

Policy Briefing

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The media of Pakistan

Fostering inclusion in a fragile democracy?

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Front cover

People in the Old City of Lahore gather to watch election results on a TV set on the street on 11 May 2013. The parliamentary elections marked the first time in Pakistan's history that an elected government peacefully handed power to another elected government.

DANIEL BEREHULAK/
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Methodology

This report is based on primary and desk research conducted by Huma Yusuf, freelance journalist and media researcher, and Emrys Schoemaker, media consultant and director at iMedia Associates, between November 2012 and January 2013. In December, 2012, 23 in-depth interviews were conducted with Pakistani media professionals, analysts, policy-makers and members of the telecommunications industry. In addition, 32 focus group discussions were conducted in Islamabad, Lahore, Karachi, Quetta and Multan by a local Pakistani research agency on behalf of BBC Media Action. The group discussions took place simultaneously in all regions with multiple moderators. They were conducted in Urdu, Pakistan's national language. Each group consisted of six to eight participants.

All group discussions were recorded and verbatim transcripts were produced, which were then translated into English for analysis. All focus group data was then coded using Atlas.ti qualitative data analysis software. Direct quotes from the focus group discussions and in-depth interviews have been edited for clarity where appropriate.

The focus group references are quotes from individuals, but are attributed to the categories that respondents were assigned to. The categories have been described in the following ways:

Age

18-29 years old: referred to as "young"
30-40 years old: referred to as "adult"
41-55 years old: referred to as "middle-aged"

Socio-economic class

A – referred to as "wealthy"
BC – referred to as "middle class"
DE – referred to as "poor"

Executive summary

The 2013 elections provided the people of Pakistan with an all-too-rare opportunity to shape their own destiny. Politics, economics and society are changing rapidly in Pakistan, and with them the prospects for development of the country. A media that has been transformed in a little over a decade has constituted a major part of this change.

The challenges and opportunities facing Pakistan's media today are in many ways a reflection of the challenges and opportunities for democracy facing the country more broadly. As columnist and policy analyst Mosharraf Zaidi put it, "Pakistan's media is guilty of being a microcosm of the society that it reports on, reports for and reports to. It is a reflection and an extension of Pakistan at large."¹

The Pakistani media's democratising function is constrained by its historic role as a state-building tool. The media remains vulnerable amid on-going threats to media professionals and the limitations imposed by the industry's financial model, which must rely heavily on advertising revenue. The government, military, intelligence agencies, judiciary and non-state actors such as militant groups exploit this vulnerability as part of their competition for political power. The geographic imbalance of the broadcast media in Pakistan further limits the industry's potential to play a truly national role.

But the experience of the last decade shows there are many reasons to be hopeful about the media's future as a driver of democratic inclusion and accountability in Pakistan. The growth of regional-language television and FM radio stations reflects the country's ethno-linguistic diversity. This trend challenges the narrative of a unified polity that has preoccupied Pakistan's political elite since the nation's founding in 1947. Alongside this, the proliferation of new media outlets has the potential to foster a sense of inclusion among groups that have previously been excluded from the nation's political identity. Political elites are already seeking to co-opt this new political space. But this briefing suggests that there is significant potential for regional media to contribute positively to the country's politics.

The significance of social media in the country's political life is still emerging, but also shows promise as a platform for public voice. Social media and the internet currently represent the country's freest space for debate, an exciting prospect for a population long excluded from the public sphere. Although internet access remains low in Pakistan, it is growing significantly, particularly outside the main urban centres. When faster 3G mobile internet services are

eventually rolled out (planned for late 2013 at the time of writing), this trend is likely to accelerate. The rise in social media gives reasons for concern too, with indications that online debate follows predictable trends towards political and social polarisation. This is a worry in a country already suffering from widening ideological and political gaps.

Overall, however, the media's expanded gatekeeping function is its greatest contribution to Pakistan's democratic transition. The media offers an increasingly coherent platform for articulating public demand and also has the prospect, over time, of providing greater scrutiny of the country's devolved political institutions.

In the coming years, the role that Pakistan's broadcast and digital media play in the country's politics is likely to become even more important. The quality of the media's contribution will be defined not simply by the quality of the actual media itself, but by the institutional context in which it operates. As Hamid Mir, one of the most popular news anchors in Pakistan and a strong proponent of a privately-owned media, said with passion, "With a strong judiciary and parliament, [the] media in Pakistan can be strong."²

“Pakistan's media is guilty of being a microcosm of the society that it reports on, reports for and reports to. It is a reflection and an extension of Pakistan at large.”

Acronyms

APP	Associated Press of Pakistan (news agency)
ISI	Inter-Services Intelligence
FATA	Federally administered tribal areas
MPA	Member of the provincial assembly
PEMRA	Pakistan Electronic Media Regulatory Authority
PMLN	Pakistan Muslim League-Nawaz
PPL	Progressive Papers Limited
PPP	The Pakistan People's Party (led a coalition government 2008–13)
PTA	The Pakistan Telecommunications Authority
PTI	Pakistan Tehrik-e-Insaf party (led by Imran Khan)
PTV	Pakistan Television Network (state-owned)

INTRODUCTION

The 2013 elections: dawn of a new era?

In May 2013, the people of the Islamic Republic of Pakistan went to the polls to select a new government. For the first time in the country's history, a popularly-elected civilian government completed a full five-year term, and power passed from one civilian administration to another through the ballot box.

These elections – marked by violence and intimidation of politicians and citizens alike – were, for many, a triumph of democracy and the human spirit against extraordinary odds. The 180 million people who inhabit Pakistan are citizens of a country – the sixth most populous in the world – which has spent half of its history under military rule.

In defiance of efforts by the Pakistani Taliban to frighten people from the polls, more than 55% of the approximately 88 million registered voters turned out in May 2013, up from 44% in the previous elections in 2008. Moreover, more than half of the 37 million women registered to vote also participated. The Pakistani Army now insists that it has rejected any notion of a return to military rule and has repeatedly expressed support for democracy.⁴

Over the past decade, Pakistan's political landscape has been transformed, as the shift from military to civilian rule has seen an opening up of civic space. This transformation has included the media. In 2000, there were just three television channels in Pakistan, all of them owned by the state. Indeed, when the military seized power in

the 1999 coup, a critical part of its strategy was the seizure of Pakistan Television Network (PTV), the state broadcaster.

