

THE MONGOLIAN MEDIA LANDSCAPE SECTOR ANALYSIS

UNESCO Office Beijing commissioned a Media Sector Analysis of the Mongolian media landscape. The overall objective of the study has been to provide a comprehensive assessment of the media situation in Mongolia. In particular the study looks to:

- Assess the impact of evolving legal, political and economic environments on media development;
- Provide an up-dated statistical summary of print, TV, radio and digital media;
- Identify prevailing trends in production, distribution, content, ownership, financing mechanisms and investment policies;
- Analyse media strengths and weaknesses, paying particular attention to media provision in urban and rural areas;
- Assess general access to the media and in particular access for ethnic minorities;
- Assess media consumption and communication needs.



Moreover, the report looks to:

- Determine a coherent strategy for the future development of the media sector;
- Prioritise problems, challenges and major constraints which hinder media development at aimag and national levels;
- Provide recommendations on overall strategy for media support.

The media sector analysis is based on a one-month mission to Mongolia in September 2006 and includes UNESCO project experiences and consultations with media NGOs in Mongolia. The study team has collected and analysed relevant and available written documents and made semi-structured interviews with media owners, editors, and journalists in central media outlets in Ulaanbaatar and media outlets in all aimags throughout the country, as well as conducting interviews with regulatory institutions, professional media associations, NGOs/civil society groups, and random interviews of citizens about their media use and communication needs.



United Nations
Educational, Scientific and
Cultural Organization

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SECTOR ANALYSIS

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RUSSIA



KAZAKSTAN

CHINA

1 Executive Summary

On its path towards media freedom, Mongolia has seen some inspiring developments but has also faced major setbacks.

Following the political transition in 1990 print media sprang up extensively, and since the late 1990's a host of electronic media has been launched. The actual media output in the capital as well as the countryside is impressive both in numbers and variety. There were 340 media outlets in 2005 serving a population of 2.5 million people..

However, the sector faces many challenges. Although the freedom of expression has improved significantly since the Communist era, even today there are considerable violations of freedom of expression in Mongolia ranging from physical harassment and threats, extensive use of libel cases, to financial pressures and unjustified obstructions. The violations take place against national as well as local media. These violations are in themselves problematic, but even more seriously they are part of a more critical problem related to the general lack of political and financial independence of the media as a whole.

The media are saturated with what is described as "business news", which essentially describes the phenomena of "paid for" articles or "paid for" programmes that are published and broadcast. "Business news" is generally accepted by media outlets and journalists alike, who see the practice as a means to insure financial returns in an otherwise financially challenged industry.

Such practice comes with a price tag: media outlets and the journalists are highly dependent on the financial support of politicians and businesses alike. Most national media outlets are rarely run as media businesses, but instead serve as the propaganda mouthpiece for the political and business interests that set them up in the first place.

When it comes to the local media in the countryside the predominance of political and financial dependency is even more comprehensive. The main patrons are the local governor's office, politicians, and business people who make the existence of local media possible. Often the financial "support" from the governor's office is crucial for the survival of the local media, although the media law of 1998 prohibits government-run media.

After some years of disarray and demise of Soviet control and structures the local governments and associated business interests have been able to find new political and business models to run and control the local media. The methods of influence have changed, but the concept that the media serve as a propaganda tool for those who control them hasn't.

One of the most crucial problems for the development of independent media is the lack of viable financial models which would allow media to be operated as a profit making business proposition.

The advertisement market is expanding together with the Mongolian economy and new media outlets. However, advertising spending often goes into paid news or advertisements that are placed according to personal connections and alliances. Due to the large number of publications available, few have circulation numbers that allow for a profit making business to develop.

The situation in the aimags¹ is quite the opposite. There are no signs of emerging local advertising markets that could support local media. This leaves few options for the local media to avoid the current situation of strong dependency on government subsidies or political and business interests especially as subscription numbers of publications and local TV are low and also do not yield additional revenue.

With regards to ownership of the media outlets a lack of transparency prevails. It is often impossible to identify the actual owners, and very often there are political and/or business interests backing them.

For many herders access to local information is still an issue, although access to satellite TV is increasing. The herders' access to print media has decreased and often the national radio channel provides their only access to electronic media; particularly during the summer months when they are mobile and leave their satellite dishes behind in winter locations.

To date there is little media concentration; a number of private media groups have emerged, but so far there is no single one with a dominant position. As media structures develop, however, consolidation could occur. At the same time aimag governors still dominate the local media and information output.

The Mongolian state-run radio and television station was in 2006 transformed into a public broadcaster according to a new law on public broadcasting. The newly formed public broadcaster is in the midst of an extremely complex and difficult transition process. While the station is undergoing internal institutional changes, the broadcaster also has to adjust to a new competitive environment. The transition has so far only resulted in minor changes to programming policy.

A major concern is related to the question of freedom of information. Despite the freedom to seek and receive information guaranteed by the Mongolian constitution, existing legislation in many ways works to restrict access to information. The state secrecy law allows comprehensive secrecy classifications to be applied to government records. The result being that government officials at all levels make frequent use of these restrictions to keep information from being made public.

The professional level of Mongolian journalists has to be assessed in the context of the media environment they work in as described above. The professional skills of many journalists have improved due to comprehensive, donor-financed mid-career training

¹ Aimag is the Mongolian term for a province.

programmes in addition to many new journalism schools. In particular, the Press Institute of Mongolia (PIM) through a long term commitment to supporting independent and fact-based journalism has had a significant impact on journalistic skills at a national level as well as in rural areas.

However, the standard of Mongolian journalism in general has improved very little in the interim. Many journalists are willing to be part of the vicious cycle of accepting financial benefits for writing paid-for content, whilst readily blaming the politicised environment for all the problems faced by the media sector.

The technical capacity of Mongolian media varies significantly depending on the media outlet. The major private television stations in Ulaanbaatar such as TV 9, C1, and Eagle TV are well equipped with modern digital technology, whereas particularly the state-run or former state-run media in rural areas are often poorly equipped with old computers and analogue cameras and editing facilities, plus there are no printing facilities outside Ulaanbaatar.

At the same time the decrease in price of technical equipment and the relative low cost of starting a media outlet have allowed for the emergence of a great plethora of media outlets. Anyone equipped with a computer and possessing some layout knowledge and minimal investment can start a local newspaper, FM radio station, or even a TV station, once transmitter and additional computers have been bought.

However, since the first round of investment into the Mongolian media sector there has been little investment into technical upgrades, as media outlets are not able to finance their own upgrades due to meagre financial income. While technical equipment is available it is often out of date; though it is not the state of their media equipment that is holding media outlets back, but the lack of a sound revenue model.

The piracy of audio visual content is also an issue for the sector. Piracy of all digital content including both international and local films, TV shows and music is rife. There is no enforcement of IPR, and Mongolian TV and radio stations freely broadcast pirated content while newspapers to a lesser degree print third party stories. While a great number of Mongolian TV and radio stations would have to close down once stricter enforcement of IPR occurs, it can also be argued that lack of piracy control is holding back the development of the local audio visual market for as long as it is cheaper to pirate content without fear of prosecution, rather than producing or paying for original content.

Despite the many media and communication initiatives that exist in the country and are supported by various donor organisations, the Mongolian government does not have a comprehensive media and communication policy that deals in a systematic way with the huge challenges facing the industry, including the lack of infrastructure and the creation of a viable market for media and communication products in rural areas.

This media sector analysis identifies a set of critical problems for the development of free and independent media in Mongolia. As an overall assessment the media sector still faces

challenges in fulfilling its pivotal role in the democratization process as a watchdog and as the provider of relevant and independent information for the public.

For these reasons it is extremely important to increase support for free and independent media and progressive civil society groups in a sustainable fashion; but within the specific context in which Mongolian media professionals operate. The issues faced by media on a national level (Ulaanbaatar) and in the countryside are diverse but equally problematic, and a different approach is necessary to support their development.

2 Media Sector Overview

2.1 Background

2.1.1 General background

Mongolia is a vast landlocked country of approximately 1.56 million square km with a scattered nomadic population of 2.6 million. Mongolia is bordered by the Russian Federation in the north and People's Republic of China in the south.

Mongolia has 20 mostly rural dwelling ethnic populations: the largest is the Khalkh or Mongolian (85 %), followed by the Kazakh (7%), mostly living in Bayan-Olgii aimag (province). The rest (8%) are divided into small groups of the Tsaatan, the Darkhad and the Buriad. Among them, major linguistic minorities are Kazakhs and Tuva-speaking Tsaatans. Other groups speak varying dialects of Mongolian. Most of the ethnic/linguistic minorities live in rural areas in Western and Northern Mongolia.

Since Mongolia cast off Communism in 1990, the Mongolian society has undergone dramatic political, social, economic as well as cultural changes. Politically the transition to a democracy with fairly free multi-party elections has been a rollercoaster ride, with governing power shifting between several political parties since the 1996 election, and an unforeseen coalition between the Mongolian People's Revolutionary Party (MPRP) and the Democratic Party (DP) after the election in 2004.

This alteration in power is a healthy sign in this fragile democracy, but at the same time the development of the democratic process poses many challenges. There remains no distinct differentiation between legislative, executive, and judicial powers, and there is confusion between political and business interests.

In 2005 a report from the United States Agency for International Development (USAID) on corruption concluded:

The major finding of the report, consistent with other quantitative and qualitative studies conducted previously, is that opportunities for corruption are increasing in Mongolia at both the "petty" or administrative and "grand" or elite levels. Both types of corruption should be of concern to Mongolians, but grand corruption should be considered a more serious one because it solidifies linkages between economic and political power that can

negatively impact or ultimately derail democracy and development, as it has in other post-Communist countries. (Casals & Associates 2005)

The report stresses that a contributing factor to corruption is "A lack of transparency and access to information that surrounds many government functions and undermines nearly all aspects of accountability by contributing to an ineffective media and hindering citizen participation in policy discussions and government oversight". The Mongolian civil society is weak and the government has increasingly clamped down on demonstrations and other civil society activities.

Mongolia's real GDP growth surged to 7.5 % in 2006 up from 5% in 2003. This impressive growth rate has been the result largely of the extraordinary expansion in the mining sector that has benefited from sustained increases in international gold and copper prices. Good weather conditions have also contributed to the growth of Mongolia's herding sector, livestock industry and agricultural production. Robust expansion continues in the services sector, including transport and construction. The country's trade deficit of 15.7% of GDP in 2003 turned to 1.4% of surplus in 2006. Combined with sustained remittances from overseas Mongolian workers, these developments led to an almost balanced current account by the end of 2004. A consequence of the economic expansion Mongolia's per capita GDP increased from US\$384 in 1999 to US\$950 in 2006.

The capital, which hosts two thirds of the Mongolian population, has undergone a significant modernisation process with financial prosperity for the newly affluent upper and middle classes. However, the wealth coming from natural resources, trading, NGOs and private donors is unequally distributed, leading to huge social differences.

Further, there is a growing financial, social and cultural divide between the modernising capital and stagnant rural areas with despondent aimag and soum² centres, and herders living a traditional nomadic lifestyle. According to UNDP, poverty levels vary significantly across the country from a low of 27% in Ulaanbaatar to 39% in Hangai and 51% in the Western region. Most of the aimags are heavily dependent on husbandry and the financial situation has improved only slowly after the devastating Zuds (harsh winter conditions) in 2000 and 2001, where extremely cold winters caused heavy losses of livestock. The infrastructure (roads) and public sector (education and health care) in the rural areas are in poor condition, and many of the soum centres only have diesel-generated power a few hours per day.

Among the poor rural areas, ethnic/linguistic minorities living there were most notably disadvantaged due to language differences and the limited state representation in these remote areas. For example, a Save the Children UK report³ points out that children in Bayan-Olgii aimag are three times more likely to drop out of school compared to their classmates across Mongolia (6.2% to 1.9%). The drop-out rate among Tuva-speaking

² Soum is the Mongolian term for a provincial (aimag's) district.

³ Kazakh Education and Learning – a Situation Analysis (2005), Save the Children UK.

Tsaatan children is even higher: 37.7%. The key health indicators such as the Infant Mortality Rate (IMR) and the Maternal Mortality Rate are up to as much as twice as high in remote provinces and among minority groups.

No specific programme for ethnic/linguistic minorities is currently implemented by the government and no official statistical data disaggregated by ethnic groups is available, mainly due to lack of financial and human resources.

2.1.2 Media background

During communism, the rural areas had good access to the widely distributed national print media as well as to radio and television for those households with radio and TV receivers. Furthermore, all aimags had a government-run local newspaper that was distributed to all sums and many bags. Many of the aimag centres had a local radio and/or TV station too, and some of them also took the opportunity to cut away from the Mongolian Radio transmission for four half-hours a week for local programmes (Simering 99). This well-organised, top-to-bottom dissemination of information from the different government levels broke down after the collapse of communism. The national print media are no longer distributed to the same extent, and many of the local media outlets have closed, so national radio and television play a more significant role. (Myagmar and Nielsen 2001)

In the 1990's the media situation in the aimags deteriorated dramatically despite the prosperity of the media in the capital. In many aimags the former system of state-run local media fell apart, and although many new outlets were established most of them were financially weak and ceased operations. In 2000, 7 out of the 21 aimags did not have a local newspaper, and the total number of copies of all the local newspapers was only around 400,000. In 2000, 13 aimags had a local radio station; half of the radio stations broadcast regularly between 3 to 16 hours a day, and the remaining half only 1 to 7 hours each week. In total 17 aimags had a local television station, but all except 2 of them broadcast only between half an hour and 7 hours each week.

The media development in Ulaan-Baatar was much more dynamic in the image of the overall social and economic changes affecting the capital of Mongolia. The government loosened its grip on the editorial policy in the 80s, and the launch of the newspaper "Shine Toly" (New Mirror) in February 1990 marked the end of the government monopoly. In the following years a host of political and tabloid newspapers (mainly weeklies) were launched in the capital. The Government accepted the new publications, and since the autumn of 1991 all publications have had to register and acquire a license from the Ministry of Justice.

Legal landmarks

The development of the media in Mongolia in the 1990's took place within the context of the 1992 constitution, while there was no proper media legislation. The Mongolian constitution guaranteed freedom of expression and the right to receive information.

In 1998 the media law enacted established the regulatory framework for the media industry. The purpose of the law was to affirm the freedom of expression and the abolishment of censorship. The legislation had vague provisions and there were no precise strategies for its implementation. The media law prohibited government institutions from controlling and running media outlets. Nevertheless, apart from the privatisation of the two former state-run national newspapers, the law did not prevent the national government from continuing to operate a state-run radio and television station, or local governments from owning and operating media outlets of their own.

The state secrecy law allows comprehensive secrecy classifications to be applied to government records. The result being that government officials at all levels make frequent use of these restrictions to keep information from being made public. After heavy lobbying from Globe International and political pressure from abroad, the Ministry of Justice and Internal Affairs in May 2006 presented a draft law on freedom of information. Article 19 welcomed the draft law as it includes some significant improvements to the current situation. Its' comprehensive critical assessment of the draft law stresses that key issues need to be improved.

(for details see <http://www.article19.org/pdfs/analysis/mongolia-foi-law.pdf>)

The draft Law should incorporate such a clear and unequivocal statement of the right of access.

The system for exempting information under the draft Law should be completely revised. The exclusion of information classified as secret by other laws should be removed and replaced with a carefully drafted regime of exceptions, in accordance with the standards set out above.

In case of a conflict between this regime of exceptions and secrecy laws, the former should prevail.

In addition, the question of proper implementation needs to be addressed. Time will tell whether the legislators will make the required changes and pass the law.

Another aspect of Mongolian legislation that restricts the development of free and independent media is the legislation on defamation. This legislation rightfully protects a citizen's name and reputation and secures the right to privacy, but contrary to international standards both the criminal and the civil law have provisions on defamation. According to the criminal law:

A criminal charge of a fine for 51- 150 times of an increased amount of the lowest level of salary or arrest for a period of over 3 months or up to 6 months shall be imposed, if libel is distributed through media or if the crime on insult and libel is committed by a person who was criminally charged before.

These severe provisions are not in agreement with the general guarantee of freedom of expression, and there have been some high profile court cases on defamation where the current president has been involved.

(see details www.monitoring.mn/?module=record1&id=130&menuid=30)

Since the late 1990's civil society organisations have lobbied for a transformation of the state-run radio and television station. Finally in January 2005, in close consultation with the NGO Globe International and international organisations including Article 19, a new law on Public Radio and Television was adopted and in January 2006 the state-run radio and television station was turned into a public broadcaster.

In the final revision of the law advertisement funding was limited to only 2% of the total programming time. While this is aimed at ensuring independence from commercial interests, legislators are now responsible for securing the funding necessary for the public broadcaster to be sustained. The main sources of revenue for the public broadcaster will be a mandatory license fee and direct support from the State budget. Therefore, the station is not politically independent, as approx 70 percent of the station's funding now comes from the state budget, and the station still seeks to secure sponsorship agreements with major private interests. Furthermore, the public broadcasting law did not by any means put an end to the confusion regarding the influence local governments have on local media. The law states that "On a local level there may be public radio and television" and that "local radio and television shall be established in conformity with the principles provided in this law, serve local citizens' interest, and be responsible to them, and operate under their control". "Budget and operation procedure for the local radio and television shall be established by the citizens' representative Hural of Aimags". The issue of how local media outlets should be funded was not addressed in the law. For this reason many local TV stations still remain controlled by local government without clear indication of the process of transformation to public broadcasting entities.

The National Human Rights Action Programme of Mongolia states that "Actions will be taken to improve the dissemination and exchange of information among members of ethnic minorities in their mother language" (article 2.2.5.7. "Right to Information and Freedom of Expression"). However, the implementation of such actions in remote areas of the country is facing a number of challenges, such as harsh weather conditions, absence of roads, electricity, obsolete or sub-standard equipment, lack of trained staff at the existing and emerging broadcasting stations, as well as lack of funds at the central level to remedy those problems. The implications of inequality of access to information resources mean nothing less than exclusion of minority groups from economic, social, educative and political life.

Finally there is no legislation on media ownership that prevents concentration of ownership. To date there are no limitations to private media ownership while the media law prohibits government ownership of media. As a result, political investment through private persons in the media is considerable. It is now being discussed that all the names of owners of media entities must be available in order for the public to know which media are owned by which politicians or inclined to be biased in which way. Foreign ownership of media also exists in practice as exemplified by Eagle TV, with US Christian backing.

Piracy and copyright infringements have not been addressed at the policy level. Movies, whole TV channels, and music alike are being pirated, dubbed into Mongolian and sold

on to end consumers. Piracy gives a competitive advantage to those who do not respect copyright. Some media owners argue that piracy as such will not allow for a local production industry to be fostered or grow as long as it remains cheaper to copy rather than to produce original content.

A major challenge and benchmark that lies ahead will be providing universal access to Information Communication Technologies to the Mongolian people. Significant investment has been made in modern information technologies not only in urban centres but also aimags and soums.

By 2012 some of the objectives of the E-Mongolia National programme are to:

- Establish a legal environment for ICT development
- Creation of a broadband backbone network throughout Mongolia
- Provide connection to the international backbone gateway
- Abolishment of monopoly in ICT sector to enhance competitiveness and public access
- Improvement of the public ICT literacy by bridging the digital divide.

By the end of 2006 the rollout of a fibre optic network connecting all aimags and many soums was to be completed providing a platform for timely access to a multitude of information. At the time of the report mission in September 2006 most aimags had already been connected via the fibre optic grid while full efforts were being made to finalise the project before the winter, when digging of trenches for the rollout is impossible.

Already all aimag centres have equipped Internet cafes, while some schools have computer rooms and train students in computer literacy. The rate of training in computer skills will be crucial to the uptake. While youngsters in Ulaanbaatar as well as the aimag centres alike are quick in the uptake, it is the older generation that lags behind. A clear plan of how to fully utilise and implement this opportunity in a meaningful way was not available from the government.

Despite the many media and communication initiatives that exist in the country, the Mongolian government does not have a comprehensive media and communication policy that in a systematic way deals with the huge challenges facing the industry, including the lack of infrastructure and the creation of a viable market for media and communication products in the rural areas.

It is this lack of a comprehensive policy that characterises the sector. While there is little hindrance for new entrants to join the market, at the same time there is also little support or regulations addressing the needs of a struggling industry that is faced with many structural problems.

While some interviewed for this report argue that the lack of regulation exemplifies Mongolia's commitment to providing the freest possible environment for an independent

media, others say that it is not in the interests of government to regulate a sector through legislation that will only curtail its own involvement in media output.

Basic media legislation has been promulgated over the last years as described above including the public broadcasting law. However, besides enacting legislation, there seems to be little insight or the perceived need to discuss and enact a comprehensive media policy that will identify major concerns and provide a roadmap forward. Further details on the Mongolian media legislation can be found on the website of Globe International www.globeinter.org.mn.

Media evolution

The print publications launched on the wake of media liberalization have had to overcome a series of severe obstacles including the economic crisis from 1992 to 1994, and unfair competition from the government with regard to newsprint, printing, and distribution. Many newly established newspapers published irregularly, and the state-run newspapers have managed to maintain a dominant position in terms of circulation.

In 1994 Eagle TV, founded by a Christian American-Mongolian foundation, broke the Government's monopoly on electronic media⁴, and in 1995 a second private television station was launched in the capital. Soon after, the radio monopoly was broken by several private radio stations launched from 1995 to 1997. In addition, several cable-TV systems were established in the mid-1990's in the capital and some other urban areas.

By the end of the millennium the media output in the capital was impressive both in numbers and variety. The often partisan newspapers represented a plurality of opinions. Circulation of print media was still limited, however, and the journalistic quality was questionable. Access to radio and television increased dramatically, including widespread access – most often with stark disregard for issues of copyright – to transnational channels and channels from Asian countries, expanding the viewers' choice of programmes. The national media market had increased, but it was far from mature, and most media enterprises were not run as businesses.

The number of media outlets has increased slightly over the last three years from 321 in 2003 to 340 in 2005. After some years of a relatively stable media situation there have been some significant developments in the last few years. Since 2003 several high profile television stations have been launched in the capital, the aimags have witnessed a significant increase in predominantly FM radio stations, and finally the number of daily newspapers increased from 6 to 8 in 2005.

The media sector in Mongolia is well documented when it comes to media supply, mainly due to the continuous monitoring of the Mongolian media conducted by the PIM

⁴ Since 1970 the Russian television station Orbit was broadcast as a second terrestrial station. Orbit broadcast more hours than the national television station and had a significant impact until it ceased in the early 1990's.

since 1999, but when it comes to media use the data is more fragmented. PIM provides data on television audience and to a lesser degree on radio audience and readership in the capital, while media use in the rural areas and information access by minorities is hardly documented.

2.2 Television

2.2.1 Overview

The television sector is in the midst of dramatic changes both in the capital (national) and locally. The previously dominant player, the State-run station MNTV, has been transformed into a public broadcaster MNPTV and is now an equal player among a host of competitors in the capital, and the station also meets increased national competition from some of the Ulaanbaatar based stations.

In 2003 after a few stable years with four stations in Ulaanbaatar - MNTV, Eagle TV, MN Channel 25, and UBS - two new high profile stations, TV5 and TV9 were established and Eagle TV was temporarily closed in 2004. The national MNTV (now MNPTV) and four Ulaanbaatar based stations (Channel 25, UBS, TV5, TV9) have since 2004 been distributed by satellite. In aimag centres and in some soum and Bagh⁵ centres the satellite signals are rebroadcast locally by the local authorities. MNPTV has its own satellite channel, UBS and MN Channel 25 share one satellite channel, and TV5 and TV9 share another. The stations are alternated every second day. Where local capacity is stretched MNPTV comes first and TV5/TV9 usually second. The satellite distribution increased the national availability of MNPTV and made the four Ulaanbaatar stations national overnight.

