and the open bidding process for broadcast media licenses have concentrated media production in the hands of a few large media groups and major business conglomerations (see section 6. The open bidding system and resulting exorbitant fees for new licenses discourage new entrants to the media industry. The failure both to digitize terrestrial transmissions and to make provisions for community media has limited the pluralism and diversity of digital broadcasting. That said, there has been a proliferation in private television channels and FM radio stations in the past five years, a large number of which broadcast in regional languages such as Punjabi, Sindhi, Pashto, and Seraiki. For this reason, many media commentators argue that the broadcast landscape is sufficiently diverse.

With regard to the internet, increasing government efforts to block websites are threatening online religious, linguistic, and political diversity. For example, in July 2012, the PTA blocked websites maintained by members of the Shia and Ahmadi religious minorities.[338] It also routinely blocks blogs and news websites maintained by Baloch and Sindhi political activists and separatists.

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338. H. Yusuf, "Silencing Pakistan's Minorities," *International Herald Tribune*, 23 July 2012, at http://latitude.blogs.nytimes.com/2012/07/23/pakistans-religious-minorities-are-silenced-online (accessed 26 December 2012).

8. Conclusions

8.1 Media Today

The liberalization of the broadcast media landscape led to greater media independence, diversity, and pluralism between 2002 and 2007. The media have been hailed in the past decade for facilitating the country's democratic transition, highlighting the plight of minorities, victims of natural disasters, and refugees, and exposing governmental corruption. However, increased competition and rampant cross-media ownership since 2007 have undermined gains in media freedom and diversity.

The financial model of the privately owned media, whereby revenues are generated almost exclusively from government or private-sector advertising based on ratings, has discouraged investigative journalism, innovation, and public service programming. In order to secure advertising revenue, media owners are increasingly willing to provide positive coverage of or defend the vested interests of political and business elites, thus undermining their outlets' independence. In the race for high ratings, television channels often mimic each other's programming or sensationalize news coverage, leading to less diversity and poorer quality of the news media content. Media groups' inability to generate advertising revenue outside major urban centers and ratings-focussed programming also discourage reports that are only relevant at a local level to certain communities, meaning that marginalized groups have yet to find a voice in the mainstream media.

The relaxation of cross-media ownership laws in 2007 and new policies to sell media licenses to the highest bidders have also led to the concentration of the media market in the hands of a few major media groups. Exorbitant license fees restrict the variety of new entrants to the media market, and new players often have political backing. Pakistan has not initiated a digital switch-over, and there are few civil society demands for media digitization owing to a lack of information and understanding about the benefits of digitization. Media digitization would, however, enable greater plurality in the media landscape as well as improve media access for people across the country (not only in major urban centers).

Media independence and pluralism are also compromised owing to the country's deteriorating security situation. A strong culture of self- and state-censorship that guides media coverage of sensitive issues, including national security, foreign policy, and religion, endures. The independence of journalists is also undermined by the fact that they face threats and violence from militant and extremist groups, political parties, the military, intelligence services, and criminal gangs.

Increased internet access has led to greater online freedom of expression. While most online activity involves social networking rather than news consumption, members of Pakistani civil society use digital media to organize political resistance, humanitarian interventions, social movements, and awareness campaigns. However, the fact that the internet is largely accessed by urban, middle-class or wealthy youngsters means Pakistani cyberspace is not representative of the nation as a whole. The internet is also increasingly used by extremist organizations for recruitment and proselytizing.

Despite the proliferation of the broadcast media landscape, the government and the military have retained control over the independent media through distribution mechanisms: access to private television is mediated by cable operators while internet access is mediated by ISPs. As the media are increasingly used to criticize the government and the military, the authorities have grown adept at exerting pressure on cable operators and ISPs to block transmission and access to certain websites.

8.2   Media Tomorrow

The majority of Pakistani television news channels are operating at a loss. In the next five years, these channels will either be bought out by larger, more successful media groups, thus further concentrating media ownership, or will switch to entertainment and infotainment programming for higher ratings, a trend that will reduce the amount of independent news coverage generated in the country. That said, there will be a growth of news and entertainment channels in regional languages. As Pakistan is going through a period of political devolution from the federal to the provincial level, these channels are likely to be backed by provincial politicians seeking greater influence. However, the advertising revenue-based financial model of regional channels will lead to the same shortcomings that have been documented in the national media: sensationalized news coverage, poor fact-checking, biassed reporting, and copycat content.

Overall, the media landscape will become more politicized in the next five years. Politicians will increasingly pressure major media groups with nationwide influence to broadcast favorable content at the risk of losing government advertising revenue. The FM radio station market will continue to grow, but high license fees will restrict radio ownership to political and business elites seeking to promote their agenda. Print media will continue to be comparatively independent; however, the growth of the regional-language broadcast media will cause print circulation to decline further.