Today, in contrast, the country boasts 89 privately-owned Pakistani television channels and 115 FM radio stations. Mobile telephone penetration has expanded from 22% of the

population in 2005 to almost 70% in 2012.⁵

Across the country, access to news and information and the capacity of individuals to communicate with fellow citizens has been radically altered. Indeed, many observers – from UN representatives to US politicians – laud Pakistan as having among the most vibrant and independent media in the Islamic world.

This briefing explores the relationship between Pakistan's on-going democratic transition and the growing number of privately-owned media outlets in Pakistan, with a particular emphasis on this media's role in fostering

inclusion – bringing more voices to the table and informing more citizens of the issues that shape their lives. These pages highlight not only the changing face of the Pakistani media at the national level and in urban centres, but also the historically under-studied roles that regional and social media are playing in bringing about change. In a country whose literacy rate hovers at 50%, the power of broadcast media to shape people's lives cannot be under-estimated.

The briefing also underscores the vulnerabilities of the country's emerging broadcast media, which limit its ability to play a democratising role. Despite impressive progress, the Pakistani media's editorial independence continues to be restricted by a variety of political actors who use the media to both shape – and manipulate – public opinion in an increasingly fractured country.

This report forms part of a series of BBC Media Action policy briefings on the role of media in fragile states. It is targeted especially at those in the international development community who are committed to supporting the future development of Pakistan. The stakes in this regard are high. Almost half of registered voters, or 47.5% of a total 84.3 million, are under 35 years old, while nearly 63% of Pakistanis are under the age of 25 – one of the youngest electorates in the world.⁶ Despite significant economic growth in recent years, the country also remains one of the poorest: the number of Pakistanis living below the poverty line increased from 17% to 22% between 2007 and 2011, and according to the UN's 2011 Human Development Report, 49% of the population suffers multiple deprivations.⁷

With a growing nuclear weapons arsenal, involvement in the on-going Afghanistan conflict and long-standing disputes with neighbouring India, Pakistan also has great geo-strategic importance to South Asia as well as the international community at large. If the country's tentative democratic transition – of which an independent media is a key component – stumbles, this could have far-reaching consequences.

At this important juncture in Pakistan's democratic evolution, a detailed analysis of its media offers considerable insight into the obstacles and opportunities remaining for the country's political development. As Quaid-e-Azam University's Mushtaq Gaadi, a leading scholar of Pakistani politics, pointed out, "Without press freedom, a smooth transition to democracy will remain merely a pipe dream. However, without democracy, the existence of a free media is inconceivable."³

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DANIEL BEREHULAK/GETTY IMAGES



The briefing contains six parts.

Part one situates the Pakistani media within its historical context. It argues that Pakistan’s media landscape has always been a contested space – both a tool wielded by the state to control national discourse and a platform for those working towards civil democracy.

Part two considers how these competing legacies are playing themselves out within the country’s current democratic transition. It suggests specific ways in which the media can enhance democratic governance in Pakistan through its function as gatekeeper, watchdog and agenda-setter.

Part three illustrates how the privately-owned media’s role as gatekeeper is already beginning to take shape in Pakistan, with positive indications for increased citizen inclusion and representation in politics through growing regional and online media.

Part four documents some of the challenges – political, security and economic – that constrain the media’s ability to hold the Pakistani government to account, including:

- How the media is implicated within the broader institutional struggles between political parties, the military and the courts.
- Threats to media professionals’ safety.
- Weaknesses in the media’s financial model that leave it vulnerable to corruption and co-option.

Parts five and six conclude by laying out some future challenges for the sector as well as issues that international actors might consider addressing in order to support the country’s media.

Above Pakistani men queue to cast their vote at a polling station on 11 May 2013 on the outskirts of Lahore.

Over the past decade, Pakistan’s political landscape has been transformed by the shift from military to civilian rule. This transformation has included the media.

PART I

The Pakistani media: a contested history

The political importance of the boom in Pakistan's privately-owned media over the past decade is based on perceptions that it is challenging the elites that have long dominated the country's political landscape. Historically, politics in Pakistan has been the result of a deal struck between well-educated military and bureaucratic elites and provincial – but nevertheless powerful – traditional leaders.⁸ The military has dominated this bargain, particularly with regards to foreign policy and domestic security, while domestic politics are the result of a patron-client relationship between bureaucratic elites and provincial leaders.

The outcome of this bargain has been three competing views of the state within Pakistan:⁹

- A security state, rooted in the dynamic alliance between the military and civilian bureaucracy
- A parliamentary state, rooted in the coalition of

bureaucratic elites and provincial rulers established at Pakistan's independence

- The Islamic state, rooted in Pakistan's founding as a homeland for Muslims

A politics of exclusion characterises all these different versions of the Pakistani state, with the marginalisation of various political actors and religious minorities serving as a major obstacle to political stability.¹⁰

The media in Pakistan has a long history of association with these competing interests and has been used both to advance the agenda of military and civilian governments and in support of pro-democracy movements (see box: *The media and the state before 2002*). Appreciating this legacy is important to contextualise the media's potential – and limitations – for deepening Pakistan's current democratising trends.

The media and the state before 2002

Control over the media has long reflected the location of state power in Pakistan. Although civilian provincial administrations shut down opposition newspapers in the years after the country's independence, it was under Pakistan's first military dictator, General Ayub Khan (1958-69), that centralised media control was properly institutionalised.