Besides the five national stations there are additionally 6 terrestrial channels and 10 cable fed channels all of them established within the last three years. Some of the new terrestrial channels are high profile and well-funded stations like the re-launch of Eagle TV and C1, while most of the cable channels are low budget operations.

Cable TV networks are available in Ulaanbaatar as well as most aimag centres. In Ulaanbaatar there are 6 main cable operators with Sansar CATV (<http://www.sansarcstv.mn>), a Chinese joint venture, being the biggest. The cable operators do not provide transparent and reliable data on cable penetration, but according to figures from Monitoring Mongolian Media 2005, 54 percent of Ulaanbaatar households subscribe to cable packages from one of the CATV companies. The high cable penetration in the urban centres is partly due to availability in the many apartment blocks.

Sansar CATV offers 50 channels as part of its subscription costing T4000/month and claims to have 50,000 subscribers. Channels include Mongolian language channels as well a number of English, Russian, Chinese, German, French etc. In 2003 Sansar CATV

⁵ Bagh is the Mongolian term for a very small settlement or a primary administrative unit.

established a cable fed television channel transmitting 5-6 hours per day. Today the station provides 3 channels 24 hours with primarily music and entertainment.

Many of the foreign channels in the cable systems are pirated which has in the past led to channels being taken off the platform following complaints and threats of legal action from the foreign channel owners. At the same time, agreements with foreign channels exist making it free to air channels such as Germany's Deutsche Welle and France's TV 5, making them widely available throughout Mongolia. In Ulaanbaatar some of the strong cable operators make additional revenue by charging national channels a fee to be included in the cable channel bouquet.

In the aimags local television has increased significantly over the last few years mainly due to the dramatically reduced cost of launching a low budget television station. In 2005 36 local television stations existed according to "Monitoring Mongolian Media 2005", and the mission team has identified several more newly established television stations in the aimags. In several aimags there are two or three television stations. Some stations broadcast irregularly (often due to technical problems) or only a few hours every week often with reruns the following day or over the weekend, other stations broadcast a few hours every day, while yet other stations broadcast all day. Either the stations have their own transmitter with varying degrees of reach, or they transmit their signal via the local cable network or block out the signal from the above mentioned rebroadcast satellite channels.

Most aimag centres also have one or two cable operators which often also run the TV or FM stations and/or act as Mobile operators. CATV networks in aimag centres offer between 20-50 channels for T2000-3500 per month / household. Again, rampant piracy allows for the great number of channels. Subscriber numbers range from between 200-500 in smaller aimag centres up to 1500 in bigger centres such as Darkhan. Often through the revenue derived from CATV operations, CATV owners also invest in TV and FM operations which would otherwise not survive due to the lack of financial resources in local areas.

Electricity is an issue in relation to availability of television in the countryside. The aimag centres and bigger soum centres have electricity all day, while many soum centres mainly have diesel generators generating electricity for a number of hours in the evening. The above mentioned rebroadcast of satellite channels is only available during hours with electricity. Hence, in soums and baghs the availability of TV signals is dramatically reduced.

While electricity is one issue, due to the vastness of the country TV signals can only reach people who live within a narrow range of the rebroadcast signals. Therefore, herders in the countryside rely on batteries or renewable energy (solar panels or wind power) that generate electricity for satellite dishes for television reception. Theoretically the herders have access to all the channels available via satellite. However, limitations of technical equipment as well as language barriers often lead to herders watching only a small number of Mongolian and Inner Mongolian channels. In the Western aimags, with

a large Kazakh population, many herders watch satellite television from Kazakhstan, Russia and Turkey.

According to a UNESCO-commissioned assessment in Bayan-Olgii, conducted by Tandem TTVS: "There is not any local audiovisual production base available, only relaying". The national public service broadcaster, the Mongolian National Radio and TV, is present in the aimag only through radio. The national TV in Mongol language is no longer available due to the obsolete conditions of the aimag's Transmission Station. Established in 1965 using Tesla equipment from Czechoslovakia, the station is functioning to half of its power capacity (30Kwt), daily transmitting 1-hour radio programmes in Kazakh produced by the local Information Technology Office (former Media centre) and 17 hours of radio in Mongol from Ulaanbaatar.

While there are no figures on the actual penetration of satellite dishes amongst herders, ownership is widespread especially in the more affluent rural areas, in aimags where there has been donor support for solar energy and satellite dishes, and close to the main roads and soum and aimag centres. Some sources estimate satellite ownership among herders at over 50%, others between 30% and 50%.

During summer, when herders are busy all day and on the move seeking out new grazing areas, satellite dishes are often left behind at winter locations making radio one of the main sources of information, as newspapers are rarely delivered.

2.2.2 Transition of state-run broadcasting to public service

The Mongolian state-run radio and television station was on January 1, 2006 formally transformed into a public broadcaster according to the new law on public broadcasting presented above. Therefore, while the station undergoes internal institutional changes the broadcaster also has to adjust to a new competitive environment.

The Mongolian State-run radio and television station has had a privileged position even after the political transition in 1990. The state-run broadcaster had two radio channels – one with national coverage and one mainly covering the capital – and one national television channel. The national radio channel was and still is the only radio station with national coverage⁶ and for many herders this radio channel is their only access to electronic media, although more herders have access to satellite television. The state-run national television channel is broadcast terrestrially and for some years has also been broadcast by Asiasat satellite with 320 retransmitting stations throughout the country. According to its own estimates, MNPTV reaches 1.8 million viewers nationwide, broadcasting a total of 119 hours of programmes weekly and 6100 annually. MNPTV has 270 staff working for the station.

⁶ In some regions the national channel is used for regional programs for half an hour twice a week. These regional inserts have a much broader coverage than the local FM radio stations that usually have a limited reach of 10 to 50 kilometers around the aimag centre.

The public broadcaster has a competitive advantage since the radio station still has a monopoly on national coverage and the television channels are the most widely distributed. This means that the public broadcaster will play a central role in the coming years both as the main source of information for the rural population, and as a consequence of that position, a key political player. But the advantage comes with a built-in disadvantage, especially when it comes to television. The new booming television market in the capital is creating dramatic changes in the pattern of television viewing. If the public broadcaster continues its current programming policy and maintains the paternalistic mode of address used by the state-run broadcaster (which is not in tune with the needs of the Mongolian population), then public broadcasting will soon be marginalised in the new competitive environment of the capital. On the other hand, it is a tremendous challenge to establish a successful strategy that bridges the gap between the programming needs among the modern socially fragmented viewers in the capital and the needs of the more homogeneous rural population, not least because the public broadcaster at the same time has to fulfil its public service obligations. So far the public broadcaster has no proper strategy to address these challenges.

Secondly, the transition process involves political aspects. The political rulers, the top management at the station, and all the employees have to change a deeply rooted political culture. For many years the status of the state-run broadcaster has been discussed among civil society groups and media professionals, but throughout those years neither the MPRP nor the DP was prepared to give up control of state-run broadcasting during their time in power, since they saw the control of the station as an important power tool in the highly politicised society. One of the reasons why the public broadcasting law after many years was finally adopted in 2005 might have been because both MPRP and DP in the meantime have launched well-supported private television stations in Ulaanbaatar and many radio and television stations across the country. Through these media outlets the two parties have maintained control over radio and television messages directed to their voters.

The new public broadcasting law – modelled on international standards – changes the government's direct influence on the broadcaster, since it is now a National Council - a regulatory body with 15 members – that will supervise the public broadcaster. Civil society nominates candidates to the council, and civil and political servants and people from the governing bodies of political parties are not eligible for the National council. Among the nominated candidates the President selects 4 members, the government selects 4 members, and the parliament selects the remaining 7 members. This selection process does not secure the independence of the National Council⁷, and it has been clear from the very beginning that the political elite is not yet prepared to give up control over public broadcasting. The National Council has been a political battlefield for indirect influence, and consequently the first General Director was fired after only a few months and leadership at the helm of the of the new public broadcaster has changed repeatedly

⁷ The political influence on the regulatory bodies, which oversee public service institutions, is always in question, even in countries with long public service traditions; the delicate balance is often challenged.

over the last months. Political influence has gone from direct to indirect, which is an improvement, and over time political influence may decrease further partly due to a marginalisation of public broadcasting in the new competitive media environment, where the two main political parties have taken precautions as mentioned through the establishment of their own TV stations.

Thirdly the transition involves financial issues. The public broadcaster is partly (one third) financed by a mandatory license fee from viewers and partly (two thirds) directly from the state budget, creating direct financial dependence on government funds. Furthermore, the station has been established without proper funding for public service obligations, investment for equipment upgrades, and for obligations towards long term employees. Hence the station has limited resources in the transition process, which makes it extremely difficult to make genuine changes as well as to compete in an increasingly competitive environment.

Finally the transition involves institutional aspects, because the public broadcaster for better and for worse inherited the old (communist) state-run institution in terms of the buildings, the outdated equipment, most of the management and all the aging employees, as well as firmly established expectations held by viewers and politicians alike. The state-run broadcaster initiated organisational and programming changes as early as 2001, but it turned out that the organisation was not able to reform itself from within, and the reform process was hardly noticed by outsiders. New management has partly come in through political appointment, while the remaining management and the employees are deeply rooted in the old system and not sufficiently trained for the new reality. Furthermore, the old buildings and the perception of the station are closely related to its past.

It will take more than legislation and a fresh new beginning to compete with the well-equipped television stations in the capital and the many new entertaining FM radio stations around the country. The public broadcaster has not been able to make this new beginning and the audience, civil society groups, and media professionals alike are disappointed that the transition has so far only resulted in minor changes to the programming policy. This said, the election coverage of the re-election in Khuvsgul aimag in June 2006 was more politically balanced and significantly different from the one-sided biased coverage of past elections. In addition, the top management stresses that the station works hard on reinvigorating the station and hopes that the audience will be patient, "because it takes time to change the course of a super tanker."

2.2.3 Content

The plethora of television stations has provided a varied supply of television content. The five national stations and a few other stations in Ulaanbaatar provide a varied mix of programming genres: news, political, and social programmes, arts and culture, entertainment, sport, music, movies, series, education, and advertisement, while many Ulaanbaatar stations are developing focuses (e.g. news only or music only).

According to "Monitoring the Mongolia Media 2005" the national stations have predominantly nationally produced programming and many of the new Ulaanbaatar stations also provide national programming. This has developed a substantial domestic production industry within a variety of genres, but unfortunately the increase in quantity has not been followed by an increase in quality. Programming is often produced by small independent production companies with little or no production budget, relying instead on funding obtained through sponsorship or 'paid content' models (see below).

All of the national stations and some of the Ulaanbaatar stations have significant news coverage. Journalistic and production values are generally low as is seen in other media sectors. News is heavily biased and editorial angle dictated by the media owners and editors who, more often than not, have a political agenda at heart rather than pure news provision. Journalists are heavily restricted in what they can say. Interested parties pay for editorial content while TV journalists will often only produce news if it is paid for.

Eagle TV has emerged as the strongest contender for news reporting. The station adamantly promotes independent and balanced news, and has shown a strong commitment to nurture and develop a breeding ground for investigative journalism. Furthermore, the station has introduced novel news features to the Mongolian public; an all news format⁸ with live newscasts throughout the day and uncensored "phone-in" comments on the air has changed the mode of address. This new way of addressing and engaging the audience has set new standards, and challenges the biased and controlled news on the other stations. Eagle TV's ratings have continuously improved, and the station is now the leading provider of news to the Ulaanbaatar audience.

Many TV stations sell broadcast slots to production companies or other interested groups. Production companies will produce programming based on revenue they can secure through advertising and sponsorship while business, politics, and NGOs will simply fill time with programming of their choice. Increasingly, nationally produced programming uses foreign entertainment formats including reality and game show formats such as "American Idol".

MN Channel 25 is one of the popular entertainment channels. It has developed a number of popular shows, including an international travel show which has attained considerable renown among the audience not least because of its cheeky style and irreverent comments towards the host country the team is travelling in. While not necessarily promoting the development of investigative or ethical journalism, the channel is setting new standards for entertainment programmes that are popular with the audience.

Other channels that are developing new programming include C1 which has started a revival of old Mongolian movies as well as a new morning news format, while others such as STV focus predominately on music.

⁸ Eagle TV is an all news network from 7AM to midnight except from twice a week the station broadcast three hours Christian value programming in the afternoon and reruns on the weekends.

When it comes to foreign programming, piracy is a fundamental problem. Most TV stations show pirated movies dubbed into Mongolian, but with the original soundtrack including voice and natural sound still audible. At present with no-anti piracy enforcement it is cheaper to dub a foreign movie into Mongolian than it is to produce domestic films, and it remains an easy way to fill airtime. It is questionable whether domestic stations could afford to produce additional high quality national programming even if piracy was significantly reduced, since to date the budgets for productions are low as the small consumer market does not yet yield large advertising budgets that in turn fund production.

As mentioned the broadcasting hours of local television stations vary substantially. Local television stations are usually run by a very limited staff (2 to 6 people); more than one or two journalists and one cameraman are rarely seen. Often the owner doubles as journalist, cameraman and operator in one. A few stations in the more urbanised areas like Darkhan and Erdenet have better staffed operations.

Most of the local stations broadcast official news from the local government and to some extent local news, paid programming, advertisement and sometimes phone-in announcements run on the screen. Some stations broadcast locally produced feature stories, interviews, children's programmes, educational programmes, and entertainment. Besides the locally produced programmes the stations often fill out the remaining airtime with pirated foreign programmes.

The quality of most of the locally produced programmes is mediocre to say the least, due to the limited number of employees, lack of trained journalists, editors, and cameramen, and political and financial constraints in general. Genuinely researched critical news features are rarely seen, but there are exceptions where local television stations against all odds broadcast relevant and critical news and interesting feature stories. OSF made in 2005 and 2006 a series of programmes for national state television on current issues which aimed at providing the audience with a groundbreaking show that shed light on current issues like "Mongolian Water" and "Mineral resources license" while training journalists in investigative journalism. The popular show was well produced and achieved top ratings, as well as many copycat shows produced in its wake. However, the cooperation with MNPRTV proved difficult in the long run and was stopped as a result. There are other examples where quality production has nonetheless paid off. Eagle TV has been building its reputation on producing timely and accurate news which has proven successful as their news programmes now receive good ratings.

2.2.4 Audience

Since 2003 PIM has conducted audience research on television audiences in Ulaanbaatar for a Joint Industry Committee consisting of some of the major television stations, a few radio stations, and some big advertisers. The audience survey is based on questionnaires and diaries and it provides monthly ratings on television viewing primarily, but also some data on radio listening and readership of newspapers. The surveys have provided insight into television viewing in Ulaanbaatar, with other urbanised areas having been included more recently.

Television is by far the most important medium in the capital; most people watch television daily and as mentioned cable penetration is high. The five national television stations as well as Eagle TV and TV 8 have a weekly reach of between 75% and 90%, and also some of the newly established stations like C1, TM TV, and STV reach more than 50% every week. Peak hours of television viewing are in the evening from 8 to 11pm, but there is substantial viewing throughout the day starting around 10a.m. The high level of television viewing during the day is possibly due to high unemployment resulting in more people being at home.

Each of the five national stations and Eagle TV and to a lesser degree STV, TV 8, C1, and TM TV are viewed on a regular basis. Eagle TV with its all news format has taken an overall leading position for news during the weekdays, although the national stations have higher ratings for their main newscast in the evening. While Eagle TV is strong in news the five national stations and TV 8 are strong in a variety of genres: news, political issues, educational and informational programmes, entertainment, and music. MN Channel 25, UBS, STV, C1 are especially strong in entertainment and music.

Nationally produced programmes are the most popular programming, although Korean movies and television series have sometimes had the highest ratings. As is the case in most other countries the Mongolian stations with local programming in Mongolian language are by far the most popular when compared to foreign (Russian, Chinese, Japanese and Western) satellite and cable stations to which audiences have wide access.

There has not been audience research conducted on television viewing in the aimags. Based on a limited number of random interviews among households in the soum and aimag centres and among herders, MNPTV still has a privileged position in the countryside partly due to its availability, TV5, TV9, UBS and C25 are also available in aimag centres and soums that own retransmitting facilities. The latter four channels share two broadcast channels and are mostly rebroadcast on alternate days.

Among herders the China-based Inner Mongolian channel (in Mongolian) was often mentioned as an alternative choice, and in the Western aimags with a large Kazakh minority, Kazakh, Turkish, Russia and Chinese television were popular. Separated from Mongolia's capital Ulaanbaatar by thousands of kilometres with no direct route, the ethnic minorities experience a specific form of information deficiency. Technological backwardness, censorship by local government and the availability of programmes from neighbouring countries (Russia, China and Kazakhstan) via satellite in minority areas all result in the absence of information in local languages relevant to local development.

2.2.5 Ownership

When it comes to ownership of the media there is a lack of transparency; it is often impossible to identify the actual owners of media outlets. Politicians and big businesses frequently jointly invest in the media outlets in order to push their agendas, and operating media outlets as businesses is often secondary to their interests.

Concurrently, there has been the emergence of privately owned television stations that are operated with various degrees of vested interests behind the channel. The programming policies of TV5 and TV9 indicate clearly that the stations are aligned with MPRP. Formally TV9 is owned by Media Holding Co., but persistent reports maintain that the current president owns the channel. Formally TV5 is owned by private investors, but reports are that the station maintains close relationships with top politicians in MPRP and a mining company. Newly established and heavily funded TV station Channel 1 belongs to the Genco Group, whose president is a member of parliament. MN Channel 25 belongs to Mongol News Co. Ltd, one of the most powerful media groups in Mongolia. The group also owns the newspaper "Onoodor" (Today), one of the most popular daily newspapers. The group is considered to be aligned towards a faction of MPRP.

Eagle TV is owned by the American religious Among Foundation. Besides promoting Christian values in developing countries, the Among Foundation is aligned with the far right in American policy. Eagle TV was initially set up with a Mongolian partner but due to disagreements shut down in 2004. Eagle TV restarted operations in 2005 as a wholly foreign owned company. Eagle TV has extremely good relations with the current American government and the American Embassy in Mongolia, which in many ways make the station untouchable, although it has been involved in several high profile and controversial political issues. In addition, its religious backing and Christian values irks some, still others are concerned by the owner's far from transparent agenda.

Many local TV stations emerged from what used to be local government information centres. Some of them are still run by the local government, while others were closed down after the media law in 1998 stipulated that the government was no longer allowed to own media outlets, and then subsequently restarted by former employees. These stations are still housed in government buildings and usually remain under strong government influence. At the same time several private TV stations have been established, some of them by individuals that also own the local CATV companies and FM stations, others by political parties or businessmen. Only a few of the local TV stations are run as media businesses without vested political or business interests although many of the interviewees claim the opposite.

2.2.6 The Revenue Model

There is no reliable data on revenue sources in the media business - neither when it comes to advertisement nor for newspaper sales, cable subscription and phone-in fees. This is obviously also the case for paid for content and bribery. Therefore it is extremely difficult to assess the financial situation in the television business, not least because many

of the major players are, as pointed out above, primarily in the television business to further their political agendas rather than to make profit through the business itself.

However, the advertisement market in the capital has recently gained momentum due to increased ad spending from international companies selling consumer goods, or telecom companies and banks selling their services.

To date there is little to no understanding of media planning on the advertiser side. Advertising is placed with a total disregard to target audience and market share. Instead, it caters to strategic business and political alliances, to personal relationships, lowest price or to where editorial content and programming time can be bought at the best rates.

In a similar fashion, TV professionals lack media management skills and to a large extent do not use audience data in their decision making processes for programme scheduling, production etc. This has partly been due to the fact that there has been no need to do so, and partly because of a lack of understanding of such tools in creating audience flow and audience loyalty.

On the other hand, due to growing competition and wealth advertisers are increasingly forced to become more professional in understanding the tools that will enable them to reach their consumers. Concurrently, competition for audience attention is also becoming a political issue: TV stations set up by political interest are only useful for as long as they reach their target audience. Once they do not serve this purpose any longer media owners have to react – and this they have.

Only recently, a debate amongst TV stations started after Eagle TV used PIM audience data to support its widely advertised claim that they produce the most widely watched TV news in town. TV9 promptly contested the data for fear of losing audience share and influence. Since this debate a number of TV stations and also private entities have expressed interest in setting up media research and ratings companies which might add to the competitive landscape of ratings and audience data available.

2.3 Radio

2.3.1 Overview

According to the Monitoring Mongolian Media 2005 Report there were a total of 58 radio stations in Mongolia. 20 of the stations were in Ulaanbaatar alone and 37 stations were in the countryside. However these figures need to be taken with a grain of salt as the number of FM stations has been growing rapidly year over year.

The last few years have seen a great increase in the number of new FM stations launched – 6 new FM stations in Ulaanbaatar alone and 10 in rural areas in 2005. The 2006 report will show that an even greater number have been established over the last 12 months and in many of the aimag centres there are 2 to 5 local FM stations.

The government has been issuing licenses to private bidders, which has increased the number of stations in the market significantly. This trend has been fuelled by the relatively low cost of the license fee (approx. US\$1,500 per year), as well as technological innovation that makes the setting up of radio stations much simpler and less expensive than in the past. It costs as little as US\$5000 to get started which has facilitated the growth of FM stations. This also means, however, that it is difficult for both old and new stations to survive as the revenue pie is sliced into smaller pieces, and distributed among an increasing number of players.

On the national side Mongolian National Public Radio (MNPR), which was founded in 1934, was like its broadcast sister MNPTV transformed into a public radio station in January 2006. MNPR's relevance for herders in the countryside in particular is still strong, while FM stations are more relevant for town and city dwellers.

MNPR includes relayed local news for the different regional areas of Mongolia. MNPR will usually sublease their airtime in one part of the country once or twice a week for up to 30 minutes to a local radio journalist or, as is the case in the Western aimags, there are regional so-called public radio stations providing the news twice a week.

With regard to technical standards of public, private and community radio stations in aimags, the Tandem TTVS assessment in 2005 concluded: "Low quality and out-dated broadcasting equipment, transmitters without electromagnetic compatibility certificates, unstable power supply poses specific challenges in remote minority areas. Aimag centres often demonstrate ineffective use of radio frequency range, high level of noise, interference of radio broadcasting. In case of a competent audit, all the above mentioned conditions would lead to closing of radio companies and withdrawal of licenses".

2.3.2 Content

According to "Monitoring Mongolian Media 2005" the then state-run national radio station broadcasted a mix of genres focusing on news, social and political issues, music, cultural programmes, documentaries, and advertisements. The state-run station broadcasted a second FM channel in Ulaanbaatar and the central aimags. This channel provided extensive educational programming, news and entertainment.

The local and regional programming relayed on MNPR provides regional news, local government news (usually paid for), prices of commodities, announcements of lost animals etc. and music.

Most of the established FM stations in Ulaanbaatar provide a varied mix of genres including news, live talk shows, educational programmes, entertainment, advertisements, and music. However, some of the established and many of the new stations only broadcast music and advertisements without any original content. Some of the stations are well equipped and well staffed, while most can be described as "bedroom" FMs or glorified juke boxes: a station residing in one or two rooms with a few young DJs working around the clock to keep them going.