Journalists will remain extremely vulnerable to threats and attacks in the next five years. They will continue to be targeted by political parties, the military, and intelligence agencies, especially during politically-sensitive times such as general elections, the withdrawal of US troops from Afghanistan, and the appointments of a new army chief and Supreme Court Chief Justice (both scheduled for the end of 2013). However, media outlets will make increased efforts to better train journalists on safety and will put less pressure on reporters to engage in risky behavior in order to break news stories.

The licensing of 3G networks will lead to exponential growth in mobile internet usage, causing the popularity of social networks, news websites, blogs, and online job portals to soar. However, greater internet access will

spur greater government censorship: not only will the PTA exert greater pressure on ISPs to block websites of a politically or socially sensitive nature or acquire a sophisticated URL filtering system, but it will also increasingly shut down cellular networks in the name of national security.

This increased government control and censorship will also be evident in broadcast media. As they enter the second decade of liberalization, they will seek greater independence; however, the government is likely to respond by imposing higher fines on media outlets that transgress the rules, revoking licenses, and using cable operators with more frequency to block television transmission. Media penetration through cable operators and ISPs will also continue to be restricted in the country's politically turbulent areas, including Balochistan, Khyber Pakhtunkhwa, and the northwestern tribal belt (though in semi-urban areas television and internet access will continue to grow as cable operators expand their networks and continue to digitize headends). Access issues will also persist, as the digitization of terrestrial broadcasts seems unlikely in the next five years.

9. Recommendations

9.1   Policy

9.1.1   Media Policy

9.1.1.1 Increasing Broadcast Coverage in Low-access Areas

Issue

Broadcast media access is concentrated in Pakistan's major urban areas, as a result of which media content focuses on urban issues while neglecting large swathes of the country.

Recommendations

- The Pakistan Electronic Media Regulatory Authority (PEMRA) should issue targeted licenses and provide subsidies to cable operators to develop distribution networks in low-access areas, particularly in Khyber Pakhtunkhwa and Balochistan.

- Going forward, the authority should develop a plan for digitizing terrestrial broadcasts throughout the country, and permitting privately owned media outlets to broadcast terrestrially.

- PEMRA's jurisdiction should be extended to the Federally Administered Tribal Areas (FATA)

9.1.1.2 Adoption of a Switchover Plan

Issue

Although PEMRA has announced a digital switchover deadline for cable operators by 2015, it has made no plans to implement the switchover, subsidize public access, create public awareness, or digitize terrestrial networks.

Recommendations

- PEMRA should create a phased plan for digital switchover, starting with cable operators (given that the largest, city-based cable operators have already started digitizing their head-end control centers for

receiving signals). This plan should include the provision of subsidies for the purchase of digital devices by low-income consumers.

▪ PEMRA should clearly define the licensing regime for direct-to-home (DTH) and other digital distribution mechanisms.

9.1.2 Internet Policy

9.1.2.1 Adoption of Internet Policy in line with International Standards

Issue

Pakistan has no internet-specific legislation. This prevents the consistent and transparent regulation of online content and enables online censorship, as blasphemy laws and other legislation are used to censor content online.

Recommendations

▪ Digital rights and civil society groups (e.g. Bolo Bhi, Bytes for All, Individualland Pakistan, and Open Society Foundations Pakistan) should engage with Parliament to develop internet-specific legislation that meets international standards.

▪ Civil society and consumer groups should launch advocacy campaigns to increase regulators' and parliamentarians' understanding of internet governance and build their capacity to promote transparency of policy and structural decisions regarding censorship of online content.

▪ Digital rights and consumer groups should continue to raise the issues of circumvention, surveillance, and data theft.

9.1.2.2 Transparency of Decision-making Behind Website Blocking

Issue

Internet censorship is growing—the government has blocked upwards of 15,000 websites, ostensibly for hosting pornography or blasphemous content, but often for political reasons. There is no established protocol to ensure that internet blocking does not violate citizens' rights to free speech and free expression.

Recommendations

▪ The Pakistan Telecommunications Authority (PTA) should make transparent the membership and appointment process of the Inter-Ministerial Committee for the Evaluation of Websites (IMCEW).

▪ The IMCEW should include civil society representatives. It should also develop protocols to notify websites in advances that they are to be blocked, explain why, and maintain a public list of all blocked websites, with the reasoning behind the decision to censor them.

▪ Civil society and digital rights groups (e.g. Alliance of Access) should track and map incidents of internet censorship in order to broaden and improve understanding of the problem.

9.1.3 Telecom Policy

9.1.3.1 Award of 3G License

Issue

Only 16 percent of Pakistan's population (i.e., some 29 million people) has internet access, while fewer than 3 million people have broadband connections.