General Ayub passed the Press and Publication Ordinance in 1960, which enabled the state to dictate and censor content and take over media institutions, such as the Associated Press of Pakistan (APP) news agency, and Progressive Papers Limited (PPL), which published the Pakistan Times, Imroze and the weekly Lailo Nahar.¹¹ In 1964, PPL was converted into the National Press Trust media group, which went on to acquire additional newspapers that supported the actions of successive military regimes.¹² The government also began to exert greater control over privately-owned outlets by establishing quotas for newsprint and by restricting distribution in order to keep newspapers in check.¹³

The state-owned PTV was established in 1964 and by 1974 was broadcasting from Karachi, Rawalpindi, Islamabad, Peshawar and Quetta.¹⁴ PTV and Radio Pakistan programming sought to maintain the authority of the government of the time and to perpetuate the new nation state's identity as a country of diverse cultures united by a shared

Islamic faith. Subsequently, General Zia ul-Haq (who governed Pakistan from 1977-88) oversaw the media's most overtly ideological nation-building role. By granting the religious political party Jamaat-e-Islami control of the Ministry of Information and Education, General Zia ensured that the Urdu-language national broadcast media was dominated by sympathetic journalists.¹⁵

Though heavily censored, privately-owned newspapers published content that was critical of military rule in Pakistan. This, coupled with newspapers' earlier role in the Pakistan independence movement, began to create the perception of the media as anti-establishment and pro-democracy. A "satellite revolution" across South Asia during Pakistan's so-called "decade of democracy" also created greater public demand for independent programming.¹⁶ By the late 1990s, there were seven satellites broadcasting American, Chinese, European and Indian content across the region, and many Pakistanis consumed independent news via the BBC World Service and CNN broadcasts.¹⁷

By the time General Pervez Musharraf came to power in 1999, the potential of privately-owned media to advance democratic values was thus well understood by the Pakistani public, even while the state continued to use its broadcast outlets and its influence over privately-owned newspapers to try to shape public discourse.

PAULA BRONSTEIN/GETTY IMAGES



For most of the latter half of the 20th century, the story of the Pakistani media was one of intimidation and control. From the start, the state – particularly the military governments – used print and subsequently broadcast media to disseminate a unified national position on domestic and foreign policy issues.

In the words of Javed Jabbar, the first Federal Information Minister in General Musharraf’s government and a key architect of the 2002 media reform laws (see below): “Previously, there was a contrived but helpful coherence and sharing of public discourse.”¹⁸ Others, including Raza Rumi, an editor at privately-owned *The Friday Times* weekly, characterised this period more harshly: “There were more than 50 years of unstoppable, concerted, well-funded propaganda by the state and the state construction of a [national] identity that is completely fictitious.”¹⁹

Pakistan’s modern media sector has been just over a decade in the making. In 2002 the Pakistani government under General Musharraf liberalised the broadcast media sector, leading to an explosion of local, privately-owned satellite television channels distributed via cable networks. Between 2002 and 2010, 89 television channels were launched and 26 foreign channels granted broadcast

rights. On the radio front, 138 FM radio licences were granted during the same period, of which about 115 had become operational by 2012. The Musharraf government also created the Pakistan Electronic Media Regulatory Authority (PEMRA) to regulate this newly liberalised sector.²⁰

Of course, privately-owned media has a much longer history in Pakistan.²¹ The country’s founder, Muhammad Ali Jinnah, was also the founder of one of the country’s most influential newspapers, *Dawn*, in 1941. The *Dawn* newspaper was just one of several newspapers founded as part of the struggle for independence from British rule, each one associated with different visions of the future state’s identity. This contradictory character of the early press – simultaneously anti-establishment and nationalistic – laid the foundation for the ideological tenor of the current media wave emerging in Pakistan.

The 2002 reforms can be read in part as a continuation of the state (and especially the military) deployment of the media to bolster Pakistan’s national image. Following the Kargil War (1999) between India and

Above Men watch President Pervez Musharraf speak during his pre-election televised address on 9 October 2002 in Rawalpindi. The 10 October election was the first to be held in the three years since the military seized power.

“There were more than 50 years of unstoppable, concerted, well-funded propaganda... and the state construction of a [national] identity...”

Pakistan, anti-Pakistan commentary on Indian satellite channels was credited with turning global opinion against Islamabad.²² In an increasingly media-saturated region, the Pakistani military thus saw licensing privately-owned media as an efficient way to strengthen Pakistan’s capacity to compete in a “media war” with India.

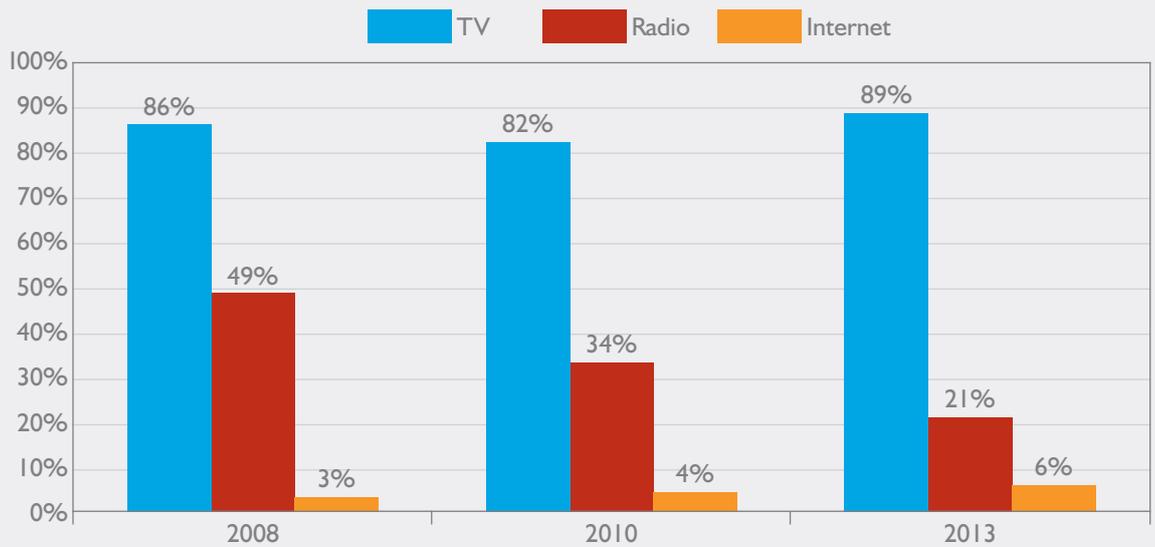
General Musharraf also saw a liberalised media landscape as a way to further consolidate his own power. Following the 1999 coup, Musharraf faced calls from citizens and the international community to uphold democratic institutions. Media liberalisation was seen as one way to appease pro-democracy voices without ceding too much control. It was also consistent

with his strategy of “enlightened moderation”,²³ which sought to embrace moderate interpretations of Islam. The general permitted the deregulation of satellite channels and FM radio stations, but retained the state’s monopoly over domestic terrestrial broadcasting, which had the widest reach. But a proliferating and newly empowered broadcast media strengthened the hand of pro-democracy activists as well as private interests opposed to military rule – eventually contributing to Musharraf’s overthrow.