The local FM stations in particular are a mixed bag. Most of them are dominated by music, announcements (phone-in) and advertisement, and several of the stations also provide other kinds of low budget programmes like story telling (fairytales for children in the morning), quiz programmes, and some local features. Some local stations provide national news usually taken from the internet and local news, predominantly "paid for" news from the government. Paid programming is not as prevalent as in local newspapers and local television. To a wide extent the FM stations have avoided being drawn into the heavily polarised and politicised media environment, in part because the local politicians see the youth oriented programming as apolitical, at least in between elections.

At the same time UNESCO and NGOs like the Asia Foundation and OSF work with local stations to create and develop content that touches on socially relevant issues such as market commodity information, environment, corruption etc.

2.3.3 Audience

While there is no reliable data for listeners in the countryside, FM stations are a new outlet for young people to interact and communicate with peers, as revealed through interviews in the countryside with audience and young DJs alike. The young anchors are usually just out of school, have had little training but identify with the interests, likes and dislikes of their young audience. While the programming is not political in nature it has potential in reaching out to kids in small towns in the outback of Mongolia and gives them a glimpse of the modern world.

Unfortunately young DJs lack training and stations struggle financially. The same can be said to a certain degree for FM stations in Ulaanbaatar though there are more examples of sustainable and securely established stations there. In addition MNPR also plays an important role in the more remote areas of the country, in particular among people who cannot afford satellite TV and have access only to radio, or among herders who are on the move.

Herders interviewed for this report were listening to the radio as their main source of information as the mission took place during the last months of summer before herders settle down in their winter locations where they often have TV and satellite dishes. Herders in particular were interested in the detailed weather reports provided in order to follow rain that would optimise the grazing conditions for their livestock.

2.3.4 Ownership

Similar to TV, there is a lack of transparency when it comes to ownership. In general, however, FM stations do not suffer to the same degree that TV and print outlets do in terms of political interference, due to their often limited reach.

Nevertheless, before the elections in 2004 many FM stations were launched as political vehicles particularly by local MPRP politicians. After the elections the political support

often stopped and the stations were left to sink or swim with new managers; although the original owner will still hold the license, only the next elections will reveal their true level of independence.

At the same time a number of local FM stations are financed by international grants and NGO funding from, among others OSF and Pact/Gobi Initiative. As such, NGOs have been an important contributor to the development of FM stations as there is a general sense that they provide a low cost communication platform for communities.

Many of these FM stations initially received funding from different agencies; however, after support for the stations subsides they are expected to become financially sustainable which is more often than not extremely difficult. While owners are passionate about the role their station plays in their community, they have difficulty making ends meet. They often resort to taking other part time jobs and employing youths with little or no experience of working as DJs.

2.3.5 The Revenue Model

FM stations have four main sources of revenue: paid programming, advertising, announcements and call-in phone fees (announcements are often paid for through the phone-in fees). As mentioned in relation to television, the advertisement market in Ulaanbaatar has gained momentum which potentially means more ad spending on radio. Nonetheless, the increased number of FM stations - many of them pure copycat stations that replicate what others are doing - cuts into the same pie of available funding; this often results in price wars, which drive down advertising rates.

In the aimags the advertisement market is immature and often insignificant. The main sources of revenue are announcements and phone-in fees, and a few years ago the first private FM stations were able to break even. The FM stations (and TV stations) pay monthly fees to the national telecommunication company for having access to the phone-in system and on top of that a substantial share of the phone-in fees. It is common practice that telecom companies charge a commission fee, but the fee is very high and the stations should join efforts and renegotiate the price.

Some FM stations that work closely with international agencies said that agency support for feature programmes and investigative reports goes a long way in helping stations become financially independent while creating quality content. At the same time content sharing amongst radio stations will also help in making quality programming available on a larger scale while bringing overheads down for individual stations. Members of the newly established Rural Radio Association already share content, which will be an important step forward in making stations financially sustainable.

2.4 Print

2.4.1 Overview

In 2005 the number of daily newspapers increased from 6 to 8, biweeklies increased from 3 to 4; there were 29 weeklies, 63 bimonthly newspapers, 32 monthly newspapers, and 19 newspapers published infrequently. An additional 68 magazine titles are published on a weekly, monthly, quarterly, and irregular basis. These impressive numbers indicates a thriving print market when it comes to plurality and freedom of expression, but when it comes to circulation and the quality of the print media it is a different story.

The top newspapers by copies sold are "Odriin Sonin" (Daily News) (13,500/day), followed by "Zuuny Medee" (Century News) (9,000/day) and "Onoodor" (Today) (8,000/day).

Some of the weekly tabloids have significant circulation with Seruuleg (Alarm) being the largest with 47,500 copies per edition, followed by "Khumuus" (People) with 42,000 and three others between 10,000 and 20,000 copies per edition. The rest of the newspapers and all the magazines have limited circulation, and in many cases these newspapers are little more than special interest papers. The print market is concentrated around the capital, although national newspapers and in particular tabloids are distributed widely throughout Mongolia.

Most aimags have one, if not even two local newspapers. In 2005 the total number of local daily newspapers was 31, one biweekly, two weeklies and 22 bimonthly or three times a month. The circulation is rarely higher than 500 or 600. Circulation figures are seldom precise and fluctuate depending on the season. Most of the local papers are printed at the Free Press Printing House in Ulaanbaatar, where the minimum print run is 500.

In minority aimags the printed press also suffers from economic hardship and a severe lack of trained journalists in local languages.

2.4.2 Content

The variety and quality of the newspapers varies considerably. The daily newspapers are comprehensive in size (8 to 24 page broadsheets) and cover a wide range of genres: mainly political, social, financial, and cultural issues as well as crime, international news, sports, leisure, and health. The newspapers are usually heavily biased in the politicised environment. Udriin Sonin, viewed by many as the newspaper of the highest quality, claims political independence but is considered to be pro DP. Zuuny Medee supports the current president, and Unuudur, though striving to be more independent, is seen to support another faction in the MPRP.

A prevalent feature even among the most serious dailies are the so-called "business news", which consists of "paid for" articles in the newspapers. The newspapers fully accept these kinds of PR-like articles from companies, politicians, NGO's or whoever is willing to pay

for publicity. Usually the journalists will receive commission for the paid articles or TV programmes in addition to a salary. At one of the leading daily newspapers, first year journalists receive a salary of around US\$50 to 60 per month, while the salary can be doubled and tripled through the procurement of "business news". A popular and experienced journalist can often make around US\$400 a month from "business news" stories alone. With most newspapers it is not possible to distinguish the "business news" from the independent reporting as no differentiation is made in terms of layout.

For these reasons the reporting on social, economic, and political issues is rarely fair and unbiased, as many journalists are willing to give up ethical standards to accommodate political and financial agendas and their own financial gain. As a result, well-researched investigative journalism is rarely seen, due to lack of professional skills, lack of resources, and editorial priorities, as well as political oppression.

With regard to content local newspapers are also problematic; some of them are little more than a spreadsheet of sponsored information reporting on local government news and announcements. However, some local newspapers do provide a variety of genres: besides official information there is news on social issues and daily life, slanderous political issues, obituaries and anniversaries, announcements and advertisements, interviews, portrait articles of politicians, businessmen and successful local sportsmen, topical issues, news from the soums, and poetry. Often the local newspapers are run by one or two people while the owner is the journalist, administrator and advertising sales person all in one. A few local newspapers in the more urbanised areas like Erdenet and Darkhan are better staffed and more comprehensive.

As described above, local newspapers are even more prone to sell "paid for" content in order to make ends meet, and in most cases the papers are financially dependent on the revenue derived from the local government or other "benefactors" (local businesses or political parties), because advertisement and subscription rarely provide sufficient revenue for the survival of the newspaper. The majority of local newspapers accept 'paid for' official news from the governor's office as one of the few revenue streams they can tap into; hence there are few local newspapers that scrutinise local government beyond the point of complaining about potholes in the pavement and broken light bulbs in the street lamps.

Local journalists accept this dependency on the local government as often there is little choice due to the lack of other viable revenue models. However, it must be said that there are exceptions, but those journalists reporting on political issues, questioning government budgets, irregularities in tender processes, and failures in hospital treatment are met with severe limitations on access to information and are often harassed if they challenge the political and financial establishment.

2.4.3 Subscription and Readership

There are no audited circulation figures or readership surveys besides the PIM monthly audience research. Circulation figures are provided by newspapers themselves.

According to PIM readership research in 2005, 19% of the population in Ulaanbaatar read newspapers every day, 53% read sometimes while 28% never read newspapers. Furthermore, 91% cited television as one of their main sources for news, while 29% mentioned newspapers. The most read newspapers in 2005 were as expected with reference to circulation, the dailies "Odriin Sonin" and "Onoodor" followed by the tabloids "Khumuus" and "Seruuleg" and the daily "Zuuny Medee".

The daily newspapers are primarily sold through subscription (more than 90%), while around two thirds of weeklies are sold through subscription. The readership of tabloids is demographically evenly spread among urban dwellers and people living in the countryside alike.

Herder families and families living in soum and aimag centres interviewed for this report stated that if they subscribed to newspapers it was to tabloids, never to dailies as was the case in former times, and seldom to local press. Considering the generally poor quality of local newspapers, it is not surprising these publications are not of particular interest to the local population, despite often being the only access to local information; circulation levels therefore are low.

A contributing factor to the relatively high circulations of some tabloids is the fact that their subscriptions are sold as part of a lottery system. Buy one subscription and have a chance of winning a car etc. While there is talk that the lottery systems are scams, this has not yet been proven.

2.4.4 Ownership of print media and media concentration

As is the case in the rest of the media field there is no transparency with regards to ownership of many of the daily newspapers. "Udriin Sonin" is owned by Udriin Medee Co. Ltd, which in turn is said to be owned by a pro-DP entity. "Onoodor" is as earlier mentioned owned by Mongol News Co. Ltd. The ownership of "Zuuny Medee" is not disclosed, but some rumours maintain that the wife of the President is one of the owners. "Mongolyn Medee" is owned by a MP, "Unen" is a party newspaper for MPRP, "Ulaanbaatar Times" is owned by the Municipality of Ulaanbaatar. The new "Onoodriin Mongol" is privately owned and supports the President, while "Golomt Bank" is said to back the latest newspaper, "Ardyn Erkh". The ownership of local newspapers falls into four main categories:

Some local newspapers are still owned by the local government, despite the fact that since 1998 local governments have not been allowed to run local media. In some aimags the editor of the government newspaper has taken over or restarted the publication under the auspices of the local governor and is financially dependent on government support which effectively makes the newspaper government controlled.

Some newspapers are owned by MPRP or DP or people closely associated with the parties. Some local newspapers are privately owned by the editor or a local businessman.

Finally, Egel Co. Ltd. owns nine local newspapers throughout the country. The owner of Egel Co. runs a local newspaper in Erdenet, while it is unclear how the other 8 newspapers are related when it comes to financial issues and editorial policy. Egel Co. controls all the licenses to print the newspapers and provides training and seminars. In some cases Egel Co. has helped to set up the newspaper and provided equipment. The owner of Egel Co. claims that the interest behind the ownership is purely altruistic: to support the development of free and independent rural media. It is hard to imagine that the motive for the Egel Co. setup has been financial gain, and although the network of local newspapers could be a significant political tool in an election campaign, so far the Egel Co. newspapers have different political affiliations.

2.4.5 Concentration of media ownership

The Monitoring "Mongolian Media-report in 2005" identified 28 media owners that own more than one media outlet. Among the larger media owners are Mongol News Co. which owns "MN Channel 25", one of the largest daily newspapers, and three minor newspapers; the municipality of Ulaanbaatar owns the television stations UBS and UBS2, a radio station, and a daily newspaper; Tayankhan Co. owns the large tabloid "Seruuleg", another newspaper and a radio station; and finally Montsame Agency which owns six minor newspapers.

Montsame is Mongolia's first national news agency. It was founded in July 1921 as the Mongolian Telegraph agency. It is a member of the Organisation of Asia-Pacific News Agencies, and has news-exchange cooperation agreements with Reuters, Xinhua, ITAR-TASS and Prensa amongst others. The agency is state-run, in contradiction to the "Media Freedom Law of 1998, Article 4", which prohibits state ownership of mass media.

Despite the lack of legislation on media ownership, none of these multiple media owners are really dominant players, so in that sense the concentration of media ownership is not a threat to media pluralism. However, as mentioned before there is no transparency with regards to media ownership, and there are tendencies to increased ownership concentration around a few key political figures closely related to large businesses.

2.4.6 Distribution & Printing

National newspapers are distributed widely throughout Mongolia; however, due to the vastness of the country it can take days before print publications reach their destination.

State-owned "Mongol Post" is the main postal service with the mandate to distribute to the most remote areas in Mongolia. "Mongol Post" has branches in all aimags as well as representatives in soums, and 70% percent of baghs. Print publications are sent out to aimags with whatever transportation is available, ranging from plane, train, car, and truck. While central aimags can be reached within a day, most others take between 4-6 days and even longer to reach the more remote aimags

The soum to bagh distance is of course the most difficult to navigate and any means of getting the publications (or other mail) to people is employed. Often bagh governors do the rounds and intermittently deliver mail to herders in their district via horse, motorbike or car. Visitors are also asked to take along parcels. If it takes longer than 21 days to deliver from Ulaanbaatar an area is called unreachable. During summer time herders are particularly hard to reach as they move around frequently and thus only get their mail when they themselves go into the soum or bagh. Subscription numbers fall during these times for obvious reasons.

While subscription sales and kiosk sales are both common in Ulaanbaatar and the main cities, most news print going out into the countryside is distributed as a subscription service, while kiosk sales in the aimags only happen at the post office, which will have the most popular publications on sale.

According to "Mongol Post" the government provides no funding for distribution efforts. This is despite the fact that only 15 percent of "Mongol Post" revenue comes from distributing publications, although 80 percent of their expenses are incurred through print distribution to the countryside. "Mongol Post" noted that they are looking at addressing this issue with the government and if no resolution is found it could mean that distribution to remote areas will become even more intermittent and/or expensive.

Another major constraint for Mongolian publishers is the printing side of the business. Following the fall of communism in Mongolia, various political interests strove to restrict access to printing houses in order to control the message. At that stage the Free Press Printing House was set up to provide access to printing at fair prices. Many of the publications in Ulaanbaatar and especially in the countryside use the Free Press Printing House to print their publications.

Moreover, the situation has changed in recent years with a number of new printing houses providing printing services, sometimes at an even lower cost than the Free Press. The reason for this being, according to the Free Press itself, that the private printing houses do not pay tax according to tax legislation and therefore have an unfair competitive advantage.

Printing costs and logistics are a major concern for local newspapers. Most publications have to print in Ulaanbaatar as there are few printing houses in the aimags and none of them have the capacity to print traditional-sized newspapers. This means that the newspaper has to send someone to Ulaanbaatar with the newspaper on a USB flash drive, get the newspaper printed and then return with the newspaper to the aimag – all of which is expensive and time-intensive considering the budget and the number of people the newspapers operate on.

The minimum print run is 500 copies per issue as per requirement of the Printing Press. Newspapers often cannot sell even half of the copies. One newspaper interviewed for this report has instead resorted to printing out its newspaper on A4 sheets of paper via computer. Most reject this idea, however, as they claim they will not get advertising for

something that does not look like a newspaper. Others cite goals of converting to broadsheet and printing in colour in order to attract funding.

Typical budgets to cover costs lie at around MNT 150,000-200,000 for an issue of 1,000 copies while MNT 250,000-300,000 revenue per issue is considered profit making. Print costs are at MNT 100,000 for 500 copies, which do not include travel and mailing costs.

2.4.7 The Revenue Model

As is the case in other media there is no transparency when it comes to print media revenue, neither concerning advertisement and subscription nor for obvious reasons "paid for" content. Although the subscription figures are moderate, the three largest dailies and the five largest weeklies have substantial revenue from subscription and advertisement as well as significant revenue from the paid for 'business news'. Since salaries and production costs are quite low these newspapers might be profitable in themselves, but there are reports of indirect support from government and political interests. Again tax issues are in question: the newspapers often avoid paying taxes, but if they write critical stories about the government the tax authorities show up.

Many of the minor political and critical weeklies and biweeklies are struggling financially. In general, the national print media are not propelled by market forces since they are less media businesses than tools for achieving economic and political power.

In the aimags the many small newspapers get their revenue from different sources. There is no actual market so the limited subscription and undeveloped advertisement market cannot support the newspapers. Most local newspapers obtain a monthly retainer from local government in order to survive and in return publish local news. Often when more than one publication exists in one aimag, only one paper receives funding – obviously the one that is closer to local government. Funding also comes in the form of equipment, office space or also bulk purchase of copies of the publication that are then distributed via government to soums and baghs etc.

At the same time, funding from private sources is also sought which comes in the form of sponsored editions featuring one company, its employees, its CEO etc. Classifieds also bring in some revenue; however, due to the fact that circulation is low and frequency unreliable little revenue comes from this source. Finally, some of the local newspapers are supported by one of the major political parties.

2.5 ICT

Uptake of information and communication technologies has been fast and dynamic over the last 5 years with lots of investment, assistance and cooperation taking place. The government has promulgated its ICT Vision 2010 that defines the goals and strategies for ICT development over the next years.

A National ICT Committee has been established headed by the President of Mongolia. Recently the Information and Communication Authority under the Prime Minister has been established to oversee coordination and implementation of projects.

The government Information & Communication Technology Authority states its ICT goals as follows:

Government-Legislation framework: The government is an open information and service provider that builds an information society structure.

Business-Economy Framework: To create business environment capable to ensure efficient integration into the world economy, to enhance intellectual capacities of domestic, national products and improve their competitiveness.

Human Development Framework: Regardless of where citizens live, to ensure opportunities for their equal and active participation in social life and for an easy communication with each other.

2.5.1 Current Reality

Since the implementation of the ICT programme, there has been rapid change. Mobile phone subscription has already overtaken fixed lines in Mongolia. While in 2004 only 5.5% people had a fixed line telephone at home, at the same time 12.9% had mobile phone subscriptions. According to a recent World Bank study on ICT⁹, mobile subscription has doubled since 2000. 64% of people in Mongolia are covered by mobile signal with mobile networks covering Ulaanbaatar, major cities, aimag centres and to a lesser degree some soums. Mobicom, Skytel and Unitel are the three cellular providers, and Mobicom leads the field with 550,000 customers.

At the same time there was 5.8% Internet penetration by 2005, up from 1.3% in 2000. Computer ownership is 2.8% up from 1.3%. In comparison 28% of households own a television set.

While city dwellers in the major urban centres have different Internet access options, it is the Internet cafes that are mushrooming in Ulaanbaatar itself as well as aimag centres. Internet cafes in the countryside are mostly attached to the Mongol Telecommunication offices, schools or other government institutions.

While traditional media, especially TV, is the main entertainment and information source, new technology including mobile phone usage as well as Internet usage are quickly gaining momentum and are becoming important tools for creating communication platforms, connecting people and providing information in a timely fashion.

⁹ Information and Communication for Development 2006: Global Trends and Policies.

All aimag centres visited have at least one Internet cafe that is usually housed in the Mongolia Telecom facilities. Some aimag centres have additional Internet cafes and centres as part of school projects or due to the fibre optic cable along the railway line going north south from Russia to China. A fibre optic backbone network is being put in place connecting all aimags and a number of soums. The project is to be completed by the end of 2006.

While access to the Internet in major urban centres is a given and the fibre optic network will greatly enhance the interconnectivity between urban and remote centres, it still remains to be seen how policy will be implemented to actually make use of the new capacities. A study on E-Readiness (2002: E-Readiness Assessment Report of Mongolia for the Networked World) though is optimistic as it assesses:

- central and local governments are computerised
- business computer and Internet penetration is high
- academia is connected at the university level
- public Internet centres and Internet cafes are available

But

- low income people can't afford Internet access or computers
- only a few secondary schools have computers & Internet access

During the mission it was apparent that the young city population is quickly picking up on new communication technologies through Internet cafes in aimag centres. However, soums did not have any Internet access. On a positive note there were a number of schools in the countryside that had recently been fitted out with computer rooms and Internet access. Once these children are trained in computer literacy as well as Internet skills and access to Internet becomes easier, access to information via the Internet should be greatly improved. Mobile phones are already being used regularly to communicate commodity prices around the country.

2.5.2 Traditional Media & ICT

Many of the Ulaanbaatar media outlets including TV stations, publications and radio stations have their own websites and are also available on joint platform sites. According to the "Monitoring Mongolian Media 2005", 18% of the 12-19 year old age group in Ulaanbaatar stated that they used the Internet as one of their sources of domestic news; nevertheless, even in this group television is by far the most prevalent source at 89%.

Internet and broadband access is increasing copyright abuse, with most FM stations downloading music from the Internet without any consideration given to copyright issues; the same issue applies to films and other content available on the internet.

3 Freedom of Expression under Pressure

3.1 Repression of Freedom of Expression

The mission team has identified violations of freedom of expression in many different forms ranging from physical harassment and threats, extensive use of libel cases, to financial pressures and unjustified obstructions; these violations take place in national as well as local media.

In October 2005 the NGO Globe International in association with the International Free Expression Exchange and Moscow based Centre for Journalists for Extreme Situation began the project Monitoring Free Expression Violations and Supporting the Rights of Independent Media.

The goal of the project is to develop comprehensive monitoring of free expression violations and to campaign for the rights of independent media so that Mongolia's media will have greater freedom to play a leading role in the development of democracy.

In addition, the project gives legal support to the journalists who have been victims of violations.

In November 2005 Globe International presented a survey on violations of freedom of expression among newspaper journalists at five daily newspapers and two major weeklies¹⁰. The survey showed that more than half of journalists had been threatened or pressured in connection with their work. The most common violations were threatening phone calls, pressure from the media management, questioning by police or the courts, and demands to publish false corrections.

Within the first year, between 25 and 30 violations were reported to Globe International¹¹. The reports include a local woman television journalist being beaten up in July 2006. In June 2006 she reported on the fate of privatisation vouchers for 9,000 employees of the Erdenet mining industry. After the television programme, unknown people threatened Tsevegmid over the phone. The director of the Erdenet brokerage company, which held the vouchers, also warned the journalist, "It is a very complicated issue, you could be killed." In July she was beaten by unidentified perpetrators, and was hospitalised for treatment.

In 2005 a woman editor of a local newspaper was threatened on the phone after a critical article. Afterwards her yard was demolished by unidentified people in a car. The incident was reported to the police, but they did not find the perpetrators. The editor stressed that "we repeatedly receive threats and are insulted by businessmen."

¹⁰ <http://www.monitoring.mn/?module=record1&id=31&menuid=46>

¹¹ All of the alerts are available in Mongolian at <http://www.monitoring.mn/?module=zurchil&menuid=37> and 12 of the alerts have been reported to IFEX available at <http://www.ifex.org/fr/content/view/archivealerts/154/>

In several situations the police have violated the journalists' right to cover demonstrations. As recently as October 2006 the "reporters G. Erdenebat, B. Khajidmaa, photographer Ya. Aranjinbaatar of "Udriin Sonin" and photo reporter Sh. Gerelsaikhan of "Ardiin Erkh" who were covering the civil society demonstration were detained for around 2 hours by policemen. Ms B. Khajidmaa, a female journalist, was beaten by policemen with batons, and her face and body were severely injured. The photo camera was destroyed while the policemen were trying to confiscate it¹²."