Recommendation

In order to take advantage of Pakistan's mobile teledensity, the PTA should resume the licensing of 3G and 4G networks to increase nationwide internet access via mobile devices. Licensing policy should be consumer-friendly, ensuring the technology is affordable for the masses.

9.2 Media Law and Regulation

9.2.1 Media Ownership

9.2.1.1 Halt the Concentration of Media Ownership

Issue

PEMRA's open-bidding process for granting FM radio licenses and lax cross-media ownership rules are leading to intense media concentration, since only existing media groups and large business conglomerations can afford new broadcast licenses.

Recommendations

PEMRA should:

- Engage independent and unbiased evaluators to review and evaluate the efficiency, impact, and gaps in current broadcast licensing policy, and draft new policies to promote media plurality and diversity.

- Evaluate media groups on the basis of their public service provision and capacity to produce localized content, before granting new licenses.

- Promote media diversity and plurality by licensing community radio stations, and expand the existing practice of issuing educational radio licenses.

- Improve the enforcement of existing media ownership limitations in order to check cross-media ownership and market.

- Work with media outlets to increase the transparency of media ownership by making public data pertaining to journalist employment terms, relations with media-buying houses, sources of non-advertising revenues, and the cross-sectoral interests of media proprietors.

9.2.2   Regulation

9.2.2.1   Independence of Regulators

Issue

PEMRA and PTA are not independent; they act on government and military requests to censor content and coerce media houses through threats of regulatory action. Moreover, cable operators licensed to distribute privately-owned Pakistani digital satellite channels frequently block transmissions at PEMRA's behest.

Recommendations

- Civil society organizations, media unions, associations, and bodies should jointly call for the independence of regulators, specifically demanding that high-level PEMRA and PTA posts are not government appointments and are instead chosen by a committee that includes members of the public and industry representatives.

- The Press Council of Pakistan should re-engage with regulatory issues and become a more effective regulatory body.

- Civil society groups should also monitor instances in which cable operators block transmissions and demand the enforcement of PEMRA regulations pertaining to high standards of service delivery.

- Going forward, civil society organizations and media associations should build consensus within the media industry to develop robust self-regulation mechanisms.

9.3   Public Service in the Media

9.3.1   Independence of State-owned Media

Issue

Pakistan's state-owned media do not have a public service mandate and are frequently used as propaganda tools by the state institutions.

Recommendation

The Ministry of Information and Broadcasting should take measures to make PTV and PBC independent, starting by abolishing the practice of political appointments to key posts.

9.4   Journalism

9.4.1   Opportunities for Formal Journalism Training

Issue

Many Pakistani journalists have not received formal training, particularly for investigative journalism and in media ethics.

Recommendation

Media groups should collaborate with existing journalism programs at public and private universities to ensure that students gain practical, field experience through internships, apprenticeships, or school projects completed in collaboration with professional journalists, stations, and publications.

9.4.2   Establishment of an Investigative Journalism Fund

Issue

Broadcast media undertake little investigative journalism because time and resources are diverted to breaking news that is likely to achieve higher ratings for programs.

Recommendation

Civil society organizations or the PBA or PFUJ should develop an investigative journalism fund. PEMRA currently receives 15 percent of all broadcasters' income as a royalty that is meant to support the development of the industry. The investigative journalism fund could be financed through this existing mechanism and media houses could receive grants from the fund in rotation, to pursue long-term investigative projects.

9.4.3   Safety Measures for Journalists

Issue

Pakistan is one of the most dangerous countries in the world for journalists, with reporters being abducted, harassed, threatened, and killed in the line of duty.

Recommendation

- Media houses should ensure that all journalists in conflict-hit areas or covering violence-prone beats (such as politics) have received the highest quality safety and risk-awareness and other relevant training.

- Media houses should make public any existing standard operating procedures (SOPs) for journalists covering conflict or other dangerous situations. If these are not available, media houses should collaborate with media development CSOs to devise standardized SOPs for reporting in risky and conflict zones.

- Media departments at colleges and universities should collaborate with the industry and related stakeholders to devise a practical course for students and working journalists on conflict-sensitive journalism.

- Civil society and working journalist bodies, including PFUJ and Press Clubs, should advocate for mandatory medical and life insurance of journalists.

9.4.4 Clamping Down on Impunity in Journalists Murders

Issue

There have been no proper trials or convictions for the murder of journalists in Pakistan. This impunity makes the security environment for reporters even worse.

Recommendations

Journalist and media bodies such as PFUJ, CPNE, APNS, PBA, and Press Clubs should spearhead urgent efforts to initiate or re-open investigations into the killing of journalists.

9.4.5 Payment Policies in Journalism

Issue

Job insecurity is chronic in the media sector; junior and district reporters and journalists working on a freelance basis are often poorly and inconsistently paid. Besides increasing the risks of journalism as a profession, these conditions increase opportunities for corruption and disincentivize reporters from producing the highest-quality work.