Pakistan’s current media landscape thus remains contradictory – freer than ever, yet still vulnerable to state control.

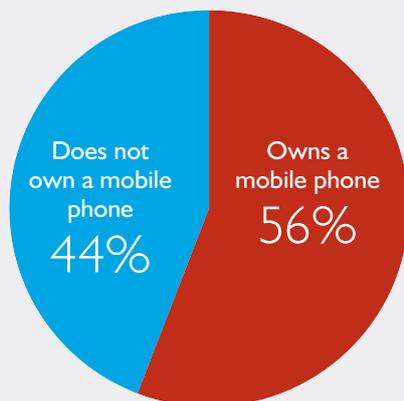
The media in numbers – a snapshot

Figure 1
Media consumption (definition: used in the past 12 months)



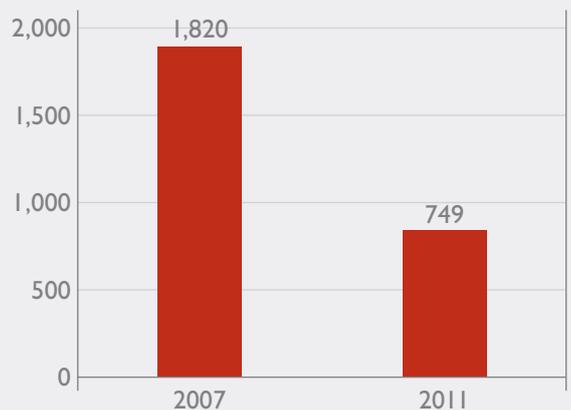
Source: BBC Media Action & BBC Marketing, Communications and Audiences Pakistan Media Survey 2013; Agency: Oasis International

Figure 2
Mobile phone ownership 2013



Source: BBC Media Action & BBC Marketing, Communications and Audiences Pakistan Media Survey 2013; Agency: Oasis International

Figure 3
Number of print publications



Source: Pakistan Bureau of Statistics (2011) *Pakistan Statistical Yearbook 2011*
Available from: <http://www.pbs.gov.pk/content/pakistan-statistical-year-book-2011>

PART 2

The opening up of media and politics

Soon after liberalisation of much of the broadcast media in 2002, the sector began to establish a reputation as an alternative political force by airing stories on government corruption and poor service delivery.

This perception was cemented during the pro-democracy “lawyers’ movement”, a civil society agitation between 2007 and 2009 that called for an independent judiciary and return to civilian rule. In March 2007, facing calls for his own resignation, General Musharraf fired the chief justice of the Supreme Court and catalysed a movement that called for his restoration. With growing support among students, middle-class professionals and civil society groups, the lawyers’ protest quickly escalated into a pro-democracy movement witnessed by anyone with access to a television screen.

In response, Musharraf declared a state of emergency in November 2007 and briefly blocked the transmission of several privately-owned television channels for their enthusiastic coverage of the protests against him. On returning to the airwaves, the media continued to provide extensive coverage of pro-democracy

activists, thereby amplifying their demands. Particularly among a new generation of young, television-watching and increasingly internet-savvy Pakistanis, this act of independence cemented a popular perception of the media as a key political stakeholder and an important democratising force.²⁴ As one young male participant in a focus group conducted for this report put it, “Private news channels question [people in power] in a way that Pakistani [PTV] channels don’t.”²⁵

“Private news channels question [people in power] in a way that Pakistani [PTV] channels don’t.”

The media’s ability to play a democratising role at this time was enhanced by the growth of the industry itself. The loosening of ownership laws in 2007 fuelled media expansion: 30 new television channels were licensed in 2008, compared with 17 in 2007 and three in 2006.²⁶ Thanks to this rapid expansion, the broadcast media was able to open a space for previously unheard voices – with content coming from the owners of new television channels and FM radio stations as well as citizens in the shape of an increasingly large, interactive audience.

Below A journalist speaks to a crowd of colleagues during a protest against media restrictions, outside the Islamabad Press Club, on 20 November 2007.



WARRICK PAGE/GETTY IMAGES

The lawyers' movement – buoyed by media support – was a catalyst in Musharraf's expulsion from power and the general elections in 2008. For the first time in the country's history, elections were held in a plural media landscape that enabled opposition politicians and newcomers to communicate directly with the electorate via broadcast media. The Pakistan People's Party (PPP) led a coalition that came to government in those elections and remained in the media spotlight throughout its term.

And not always in a positive way. Television channels regularly highlighted corruption scandals involving high-ranking politicians and news bulletins focused on examples of government negligence or mismanagement. The highest-rated television shows inevitably included political satire – short, comical segments on political developments, especially the follies of senior politicians.²⁷ The party's poor overall performance – consistently highlighted by the media – led the PPP to be decisively defeated in the 2013 election, winning only 31 out of 272 seats in parliament compared to the 87 it picked up in 2008.²⁸

The picture in 2013

The privately-owned media also emerged as a key actor in the run up to Pakistan's 2013 elections. Hours after polling closed on 11 May, the Chief Election Commissioner of Pakistan praised the privately-owned media for spreading

awareness among the public about the importance of voting, attributing the high turnout to the media.²⁹ All major political parties ran aggressive media campaigns to boost their electoral prospects. Two weeks before election day, cricketer-turned-politician Imran Khan's Pakistan Tehrik-e-Insaf (PTI) party – which eventually won the second-highest number of popular votes – had the highest share of airtime for political advertisements (39% compared to the Pakistan Muslim League-Nawaz (PMLN)'s 22%).³⁰

Political parties that were being targeted by the Pakistani Taliban turned to advertisements and appearances on talk shows, which were seen as a safer and more effective way to get their message across than street campaigns. Indeed, Nawaz Sharif – leader of the PMLN – joked that the rival PPP only existed in television ads.³¹ Marginal political actors also sought to use the media for electoral ends – the CEO of the highest-ranked Sindhi-language television channel launched a new political party in January 2012.