These alerts are the tip of the iceberg. The mission team has in accordance with Globe International survey conducted interviews all over the country with journalists, editors, and civil society people that have been exposed to harassment. Many journalists did not report the incidents either to the police or to Globe International. In many cases the perpetrators were part of governing political elite, powerful businessmen or even the police, and the journalists expressed distrust in the police and the courts; in fact they feared that reporting it to the police would make things even worse. In some cases the journalists were not aware of the Globe International project, but even if the journalists knew about the project they did not report the harassments, since they feared that further attention and publicity on the incidents could easily spark more tension and animosity.

Globe International addresses the perpetrator and expresses its disapproval of the harassment, but in one local community this has spurred the powerful perpetrator to continue the harassment and made it even more difficult for the journalist to continue her work as a local journalist.

3.2 Ethnic Minorities

There are several different ethnic minorities in Mongolia. The largest minority group is the Kazakh minority primarily living in Bayan-Olgii and Khovd aimags. In Bayan-Olgii the Kazakh population makes up more than 90% and the local media is mainly in Kazakh language. The population is predominantly Sunni Muslims of Kerei kinfolk.

The interviewees stressed that there is a peaceful co-existence between Muslims and Buddhists and there have not been any strong conflicts. The political scene in Bayan-Olgii is similar to the rest of Mongolia with MPRP and DP dominating. MPRP has been in power since 2000, and the local situation is politicised along party lines, but the political and social situation is more complex because of an internal clan system among the Kazakh population. The aimag centre is more prosperous than the neighbouring aimag centres because of business relations to both China and Russia and substantial support from Kazakhstan.

There are three small Russian language newspapers and one Chinese. Via the cable and satellite systems the Russian and Chinese minorities have easy access to television in their own language, especially in the border areas.

¹² <http://www.globeinter.org.mn/en/enewsdetail.php?nid=371>

It is also critical to reduce the information gap not only between the capital of Mongolia and the remote aimags, but also between aimag centres and remote soums, which are left out of any information field at the moment due to the electricity shortages and economic duress.

UNESCO's pioneering work aimed at extending information access for minorities started in 2004 and set a pace for other UN agencies in Mongolia. UNESCO has established a Reindeer Radio FM station radio for Tsaatan and Darkhad minorities. A recent survey among radio-listeners showed that the most popular programmes are the weather forecast, news, science and educational programmes, ads, programmes for children and Mongolian popular songs and other types of music. When asked what kind of programmes they would like to listen to more frequently, minority representatives mentioned lawyers' advice, literature time and market news related to the ethnic language and culture. UNESCO projects with Darkhad and Tsaatan people established that although these two groups have managed to maintain their specific lifestyle, culture, language and dialect, they are facing challenges to their self-preservation and experience severe lack of developmental information in their native dialects.

UNESCO conducted trainings on Public Service Broadcasting for media practitioners in Bayan-Olgii aimag with the participation of BBC and local NGO experts. Subsequently 4 selected trainees from Bayan-Olgii went for studies at the journalist department of the Kazakh State University in 2005 and one professional cameraman from Olgii TV was despatched to Radio Television Malaysia for up-grading his skills in 2006. UNESCO is currently assisting the local broadcaster in establishing three community radio stations in remote soums. In cooperation with the National Library of Mongolia, UNESCO translated, published or purchased thousands of books in minority languages of Buryad and Kazakh.

3.3 Journalist Education

Since the collapse of communism, Mongolia has faced the challenge of building an entirely new media system that meets the requirements of a young democratic state. The training of journalists and media management training are vital parts in the equation.

For this reason many multilateral organisations and NGOs in Mongolia have been extraordinarily active in Mongolia in terms of journalist training over the past 10-15 years. Indeed, the vast majority of journalists interviewed for this report had, at one stage or another, received mid-career training from the PIM (See NGO section) or one of the other numerous NGOs working in Mongolia.

However, despite the heavy investment in mid-career training and despite almost all journalists being able to cite the virtues of a free and responsible press, the standard of Mongolian journalism has only improved very little in the interim.

Until 1990 journalism was only taught by the Mongolian University. Since that time, 21 schools offering journalist training have opened in Ulaanbaatar. Four of those schools are

directly administered by the government while the rest are privately run. On average, these schools have a total student body of around 1,500 students at any given time.

Media professionals and Journalism professors, for their part, note that the quality of training offered at the universities and the private schools is low. The private schools are generally geared towards generating profits rather than producing journalists with a strong sense of ethics and high levels of professionalism. Also, schools and universities only provide theoretical training and rarely teach any practical skills as a number of media owners noted.

As far as ethnic minorities are concerned, no journalist training is available to them in their native language in Mongolia.

Training and journalism education in the countryside are different matters. While NGOs will from time to time conduct training in the countryside, there are no local journalism schools or established training facilities available. In addition, according to reports from media owners in the countryside, there used to be more training opportunities available which have now almost dried up. The centre for journalist training is in Ulaanbaatar, which makes attendance for media journalists from the countryside difficult. Not only are costs prohibitive, but often local media outlets are composed of only one or two people and would have to shut down if their employees went to Ulaanbaatar for training.

At the same time local media owners complain that those young journalists sent to the city for training seldom return not least due to the dire financial situation the local media are in and the low salaries they pay. As a result, young journalists in the countryside in particular have very little formal training and have learnt what they know on the job; this is especially the case in the local FM stations.

While there are a great number of journalism schools, there are no media management courses. Fifteen years since Mongolia's move to democracy, there is still little to no understanding of how to manage and grow an independent and balanced media outlet that exists for the sake of providing free and independent information or for the sake of being a business in itself, without having to depend on political and/or business support.

3.4 Journalism ethics

Journalism ethics are a key issue in Mongolia. In 2003 The Mongolian Association of Independent and Free Newspapers adopted a code of ethics, but the code has had only limited impact. Journalism ethics are under pressure from different angles. The media environment itself does not encourage nor allow for fair and balanced reporting. It is often the internal editorial policy of the media owners that do not allow for balanced reporting.

Training at the journalism schools and NGOs tends to focus on how to operate in an ideal, professional media market, not the one that actually exists. Once graduates are released

into the world, they find that the skills they were taught in school do not apply to the environment they have to operate in.

However, the question remains: why it is that many journalists and editors see nothing wrong with accepting bribes or selling paid news to the highest bidder. There are many reasons why this might be the case. The environment is far from conducive to nurturing free and independent journalism. The journalists can hardly survive on salaries as low as US\$ 40-50 per month. Of course, this reason is too easily used as an excuse by journalists that are not willing to live up to the challenges and responsibilities that go hand in hand with the profession.

Another reason might be a heritage from the communist rule where the media was well organised due to the importance any one-party regime gives to the media. The top-down control was supreme, and unambiguous rules of what journalists were allowed and not allowed to report, clearly regulated the output. This era ended only some 15 years ago, which means that many of the journalists from those days are now working for newspapers and TV stations, or are indeed out in the countryside running local media outlets.

Many of them have had numerous training sessions over the past years with a number of NGOs. It is not easy to change a mindset, however, and investigative journalism and criticism of leadership or government are alien to many, not least because many journalists are members of the ruling party. The situation is aggravated where journalists are financially dependent on local government, as is often the case in the countryside or the communities are so small that journalists dare not speak freely for fear of being ostracised from their community.

Nevertheless, some of these older, more experienced journalists enjoy the new freedom, setting the standards for the new generation. Likewise the young journalists are divided between those who lack ethical standards and readily lend themselves to business news and scandalous stories for better pay, while others relentlessly stick to the principles of free and independent journalism.

4 Independent and Free Media - Challenges and Opportunities

There are many challenges to the development of free and independent media in Mongolia. The above mentioned violations of freedom of expression are in themselves problematic, but even more seriously they are part of a more critical problem related to the general political and financial dependency of the media. The immense political and financial influence on the media leaves little room for independent, proper journalism. The media are saturated with so-called "business news" in the form of paid articles or paid programmes.

Political and financial influence on the media is acknowledged all over the world, but a major cause of concern in Mongolia is the fact that the journalists themselves conduct the reporting for the company or the politician. Hence the journalist risks whatever

credibility is left of the profession, and it also prevents the journalist from afterwards making critical reports on the same company or politician. Secondly, the readers of newspapers or viewers of television programmes are put in an awkward position not knowing what to believe, because the media outlets present the "business news" with no distinction from independently edited reporting.

In some cases the journalists do not inform the media outlets that the articles or programmes are paid for and instead take all the money themselves. If this "deception" is revealed by the media outlet it might cause minor disciplinary sanctions, not so much for reasons of journalistic ethics, but because of the financial hoax. Moreover, freelance journalists often earn their money through providing "business news" to the media outlets.

Some media outlets do not accept "business news" at all, but they often have a hard time avoiding it since it is such common practice amongst journalists.

What is more, it is sometimes difficult for an editor to judge if a journalist has been paid for an article or a programme. Eagle TV has a policy where they immediately expose the news reports that have been paid for, and the journalist has to pay back any money gained. In the event of a journalist accepting such payment twice, or just once for political reasons he or she will be dismissed. It is important to stress that Eagle TV pay substantially higher salaries to the journalists; the lowest salary for a journalist being \$200 per month.

When it comes to the local media the prevalence of "paid for" articles and programmes is even more comprehensive. Almost all local media, apart from some of the new low budget FM radio stations, are dependent on paid articles and programmes; indeed, some local television stations broadcast nothing but paid programmes. The main patrons are the local governor's office, politicians, and business people, but can also be a soum centre that wants some publicity or NGOs promoting a project. The financial "support" from the governor's office is crucial for the survival of the local media. The media law of 1998 prohibits government run media, but in reality local media in many aimags are fully controlled by the governors and a small aligned group of politicians and businessmen. The formal ownership has often been turned over to a private person or to the local assembly, but in reality the local governors (most of them from the MPRP) or the MPRP party controls the majority of local media.

In some aimags media outlets are aligned with the oppositional DP, or at least they are seen by the public to be aligned with the party. No matter how hard you try, the polarised environment makes it almost impossible to maintain a position outside this bi-partisan polarization. However, the "oppositional" local media are in many respects dependent on the local governor; some of these media get financial support for providing paid official information from the Governor's office, and they have to rely on the good will of the Governor when it comes to access to relevant information. In some aimags the oppositional media are cut off from relevant information from the authorities, which is detrimental to the democratic process and the freedom of information. Finally, if the

oppositional local media get too critical the local rulers use more heavy-handed methods as described in the chapter on freedom of expression under pressure.

This said, it has to be stressed that some local media with committed and well trained journalists manage despite all the odds provide well researched independent journalism, sometimes at risk to their own lives. Unfortunately, these audacious journalists and editors not only have to fear different kinds of harassment, but they usually also have to spend a large amount of resources on administrative issues related to financial survival.

The local FM stations are in some ways unique in respect to free and independent media. To some extent many of the new local FM radio stations have been able to stay out of this polarised media environment. One main reason for this is that due to the low cost of launching an FM station and some inspiring examples of profit making local stations, many of the FM stations are launched by entrepreneurial people for business reasons; unlike most media the stations are conceived as a business paradigm and not as a political paradigm. Certainly, many FM stations were launched by MPRP before the last election as a tool in the election campaign, but afterwards the stations were handed over to new managers that widely stress that they work independently of MPRP. Secondly, most FM stations are anchored by young high school kids and mainly provide music, contests, poetry and fairy tales, educational programmes and phone-in announcements. Most FM stations are considered as entertaining and not political. At any rate, the stations provide a dramatic change in mode of address with live call-ins and a broader outlook on the modern world, so the stations might from a cultural point of view have significant impact, not least on the younger generation in the aimags.

In any event, the FM stations that provide news and more journalistic programmes are immediately absorbed into the polarised political media environment. Local FM stations with critical journalism have been harassed in the same way as local newspapers and TV stations. In addition, it should be noted that although MPRP apparently does not interfere with the programming policy of the FM stations, the party maintains control over the license and therefore may use the station once more as a tool in the next election.

In the aimags the MPRP and associated business interests after some years of disarray have been able to adjust to the partly competitive media environment. The renewed rulers have found new political and business models for the running and controlling of the media, often spiced up with harassment if necessary. The methods have changed, but the domination mentality is the same. The DP is in a shambles and definitely less organised in the aimags, so the party does not provide a genuine alternative.

4.1 Revenue Model – Is Financial Independence Possible?

One of the crucial factors for the development of a free and independent media is a viable financial model where media are run as businesses in their own right that compete for market share (i.e. audience, readers, listeners etc.), and that allows media to survive without relying on political or business interests.

This Western inspired model controlled by market forces has in many countries succeeded in building a viable financial model that in itself makes media ownership a worthwhile business opportunity although it is far from perfect. The heavy reliance on audience demand does not necessarily magnify public discourse in what can be considered a healthy fashion for democratic process. Yet, in order for this system to work, there already needs to be in existence a strong, sophisticated economic environment that understands the value of marketing and advertising. Audience demand for trustworthy information and entertainment is the key to creating a sustainable financial model.

In Mongolia, the development of such a system is still in its infancy. While Mongolia, for a country of 2.5 million people, has an impressive number of media outlets, many of them do rely on external support from vested interests and the rest struggle financially due to the lack of a viable advertising and subscription economy. Very few media outlets in Mongolia were set up with an eye towards media business and providing independent media services.

However, Mongolia's economy has been increasingly gaining momentum as the country is discovering its immense wealth in natural resources including coal, copper, gold etc. Whereas in Ulaanbaatar a young urban middle class is emerging and with it a growing consumer market, the new wealth has also seen a greater divide between the poor and rich, with the benefits only trickling down to a few in the countryside that are well connected or who are selling the Mongolian natural resources cheaply to its neighbours. As one interviewee put it, considering its great wealth through natural resources, everyone in Mongolia should be able to afford to drive a Mercedes car – instead only a few are hoarding the profits.

Therefore Mongolian consumers, especially in urban centres, are seeing an increasing variety of goods and services available to them, all of which are exploring marketing and branding through media. As marketing and ad spending on consumer goods increases, there should be an increasingly large advertising pool for media outlets to utilise, helping to reduce their reliance on political and business interests.

As noted earlier, the television stations are slowly starting to recognise the market opportunities in the increasingly competitive television market. Audience research and related research have recently gained momentum, and the market forces might slowly change the logic behind the media market in general. This said, the stakes are extremely high for the vested interests and they will probably not give up control of the media without fighting back.

The situation in the aimags is quite the opposite. There are no signs of an emerging, local advertising market that would support local media. This leaves few options for the local media to avoid the current situation of strong dependency on government subsidies or political and business interests. Low budget FM radio stations have in some aimags been able to make reasonable business based mainly on phone-in fees and announcements, but very often the FM stations have additional revenue from "paid for" content. The entrance

of new competitors makes it hard for anybody to recoup investment, and in some areas the revenue from phone-in calls is decreasing probably because the callers realise the cost.

In the countryside, a form of public support or public broadcasting may be the only viable option as advertising and subscription revenue will not be enough to support local media outlets with proper local content.

5 NGOs and Civil Society

5.1 The Role of NGOs & Civil Society

Civil society plays an important role in the extremely politicised and corruption prone Mongolian society. Unfortunately civil society is not an especially strong force for change at the moment. As we have pointed out earlier many organisations like the different journalistic organisations as well as a host of NGOs are closely associated with the political rulers. Often the wife or relatives of a politician set up an NGO to get access to funding. There are significant exceptions that make a difference. Organisations like the Soyombo Movement and Healthy and Just Society Movement are committed to working hard for social change and act as vigilant watchdogs against injustice. In 2006 several civil movements have joined forces and have gathered substantial support for extra parliamentary activities.

In October the leader of the Mongolian Free Elders movement G. Baasan was arrested, allegedly because she had assaulted a police officer. In the subsequent demonstration to free the civil movement leader the police used excessive force to disperse the demonstration, and among others three journalists from two daily newspapers were beaten up and detained. The heavy-handed clampdown on the activists and journalists covering the demonstrations reveals that the Government does not feel comfortable with public support for these movements.

Within the media field some NGOs stand out for their long-term commitment to supporting the development of free and independent media; the Press Institute of Mongolia and Globe International being the most prominent. The different NGOs and many media outlets have been supported by a great variety of donors in the area. DANIDA came in with heavy support in the mid 1990's and made a big impact in setting up PIM and the Free Press Printing house, but DANIDA was also among the first to withdraw support before the development towards free and independent media was self-sustainable. At present, donor support has decreased with UNESCO and private American foundations being among the chief contributors. At any rate, there are still a host of minor contributors around extending support to different media activities, but there is no genuine coordination of activities or a holistic approach.

5.1.1 PIM

Background

PIM was established in 1995 as part of the Free Press project financed by DANIDA.

The mission of PIM is to:

- Support the development of independent and pluralistic media in Mongolia;
- Assist in improvement of qualifications and skills of Mongolian media workers;
- Analyze the development of Mongolian media, disseminate objective and reliable information on this development and support exchange of scientific information on media;
- Explain to the public the role and importance of free media in the social, economic and intellectual life of the country.

Training

PIM offers short and long term training including a 6-month Journalism Diploma course, and a 4-year BA programme developed jointly with the Danish School of Journalism, as well as a digital-equipment based Photojournalism Course developed with funds from UNESCO. The courses focus on providing practical, rather than academic training reflecting an issue cited by many media owners who complain that fresh media graduates seldom have any practical grounding in actual journalistic work. In the past 10 years since its inception PIM has conducted approx 500 training units involving 5000 media workers.

Media Research

Since 1999 PIM has compiled the annual "Monitoring Mongolian Media Report" in which it provides quantitative statistical data on the Mongolian media landscape. It has high credibility, even though a few of the continuous changes in the media landscape in the aimags have not been registered in the latest report.

In 2003 PIM in cooperation with several television stations and some large companies sat up a Joint Industry Committee to establish regular audience research, primarily on television in Ulaanbaatar as well as other urban centres including Darkhan, Erdenet, Baganuur, Nalaikh and Zuunmod. The ratings are sold to 15 media owners, advertisers and other interested parties on a monthly basis.

Eagle TV recently used PIM audience data to support its widely advertised claim that they produce the most watched news in town. TV9 contested the data. While this in itself can be seen as a very positive development, at the same time it also exemplified that even NGOs such as PIM are not free of internal and external pressure. Former PIM director Enkhbat, now head of TV9 and still head of the PIM Board, put considerable pressure on PIM to change its data. To its credit PIM did not give in to the pressure and maintained its stand on the integrity of its data.

PIM now generates 70% of revenue from their training and research activities, which also puts a strain on the management to focus on projects that will bring in funding.

Past projects of PIM have included Free Press Project (DANIDA, 1995-1999); Media and Advocacy Activities on the National Level (UNDP 1996-1999); Consolidation of Democracy through Strengthening of Journalism (UNDP 1997-2000); Development of Responsibility and Pluralism in Mongolian Media through Improvement of Professional Standards of Journalism (EU/TACIS 1999-2001); Journalism and Media in Mongolia: Monitoring Mongolian Media (DANIDA 1999-2002) etc.

5.1.2 Free Press Printing House

The Free Press Printing House was founded in 1996 as part of the DANIDA Free Press project. It provided its services at affordable prices in an environment where little if any other private printing facilities existed. The printing house at one stage printed 90% of all print run in Ulaanbaatar without hindrance through political or other interference and was highly profitable due to the lack of competition. However, now the Printing House is finding it increasingly difficult to survive. The new private sector printing facilities offer cheaper prices. In addition, since its inception in 1996 the Free Press Printing House has not been allowed to change its pricing structure and thus is feeling the pinch of rising paper costs which have increased by up to 40% in recent years. Despite this, the Free Press Printing House still prints 60% of all print run in Mongolia which covers 75% of all titles published in Mongolia.

Rural publications in particular rely on the Free Press Printing Facilities as well as their pre-press services; while their main complaint is that the costs of the minimum print run of 500 copies per issue are still too high for them to cover.

While many local newspaper owners noted that they would greatly welcome printing facilities in the countryside, only in a few aimags have minor printing houses proven viable, and so far these are not equipped to print newspaper formats.

5.1.3 Globe International

Globe International (<http://www.globeinter.org.mn/en>) was founded in 1999 as a non-profit NGO. The organisation currently has seven employees. It focuses on freedom of expression, public broadcasting, democratic elections and human rights in general, and it has developed a special expertise in legal aspects.

Globe International has been funded primarily by international donors, UNESCO and Soros Foundation being the leading contributors, but it has also maintained a broad spectrum of donors, making it less vulnerable to sudden changes in donor priorities.

In 2002 Globe International initiated a Right to Know: Freedom of Information Programme. In cooperation with Article 19, Globe International has made a comprehensive analysis of the Mongolian legislation that demonstrates the many

restrictions on freedom of information. Finally, in 2006 the Government presented a draft law on freedom of expression (which has so far not been adopted) as well as the "Law on Public Service Broadcasting".

Globe International also implemented the nation-wide Media Against Corruption campaign funded by UNESCO in 2004-2005, and at the invitation of UNESCO reported on the situation of media and good governance in Mongolia at the World Press Freedom Day in Senegal, 2005.

In 2005, Globe International began in association with the IFEX project Monitoring Free Expression Violations and Supporting the Rights of Independent Media. It appears to be aware of the menacing situations courageous journalists often find themselves in; yet, the NGO has not been able to provide appropriate support to harassed journalists, particularly in the rural areas. Consequently the monitoring of free expression violations might not give an adequate understanding of the problems, and the project does little to improve the situation.

Globe International has over the years produced many high quality publications in Mongolian as well as in English, available on its website.

5.1.4 Open Society Forum

The Open Society Forum (OSF) is part of the Soros Foundation Network and the successor of the Mongolian Foundation for Open Society. OSF was established as an NGO in 2004 and focuses "on two core areas, democratic governance and economic policy"; of which a minor part is the media programme, whose goal is more specifically: "to assist in ensuring the role of the media in democratic society as a factual, objective and balanced information provider and as a public watchdog".

Previously the Soros Foundation generously supported the development of free and independent media in Mongolia over the years, but now the funding has been concentrated on OSF and the media support has decreased dramatically. In 2004 and 2005 OSF supported different media activities like programme exchange among rural radio stations, advocacy for public broadcasting, and several public meetings. OSF produced a series of talk show programmes on social and political issues. These programmes were broadcast at primetime via the state-run channel.

OSF is well funded and has highly qualified staff, although limited experience in the media field, and media issues come second to other priorities.

5.1.5 News and Information Association of Mongolia (NIAM) NGO

NIAM (www.moninfo.org) provides a platform for independent and balanced news on Mongolian issues through its own dedicated website. Its mission statement states:

NIAM is also involved in broader media reform in Mongolia through the

development of journalism training and the creation of journalism resources and journalism internships for students...

One of NIAM's media development projects provides a platform for sharing information amongst other NGOs and donor groups.

NIAM has instigated and organised an ongoing series of monthly meetings with representatives from media-development NGOs and NGOs involved in project-specific journalist training. The aim of the meetings is to open the channels of communication, identify problem areas with the Mongolia media and identify ways the organisations could be working with the media and each other more effectively in order to achieve long-term development aims. Participating organisations include: Globe International, the Open Society Forum, the Press Institute of Mongolia, the National Human Rights Commission, UNDP, UNFPA, the Swiss Agency for Development and Cooperation, and Mongolian National Broadcasting.

This kind of platform is very much needed in an environment where there is little coordination of media development activities amongst donor groups.