Recommendations

- Journalist bodies should work with media houses to devise a mechanism that ensures that the industry adheres to labor laws.
- The PFUJ should continue to ensure that the Wage Board (which determines newspaper journalists' salaries) is implemented.
- Civil society organizations and media associations should pressure media groups to uphold professional standards.

9.4.6 Adoption of Self-regulatory Codes

Issue

Pakistan's print and broadcast media have not developed a consensual self-regulatory code. Government regulation, meanwhile, is corrupt and ineffective: media regulators use their authority to censor content on political grounds, arbitrarily enforcing regulations to generate revenues through fines.

Recommendations

- Media associations should urge media houses to develop a consensual self-regulatory code for television and print.

- Efforts like the Coalition of Ethical Journalism and initiatives such as the Ethical Media Audit and Media Credibility Index should be mainstreamed to encourage professional industry practices and ethical journalism.

9.5   Digital Media Literacy

9.5.1   Media Literacy Campaigns

Issue

Lack of awareness about the media's democratic role and low levels of media literacy are rampant among regulatory bodies, government, civil society organizations, and in the media industry itself.

Recommendations

- Media development CSOs should launch media literacy campaigns emphasizing the media's "fourth estate" responsibilities.

- Media groups should facilitate in-house workshops for journalists at all levels, focussing on the media's democratic role and the importance of public service content.

List of Abbreviations, Figures, Tables, and Companies

Acronyms and Abbreviations

AAM	America Abroad Media
ANP	Awami National Party
ATSC	Advanced Television Systems Committee
BBC	British Broadcasting Corporation
CPJ	Committee to Protect Journalists
DfID	Department for International Development (UK)
DTH	direct-to-home
DVB	digital video broadcasting
ECP	Election Commission of Pakistan
FAB	Frequency Allocation Board
FATA	Federally Administered Tribal Areas
GPRS	General Packet Radio Service
IDP	internally displaced person
IMCEW	Inter-Ministerial Committee for the Evaluation of Websites
IPTV	internet protocol television
ISDB	integrated services digital broadcasting
ISI	Inter-Services Intelligence
ISP	internet service provider
ISPAK	Internet Service Providers Association of Pakistan
ITU	International Telecommunication Union
LeT	Lashkar-e-Taiba
MMDS	Multi-channel Multi-point Distribution Service
MQM	Muttahida Qaumi Movement
NGO	non-governmental organization
NIPS	National Institute of Population Studies
PBA	Pakistan Broadcasters Association

PBC	Pakistan Broadcasting Corporation
PBS	Pakistan Bureau of Statistics
PCP	Press Council of Pakistan
PEMRA	Pakistan Electronic Media Regulatory Authority
PID	Press Information Department
PML-N	Pakistan Muslim League (N)
PPP	Pakistan People's Party
PTA	Pakistan Telecommunication Authority
PTCL	Pakistan Telecommunications Company Limited
PTI	Pakistan Tehrik-e-Insaf
PTV	Pakistan Television Corporation
TRP	target rating point
VoA	Voice of America

Figures

Tables

Companies

Airwaves Media

Alibaba

Apna TV

ARY Digital Network

ATV

Baidu

Brands Promotion Centre

Cellevision

Cross Currents

Dawn Media Group

Dialogue

Express Media Group

Hashoo Group

IDG

Independent Media Corporation (known as the Jang Group)

Interflow Group

Khyber News

KTN

Lakson Group

Mindshare

Mobilink

Multinet

Pakistan Herald Publications Limited (Dawn Media Group)

Pakistan Telecommunications Company Limited (PTCL)

Pearl Communications

QMobile

Telenor

Ufone

Unilever Pakistan

Waqt Media Group

Warid

Waseb TV

Wateen

Zong

Mapping Digital Media: Country Reports (published in English)

1. Romania
2. Thailand
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41. Kazakhstan
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Mapping Digital Media is a project of the **Open Society Media Program** and the **Open Society Information Program.**

Open Society Media Program

The Media Program works globally to support independent and professional media as crucial players for informing citizens and allowing for their democratic participation in debate. The program provides operational and developmental support to independent media outlets and networks around the world, proposes engaging media policies, and engages in efforts towards improving media laws and creating an enabling legal environment for good, brave and enterprising journalism to flourish. In order to promote transparency and accountability, and tackle issues of organized crime and corruption the Program also fosters quality investigative journalism.

Open Society Information Program

The Open Society Information Program works to increase public access to knowledge, facilitate civil society communication, and protect civil liberties and the freedom to communicate in the digital environment. The Program pays particular attention to the information needs of disadvantaged groups and people in less developed parts of the world. The Program also uses new tools and techniques to empower civil society groups in their various international, national, and local efforts to promote open society.

Open Society Foundations

The Open Society Foundations work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities in more than 70 countries, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.

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