With the growth of the broadcast media sector – including the launch of many channels in the country's various regional languages (see part 3) – the Pakistani media landscape is now more inclusive and representative than ever. This media decentralisation reflects recent Pakistani political trends, particularly the devolution of power from the federal to the provincial governments. The

Right Opposition party protesters march during a hearing for Pakistani Chief Justice Iftikhar Mohammed Chaudhry at Pakistan's supreme court in Islamabad on 3 April 2007. Thousands of opposition party protesters and lawyers rallied outside the court during a hearing on misconduct charges against the suspended chief justice.



PAULA BRONSTEIN/GETTY IMAGES



Left A senior election official is surrounded by media in January 2008 as he announces that the election board has not reached a decision on when the elections will be held.

PPP-led coalition that completed its term in March 2013 passed the historic 18th Amendment to the Constitution, granting the provinces exclusive legislative and executive authority over the 17 ministries that previously operated at the federal level.

This political decentralisation – carried out between April 2010 and July 2011 – sought to address the grievances of citizens in the most underdeveloped and conflict-affected parts of the country, including Balochistan, Sindh and the federally administered tribal areas (FATA), by making government more responsive and locally accountable. The May 2013 election results accelerated this shift towards greater political representation, with different, ethnically representative political parties now ruling each of the provinces.

Gatekeeper, watchdog or agenda-setter?

There is no question that the Pakistani media’s democratic development has gone hand-in-hand with the country’s wider democratic opening. But a question remains over how much of the democratic transition in Pakistan can be attributed to the role of the media.

To assess the role of Pakistan’s media in the country’s political evolution, this report draws on three separate but interrelated functions expected of the media in a democratic context – namely as “gatekeepers”, “watchdogs” and “agenda-setters”:

- As **gatekeepers**, the media can ensure that all views – particularly those of minorities and marginalised groups – are included in public dialogue

- In its **watchdog** role, the media can protect the public interest by holding the powerful to account
- As **agenda-setters**, the media can act as a platform for public debate by framing social issues and shaping public opinion³²

The remainder of this briefing argues that when held up against this ideal type the Pakistani media landscape offers a mixed picture. On the one hand, there is considerable evidence to suggest that the media is upholding certain aspects of its democratising role. In particular, the plurality of national, Urdu-language channels coupled with burgeoning regional-language outlets and social media platforms enhance the media’s gatekeeping functions, promoting inclusivity in Pakistan’s divided state. On the other hand, the media continues to be vulnerable to intimidation, coercion and/or financial and regulatory pressures, especially from state actors, constraining the ability of media outlets to exercise their watchdog and agenda-setting roles.

That said, the proliferation of independent, privately-owned broadcast media outlets over the past decade is still widely regarded as one of the most significant developments in Pakistan’s political evolution, enabling new political actors to compete with established political institutions in the struggle for influence and power. As Pakistan’s democratic transition unfolds, there may be more opportunities for the media to assume an even greater accountability function – informing citizens, fostering free and open public debate and holding authorities to account.

“The media continues to be vulnerable to intimidation, coercion and/or financial and regulatory pressures.”



PART 3

The privately-owned media's recent gains

Above Pakistan's privately-owned television sector is largely an urban phenomenon from which the rural poor are excluded. Here an elderly Pakistani labourer carries a television on his back in Quetta.

The media's democratising potential in Pakistan is most evident at key political moments – for example, when amplifying the demands of the lawyers' movement or when mobilising and educating voters in the run-up to elections. Between seminal political events, however, this briefing argues that the media's most effective democratic contribution is as a gatekeeper, empowering diverse voices.

According to a June 2011 Pew Research Center poll, 76% of those surveyed in Pakistan believe that the media has a good effect in the country.³³ This high level of confidence in the industry largely extends from the public perception that the privately-owned broadcast media plays an important role in articulating public demands. The following section analyses this perception and demonstrates how the media has expanded its gatekeeper function through the growing popularity of regional-language channels and social media platforms that are used to spark public debate, mobilise civil society and evade censorship. Together, these factors

have helped the media to execute its gatekeeping role by making the media landscape more inclusive.

Articulating public demand

Many media professionals believe that the greatest outcome of Pakistan's media boom in the last decade or so has been the ability of the national media – including more than a dozen Urdu-language news channels – to serve as an effective gatekeeper: opening space for the country's diverse population to be heard in ways historically denied by political institutions. As Express News' Talat Hussain, a popular national television talk show host, explained in an interview for this briefing, the media "performs the vital function of articulating public demand".³⁴

Focus group discussions conducted for this study revealed an almost universal acknowledgement of this gatekeeping role. "There are lots of programmes [on air] these days in which people come and talk about

their issues,” said one female respondent from Karachi.³⁵ Discussing Tonight with Jasmeen, a political talk show hosted by Jasmeen Manzoor on national satellite Samaa TV, one female respondent from Islamabad stated, “[Manzoor] calls the leaders and puts the nation’s problems in front of them. She speaks in the way that we want to speak; she puts forward the common man’s voice.”³⁶

Television shows that highlight the everyday problems of citizens were identified as being particularly important in this regard. *Shabbir Tau Dekhay Ga* (Shabbir Will Bear Witness) is a show that spotlights local issues such as family disputes and resource shortages in small towns across Pakistan. Media consumers seem to value having their grievances aired by the media because they think that the industry projects their voice within the corridors of power – perhaps for the first time. As one male respondent from Lahore put it: “When the media covers our issues and questions the authorities, we get some satisfaction from thinking that maybe we have been heard.”³⁷

Unfortunately, the media’s gatekeeping function is constrained by its limited reach. Both in terms of production and consumption, television news media is heavily biased towards urban areas (see box: *Urban bias: how accessible is privately-owned media?*). Focus groups in rural areas of Pakistan confirmed this urban bias: “If [the] media highlighted our areas as much as it is highlighting the issues of Karachi, then our issues could have been resolved sooner,” said one middle-aged male respondent in Mardan.