5.1.6 UNESCO

UNESCO has over the years supported a range of projects related to media freedom (transparency in public administration, guide on media practitioners rights), minority issues (such as the aforementioned Kazakh minority project, and support to community radio station for indigenous people), and training courses. Further, UNESCO has financed this media sector analysis to establish a more informed basis for new initiatives. The following are the media projects implemented by UNESCO over the years:

Photojournalism Course and the Photo Laboratory at the Press Institute of Mongolia (November 2005-March 2006), Media for Transparent Governance (October 2004-October 2005), Translation and publication of the "Practical Guide for Journalists" in Mongol (20 May -10 July 2006), Improvement of National Radio and Television services (2003-2004), Development of Broadcasting Service (1997-1998), Modernization of the Montsame News Agency (1999-2001), National News Agency (1985-1986), Radio/Television Training at the National Press Institute (1997-1998), Renovation of the printing industry (1995) and Training Centre of the State Printing Kombinat (1988-1990).

5.1.7 Other

There are a host of active donor organisations including embassies in Ulaanbatar, Konrad Adenauer Foundation, Deutsche Welle, Canada Fund, USAID, the World Bank and IFEX, but at the moment the donor support is diverse and often media engagement is one component of a project that includes a communication budget but which does not directly address the development of the media sector at large.

There also seems to be little coordination between donor activities, though the NGO MonInfo, the News & Information Association of Mongolia (NIAM) is looking at bridging that gap (see above).

6 Aimag Overviews

6.1 Dornod

Area: 122,000 km²
Pop: 75,000 (48,000 living in aimag Centre Choibalsan)
Econ: Revenue of local government in mln. MNT: 1363.6



6.1.1 National Media Availability

Newspapers

National newspapers are available upon subscription from Ulaanbaatar arriving twice a week by plane and once a week by car. Direct sales are available through the Post Office. Most of the publications are tabloid format.

Top Subscription Publications

Tabloids

Khumuus (People)
Seruuleg (Alarm)
Zunidaa (Rank)

Daily

Zuuny Medee (Century News)
Odiriin Sonin (Daily News)

Source: Post Office Executive

Television

All 5 national channels are available on cable including MNB, TV5 / TV9 share one satellite channel and UBS / C25 another, and are available on alternate days.

6.1.2 Local Media Availability

Television

Shine Suvag TV

Director Ms S.Delger.

Shine Suvag TV was established in 2001 and is staffed by 2 employees and part time student helpers. The broadcaster's director has attended PIM training. Initial establishment of the broadcaster was difficult as the local government at the time thought she would be politically biased and confiscated her equipment for close to a year. The issues are resolved now and according to the director the government has by and large left them alone

Broadcast 19:00-22:00, 3 hours daily via terrestrial and carried on both local cable networks, Kherlen CATV and Tsangsrags CATV. The programming is not seen outside the aimag centre. Shine Suvag TV pays a fee for carriage on the local cable networks.

Content for the channel includes local news, government and business announcements, dubbed (pirated) movies, obituaries and open text programmes read by an off-screen announcer. Additionally, a children's programme is produced locally with financial assistance from NGO Save the Children UK and aired twice a month.

Main advertisers on the channel include political parties and candidates (during elections), real estate, and job openings. Politicians have to pay to make announcements.

Kherlen TV

The TV station is part of Kherlen CATV but with irregular transmission of local programming.

Cable Network

Kherlen CATV

Established in May 2005 by local Telecom Company Director Mr L.Bayarmagnai, Editor in Chief Ms D. Dariimaa (also current Telecom Company Director), with 5 other staff members.

1,800 Households, transmitted 6 days per week.

20 channels (Mongolian, Russian, DW, Arirang etc.) .

MNT 1800 per month for subscribers living in apartments.

Tsangsrags CATV

600 Households. 30 channels.

MNT 2500 per month for subscribers living in gers¹³.

¹³ gers are traditional canvas tents used by nomadic herders, now also used as a form of less expensive housing in some urban areas

Radio

Talyn Mongol FM 107.5

Director Mr S.Badarch.

Broadcast from 08:30 – 23:00 daily.

Two DJs throughout the day provide the music selection as well as classified announcements every two hours. Established in 2003 with assistance from the Gobi Initiative and other private investors.

The director has worked previously with PACT Market News and has also taken part in UNESCO distance learning initiatives.

Mongolia National Radio / Regional Public Radio

Director Mr S.Badarch (as above).

Director of Talyn Mongol FM 107.5 radio station also provides programming for MNR / Regional Public Radio.

Twice a week on Tuesdays and Fridays 09:30 – 10:00, Regional Public Radio is inserted into Mongolian National Radio. Content includes local news and local announcements, local government info, etc. He leases time from the MNR and finds advertising and "paid for" content to recoup investment.

Kife FM 102.

Established in December 2005 by Mr L.Bayarmagnai.

Transmitted Daily 24 hours.

Newspaper

Dornod

Director Ms B.Tuya.

The publication is part of Egel Co. Ltd. / Confederation of Local Newspapers and supported through them by logistical assistance in getting the layout to the printing house and ad sales in Ulaanbaatar. However, the publication is independent and can keep its profits. They also won the best sector (rural & other special publications) Newspaper prize awarded by PIM twice in 2003 & 2004.

Published 3 times a month with a circulation of 600. Staff consists of 4 employees with one in-house designer. The majority of the copies are distributed within the aimag centre and approximately 20 copies each to the 13 plus soums. Subscribers pay 2700 MNT for a 3-month subscription.

All copies of the newspaper are provided on a subscription basis. The only place they are sold directly is at the Post Office. According to Ms Tuya, she is afraid to lose subscribers

if she allows individual copies to be sold at kiosks since readers in this case will not opt for a subscription.

Children of Dornod

Editor in Chief Ms M.Odgerel.

Children's fortnightly newspaper, launched with funding from Save the Children UK in 2006 by Ms Odgerel.

Circulation 1,000; 1800 MNT for 3-month subscription.

Dornod Times

Closed down – used to be the newspaper aligned with Democratic Party interests.

Internet / Mobile

Internet

5 of 12 schools have internet access.

1. Micom 80+ organisations (Mongolian Telcom);
2. Dornod Net 20+ organisations; 20+ households (local);
3. Dornod Temtsel NA (private).

Mobile

20 percent (10,000 people) in aimag Centre have mobile access. Mobile servers Unitel, MobiCom and Skytel.

6.1.3 General Comments

Over the last year there have been some instances of violations of press freedom. "Dornod" Newspaper once wrote a critical corruption related article about a local civil servant who lived in the same apartment building as the reporter. Before and after the article appeared he repeatedly sent threatening text messages to the reporter. The case was reported to the Globe International Alert initiative.

Other comments included the lack of training or networking opportunities. In the past PIM would send annual schedules for training but for the last year there have not been any updates from PIM, let alone any training events.

6.2 Sukhbaatar

Area: 82,900 km²
Pop: 52,400 (14,000 living in aimag centre Baruun-Urt)
Econ: Revenue of local government in mln. MNT: 3500.0



6.2.1 National Media Availability

Newspapers

Daily delivery between Ulaanbaatar & aimag centre; mainly tabloids; twice weekly delivery via car to soums.

Top Subscription Publications

Tabloids

Khumuus (People)
Zunidaa (Rank)
Seruuleg (Alarm)

Daily

Odriin Sonin (Daily News)
Zuuny Medee (Century News)

Television

MNB, C25, UBS and TV5 / TV9 on alternating days

6.2.2 Local Media Availability

Television

Talyn Dolgion TV

Director Mr S.Batsaikhan.

The local TV station was established in the 80's during the communist era with local government funding, but was closed after introduction of the new media law which does not allow for government ownership of media.

The TV station was then relaunched by Mr Batsaikhan in January 2003 who had worked for the station in the past. Mr Batsaikhan leased the old TV equipment from the local government to get started and received a NGO grant (Youth Federation) as well as a private loan from a member of parliament.

Programming is broadcast on Saturdays and Sundays from 09:00 – 11:00 (Sunday a repeat of the day before). Programming consists of local news and government announcements plus rebroadcast content from TV5 and TV9. The transmitter radius covers 20 kilometres.

The TV station team consists of 3 people who are housed in the local government house. Initial TV training was provided through PIM in 2003 and 2005. Funding is mainly through "paid for" content for local government news as well as business and classifieds.

Cable Network

Currently no cable TV station available. Local officials noted that they would like to establish a cable system, but lack of funds and the small number of households make it difficult.

Newspapers

Shine Sukhbataar

Editor in Chief Mr S. Amartaivan.

"Shine Sukhbataar" was launched in 2000 by Mr S. Amartaivan, a Democratic Party member and head of the local government's Social Policy Department and is printed once a month with a print run of around 1,000 copies. The publication is housed within a local government building (MPRP).

Revenue is derived from "paid for" content from the local government as well as from international agency projects and classifieds. One page sells for MNT 100,000. Cost of print for 1,000 copies is MNT 126,000 plus transportation. During election cycles advertising revenues increase substantially.

Publishing has restarted recently following the return of Mr Amartaivan who had been called to Ulaanbaatar for civil servant training for six months. Due to his absence the newspaper had no subscribers at the time of the interview. The newspaper has a staff of 1-2 people including the layout person.

Radio

Talyn Tsurai FM

Director Mr D. Munkhbat.

The station was established with funds from the Soros Foundation in 2002. Broadcast from 09:00 – 20:00 daily. The content consists mainly of music and talk shows. Tuesday

and Thursday nights have open topic sessions (for example, the show airing during the visit covered the problem of street light theft) and Saturdays feature singing contests.

Revenue comes from "paid for" content, announcements and classifieds as well as through phone-in and song dedication. The word rate for announcements is MNT 15/word while the rate is increased to MNT 300/ minute during elections. Revenue averages at MNT 0-200,000 earned daily.

The station has a staff of 2 people. The DJ interviewed worked as an intern at the radio station before getting the full-time job. His background is in sports which he studied in Ulaanbaatar, but music is his passion.

Internet / Mobile

Mobile

MobiCom, Unitel & Skytel.

Signal coverage in aimag centre and 3 soums.

Skytel 4000 customers.

Internet

Government house connected with Internet cafe (set up by Indian government initiative); Mongol Post Internet Cafe; 2 schools with internet connection.

6.2.3 General Comments

Media closely tied to local government; all in local government house; no reports on infringements of freedom of speech; the local journalists mostly trained during communist times will nonetheless agree that all content is paid for and they are told what stories to write about - according to one journalist the main difference between the old and the young generation journalists is that the young journalists know about Freedom of Press but have no experience, and often are only interested in sensational news and spreading of rumours without checking facts.

6.3 Khentii

Area: 82,000 km²
Pop: 68,100; 17,300 in aimag centre Undurkhaan
Econ: Revenue of local government in mln. MNT: 1868.5



6.3.1 National Media Availability

Newspaper

Newspapers are delivered every day by bus but are delivered one day after publishing.

Top Subscription Publications

Tabloids

Khumuus (People)
Zunidaa (Rank)
Seruuleg (Alarm)

Daily

Odriin Sonin (Daily News)
Zuuny Medee (Century news)

Television

MNB, UBS, C25 and TV5 & TV9 on alternating days
Cable / 14 channels

6.3.2 Local Media Availability

Television

Sanburd TV

Editor in Chief Ms P.Naranchimeg.

Established in 2004 by Mr B.Purevbanzragch, 14 staff members including 3 journalists.

Broadcast time is ten hours per day with 4 hours of this time dedicated to newscasts at weekends; otherwise content is generally movies, entertainment and advertisements. The station owner and investor is an MPRP member based in Ulaanbaatar. The TV Station is part of and housed in the Sanburd Cable TV office which was set up during the 2004 elections.

Cable Network

Sanburd Cable TV

1500 subscribers; 14-16 channels including all Mongolian as well as foreign channels; MNT 2900 / month; also owns Sanburd TV.

Newspapers

Khentiin Sonin

Editor in Chief Ms I.Baigalmaa, Eastern Aimag Globe International Alert representative.

Established in 2002, the publication claims 100 subscribers with a print run of 500 copies. Khentiin Sonin was originally published 2-3 times a month. However, due to financial difficulties, it now only publishes when it receives enough advertising / paid for content which it pegs at around two pages for breakeven. The cash crunch came as government subsidies and guaranteed subscription from the local soums dried up.

According to Ms Baigalmaa, the publication is not doing well since it has had to rely solely on subscription revenues. One major cost concern is printing in Ulaanbaatar. Ms Baigalmaa noted that the lack of printing facilities in the aimag are a major strain on the costs as going to Ulaanbaatar for printing is prohibitive.

Ms Baigalmaa is also Globe International Alert representative, PIM coordinator, and has been part of many training courses over the years. She is looked upon as a local journalistic leader.

Uragshaa

Editor in Chief Mr D.Ayurbuni.

Uragshaa was established in 2004 as part of an NGO set up by the local governor, Mr N. Nyam-Osor. At the time of writing, two issues had been produced with the content focused solely on government news. The newspaper is said to lean towards DP.

Radio

Dulguun Kherlen FM 106.2

Director Mr B.Adiyakhuu.

Established in 2002 with Soros Foundation assistance (US\$40,000 was provided for establishment of the station which was shared with Sukhbaatar Talyn Tsurai FM), the

station broadcasts daily from 07:45 to 23:00. The content is varied and includes local and national news each hour as well as entertainment. According to the station owner, Mr Adiyakhuu, the station earns around US\$300 each month for paid content, announcements and classifieds.

Erdes FM 101

Director Mr O.Nasantogtokh.

Established in 2001 and broadcasts from 09:00 to 12:00 daily. Currently four people are working at the station, including a young DJ. Content consists mainly of music, love poems and live call-in. Revenue is mostly derived (60%) from classifieds and government news. Concurrently they are applying for a call-in number.

Internet / Mobile

Mobile

MobiCom approx. 5,000; Skytel approx. 1,000 (six soums have mobile connection).

Internet

1 Internet cafe in Mongol Telecom with 4 computers (Indian government support).

6.3.3 General Comments

There are constraints to freedom of speech; Ms Batsetseg, now at the local TV station was previously employed by Democratic Party backed "Uragshaa Newspaper", but was fired after she wrote a feature story on an accomplished doctor who is a member MPRP. The case was reported to the Globe Alert network, although initially Ms Batsetseg was reluctant to report the case as she was worried that she would lose her new job with the TV station.

In addition, it was also reported that the local MPRP provides funds for retired journalists to write negative and slanderous reports about DP politics and politicians (ruling party in Khentii) that are then supplied to the tabloid press in Ulaanbaatar; apparently these articles are often false but nonetheless printed.

Interviewees suggest that the local media is very much in the hands of politics and business; while during non election times this might not be of major consequence, the alignment is most apparent during election times.

BAGH Visit

Khentiin Bor Undur

Mining settlement (Mongolian – Russian – Chinese joint venture that has existed for over 25 years).

Train connection to Ulaanbaatar (due to mining).

Population: 10,000

Media: FM Station operated by World Vision.

FM Wonders of Treasure

Started work in February 2006, now in testing phase and is still waiting for approval from Ulaanbaatar. Approval is taking longer than expected, most likely due to the fact that they have religious backing. FM producer from Ulaanbaatar has been hired and equipment has been bought; training has also begun.

Content will include community education, computer classes, language training, health topics, international and local news, music for different age groups, development programmes etc. They are also cooperating with other FM stations in the aimag (Khenti Centre) and Gobi-Sumber, and will start working with PIM for training.

The FM station was one of the best equipped and staffed of all radio stations interviewed during this mission. The holistic approach is also taking many factors into account that are vital in creating an environment conducive to fostering independent media. All revenue will be reinvested. For now the project is fully sponsored by World Vision.

6.4 Gobi-Sumber

Area: 5,540 km²
Pop: 12,230; 6,000 in aimag centre Sumber
Econ: Revenue of local government in mln. MNT: 604.5



6.4.1 National Media Availability

Newspapers

Most newspapers available, delivered via train as the aimag is on the main train track to the South.

Television

MNB, UBS, C25 and TV5 & TV9 on alternating days.

6.4.2 Local Media Availability

Television

Previously available but closed in 2005. See Media Content below. Mr Urantsengel, owner of FM radio station and new local newspaper "Janjin Choir" has plans to start a TV station.

Cable Network

Cable TV available – approx. 15 channels; no other information available

Newspaper

Two newspapers with a third one just launched; however two are very irregular and have joined forces while one will most likely not be published again.

Janjin Choir

Owner /Editor in Chief Mr D.Urantsengel – MPRP member.

Launched in July 2006, the newspaper is published weekly in A5 format, 8 pages. Its printing is run off of a computer as the low subscription numbers do not justify printing in Ulaanbaatar where the minimum print run at the Free Press Printing facilities is 500 copies /issue.

The publication's content consists of "positive" local news: Government news / 1st page; positive interview / 2nd page; column / poems etc / 3rd page; life & development (public health etc. / 4th page); the rest consists of classified advertisements. Sold at a cost of MNT 300 / copy, revenue comes from classifieds and advertisements.

Mr Urantsengel also owns an FM station and is the local representative for the third mobile provider Unitel. He is also planning to set up a TV station.

Nutgiin Medee

Owner /Editor in Chief Ms G.Baasansuren.

Launched before the elections in 2004 with the support of the Herder Initiative (Gobi Initiative). Focused solely on local news, the newspaper previously had 200 subscribers but is now down to 60 subscribers with a print run of 500 copies; no issue published in August 2006 as the previous issue made a loss.

Choir 54

Owner /Editor in Chief Ms G.Baasansuren (as above).

Launched in 2000. Last issue published in July 2006; owner notes that she no longer plans to publish the publication but would reconsider should advertising pick up.

Radio

FM Borjigon Nutag 102.5

Owner/Director Mr D.Urantsengel (as above).

Launched in August 2005 by Mr L.Odonchimed.

Broadcast 08:00- 23:00 daily.

Content: Interviews (65 to date); Quiz shows; scientific shows; local news every hour.

Objective: not only aim at young audience, but also diversify to other age groups.

Internet / Mobile

Internet

2 Internet cafes: one in local school, one with Mongolian Telecom.

Mobile

Mobicom – 1,500 users; total estimate – 3,000-4,000 users including Skytel and Unitel.

6.4.3 General Comments

Gobi-Sumber is a new aimag with a very small population.

If the local newspapers print their newspapers in Ulaanbaatar, the minimum print run at the Free Press Printing House is 500 which is too much for their aimag; therefore "Nutgiin Medee" and "Choir 54" have published some issues together whereby one paper takes the inside pages and the other the outside page; however, financial issues still prevail.

Mr Urantsengel from Janjin Choir has taken a different route and is printing his publication from the computer; he also has a very pragmatic and entrepreneurial approach to setting up media and making them financially sustainable. He now owns 2 media (FM station and newspaper) and is planning to set up a television station over the next months. Mr Urantsengel used to work in TV providing local news for MNB (national TV) as well as Radio. In 2005 he started providing news to TV9. At the same time, from 1998-2005 he was employed by local TV (3 people then) and was subsequently dismissed for reasons that were not apparent. The local TV station then stopped broadcasting in 2005.

According to Mr Urantsengel, following his dismissal from the local TV station, he set himself the goal of establishing his own media empire in Gobi-Sumber. His vision is to have television, radio and newspaper to promote the aimag throughout the world. He already has the license for all three media and financing from the bank. He also noted that his goal is to build his own office space so that he cannot be thrown out of his current location.

6.5 Dornogovi

Area: 115,200 km²
Pop: 53,300; 19,600 in aimag centre Sainshand
Econ: Revenue of local government in mln. MNT: 2643.5



6.5.1 National Media Availability

Newspapers

Daily delivery of newspapers to aimag via train; delivery one day later than publishing; most popular -tabloid press.

Television

MNB, UBS, C25, TV5 & TV9 available terrestrially.

6.5.2 Local Media Availability

Television

Dornogobi TV

Director Mr Ch.Duuren.

Set up in 1995 by the MPRP. Broadcast 4 times 30 minutes per week (twice repeated) 18:30 – 19:00 / Monday, Wednesday, Friday, Saturday. Broadcast within 10km radius, reaching aimag Centre only. However, often has a broken transmitter due to low quality of the equipment.

Dornogobi TV is still owned by local government as no one wanted to buy the TV station. All the equipment is government invested (i.e. the transmitter was bought in 2001 for US\$ 4,000); head of TV station is on government payroll. Local government is its main funding source/client, having signed a contract with them that provides 90-95% of funding for the station in return for which the station reports on local government news. Advertising revenue is a very small portion of the pie due to the small market. There are no large scale local companies in the area. TV station personnel noted that the government does not tell them what to report on, but rather provides a list of current activities of that week. The Democratic Party can also provide a list, though activities are few and far apart.

As Mr Duuren noted, it is not possible for any local aimag media to be completely independent. This is possible only in larger cities such as Ulaanbaatar and Darkhan where there is revenue from other sources beyond the government. He went on to note that at the same time even MNB receives government money and is not completely free to report on anything. Mr Duuren has worked as journalist for 24 years, trained in the National School of Journalism; although the content is far from independent, the quality of the programming was very good with a good cameraman who knows how to film and edit news pieces.

Cable Network

Narny Erchim CATV (same owner as FM 101.5)

Director Mr B.Zorigtbaatar.

Launched in 1998

Service: 3-tier offer.

1. 5 channels (Mongolian) – MNT 500 / month;
2. 24 channels – MNT 3,450 / month;
3. 28 channels – MNT 3,450 / month (only in apartments).

Total of 3000 households in the aimag centre; no Chinese channels on the platform as customers wanted further Russian channels instead, now available Mongolian, Russian, Korean, German, French, etc. channels.

Newspaper

No local newspaper; group of private citizens tried to set one up a few years ago but failed due to financial constraints.

Radio

Minii Nutag FM 101.5 (also owns CATV)

Director Mr B.Zorigtbaatar, Editor in Chief Ms D.Otgontugs.

Launched in 2002 and broadcast from 07:00 to 03:00 daily with 6 full time staff. Content consists of DJ hour, local news, singing competitions, call-in number, research conducted through a survey last year. The channel is trying to cater to all age groups at different times of the day, and also looking at increasing coverage area of the radio station. A 300km radius transmitter had been bought, but not yet installed due to lack of electricity capacity to operate it. Revenue is mainly derived from advertising & classifieds.

Mr Zorigtbaatar initially started the FM station as he believed it would be easy to do since he had already started the CATV network. However, the station is still struggling financially especially after the launch of Elgen FM (see below) which created an advertising price war. At the same time, local government supports Elgen FM due to

previous ties to Telecom Mongolia. Initially this was strong competition but now they also see the second FM station as an advantage as they have had to reassess their programming and conduct a customer survey, leading them to change some programming on their schedule, get a new DJ, etc.

The Director has a strong entrepreneurial approach, and is an MPRP member and strong supporter. He says there is no media without politics; in 2000 he strongly supported MPRP. Now he tries to be more balanced.

Elgen Nutag FM 105.5

Director Ms B.Naran.

Owned by Mongolian Telecom Company and Elgen Netgen (Famous Radio in Ulaanbaatar).

Launched in 2005 by then Director of the local Telecom Company Mr Bayankhuu, the station's target audience is the middle aged population. They have a government contract to broadcast local news due to long-standing agreement and a cable line to the Telecoms office. The agreement does not seem to be based on politics but rather on infrastructure, as previously Mongolian Telecom broadcast Mongol Radio and the cable is laid down to their office.

Internet / Mobile

Mobile

Aimag Centre + 4 soums; approx. 10,000 users.

Internet

Two Internet cafes in town: one Mongolian Telecom with 16 computers and one Mongolian Railroad with 16 computers. The Mongolian Railroad line is much faster.

Soum Visit: Saikhandulaan Soum

Population: over 1000.

Total subscriptions to newspapers in soum: 60.

Most popular : Zuuny Medee + Uren (Daily).

Khuumus (People) + Hani (Partner) + Seruuleg (Alarm) (Tabloid).

Soum Visit: Mandah Soum

Population: 1700 population in total.

TV: Transmitter available which broadcasts MNB from 20:00 – 24:00. Electricity only available during this time from diesel generator.

Costs: MNT 600 / month per household.

Newspaper delivered once a week; most popular tabloid press. Herders pick up subscriptions or they are delivered through bagh governor.

6.6 Omnogobi / South Gobi

Area: 165,000 km²
Pop: 46,300 people; 14,700 in aimag centre Dalanzadgad
Econ: Revenue of local government in mln. MNT: 4208.9



6.6.1 National Media Availability

Newspapers

Newspapers are flown into the aimag Centre twice a week.
Most popular newspaper – tabloids.

Television

4 national Mongolian channels (MNB, TV9 & TV5; UBS C25) available plus one Russian and one Chinese available terrestrially.

6.6.2 Local Media Availability

Television

Altan Gobi TV

Director Ms S.Nomintsetseg (also newspaper, FM, CATV).

Launched in 2003 and broadcast from 17:00 to 22:00 daily, with newscasts on Mondays, Wednesdays and Fridays. Currently have 8 employees. Content consists of local news for half an hour, children's issues, interviews, "paid for" news (max. 30min). The broadcaster makes a schedule for two weeks of programming that is then repeated once.

80% of their revenue comes from announcements (MNT70/word) and classifieds with the rest consisting of paid for programming.

Gobi TV

Owner /Editor in Chief Ms M.Tsoomoo.

Established in November 2003. 4 other staff members. Transmitted 19.00 – 22.00 daily.

Cable Network

Altan Gobi CATV

Director Ms S.Nomintsetseg (as above).

Launched in July 2006 and currently has 70 subscribers paying MNT 2,800 per month for 24 channels.

Gobiin Naran CATV

Launched end of 2005; 12 channels including Mongolian and foreign. Number of subscribers unavailable.

Newspaper

Two newspapers:

Mongol Gobi

Editor in Chief Mr Ts.Bat-Ulzii.

Launched in 2001 and published every 10 days with a circulation of 200 subscribers mostly in the countryside. The publication employs 5 staff and is based on the old local government newspaper - it is essentially a continuation of it under another name. Publication is biased towards MNRP.

There have been many problems over the past years including a change of bosses (indeed, one recent manager stole most of the equipment on her way out). As the newspaper is owned and part of the Egel Co (Confederation of local newspapers) they were given new equipment by Egel Co. Subsequent problems have included loss of subscribers as the publication was published irregularly.

Revenue is from a government subsidy of MNT 100,000 / issue plus extra income from subscription, copy sales, advertising & classifieds. Content consists of government news. However, it was noted that the government does not tell them exactly what to report on. Officials in soums send info to aimag government office which then provides the news to them.

Altan Nutgiin Medee

Director Ms S.Nomintsetseg (as above).

Launched in July 2006 and published on the 10th, 20th and 30th of every month to a subscription base of 200 subscribers (print run 1,000 copies). Printed at OBI Capital Press in Ulaanbaatar.

The content, developed by two full time reporters, is very well put together with diversified topics and columns. The publication is said to be pro DP.

Radio

Gobiin Dolgion FM 103.6, NGO (also regional radio)

Director Ms D.Naranchimeg.

Launched in 2000 with start-up investment from Soros Foundation. Broadcast from 09:00-21:00 Monday to Saturday; Sundays broadcast for six hours. The content is focused on local news, education, raw material prices, weather, announcements, current issues and VOA (Voice of America) content; morning programming is repeated in the afternoons.

Revenue is mostly derived from "paid for" news (longer than on the regional channel) and announcements at MNT 20/word.

Gobiin Dolgion Regional Public Radio (Run by FM 103.6) / NGO

Director Ms D.Naranchimeg.

Set up as independent radio in 2000 under an NGO structure. Regional broadcast to 15 soums in South Gobi aimag on MNR frequency. They pay MNT 120,000 a month for the broadcast slot. Broadcast twice per week: Tuesday & Friday 08:00 – 08:40 and 18:00 – 18:40. Content consists of administrative and local news, Gobi initiative news (market place), law & order announcements, weather reports, etc.

Revenue is garnered from "paid for" news and announcements as well as classifieds at MNT 50 per word. Gobi Dolgion FM and Gobiin Dolgion Regional are run as an NGO that received initial investment from Soros Foundation and Gobi Initiative. Now they also receive funding from the Asia Foundation, which has helped in terms of providing equipment to receive and broadcast VOA for English lessons.

The Asia Foundation has also been providing funding and training for the development of a radio series on Environmental Education especially as Ninja mining (one-man mining operations) is common throughout the aimag. The programme involved going to the mine sites and interviewing herders as well as miners.

Minii Gobi FM 104.1

Editor in Chief Ms S Nomintsetseg (as above).

Established in December 2003 by Ajnai Corporation. Transmitted 09.00 – 22.00 daily. 1 other full-time staff member.

Muruudliin FM 102.6

Owner /Director Ms M.Tsoomoo (as above).

Established November 2003 by Ms Tsoomoo. Transmitted 09.00 – 21.00 daily. 1 other full-time staff member.

Internet / Mobile

Mobile

Number of mobile subscribers unavailable; however in addition to aimag Centre two soums & Ivanhoe mines have Mobicom signal.

Internet

Currently being connected to the fibre optic network; also some soums being connected 4 internet cafes in aimag centre (School, Government house, Telecom, library).

6.6.3 General Comments

According to media interviewed, there is not a lot of pressure from the local government. The media itself is quite evenly split between MPRP & DP while also outside observers who used to work in the radio sector say that information is generally not biased, except during election times.

About Altan Gobi Group (TV, Radio, Newspaper & CATV)

Owned by Member of Parliament from this constituency / Democratic Party.

Initially launched to promote the owners' parliament elections, but now more balanced according to manager interviewed. However, the perception is that they are still a DP funded media group.

As there is no financial support from the local MPRP government for their media group their biggest challenge is the financing of the various media as well as lack of professionally skilled media personnel. The newspaper, which is the most recent addition to the group, was established in order to reach herders. The newspaper's establishment was subsidised from radio and television revenue.

Soum Visit: Khan Khongor

3 Channels available (MNB, TV5, TV9) / MNT 600 per month.
Electricity all the time & mobile signal.

Soum Visit: Tsogt Ovoo

1 channel (MNB) available at night / MNT 600 per month.
Electricity from 21:00-24:00 (Diesel motor).
Once per week newspaper gets delivered to soum.

6.7 Dundgobi

Area: 78,000 km²
Pop: 49,400; 13,800 in aimag centre Saintsagaan
Econ: Revenue of local government in mln. MNT: 1348.7



6.7.1 National Media Availability

Newspapers are delivered four times a week from Ulaanbaatar; from the aimag centre newspapers are delivered via post vehicle to the soums three times a week.

Newspapers

Top Subscription Publications:

Tabloids

Khumuus (People) – 600-1000 subscriptions (depending on the season; approx 60% of the subscriptions are from the soums)

Zunidaa (Rank)

Seruuleg (Alarm)

Daily

Zuuny Medee (Century news) – 60-70 subscriptions (mainly government offices in aimag centre and soums)

Odriin Sonin (Daily News)

Television

All 5 Mongolian national channels are available (MNB, TV5/TV9 and UBS/C25).

6.7.2 Local Media Availability

Television

Dundgobi TV (Urgoo)

Broadcast 3 times a week on Monday, Wednesday and Saturday from 18:30 for three hours; broadcast times are very irregular, but on average there will be two broadcasts a week.

Content: one hour local news, movie and announcements. 2 full time staff; the station receives support from local government

Cable Network

Horol Cable TV

18 channels / MNT 2500 per month.

Newspaper

Gobiin Amidral (Gobi life)

Editor in Chief Mr S.Budjav.

The newspaper was launched early 2005 and comes out every 10 days (colour, A3, four full pages). The newspaper is fully subsidised by the aimag government, and the Editor in Chief is a civil servant heading a government department. The office space for the newspaper is also within the government house. The local government is MPRP.

Khadag

Editor in Chief Mr S.Purevsuren.

The newspaper was established in 1991 and at its peak used to have 1,000 - 1,500 subscribers; however, since 2005 the financial situation has become worse and the newspaper is close to being shut down. The paper is only published when Mr Purevsuren can find a sponsor to pay MNT 200,000 for advertisement (such as company anniversaries etc). Mr Purevsuren now also works for State Professional Inspection Authority, whereas before he used to work for the aimag government. During its peak time of existence "Khadag" newspaper received monthly payments from the local government in the name of paid news.

The last issue of Khadag newspaper came out in July 2006 for the 50th anniversary of Energy sector in the aimag, and was distributed free of charge by the energy company. Mr Purevsuren uses his government office to publish "Khadag" newspaper; he is an MPRP member.

Ugluu (Morning)

Editor in Chief Mr Ch.Tumennast.

The newspaper was launched recently by Gobiin Amidral newspaper, and is published monthly catering to children.

Radio

There are two local FM stations in the aimag centre.

Gobiin Tenger FM 101.9

Editor in Chief Mr P.Tsolmontugs.

Established in May 2003 by Ms S.Otgonjargal. Besides the Editor in Chief, there are 4 other full-time staff members. Very regular service, transmitted from 08.00 – 24.00 daily; mostly music, classifieds and announcements.

Mandalgobi FM 107.5

Editor in Chief Ms S.Oyunchimeg.

Established in June 2004 by the NGO Narantsatsral San. 1 other full-time staff member. Transmitted from 09.00 – 24.00 daily.

Internet / Mobile

Approx. 2000 mobile subscribers.

Aimag centre and one soum have mobile signal.

6.8 TUV

Area: 81,000 km²
Pop: 99,200; 14,800 in aimag centre Zuun Mod
Econ: Revenue of local government: 3418.0



6.8.1 National Media Availability

Newspapers

Proximity to Ulaanbaatar; therefore regular delivery of Newspapers, Tabolids etc;
Tabloid Press most popular.

Television

MNB, TV5 & TV9; C25 & UBS available, (3 channels / latter four on alternate days).

6.8.2 Local Media Availability

Television

Zuunmod TV

Editor in Chief Mr J.Enkhbaatar.
1 other full-time staff member.

Established in April 2005 by Mr Enkhbaatar. Broadcast 3 times per week via cable network.

Cable Network

Od CATV

Director Mr J.Boldbaatar.

Established in 2001 by Mr Boldbaatar. Transmitted 24 hours a day; 21 channels.

Radio

Zuunmod FM 106.5

Editor in Chief Mr Munkhtuvshin.

Established in 2004 by Mr Munkhtuvshin. 1 other full-time staff member. Transmitted 18 hours per day.

Misheel FM 99.3

Editor in Chief Ms S.Ulziitogtokh.

Established in 2004 by Ms S.Ulziitogtokh. 1 other full-time staff member. Transmitted 24 hours per day.

Newspaper

Tuv Times

Editor in Chief Mr J.Enkhbaatar.

Established in April 2005 by Mr J.Enkhbaatar. Junior Editor Ms G.Khishigsuren, 2 other full-time staff members. Published every 10 days, with a circulation of 1,000.

6.9 Selenge

Area: 43,000 km²
Pop: 102,000; 29,000 in aimag centre Sukhbaatar
Econ: Revenue of local government in mln. MNT: 2600.0



6.9.1 National Media Availability

Newspapers

On paved road to Russia from Ulaanbaatar; regular delivery of Newspapers
Tabloid Press most popular.

Television

MNB, TV5 / TV9 and C25 / UBS available.

6.9.2 Local Media Availability

Television

Selenge TV

Director Mr D.Baldan.

Established October 1995 by the local Citizens' Representative Council. Selenge TV is the broadcaster from communist days, currently has 4 full-time and 2 part-time employees and is still closely tied to the local government. Mr Baldan is also the Director of Theatre in Selenge and funding comes from the local government.

It is broadcast from 06:00 – 20:30 via its own terrestrial transmitter and also Tsolmon TV (CATV). However, at the time of interview the transmitter was not working and no broadcast was possible; it was not confirmed when the transmitter would be working again.

Content consists of local news for one half hour, reports, interviews, daily highlights and weather. Revenue is close to 100 percent provided from the local aimag government (MPRP) to the tune of MNT 1 – 1.5 million annually.

Narny Khuleg TV (also own Narny Khuleg CATV)

Owner /Director Ms Ch.Narantsetseg.

Launched in 1999 by Ms Narantsetseg. Broadcast daily from 8.00 – 23.00; 12 full-time staff members. Currently only carried on its CATV network. Previously it was carried terrestrially as well but Narny recently sold the transmitter. Content consists of local news and human interest stories.

Revenue: No funding from local government but they are trying to get funding; for now funded through cable subscribers; from this year also concentrating more on cable TV and reducing local TV broadcast to two times per week

Minii Mongol TV (also own FM, Cable)

Owner /Director Mr D.Ganbold.

Launched in February 2006 by Mr D.Ganbold and broadcast 3 times per week with next day repetition. Content is generally news on Wednesday and Friday and a guest profile on Monday.

Revenue is 80 percent derived from announcements and classifieds (at MNT 70/word) with the rest coming from paid for programming.

About the Minii Mongol media group

A DP Member of Parliament from the region bought the Minii Mongol CATV network at the end of 2005 and then started the FM and TV shortly thereafter in December 2005 and February 2006 respectively. At the moment the staffs say that the media group is not politicised but are not sure what will happen during the next elections in 2008. The group has a total of 6-8 people working for it.

Cable Network**Tsolmon CATV (working with Selenge TV)**

Households: unavailable (in gers only).

Channels: Approx 20.

Narny Khuleg CATV (also TV)

Launched in 2001.

Households: 800; MNT 3000/ month.

Channels: 14.

Minii Mongol CATV

Director Mr D.Ganbold.

Launched in 2006.

Households: 1,200 (apartments only); MNT 3,000/ month.

Channels: 28; Mongolian; Russian, German, French, Korean.

Newspaper

Selengiin Medee

Editor in Chief Ms J.Oyunmaa.

Launched in September 2002 by Egel Company, part of the Rural Newspaper Association and was the first independent newspaper in the aimag centre; currently has three employees. Ms Oyunmaa worked in the newspaper business for many years during communist times.

Published weekly with a circulation of 900 – 1,000 subscribers. Print run of 1,000 copies with most distributed to the countryside. Content is generally focused on news (local, government and business) with little in the way of human interest.

60% of the revenue comes from subscriptions (MNT 2,700 for 3 months), with around 20% coming from "paid for" content and advertisements and classifieds making up the rest. The newspaper was initially subsidised at MNT 200,000 per month for the first two years, then MNT 100,000 per month, and at the time of the interview not at all for 2006.

The best returns to date were during the last election which allowed the newspaper to buy some new equipment including computers. From time to time, different parties will sponsor an edition. Their biggest problem to date derives from low finances and a low industry base in the aimag for advertising.

Gegee Newspaper

Editor in Chief Ms L.Byambaa.

Launched in April 2005 and published twice a month. The first and last pages are colour with the rest in black and white. Print run stands at 1,000 copies per issue. Content for the publication is focused on providing "positive news that inspires people," "paid for" news and human interest stories.

Revenue is based largely on "paid for" content. For example, the last edition celebrated the 80 years anniversary of the soum for a price of MNT 350,000. The break-even point stands at MNT 200,000 - 250,000.

The paper is printed in Ulaanbaatar, picked up there and then distributed using Mongol Post to deliver to the soums.

Radio

2 FM stations.

Minii Mongol FM 107.5

Owner /Director Mr D.Ganbold (as above).

Launched in December 2005 with one young DJ working there. The station is also housed in the same building as the TV and CATV station. Revenue is mainly derived from advertising, "paid for" content and a call-in phone number.

Orgon Selenge FM 104

Director Mr R.Bumdari.

Established in 1999 with Soros Foundation funding and set up as an NGO. The station broadcasts from 10:00-18:00 with one young DJ working there. The Director who set up the station now has a full time job with the local government, working for Montsame news agency and other departments.

The DJ who had been working at the station for the past 4 years stated that training was a big problem and that only interns come and work for the station but otherwise it is difficult to retain staff. The DJ had taken part in a one-day training course in Darkhan.

Content consists of Q&A shows, knowledge based programming, news (usually the newspapers will be the source of information) while the director also provides news to be broadcast via FM.

Internet / Mobile

Mobile

The aimag centre and 11 of the 17 soums have mobile signal.

Internet:

3 Internet cafes in the aimag centre including Mongol Telecom, Railway and a hotel.

6.9.3 General Comments

Selenge aimag has a number of soums that have their own local media outlets. It was explained that the aimag centre has very little industry and therefore it is difficult for the different local media there to survive. However some of the soums are wealthier and therefore have their own TV programming including Saikhan, Mandal, Tsagaannuur, Yeroo, Tushig etc.

6.10 Darkhan-Uul

Area: 3,280 km²
Pop: 94,280; 81,000 in aimag centre Darkhan
Econ: Revenue of local government in mln. MNT: 7085.2



6.10.1 National Media Availability

Newspapers

Darkhan is on the paved road to Russia from Ulaanbaatar, which facilitates regular delivery of newspapers etc.
Tabloid Press most popular.

Television

MNB, TV5 & TV9; C25 & UBS available (3 channels / latter two on alternate days).

6.10.2 Local Media Availability

Television

DBS TV (Also CATV, FM, ISP)

Mr A.Tuvshinbat, Director.

Established in 2004, also runs an FM station as well as the biggest CATV network and ISP in Darkhan. TV broadcast 06.00 – 24.00 daily; 16 full-time staff members.

About DBS:

The company owns the TV station, CATV, FM and ISP business as well as a TV production company. They are seen to be leaning towards MPRP. Their revenue comes 60% from CATV subscription and 40% from advertising.

Lkha TV (Also CATV, FM)

Owner /Director Mr Ch.Lkhagvadorj.

Established in 2001 by Mr Lkhagvadorj as part of a CATV station that was established in 1996; they are seen as leaning towards the Democratic Party.

Broadcast 06.00 – 24.00 daily, with 12 full-time staff members. They produce 20min daily news and chat shows along with dubbing Russian entertainment into Mongolian which is broadcast Mon- Sun / 1 hour from 20:30-21:30.

As with other TV stations financing is difficult and their main revenue source is CATV subscriptions (see below). The advertising market is very small while "paid for" content also has its limits. They take approx. MNT 160,000 / 20min for paid content.

Cable Network

DBS CATV (part of DBS TV)

Households 6,000; MNT 2000 / household.

Channels: Mongolian and foreign channels but also 6 in-house channels including educational channel, music, chat, cartoon, and news.

Lkha Tenger CATV

Households: unavailable, MNT 3,100 / household; 53 channels.

Newspaper

Darkhany Sonin

Editor in Chief Ms B.Nyamgerel.

Launched in August 2000, with a break from 2004-2005 when the Editor in Chief was ill. Weekly publication distributed in Darkhan and some soums; initially the publication had a circulation of 1,000 copies, which is now down to 500-1,000. Content: local news, entertainment, social programmes. There is no funding from local government provided; the greatest challenges are financial constraints and trying to make publishing of the newspaper as regular as possible in order to attract and retain subscribers.

Shine Medee-Darkhan

Editor in Chief Ms N.Lkhagvadulam.

Established in 2006 by Egel Company. 3 other full-time staff members; circulation 1,200.

Nairamdalya Darkhan

Editor in Chief Ms A.Batzaya.

Established in 2003 by Ms Batzaya. 2 other full-time staff; circulation 600.

Darkhan Zar

Editor in Chief Mr Z.Adiya.

Established in 2006 by Mr Z.Adiya. 3 other full-time staff members; circulation 800.

Radio

Orkhon FM 106

Director Ms O.Khishigsuren.

Set up in 1999 with Soros Foundation funding. Ms Khishigsuren has engaged in a thorough audience research and analysis in order to better identify needs. Often the lack of management skills is what is keeping local radio stations back and this is where she sees her radio station as being different. They have adapted their programming to audience needs and also work closely with international organisations that help fund programming and provide training if they like the topics she proposes, which include HIV, corruption, environment etc.

As training is a major issue, Ms Khishigsuren tries to train young people in-house but also encounters the problem that the youths then leave for Ulaanbaatar. For that reason she now takes the view of trying to build up the station as much as possible as a family business. She now has 6 people working for her full time.

Revenue: 50% from donor organisations; 20% advertisement and classifieds; 30% paid programming, call-in phone line.

DBS FM (see above for DBS)

Mr A.Tuvshinbat, Director.

Broadcast from 8:00-24:00; programming mostly music; revenue difficult but they are able to do multi-platform promotion (TV & Radio) for their advertising clients i.e. TV ads are read out on radio.

Lkha Sky FM 107.5 (part of Lkha Tenger)

Owner /Director Mr Ch.Lkhagvadorj.

Established in 1996, the station broadcasts from 8:00-24:00, Friday and Saturday until 2:00. 4 full-time staff members work at the station. Programming includes music, entertainment, travel, horoscope and children's programming. They see themselves as being different from DBS in terms of greater variety of programming.

Burkhantyn Tsurai

Editor in Chief Mr B.Norovsambuu.

Established in 1986 by Mr Norovsambuu. 2 other full-time staff. Transmitted daily for 2 hours through MNPR.

Shine Dolgion FM 102.5

Owner /Editor in Chief Mr A.Tuvshinbat (as above).

Established in January 2004 by Mr Tuvshinbat. Broadcast every day from 08.00-24.00. 5 other full-time staff, 2 part-time staff.

Zaluusyn dolgion FM 104.5

Owner /Editor in Chief Mr B.Ganbayar.

Established in December 2005 by Mr Ganbayar. Broadcast every day from 08.00-24.00. 6 other full-time staff, 3 part-time staff.

Internet / Mobile

Internet: 10-11 internet cafes; office / corporate internet access as well as individual home internet access.

Mobile:

MobiCom 11,000; Skytel: 6,000; Unitel 1,800.

6.10.3 General Comments

General assessment is that the situation of media in Mongolia is getting better, but particularly in the aimags there are still a lot of local government funded media even though this is no longer allowed. Another major issue in the countryside is the lack of skilled, professional journalists. Those who go to Ulaanbaatar for training don't return, and those who remain in the countryside are often not very motivated or actively trying to increase the value of local journalism.

Ms Khishigsuren believes that the quality of the programming is the key to the success of the radio station while she also actively works with other FM stations in order to exchange programming and cooperate. They are currently setting up a radio association including 21 aimag radio stations as well as some from Ulaanbaatar. The association will focus on cooperation between the stations.

Empowering local media directly and not through Ulaanbaatar-based entities is key says Ms Khishigsuren, including on-the-spot training.

6.11 Gobi Altai

Area: 142,000 km²
Pop: 64,000; 20,200 in aimag centre Altai
Econ: Revenue of local government in mln. MNT: 2730.5



The aimag centre relies on diesel power.