“When the media covers our issues and questions the authorities, we get some satisfaction from thinking that maybe we have been heard.”

Instead, rural respondents highlighted their continuing reliance on direct, personal relationships with district-level politicians or members of the provincial assembly as the best way to make local government officials aware of a problem. In contrast, urban groups were much more likely than rural respondents to refer to the media for this purpose. This may suggest that as media saturation increases, the public will depend increasingly on media access as a way to engage with state representatives.

Urban bias: how accessible is privately-owned media?

Even while the growing importance of the privately-owned media in Pakistan has been celebrated, media access remains uneven across the country and non-existent in some parts. This situation also acts as a curb on the privately-owned media’s ability to provide a platform for a full range of national voices.

The privately-owned broadcast media is largely concentrated in the highly populated eastern part of the country, which is Pakistan’s industrial and agricultural heartland. In the less developed parts of the country – for example to the west of the Indus River, in the sparsely populated western Balochistan province, north-western Khyber Pakhtunkhwa province and in FATA – media access remains limited because of poor infrastructure development and state control of privately-owned media outlets.

These areas are “media-dark”, both in terms of production and consumption. Few media houses maintain offices outside of the provincial capitals of Quetta and Peshawar and most reporters contributing from these areas work on a freelance basis. As a result, news coverage of local issues – and opportunities for locals to air their viewpoints through the media – remain limited.

A similar urban bias affects news consumption. In 2009, Gallup estimated that of 38 million cable and satellite viewers in Pakistan, the rural audience was just 12 million.³⁸ Media professionals interviewed

for this briefing estimate that cable viewership had grown to 60 million by 2012, with a larger proportion of rural audiences thanks to cultures of communal television watching in rural areas.³⁹ Still, the state’s monopoly of terrestrial television and radio broadcasting means that the PTV network and Radio Pakistan continue to command the largest overall national audiences. In 2008, an estimated 56% of the population watched channels broadcast by the state-owned PTV network, while only 36% watched the privately-owned Geo News, the most popular non-state news channel. Significantly, at the lower end of the income scale, these figures drop to 61% and 30%, respectively.⁴⁰

In other words, Pakistan’s privately-owned television sector is largely an urban phenomenon from which the rural poor are excluded. Privately-owned FM radio broadcasts, meanwhile, are limited to a 50km broadcast footprint and are primarily urban. Despite this, FM radio has greater penetration than television in Khyber Pakhtunkhwa and Balochistan, where cable operators have yet to establish networks, satellite receivers are prohibitively expensive and television is banned in some areas by the Pakistani Taliban. However, Pakistan is urbanising at the fastest rate in South Asia: half the population will live in cities by 2050, up from one-third at present.⁴¹ This means access to privately-owned media is likely to soar in coming years, further reducing state control over the media landscape.

Urban/rural media consumption 2013

Figure 4

2013: TV viewership

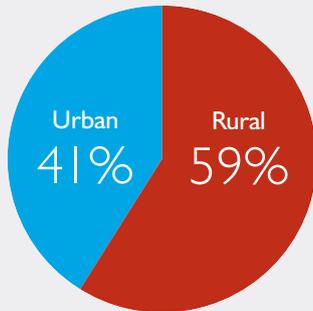


Figure 5

2013: Radio listenership

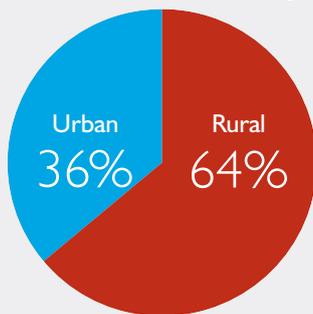


Figure 6

2013: Internet use

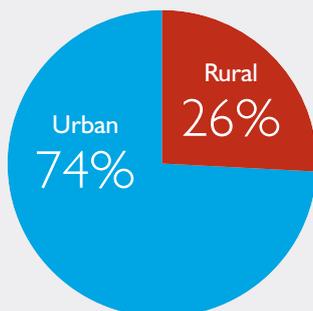
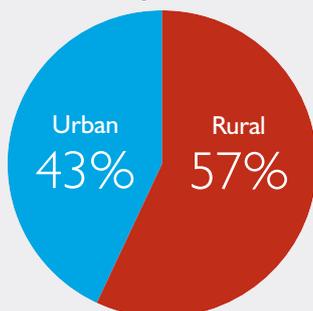


Figure 7

2013: Mobile phone ownership



Source: BBC Media Action & BBC Marketing, Communications and Audiences Pakistan Media Survey 2013; Agency: Oasis International

Access to privately-owned broadcast media matters in Pakistan. The country’s literacy rate hovers at 50%, but even among those who do read, circulation figures for print media – historically the only source for independent news – are declining.⁴² However, English-language newspapers remain very influential among Pakistan’s political, military and business elite.⁴³ Urdu-language newspapers also continue to be popular with the general public, and are an important source of information and opinion in the rural areas where cable television penetration is low. On the whole, however, the relative importance of print publications is declining. According to the Pakistan Bureau of Statistics, the average daily sale of all Pakistani daily newspapers fell from 9.9 million in 2007 to 6.1 million in 2008, reaching less than 4% of the population at that time.⁴⁴ Further, the number of publications in the country peaked in 2007 at 1,820 and then fell to only 749 publications in 2011.⁴⁵

The rise of regional-language media

Audiences clearly value the ability to articulate their concerns through news channels that broadcast in Urdu, Pakistan’s national language. But the growing sense that privately-owned media outlets act as a gatekeeper to include more of Pakistan’s diverse population stems also from the rising number and growing popularity of regional television channels and FM radio stations. These stations, which broadcast in local languages such as Sindhi, Punjabi, Pashtu, Saraiki and Balochi, aim to appeal to the ethno-linguistic communities that reside within Pakistan’s different provinces. Television channels catering exclusively to the residents of one major city – Metro One in Karachi and City 42 in Lahore – have also proved popular.