6.11.1 National Media Availability

Television

The aimag centre and a few soums have access to MNPTV and additionally two terrestrial national television channels alternating between TV5/TV9 and UBS/Channel 25. According to the government office approximately 50% of herders have satellite dishes.

Radio

National radio is widely available in the aimag.

National newspapers

Delivery by plane twice a week and once a week by post vehicle. Delivery from aimag centre to soums once a week and to baghs less frequently.

Weekly tabloids like Khumuus are most popular.

ICT

According to the government office Internet penetration is low. Besides government institutions and two Internet cafes only around 20-30 households have dial-up connections. Access to mobile network in aimag centre and 6 soums.

6.11.2 Local Media Availability

Radio

Golden Gobi FM 107.5

Owner /Director Ms J.Erdenechimeg.

A private FM radio station established in 2005 by a local communication engineer, Ms Erdenechimeg. The station is run by the founder, one employee, the founder's two teenage daughters, and some young volunteers.

The station broadcasts from 09.00 – 24.00. 60% is music of varied kinds (modern and traditional Mongolian, Korean and Russian); the remaining programming is advertisements, educational and children's programmes. A popular programme was a phone-in programme on "Down with it" with critical comments on potholes in the pavement etc.

The station is primarily aimed at young people and the young teenage anchors claim that the station is popular among high school kids. The station is financed through advertisements and phone-in fees.

Mongolia National Radio / Regional Public Radio – Altai Radio

Mr G.Chardag, Head of Information Centre.

The public radio station broadcasts local/regional news and announcements twice a week for half an hour relayed on MNPR. The station covers parts of the five Western aimags and has 6 employees of which two are journalists. The equipment is outdated.

Half of the revenue comes from the aimag government, the other half from advertisement. According to the Head of Information Centre, the mission of the station is to be the voice of the government although the change from state-run to public broadcasting has loosened the direct control from the government.

The Information Centre previously also broadcast local TV, but the station has closed down because of outdated equipment.

Radio & Television

FM radio and TV stations were established with MPRP money before the election in 2004. The director claims that the stations now run independently of MPRP. The stations are primarily financed through advertisements and phone-in fees:

Burkhan Buudai TV

Editor in Chief Mr. D.Dorj.

Broadcasts Monday, Thursday, Saturday at 19.00-23.00. 2 other full-time staff members. Main programming is news, entertainment, movies, and advertisements.

Khantaishir FM 104.5

Editor in Chief Mr. Kh.Altannar.

Transmitted daily 09.00-23.00. 1 full-time staff member. The radio station broadcasts predominantly music, entertainment, local news, advertisements and announcements.

Newspaper

Tsakhur Tumor

Editor in Chief Mr D. Sereeter.

Established in 1999 by Mr Sereeter. This bimonthly privately owned newspaper has a circulation of 500; 100 copies sold in the aimag centre, the rest in soums and beyond. Publisher runs all aspects of the newspaper from journalism to accounting.

The newspaper provides a traditional mixture of official news, paid articles, local events etc. The newspaper does not make any clear separation between edited articles and paid articles.

6.11.3 General Comments

The local media is dominated by the government and MPRP. The local media do not in any sense provide critical journalism and can by no means be seen as fulfilling their role as watchdog. Nonetheless, the private FM station provides a fresh new attitude and addresses the young audience.

6.12 Khovd

Area: 76,000 km²
Pop: 91,000; 33,000 in aimag centre Khovd
Econ: Revenue of local government in mln. MNT: 1389.8



The aimag has a Kazakh minority.
The aimag centre and 6 soums have power from Russian grid. Hydro-power station is under construction.

6.12.1 National Media Availability

Television

The aimag centre and 6 soum centres have access to MNPTV and additionally two terrestrial national television channels alternating TV5/TV9 and UBS/Channel 25.

The government office estimates that 70% of herders have solar batteries and 20% satellite. Many of the satellite receivers are installed so that they can only receive three to five channels often MNB, TV 5/TV 9, UBS/MN25 and an Inner Mongolian channel.

Radio

MNPR is widely available in the aimag.

Regional Public radio is available twice every week for half an hour relayed on Mongol Public radio and broadcast from Gobi Altai.

ICT

13,000 fixed-line phones in the aimag; access to mobile network in aimag centre and 3 soums with 6,000 mobile users.

6.12.2 Local Media Availability

Television

Khovd TV

Director Ms Kh.Altantuya.

Established in 1997 by Mr N.Damba, this local government supported TV station broadcast two and a half hours daily. The station has four employees (two journalists and two cameramen). The station broadcasts local government and business news, social issues and educational programmes.

The local government finances the station, and although the station asserts its editorial independency, it avoids criticising the government. The reporter maintains that 80% in the aimag centre watch the programmes.

Radio

Hit FM 107.1

Owner /Director Ms B.Nominchimeg.

Established July 2006 by Ms Nominchimeg, this private FM radio station is run by the founder, a journalist, three high school presenters, and an accountant. The station broadcasts from 8.00 – 24.00 and the programming consists of 60% music (modern and traditional Mongolian and foreign), information about local events, phone-in comments, public announcements, and advertisements. The station sells air time. The Director hopes it will be possible to develop more local programming. The station caters primarily to young people. The station is financed through advertisements, phone-in fees, and paid programming.

A second FM station financially supported by MPRP has been on the air since 2004. The station has not been interviewed.

Newspaper

Khovdyn Medee

Owner /Editor in Chief Ms A.Byambasuren.

The local newspaper is published every ten days with a circulation approx. 350-500, depending on the season. 40% is sold in Khovd and the rest in soums and beyond.

The newspaper is run by the owner and has three employees (a journalist, a designer, and an accountant). The owner received extensive training at PIM, she is a Globe International reporter, and has for many years been the PIM coordinator in Western aimags.

The newspaper tries to stay independent and unbiased, and it has published critical investigative journalism on social and political issues and disclosed corruption in Air Mongolia. Nevertheless, the newspaper publishes announcements and paid articles from the government and other sources without any clear separation between the edited articles and paid articles. The newspaper is financed through advertisement, paid articles (government information) and subscription.

Recently a printing house has been established, but it does not have the capacity to print traditional tabloid size newspapers. The printing house prints books, brochures etc.

6.12.3 General Comments

The local newspaper is setting journalistic standards and won the PIM award for best local journalism in 2005. The government has continuously tried to subdue the newspaper without success. The journalist has once been threatened with libel, and demanded to be told the source of information in relation to an article on corruption in Air Mongolia, but following Globe International Alert action, an investigation by Air Mongolia led to the dismissal of two cashiers for fraudulent ticket sales. The low-budget FM stations are catering to the modern young generation.

The local media scene in the aimag centre is comprehensive, and the already significant output of local media will increase since the people behind the newly established printing house plan to launch an FM radio and a television station. It is difficult to see how this media output can be sustained as media businesses without substantial support from external sources.

6.13 Arkhangai

Area: 55,300 km²
Pop: 90,400; 17,900 in aimag centre Tsetserleg
Econ: Revenue of local government in mln. MNT: 791.4



The aimag centre Tsetserleg and all soums and 30% of baghs are connected to the central power grid from Ulaanbataar.

The aimag experiences substantial migration to UB.

6.13.1 National Media Availability

Television

Tsetserleg has terrestrial access to MNPTV and a second channel swapping between the local TV station and an Inner Mongolian channel. The Governor's office estimates cable penetration at 10%. Many soums broadcast a limited number of Mongolian channels. The Governor's office estimates satellite penetration among herders to be around 40%. There are a CATV network with 14 channels and 440 subscribers, and a wireless distribution of 16 satellite channels with 80 subscribers.

Radio

MNPR is widely available in the aimag.

Newspapers

According to the Governor's office subscription to national daily newspapers is 550 and subscription to tabloids (mainly weeklies) is 12,000. 60 - 70% of subscribers are in the aimag centre, and the Governor's office estimates that there is a decrease in subscriptions among herders due to cash shortage and increased access to television.

ICT

There are 1,650 fixed-line phones of which 200+ are outside Tsetserleg. Mobile phones with 5,000+ users have within a few years outnumbered fixed-line phones.

Tsetserleg and a few soums have received fibre optics, and the plan is to provide fibre optics to all soums by 2008. The fibre optics will be used for mobile phones and internet primarily, within the civil service at soum and aimag levels and in schools and hospitals.

6.13.2 Local Media Availability

Local Information Centre Radio, Television & Newspaper

FM 107.5 station, Tamir TV, & Arkhangain Amidral

Director Ms O.Amarzaya, Head of local Information Centre.

The local Information Centre was established in 2005 on the remains of three struggling media outlets and financed by a MNT 30 million "loan" from the aimag budget. The head of the local information centre acknowledges some degree of dependency on the local government. The ownership is not yet finally clarified and is up for discussion this autumn. The Centre runs a local newspaper, an FM radio station, and a local TV station. It is situated in the government building.

The three media outlets have a total of eight employees, of which two are trained journalists. The Head of the local Information Centre complains about the lack of resources and well-trained staff. In a remarkable setup, the newspaper is owned by the Egel Company, although all revenue from the three media outlets is pooled; the Egel Company does not interfere either financially or in editorial policy.

The three media outlets are not directly dependent on the local authorities, and the Governor's office does not pay for the dissemination of official information (as is the case in most aimags). Nevertheless, the editor says that she senses the influence from the Governor's office and stresses that the independence is only 80%. In some cases she has been summoned to the Governor's office because of critical stories.

The newspaper is published every 10 days with a circulation of around 600, of which the major portion is sold in soums and beyond. The local newspaper is the only local media outlet that is available outside Tsetserleg. The newspaper provides news, official information (non-paid), topical issues, interviews (often paid stories), stories about daily life in the area, advertisements and announcements. According to the local information centre, the newspaper often contains quite critical articles.

The FM radio broadcasts from 9a.m. to midnight and provides a wide range of genres: news (official news, health issues, etc.), entertainment, live interviews with phone-in, drama production (donor financed, provided by local network), paid programmes, announcements, and music. The FM station is similar to most local FM stations.

The TV station broadcasts once every week two to three hours, plus reruns two days later. The station is broadcast on a terrestrial channel. This channel re-broadcasts an Inner Mongolian station received by satellite whenever there is no local television. The local station provides news, official information, topical issues, children's programmes, and

brief comments from the listeners on local problems followed by comments from the authorities that have been criticised.

The main source of revenue is paid articles for the newspaper and paid programming for television, while subscription, advertisements and phone-in fees are minor sources. The financial revenue is stable, but the three outlets are financially vulnerable.

Radio

FM 102.5

Owner /Director Mr J.Gurvantamir.

The FM station was established in 2005 by Mr Gurvantamir, a local businessman who also runs a wireless distribution of satellite television. The owner got the idea to launch an FM station from similar FM stations in other aimags.

The station has two employees, of which neither is a trained journalist. The owner complains about the lack of qualified staff. The FM station broadcasts music, karaoke, literature, drama, and English courses, but no news.

The financial expectations have not been met so far, but the owner seems committed to running the station. The FM radio has so far struggled because of a lack of qualified staff, and has been on and off the air.

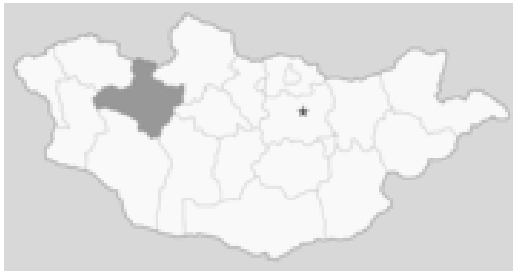
6.13.3 General Comments

The three media outlets from the local Information Centre dominate the local media in Arkhangai. The Head of the local Media Centre and Editor in Chief for the three media outlets struggles to provide good and critical fact-based journalism, and she has proposed to the local parliament that the local Information Centre should be transformed into an independent public organisation or alternatively privatised.

The local newspaper is the only local medium that to some extent reaches the soums and the herders.

6.14 Zavkhan

Area: 82,000 km²
Pop: 79,000; 16,100 in aimag centre Uliastai
Econ: Revenue of local government in mln. MNT: 2345.0



The aimag centre Uliastai only has diesel generated power; a hydro power plant that was scheduled to be in operation is not yet functional.

6.14.1 National Media Availability

Television

The aimag centre and one soum have terrestrial access to MNPTV and a second channel that swaps between the local TV station, and TV 5 and TV 9 alternately. Head of the information office estimates cable penetration to be less than 10%.

Radio

MNPR is widely available in the aimag. Regional Public radio is available twice every week for half an hour relayed on MNPR and broadcast from Gobi Altai.

6.14.2 Local Media Availability

Television

Zavkhan TV

Director Ms D.Natsagmaa, also Head of local Information Centre.

The local parliament runs the local TV station that was previously run by the Governor's office. The reason for the change of ownership is the legislation that prohibits the Governor to run media outlets; the head of the information office says the change has not made any difference, however.

The station has three employees (the editor, a journalist, and a cameraman) and broadcasts between one and two hours twice a week. The station only provides

advertisement and paid programming from different sources such as the Governor's office, soums, the political parties and different companies.

The station has a fairly good financial situation that meets all ends, but the director stresses that the financial model implies an inherent problem since it leaves no room at all for investigative and independent journalism.

Uliastai CATV

Director Mr G.Gantogtokh.

Established in 1998 by Uran Baigal Trade Company. With 3 full-time staff members, the network broadcasts 13 channels from Russia, Inner Mongolia and India, amongst others.

Radio

Uliastai FM 106.5

Director Mr B.Otgonbayar.

The private FM station was established in 2006 by a local businessman (trading). His son, a communication engineer, runs the station together with two young anchors. The aim is to hire a trained journalist.

The station broadcasts 16-18 hours per day mainly music. The station also broadcasts national news picked up from television and aims to independently provide local news. The station has revenue from advertisements, phone-in fees and paid programming.

Etugen FM 103.5

Owner /Editor in Chief Mr D.Erdenesaikhan.

Established in 2005 by Mr Erdenesaikhan, a communications engineer who has previously tried to run a TV station and a newspaper without success. The station broadcasts 16 hours per day with varied programming: music, greetings, announcements, advertisements, entertainment, educational programmes, and local stories on daily life in Ulaistai. The station has revenue from advertisements, phone-in fees and paid programming. There are 3 full-time staff members.

Two more FM stations have been broadcasting irregularly, particularly before elections; these stations have not been monitored.

Newspaper

Zavkhan

Editor in Chief Mr B.Ider.

The newspaper was established by the Egel Company in 2001 after the old communist newspaper ceased during the Democratic Party Governance from 1996 to 2000. It is

published every ten days with a comparatively high circulation: between 600 and 1,000 depending on the seasons. 20% is sold in Uliastai and the rest in soums and beyond.

The newspaper has four employees, an old male Editor in Chief, a female journalist educated in UB, a manager, and a person responsible for advertisements. The Editor in Chief was a journalist during the Communist era, but for political reasons he was removed to work in the vegetable fields from 1991 to 2004. In 2004 he returned as Editor in Chief. The newspaper has established a system where the local governments in the soums are responsible for collecting local information. These local stories are one of the reasons for the comparatively high subscription rate in the rural areas.

The newspaper provides paid official news, a variety of genres that promote local development, and substantial announcements. The newspaper has criticised local soum governors, but does not criticise the aimag governor.

The financial situation seems to be stable without providing any profit. Egel Company does not seem to be directly involved in editorial policy and does not interfere as long as the newspaper is published without any problems.

Zavkhany Medee

Editor in Chief Mr D.Ulambayar.

Established in 1993 by Mr D.Ulambayar. With 3 full-time staff members, the newspaper is printed irregularly at 1,000 copies.

6.14.3 General Comments

There is no independent local journalism in the aimag, which does not seem to concern the newspaper or the TV station. The FM stations, however, aspire to develop independent journalism, provided the financial situation improves. The soums and herders have very limited access to local news through the local newspaper, which is the only local medium that reaches them.

The NGO World Vision has just begun a project to support 500 poverty-stricken households. The World Vision philosophy is based on a participatory perspective, empowering poor people through a bottom-up approach and a two-way flow of information. But the project manager did not see the existing media as the correct tool for disseminating information, since the poorer people to a great extent did not have access to any media.

6.15 Uvs

Area: 69,000 km²
Pop: 83,500; 26,500 in aimag centre Ulaangom
Econ: Revenue of local government in mln. MNT: 1614.3



Aimag centre and 10 soums connected to Russian power grid

6.15.1 National Media Availability

Television

The aimag centre and two nearby soums have terrestrial access to MNPTV and the local TV station.

There is CATV and wireless distribution of satellite channels, but according to an estimate from the Governor's office, penetration is less than 10%; satellite penetration among herders is estimated to be 15- 20%.

Radio

MNPR is widely available in the aimag.

Regional Public radio is available twice every week for half an hour relayed on MNPR and broadcast from Gobi Altai.

ICT

2,500-3,000 fixed-line phones in the aimag. Access to mobile network in aimag centre and 5 soums, with up to 10,000 mobile users.

6.15.2 Local Media Availability

Radio & Television

Sama TV and Ulaan-Uul FM 101.1

Owner Mr S.Javkhlan, Director Mr S.Kunchin.

Private local TV station established in 2005 by Mr S.Javkhlan. The station provides five hours programming four days a week with reruns of the best programmes on Saturdays. The station provides a wide range of programmes: official news ("paid for" programming), local news with an emphasis on business and weather, cartoons, humour-drama, advertisements, horoscope, movies and series.

The television station has 6 employees and is financed by advertisements, paid programming, and a voluntary household license fee of 300 MNT per month, which is paid by about 15% of the households. The owner complained that the advertisement market for television is not developed yet, and the station might close down if the advertisement business does not soon improve.

The owner also runs an FM radio station established in 2002. The station is run by one employee and three high school girls who work as volunteers. The programming is predominantly music of different genres and phone-in greetings and announcements. The station is primarily financed by increasingly lucrative phone-in fees. The radio and TV stations do not cooperate and do not make cross-promotion.

Radio

Shine Zuuny FM 100.6

Director Mr Munkhchuluun.

There is one competing FM station established in 2003 by a local businessman who wanted a promotional tool for his business.

The radio station is now run as an ordinary station with varied programming of fairy tales, educational, messages, contests, and different music genres. The station is financed by advertisements and phone-in fees.

Newspaper

Uvsyn Amidral

Editor in Chief Mr Battumur.

Local newspaper supported by the aimag parliament that is published twice a month with a circulation of 500; 50% is sold in Ulaangom and the rest in soums and beyond.

The newspaper has two employees: a political appointee and journalist Ms Batkhuu, educated in UB. The newspaper provides a mixture of "paid for" information (official news) from the local government and local news about life and problems in Uvs aimag, as well as more critical stories, for example on environmental issues related to "Ninja" mining.

The financial situation is vulnerable, and the paper has recently changed from being published every 10 days to twice monthly. The newspaper is poorly equipped with only one outdated computer. It has regularly been approached by people offended by the coverage of certain stories, but there have never been libel cases.

6.15.3 General Comments

The local media in Uvs are struggling financially, and there are no real independent and critical journalistic efforts. The financial situation is vulnerable for all the media.

Mr Batnasan from the Governor's office stressed that it is difficult to find ways to disseminate information; at any rate he considers the public to be well informed.

6.16 Bayan Olgii

Area: 45,800 km²
Pop: 95,200; 28,500 in aimag centre Olgii
Econ: Revenue of local government in mln. MNT: 4899.4



The aimag is inhabited by Kazakh (90% of the population) and emigration to Kazakhstan is considerable (estimated to be about 90,000 at the time of the mission).

6.16.1 National Media Availability

Television

There is a CATV network with 24 channels and 3,500 subscribers. Satellite penetration among herders is estimated to be 15- 20%.

Radio

MNPR is widely available in the aimag.

6.16.2 Local Media Availability

The local media are mainly in Kazakh language.

Newspaper, Radio & Television

Bayan Olgii Radio, & Bayan Olgii TV

Director Mr R.Suragan, Head of local Information Centre.

Shine Erin (Jana Daur) Newspaper

Editor in Chief Mr N.Erbakhyt.

The local government supports and controls the local Information Centre, which is a media centre that provides a sub-branch of the national public radio MNPR, a temporarily closed local television station, and an irregularly published newspaper (twice in three months).

The media centre has 18 employees of which only a few are trained journalists. The head of department controls all three media outlets. Compared to other local media outlets the

government-run media centre is financially well supported by the local government (25-30 million MNT per year) and quite well staffed, not to say over-staffed.

The three media outlets all have outdated technical equipment despite the heavy support from the local government. The local so-called public radio broadcasts one hour every evening relayed via MNPR. The station covers the whole aimag and beyond to neighbouring Kazakh speaking areas in China and Russia.

The station broadcasts in Kazakh. The station provides official and non-controversial news from the aimag, national and international news as well as public announcements about lost horses and deceased persons. The head of the information centre claims that the radio station is very popular outside the aimag centre, partly because the announcements of deaths give relatives a chance to go the funeral in an area where phone communication is limited.

The local newspaper is published irregularly and there are no subscribers. Advertisement covers the printing cost. The editor has been trained in Kazakhstan in language and literature, and he has worked several years in the media. The newspaper provides official news, culture, history, feature stories, letters from readers and advertisements. Occasionally the newspaper has included a children's supplement. The newspaper does not have an independent editorial policy.

The local TV station used to broadcast three hours per week but is temporarily closed. The media centre wants to launch a local FM station as well.

Television

Olgii TV

Owner /Director Mr Kh.Meiram.

Private local television station owned by a local businessman and run by a member of the DP, who is also the Globe International reporter on the project Monitoring Free Expression Violations and Supporting the Rights of Independent Media. The station broadcasts 5-6 hours per week plus reruns and besides the Editor in Chief Mr I.Khuatai, has 6 employees of which one is a journalist.

The station broadcasts local news and features, concerts, and advertisement. The station occasionally makes news and critical programmes.

Radio

Shalkhar FM 106.5

Director Mr U.Nurbek.

Established in 2004, the privately owned FM station broadcasts from 9.00 – 24.00 and has a variety of programmes: music (mainly Kazakh), weather, questions and answers, children's programmes, phone-in greetings and announcements, and advertisements.

The station produces a weekly half-hour religious programme provided by one of the Koranic schools. The station has three employees, two anchors and a manager. The station is financed by phone-in fees, advertisements and "paid for" programming.

FM 104.5

Owner /Director Ms M.Aigulik.

Established in 2004, the privately owned FM station broadcasts from 8 a.m. to midnight and has a variety of programmes: music (mainly Kazakh), weather, questions and answers, children's programmes, phone-in greetings and announcements and advertisement.

The station has five employees: three anchors of which one is a journalist, and two managers. The station is financed by phone-in fees and advertisements; the station does not have any paid programming. In the beginning the phone-in fees were quite lucrative, but increased competition has reduced the revenue dramatically.

Aikhoi FM 107.5

Owner Mr D.Erbol, Editor in Chief Ms B.Sailaukhan.

Established in 2004 by Mr Erbol. 2 other full-time staff members. Transmitted from 10.00 – 22.00 daily.

Ekran FM 102.5

Owner /Director Mr A.Khuanysh.

Established in March 2006 by Mr A.Khuanysh. 2 other full-time staff members. Transmitted 24 hours daily.

6.16.3 General Comments

The local media scene is polarised. The government supported local media are, contrary to the existing legislation, fully controlled by the government and used as a mouthpiece for the government and MPRP. The local private television station is pro DP, but the station does not have resources to be a significant alternative voice.