Regional-language and city-based television channels focus on the local issues that national, Urdu-language channels cannot, including district- or provincial-level politics, news about local infrastructure or other development projects and business news pertaining to industries or cash crops that dominate a particular region. FM radio stations, meanwhile, provide hyper-local news coverage, including traffic reports and coverage of local events. “The regional-language channels report heavily on local politics and reflect what’s happening at the political frontlines,” explained Adnan Rehmat, former executive director of the media capacity-building non-governmental organisation Intermedia Pakistan.⁴⁶ These channels are credited with overcoming what Samaa TV CEO Naveid Siddiqui described as the “vernacular snobbery” of Urdu-language national channels.⁴⁷

The proliferation and popularity of regional-language media in Pakistan coincides with the processes of political decentralisation and strengthening of provincial



autonomy described earlier. Regional media is important because it counters the centralising tendencies of the federal government, military authority, language and religious nationalism that have historically been a significant cause of tension among the country’s diverse population. In this context, regional-language media provides new and greater opportunities for the Pakistani media to open up a new space for grassroots demand, hold local government accountable and foster a sense of inclusion among marginalised communities. As Intermedia Pakistan’s Rehmat, put it, “Local is the new national; regional-language media is reflecting the natural pluralisms [of Pakistani society] and will help entrench the political shift.”⁴⁸

Regional-language outlets are thus expected to fulfil one of the aims that proponents of the 2002 media liberalisation envisioned. Former Information Minister Jabbar explained that one of the rationales for liberalising the media was precisely to reflect Pakistan’s ethnic, linguistic and political diversity, adding that “the pluralism of political opinion was not reflected [in state-owned media].”⁴⁹

In striving to present the demands of their province or ethno-linguistic community to the Pakistani political federation and in articulating a specific constituency’s interests, regional-language outlets have increasingly

become powerful representatives of local interests. Sindhi-language channels such as Kawish Television Network (KTN) and Sindh TV, for example, have been vocal opponents of the Kalabagh Dam – a proposed hydroelectric project on the Indus River, which would help irrigate fields in Punjab and Khyber Pakhtunkhwa but potentially deprive Sindh of water resources.⁵⁰

Similarly, Saraiki-language channels Waseb, Rohi and Kook have amplified calls to create a new province comprising districts of northern Sindh and southern Punjab where Saraiki is spoken. In February 2013, a senate committee approved the draft of a constitutional amendment bill for the creation of the Bahawalpur South Punjab province.⁵¹ “Whatever work was done on [the issue of] a south Punjab province was done after Waseb raised its voice,” boasted Farrukh Syed, the CEO of Waseb TV, a channel that broadcasts in Saraiki.⁵² In light of such developments, Express News talk show host Talat Hussain concluded that: “Urdu media’s influence is going to decline to the point of becoming irrelevant as far as regional dynamics are concerned.”⁵³

Findings from focus groups conducted for this briefing reinforce this notion that regional media is becoming

Above Regional media can foster a sense of inclusion. Here producer, Fresha Shikhany edits a radio programme at Pact Radio studios in Peshawar, Pakistan. The NGO-managed Pact Radio broadcasts in Pakistan’s tribal belt and in Afghanistan in a bid to counter extremist broadcasting.

“Regional-language media is reflecting the natural pluralisms [of Pakistani society] and will help entrench the political shift.”

“Urdu media’s influence is going to decline to the point of becoming irrelevant as far as regional dynamics are concerned.”

more and more popular in Pakistan. Participants from locations other than Karachi consistently described regional-language media as more accessible and more representative than national outlets. “National media is not so good; they never listen to our voice,” complained one young female respondent from Islamabad.⁵⁴ One male participant from Quetta observed that, “Pashtu channels promote the culture of Balochistan”.⁵⁵ Another, also from Quetta, added, “[Pashtu-language] Khyber TV is reliable because it shows footage of Balochistan, represents our area and shows our concerns [about issues like] electricity shortages.”⁵⁶

Regional-language channels are also more trusted than Urdu-language media sources because they are perceived to hold local government officials to account more effectively. In all focus groups there were discussions about shows on regional-language channels that questioned the activities of local elites, from members of the provincial assembly (MPAs) and district-level politicians to local police officials such as station house officers. Respondents from Lahore, in particular, praised the efforts of the city-specific channel City 42 to hold the

government of Punjab and Lahore city officials to account. Discussing Najam Wali Khan – the host of News Night, a political talk show on City 42 – one participant said, “Khan invites Members of Provincial Assembly (MPAs) and Members of the National Assembly (MNAs) on his talk show. He tells them, ‘I went to your locality; all the roads there are broken.’ Then he asks, ‘Where have you spent the funds that you received for this purpose?’”⁵⁷

The growing legitimacy of city-specific and regional-language channels is likely to propel growth in Pakistan’s local media market, thereby further strengthening the media’s gatekeeping function. That local media outlets are gaining in popularity at a time when provincial governments will be taking the lead on policy-making for the first time also heralds new opportunities for the media to play a greater watchdog role and so contribute further to democratisation.

Opening the gates: social and mobile media

The growth of regional media outlets promises to make Pakistan’s political future more inclusive and less centralised. Increasing access to mobile phones and

Below A woman frames a photograph on her mobile phone of fellow supporters as they wait for Imran Khan, chairman of the Pakistan Tehrik-e-Insaf (PTI) party, during an election campaign rally in May 2013 in Multan, Pakistan.



DANIEL BEREHLUK/GETTY IMAGES

Table 1 Top 10 social networks and websites featuring user-generated content

	Most popular networks and websites in Pakistan featuring user-generated content	Popularity ranking of site in Pakistan overall
1	Facebook	1
2	Blogspot.com	5
3	LinkedIn	8
4	Twitter	11
5	Blogger.com	12
6	Daily Jang	13
7	Wordpress	15
8	Pinterest	23
9	Tumblr	34
10	Express Tribune	42

Source: Open Society Foundation using data from Alexa “Top Sites in Pakistan” at <http://www.alexa.com/topsites/countries>

the internet is also yielding innovative ways for new constituencies to engage with the political process.