The low-budget FM stations have so far been left out of the political controversy; the presenters are mainly successful young women, who claim there are better opportunities for women than men in the radio business even in this male-dominated society. There have been several violations of journalists' rights reported.

The most urgent issue requiring the attention of the local administration and relevant state and international agencies is the replacement of the Broadcasting Transmission Station. The station is part of the Radio and TV Network (RTVN) of the State Information Technology Agency (ICTA) and it was not included in the Japanese-funded project aimed at renovation of transmission facilities around Mongolia. Established in 1965 using Tesla equipment from Czechoslovakia, the station is now relying heavily on Russian spare parts. It is functioning at half of its power (30Kwt), transmitting 1 hour local radio programs produced by ITO and up to 17 hours of radio programmes from Ulaanbaatar daily. Increasing the local-language broadcasting is impossible due to prohibitive transmission rates per hour. Mr Kh.Uzben, General Manager of the Bayan-Olgii Telecom office, Mr K.Askar, Head of Transmission Station and Mr T.Gantumur, Head of Radio and Television Network Department of ICTA, all agree that the obsolete equipment and lack of funds and adequate spare parts could lead to the failure of the transmission soon. This in turn will not simply harm the capacity of the ethnic minority to receive and exchange information in their native language – it will leave it without any state broadcasting.

6.17 Ovorkhangai

Area: 63,000 km²
Pop: 110,200; 25,000 in aimag centre Arvaikheer
Econ: Revenue of local government in mln. MNT: 1463.3



The aimag centre and all soums but two are connected to the central power grid from Ulaanbataar.

6.17.1 National Media Availability

Television

The aimag centre has terrestrial access to MNPTV, two local TV stations, and national channels alternating on one channel. Cable penetration in the aimag centre is estimated to be between 10 and 20%.

Radio

MNPR is widely available in the aimag.

6.17.2 Local Media Availability

Newspaper

Ovorkhangain Amidral Newspaper

Owner /Editor in Chief Mr J.Dangaa (also Montsame agent).

Established in 2002 by Mr Dangaa, Director of the Tsagaan Alim Company, the local private newspaper is heavily supported and financially dependent on the local Governor's office. The newspaper is published once a month aiming at twice a month, and the circulation is quite high compared to other local newspapers: between 1,000 and 1,500. Before the last election the Governor (MPRP) paid for the distribution of 20,000 copies with his election programme. The newspaper has three employees of whom none is a trained journalist.

The newspaper provides local news, paid official information from the Governor's office, articles about life in the aimag, paid articles, advertisements, and announcements. The

newspaper has provided slightly critical articles, but the editor feels a heavy political influence.

Ovorkhangain Sonin

Editor in Chief Ms B.Javzansuren.

The private local newspaper is supported by locally elected members of the national parliament for the DP. The newspaper is published once a month aiming at twice a month. The circulation is around 500 and according to the Editor in Chief the Governor has urged people not to subscribe to the newspaper; the newspaper was not accepted on the list for subscription at the telecom office.

The newspaper is financed by advertisements and support from MPs from DP. The newspaper has received a US\$ 500 micro loan from the Konrad Adenauer Foundation. The newspaper has three employees of whom two are trained journalists.

The newspaper sees its mission to provide real free media, and the editor stresses that the newspaper is independent from DP, although by others it is seen as affiliated. The newspaper has provided many controversial and critical articles, and the editor stresses that people from DP have also been criticised. The editor has recently been sued for libel from the police department, but the case has not yet gone to court. The journalists are not invited to official meetings at the Governor's office. The harassment from the Governor's office and threats from a police officer have not been reported to Globe International (the editor did not know about the Globe International project).

Ovorkhangain Medee

Editor in Chief Ms P.Oyunjunai.

Established in 1998 by Egel Company. 3 other full-time staff members. Circulation 1,500.

Gurvaljin Medee

Editor in Chief Ms Sh.Byambaa.

Established in 2002 by Women for Social Progress NGO. 4 other full-time staff members. Circulation 1,000.

Bus Nutgiin Khogjil

Editor in Chief Mr J.Jantsandorj.

Established in 2002 by local branch of the State University of Science and Technology. 1 other full-time and 2 part-time staff members. Circulation 1,000.

Television

Arvaikheer Choloot Suvag

Editor in Chief Mr I.Munkhjargal.

Local private TV station established in 2004 by Mr Z.Enkhbold and Mr Z.Khishigtogtokh and, like one of the newspapers, is supported by locally-elected members of the national parliament for the DP. The station has now been handed over to a group of local young people and has 5 employees of whom none is a trained journalist.

The station broadcasts 5 hours per day and provides 10-20 minutes local news (events, business, and weather), music, movies, paid programmes primarily from NGOs, live transmissions and advertisements. The station finds it difficult to get access to information from the Governor's office. The station is financed through advertisements and paid programmes.

Ovorkhangai TV

Editor in Chief Ms T.Narangarav.

Established in 2004 by Mr G.Ganbold. 3 other full-time staff members. Transmitted from 19.00 – 23.00, 6 days a week.

The Governor's office also runs a television station, but this was not assessed.

Radio

Noyon Uul FM 102.6

Owner /Director Mr S.Munkhdalai (also Globe International reporter).

Established in 2001, the local FM station is supported by UNESCO with the aim to develop independent free media. The station broadcasts 12 hours three days a week and four hours the remaining three days. The station has three employees of whom two are trained journalists.

The station provides local news, educational programmes on Severe Acute Respiratory Syndrome (SARS), food safety and environmental issues, national and international political issues, children's programmes, paid programmes and music. Compared to other local radio stations Noyon Uul provides more varied programming.

According to the director the station aims at being neutral in the much polarised media environment and it has been successful in fighting for extended access to local information. The local parliament has accepted to re-open their meetings to media. At any rate the station is seen by several interviewees as being related to MPRP, partly because the station receives money from the Governor's office for providing official information.

6.17.3 General Comments

The local media outlets in Ovorkhangai are openly politically polarised, because the DP has supported alternative media outlets to the MPRP-dominated media in the aimag. In this sense the media scene is more pluralistic than in other aimags.

It is also remarkable that there has not been any FM station launched since the early launch of the UNESCO supported station in 2001. The only local media that to some extent reach the soums and the herders are the local newspapers.

6.18 Bayankhongor

Area: 116,000 km²
Pop: 84,000; 32,000 in aimag centre Bayankhongor
Econ: Revenue of local government in mln. MNT: 8437.4



6.18.1 National Media Availability

Television

The aimag centre has terrestrial access to MNPTV and a two channels swapping between UBS and MN Channel 25, and TV 5 and TV 9 alternately.

There is a CATV network in the aimag centre. No estimates on cable penetration and satellite dishes among herders.

Radio

MNPR is widely available in the aimag.

Regional Public radio is available twice every week for half an hour relayed on MNPR and broadcast from Gobi Altai.

6.18.2 Local Media Availability

Newspaper

Bayankhongor Times

Editor in Chief Mr L.Khadbaatar (also Editor in Chief of Bayankhongor TV).

The newspapers are owned by Egel Company, but according to the editor Egel does not have any involvement in editorial policy. Egel provides training seminars for the local newspapers.

The newspaper employs 4 staff members, and is published every 10 days with a circulation between 500 and 800. The newspaper provides news, official information (none paid), interviews (often paid stories), and advertisements and announcements. The

newspaper sees its mission as providing local information to the public. It has had some quite critical articles that caused harassment. The Editor in Chief does not consider the newspaper to be a true watchdog because of self-censorship. The harassment has not been reported either to the police or Globe International (they did not know about Globe International).

The Governor's office stands behind a newly launched newspaper that has increased competition, and there is a children's paper and an ads only newspaper. None of these special issue newspapers have been assessed.

Bayankhongoryn Medee

Owner /Editor in Chief Mr P.Sanaadagva.

Established in 2005 by Mr P.Sanaadagva. 3 other full-time staff members. Circulation 1,400.

Television

Bayankhongor TV

Owner Mr S.Bayarsaikhan, Editor in Chief Ms D.Bazartungalag.

This private local television station is run by the Government. The owner is a local MPRP government representative, and the local parliament has the license.

The station broadcasts on weekdays from 19.00 – 23.00 with reruns during the weekends and has three employees: an editor (journalist) an anchor (journalist), and a cameraman. The station provides news, paid programming (from NGOs, Governor's office, and MPRP), cartoons, movies, and advertisements.

The Editor in Chief stresses that she has editorial freedom and that the owner does not have any influence on editorial policy, although she says that there are issues that cannot be disclosed. The station has provided critique of the local government on minor issues.

Telecom Business Channel TV

Director Mr G.Mungunsukh.

Television station established in 1999 partly owned by local Telecom Company (40%) and partly private (60%). The station is run by one person and broadcasts two to three hours every day. The station provides local news, official news from the Governor's office (paid programming), interviews (paid programming), movies, and advertisements.

The station provides critical issues, and some of the critical news features have caused controversy and harassment, but the editor has never been sued for libel. The editor has not reported the harassment either to the police or to Globe International. The editor stresses that there is no real access to information in the aimag and the media is politicised.

Radio

Khongor Nutag FM 107

Owner Mr L.Khadbaatar (as above), Editor in Chief Ms J.Altantsetseg.

Private FM station owned by the above mentioned MPRP businessman. The station was established by MPRP before the election in 2004, where it was used as a propaganda tool. Afterwards MPRP lost interest in running the station, although the new Editor in Chief Ms J.Altantsetseg, gets her salary from MPRP.

The station provides a varied programming mix similar to other local FM stations with news from the aimag and the soums, paid programming from NGOs and music aimed at different age groups. The editor claims that there is no editorial influence from MPRP, but several interviewees expect that MPRP will resume control before the next election.

The other FM station has not been assessed, but it provides less varied programming, focusing more on music.

6.18.3 General Comments

At first sight the local media output is impressive with 4 local newspapers, of which one is a children's newspaper and one other a classified ads newspaper; two FM radio stations and two television stations.

Despite the comprehensive output of local media in Bayankhongor the variety is limited and MPRP and the Governor's office control most of the media. The media do not provide independent and critical news.

The only local media that to some extent reach the soums and the herders are the local newspapers.

6.19 Khuvsgul

Area: 101,000 km²
Pop: 123,500; 36,100 live in aimag centre)
Econ: Revenue of local government in mln. MNT: 2049.3



6.19.1 National Media Availability

Television

The aimag centre has terrestrial access to MNPTV and a two channels swapping between UBS and MN Channel 25, and TV 5 and TV 9 on alternate days.

There are two CATV networks. Head of local government authority estimates cable penetration to be around 10%, solar panels among herders around 40%, and satellite dishes 20%.

Radio

MNPR is widely available in the aimag.

Telecommunication

Fixed phone available in all soums and two mobile networks in aimag centre. Aimag centre and three soums connected to fibre optics.

6.19.2 Local Media Availability

Dalai Eej newspaper & FM 107 Human Rights Radio

Owner Mr L.Tserenjav, Editor in Chief Ms B.Sarantuya.

Established by MPRP in 1992, this private newspaper was taken over by the current owner in 2004. The editor stresses that the newspaper has no affiliation with MPRP and that it took some time to cast off the MPRP heritage. The newspaper has 4 employees and some local stringers. It is published every 10 days and has a circulation of between 400 and 800; most of the copies are sold in the soums. The newspaper provides local, national and international news, interviews and portrait articles, health and cooking tips, poetry, and advertisements. The paper is financed by paid articles, advertisements, and subscription.

The Editor in Chief also runs an FM station established in 2005 with support from a private individual from America. The mission was to protect human rights, and the station provided on air legal advice and programmes on human rights violations, but due to lack of funding the station switched to programming similar to most local FM stations: music, literature, religious programmes and phone-in announcements. The station has three employees.

Newspaper

Erkh Choloo

Owner Mr D.Lkhagvasuren, Editor in Chief Ms Yu.Gereltuya.

Established in 1942 as a party newspaper but taken over by a businessman in 1999. The Editor in Chief stresses that there is no editorial pressure from the owner. One out of every five of the newspapers printed is sold in Moron, the others being sold outside the aimag centre. The newspaper use local parliament members to boost circulation in the soums. The editor stresses that this dependency on the politicians makes it difficult to criticise the politicians afterwards. The newspaper has four employees, all journalists.

The newspaper is published every ten days with a circulation of between 500 and 1,000, down from 5,000 during the time of transition. The newspaper provides investigative reports, political news, local affairs, educational articles, opinions, literature and local reports from stringers.

The paper has been called to court and the editor has been harassed several times. In some cases the harassment has been reported to the police, but the police have not taken action.

Radio & Television

FM 105.5 Shine Amidral, FM 107.5 Khokh Tenger, & Dalai Van TV

Owner Mr D.Tserenjav (as above), FM 107.5 Editor in Chief Ms D.Lkhagvasuren, FM 105.5 and Dalai Van TV Editor in Chief Mr D.Gangaa.

Established in 2003, the stations provide local news, educational and health programmes, youth programmes, music and advertisement. The stations are financed by phone-in fees and advertisements. The stations do not advertise the owner's other business activities.

Dalai Van TV so far rebroadcasts TV9 and TV 5 on alternate days, but the station will soon begin as a local station with its own programming schedule.

LW radio, FM radio & Moron TV

Director Mr M.Nyamaa, also Head of Radio & Television editorial office.

The two radio stations and the television station have 6 employees. The stations are financed by a contract with the government, advertisements and paid programmes.

The LW station, established in 1988, broadcasts three times 30 minutes per week. The station provides official and local news.

The FM station was established in 2001, funded by Soros, and broadcasts from 9a.m. to 11p.m. The station caters primarily to young people and drivers. It broadcasts 5 minutes of news every hour, traffic information, live interviews, song contests, music, and advertisements.

Moron TV, established in 2001, broadcasts three times 90 to 180 minutes per week with reruns the following day. The station provides 30 minutes of news, live interviews and paid programming.

DES TV & FM 104.5 Shine Myangany Radio Station

Owner /Director Ms Ts.Myagmarbayar.

The television station was established in 2002 with financial support from Cyprus in a project running until 2004. The FM station was established in 2002.

In the beginning the two stations had 10 employees, but due to financial constraints the staff has been reduced to 6 people: 4 on television and two on radio.

The television station broadcasts 15 hours per day with news, children's programmes, features on environment etc., greetings, business programmes, open microphone on local issues, and advertisements. It is financed by voluntary viewer fees, advertisements, phone-in fees, and paid programming, while the FM station is financed by phone-in fees and advertisements. The stations do not make any crossover promotion, but the stations have been innovative in making new forms of advertisement, contests and awards.

The director stresses that the station has a loyal audience and claims that the public perceives the news to be fair and independent. She trained at PIM in the mid 1990's. After she returned to Khuvsgul in 1998 she experienced harassment from the political elite, but she claims that the attitude towards media freedom has improved. Nonetheless she complains about the quality of the media output caused by financial restraints and lack of trained journalists.

FM 104.1 Tsaа Bugа

Editor in Chief Mr M.Batdavaa.

Established in September 2006 with financial support from UNESCO, located in Renchinlkhumbe soum. 2 other staff members. All staff trained in Mongolian National TV, Radio & Press Institute. Transmitted 6 days a week, from 10.00 – 13.00, then 15.00 – 18.00, to a radius of between 30 – 70km from the soum centre. Programming includes news, music, educational programmes, children's programmes, legal information etc.

Lkha CATV

Owner Mr Ch.Lkhagvadorj, Editor in Chief Ms O.Lkhagvamaa.

Established in 2005 by Mr Ch.Lkhagvadorj; branch of Lkha TV based in Darkhan.

Sky CATV

Owner Mr Ch.Lkhagvadorj, Director Ms O.Lkhagvamaa.

Established in 2003 by Mr Erdenetsogt.

Tsagaan Dalai CATV

Director Ms Ch.Oyunchimeg.

Established in 2004 by Tsagaan Dalai Company. 2 full-time staff members.

6.19.3 General Comments

The proliferation of local media outlets in this remote Northern aimag is amazing; with three local TV stations and one in the making, five FM stations in Moron, two or three FM stations in soums, one UNESCO financed FM community radio station for reindeer breeders, a long wave station, and two newspapers (several of these media outlets have not been assessed). Some of the local media outlets have good quality programming compared to other local media. On the other hand, the abundant media output is not financially viable in the long run.

6.20 Orkhon

Area: 840 km²
Pop: 84,000; 80,000 in aimag centre Erdenet
Econ: Revenue of local government in mln. MNT: 10,100.0



Orkhon aimag is an atypical aimag because it is relatively small at 840 square kilometres and basically built around the mining city, Erdenet, that was established in 1975.

6.20.1 National Media Availability

Besides the national radio station there are three national terrestrial television channels: MNPTV and two channels swapping TV5/TV9 and UBS/MN Channel 25.

There are two CATV networks and a wireless distribution of satellite channels. The wireless distribution has 800 subscribers, down from 3,000 in 2005, and the two CATVs have 7-8,000 subscribers. Penetration of cable and wireless is around 30-35%.

6.20.2 Local Media Availability

TV, radio, & newspaper

Nomin TV, FM 104.5 Nomin and Classified ads paper

Director Mr Kh.Khishigbaatar, TV Editor in Chief Mr S.Baasanjav, FM Editor in Chief Mr N.Purevdagva.

Nomin TV was established in 2004 by Mr Khishigbaatar, who set up the FM station and newspaper in 2005. The stations were set up with seed money from DP, but all three media outlets are now privately owned by two young men. The director stresses that the media outlets are seen by the general public to be pro DP, but he does not find this perception fair and claims that the media outlets have editorial independence. The three media outlets have 12 employees, of which the oldest is 37 years old while most are under 30. Several of the employees are trained journalists and three were trained at PIM.

Nomin TV broadcasts from 07.30 – 24.00. The station broadcasts local news with feature stories four times a week for 20-25 minutes, original entertainment, social and political issues, movies and advertisements. Previously the station also broadcast educational programming.

The Director claims that the television station has been able to establish itself as a very popular station through a mixture of critical programming and locally produced entertainment. The station has conducted a small audience survey where 388 out of 500 voted Nomin TV as best local television station in Erdenet. The Director stresses that this popularity and the public support have made the station immune to most kinds of harassment, but the station is under rigorous tax scrutiny. The television station is financed by advertisements (the major part), paid programming and sale of programmes.

The FM station broadcasts primarily music, news, and advertisements/announcements, and is financed through advertisements and phone-in fees. 80% of the listeners calling in are young people, but there are also many drivers calling in. The management sees the three media outlets in a holistic perspective, and the different outlets make cross-promotion.

Television

Public Broadcasting TV

Director Ms B.Munguntuya, also Head of Information Centre.

The station was established in 1994 as State-run television. A few years ago the station was transformed into public broadcasting according to the media law of 1998. The station is funded by the local public budget.

The station has 9 employees, down from 40 employees in the past when the Information Centre also ran a radio station and a newspaper.

The station broadcasts from 9.00 – 24.00 with original programming between 19.00 and 22.00. Main programming is interviews, reporting, official news and live programmes.

The Director stressed that the station was independent of the local Governor. The Information Centre has made a survey showing that 90% of the public get information from the public broadcaster.

Television, Radio & CATV

Lkha TV, Lkha CATV, FM 105.1 Tenger

Director Mr N.Natsagdorj.

Established in 2001 as the first private television station. The television station broadcasts from 7.00 – 2.00. The content is news, entertainment, music, movies, and advertisements. The stations provided live transmission from the local Nadaam festival. The company has 30 employees in Erdenet and 10 in Bulgan. A main part of the company's business is a 50-channel CATV network with 3,000 subscribers.

The company also runs an FM station, and a television station in Bulgan aimag.

Radio

FM 102.4 Zaluusyn Radio

Director Mr S.Chinbat.

First private radio station established in 2004. Temporarily shut down in 2005 because of technical problems. The station broadcasts all day and provides varied programming with local, national, and international news (some of the news taken from the internet), educational programmes, informational programmes, soft social issues, entertainment, music, and advertisements and announcements. The station has 5 employees of which two are trained journalists.

The station is financed by phone-in fees, advertisements, and awards in sponsored programmes. The station does not have paid programmes. Nevertheless, the station is profitable due to substantial phone-in fees. The director stresses that the station is a popular critical voice for the public. The station has had several arguments with the local authorities and experienced harassment several times (broken windows).

The mining company also runs an FM station with local information for the employees in the morning and traditional programming the rest of the day. The station has not been assessed.

Newspaper

Shine Medee

Owner Mr S.Sharavdorj, Editor in Chief Ms J.Oyun.

The newspaper was established in 1998 by the current owner Mr Sharavdorj. Egel Co. owns several other local newspapers. The newspaper in Erdenet is published once a week (planning to go biweekly) with a circulation of 1,800. The newspaper has 14 employees of which 8 are journalists. The paper covers social, economic, and political issues, paid official information, paid articles and advertisements.

The paper is financed by subscription, advertisement and paid articles. The paper makes profit, part of which is used to support the other newspapers in the Egel Co.

6.20.3 General Comments

The general media situation in Orkhon/Erdenet differs in many ways from the other aimags. The media output is comprehensive, and there are 60 journalists organised under the local branch of the National Journalist Association. The advertisement market is relatively well developed so it is possible for the current media to make ends meet. Anyhow, some of the interviewees said that at least two new television stations are in the making.

6.21 Bulgan

Area: 49,200 km²

Pop: 58,000; 12,000 in aimag centre Bulgan

Econ: Revenue of local government in mln. MNT: 2500.0



6.21.1 National Media Availability

Newspaper

Top Dailies

Ogloonii Sonin

Zuunii Medee

Odriin Sonin

Tabloids

Khumuus

Zindaa

Hani

Seruuleg

Subscribers in Selenge and Bugat soums receive their newspapers via Erdenet.

Television

MNB widely available.

Channel 25, TV5 and TV9 via Khiimor cable station (see below).

6.21.2 Local Media Availability

Newspaper

Bulgany Medee

Editor in Chief Ms G.Norjmaa.

Established in September 2004 by the Director of Egel Company, Mr S.Sharavdorj. The newspaper has 3 other full-time and 2 part-time staff members. The newspaper is published every 10 days, and has a print run of 840 copies per issue.

Television & CATV

Lkha TV

Bulgan branch of Darkhan-based private TV (see above). Established in 2002. Broadcasting time 1 hour from 19.00 – 20.00.

Khiimor CATV

Cable station owned by Telecommunication Office. The CATV station transmits 14 channels, including all 5 national TV stations. There are over 300 subscribers.

Radio

Elgen Nutag FM

Director Mr D.Naranbayar.

Established in 2003 by Mr Naranbayar, Head of the Governor's Office, the MPRP-owned FM station transmits for 14 hours daily and has 3 full-time and 3 part-time staff members. Mostly broadcasts music, announcements and entertainment, with little news. It also has small offices in 7 of the southern soums.

7 List of abbreviations

ADP	Area Development Programmes
CBO	Community Based Organisations
DANIDA	Danish International Development Agency
DP	Democratic Party
ICT	Information and Communication Technologies
MNB	Mongolian National Broadcaster
MNPR	Mongolian National Public Radio
MNPTV	Mongolian National Public Television
MNT	Mongolian Tugrik
MNTV	Mongolian National Television
MP	Member of Parliament
MPRP	Mongolian People's Revolutionary Party
NGO	Non Government Organisation
NIAM	News and Information Association of Mongolia
OSF	Open Society Forum
PIM	Press Institute of Mongolia
UNESCO	United Nations Educational and Cultural Organisation
USAID	United States Agency for International Development