Social and mobile media are increasingly competing with the mainstream media’s gatekeeping and agenda-setting roles in Pakistan by enabling new forms of political communication and co-ordination. Social media platforms currently provide the only opportunity for ordinary citizens – at least those with internet connections – to participate in the national debate with little mediation. In fact, the rise in social media use has led one commentator to claim that Pakistan is “one tweet away from its own Arab Spring”.⁵⁸

Such claims are tempered by the low levels of internet access, which remains largely urban and male-dominated. Only 9-16% of Pakistan’s 180 million-strong population have access to the internet – a total of 20-30 million people.⁵⁹ “We know the internet is the future [of the media in Pakistan], but it is not the present,” said Musadiq Sanwal, editor of Dawn.com, the online edition of the daily Dawn newspaper.⁶⁰

That said, social media is increasingly popular in Pakistan, particularly among young people. The social networking site Facebook has just over 8 million users in Pakistan, a penetration rate of approximately 4% of the population, which – though low – is growing rapidly. In the six months prior to January 2013, over a million users joined the site.⁶¹

Even more significant than the internet, growing access to mobile phones has the potential to transform how people in Pakistan communicate and to expand the media’s gatekeeping function in unprecedented ways. The

Pakistan Telecommunications Authority (PTA) estimated that there were 123 million mobile subscriptions in November 2012, though the high incidence of multiple Sim card ownership could mean that the number of Pakistanis with mobile phones is closer to 80 million.⁶² Mobile phones are increasingly used to listen to, and interact with, radio stations. Some reports suggest that over half of regular radio listeners listen through their phone, while some radio stations report receiving more than 100,000 text messages per month.^{63 64}

High levels of mobile penetration are also driving much of Pakistan’s growth in internet access, particularly in rural areas. The PTA claimed an increase in mobile internet growth from 2.4 million in 1999 to 14 million in 2012,⁶⁵ while mobile operators report that the largest growth of data consumption is outside Pakistan’s main cities. Internet usage on mobile phones will also surge once Pakistan licenses a 3G network, which the new government has identified as a priority to be addressed in 2013.⁶⁶ Pakistan’s mobile users are already above-average data consumers, and one report for the PTA by Ericsson optimistically suggested that 20% of handsets in Pakistan – a total of more than 50 million – could be smartphones by 2016.⁶⁷

This increased access to social and mobile media has made itself felt during several prominent instances of political engagement. Throughout the lawyers’ movement, text messages, Facebook and Twitter were used extensively to co-ordinate protests.⁶⁸ Since then, technology has become an integral part of nearly all public protest in the country. A recent report on demonstrations against rising attacks on members of the minority Shia Muslim sect

“The electronic media gave a voice to a class of people in urban Pakistan who were not to be found in traditional power quarters such as the military, bureaucracy or political party elites.”

noted that “most [protesters] learned about the protest through text messages and social media and decided to take to the streets”.⁶⁹

Social and mobile media have the potential to liberate users from traditional media outlets and to provide a platform for marginalised voices, enabling more diverse views to be reflected in public debate. The Friday Times’ Raza Rumi argued that “the electronic media gave a voice

to a class of people in urban Pakistan who were not to be found in traditional power quarters such as the military, bureaucracy or political party elites.”⁷⁰

In focus group discussions conducted for this briefing, the majority of participants with access to social media selected this medium as the preferred means for having their voices heard. One Karachi-based male in his thirties said: “When we share videos and images on the internet, [they] start

receiving comments and people keep on sharing them. This way, [the story] reaches higher authorities as well.”⁷¹ Dawn.com’s Sanwal also added, “TV content increasingly relies on social media [for story ideas].”⁷² Over time and as social media penetration rises, the expectation is that more diverse voices will find a public platform, thus strengthening inclusion in what hitherto has been elite-dominated public debate.

Some marginalised groups are already using social media to drive the mainstream media agenda in this way. Activists, for example, use social media to connect directly with international media organisations whose coverage of issues prompts subsequent coverage by the country’s national media.

This strategy has been particularly successful for activists from Balochistan protesting against human rights violations and underdevelopment in their region and calling for greater provincial autonomy or even secession.⁷³ After struggling for years to get mainstream media coverage of what has been termed “Pakistan’s forgotten war”,⁷⁴ Baloch activists have targeted tweets to Al Jazeera’s live Twitter feed, prompting extensive coverage by the international broadcaster.⁷⁵ Pakistan’s digital rights activists also attracted global coverage of the government’s plans to initiate an internet firewall, ultimately forcing officials to suspend their plans. “It’s a conscious strategy for [groups] to get international media coverage so that news gets covered in the mainstream media in Pakistan as well,” said blogger Sana Saleem of the digital rights group Bolo Bhi.⁷⁶

Political parties are also increasingly turning to mobile phones and social media to mobilise support. Imran Khan’s PTI party, for example, recognised that its core

constituency was “an elite that communicates on emails, on Facebook”, according to its social media advisor Awab Alvi. Before PTI’s campaign gained national momentum, Alvi felt that “the only way that we [could] defend Imran Khan is on our turf and since we [cannot] invest in the print or broadcast media, our turf is the social media.”⁷⁷

In sum, though internet access is low in Pakistan, its influence on broadcast media and the decision-making elite is disproportionately high. And when coupled with internet-enabled mobile phones, these new media technologies have truly transformative political potential, particularly in terms of expanding the media landscape’s gatekeeping and agenda-setting function. Like more traditional media, however, social media also faces the reality of political constraints.



Left A girl lights candles during a protest against the ban on television and radio channels in Karachi, November 2007. Successive governments have sought to influence privately owned media through censorship and regulation.

PART 4

The politics of pressure: the limits of the media's democratising potential

Despite promising signs that Pakistan's media is providing a positive gatekeeping function, its roles as a watchdog and agenda-setter – which are equally essential in a democracy – are also limited. Pressures include government and military interference, censorship and security threats as well as a fragile financial model that prioritises profits and political interests. As Shahid Rind of ARY TV in Quetta is quoted as saying, “We get diktat[s] from all stakeholders... and face threats and censure. There are red lines and we cannot dare to be objective in reporting.”⁷⁸

Regulating or censoring? The government and the courts

While strategic deployment of the media to advance institutional interests is part and parcel of any political environment, in Pakistan this dynamic has often crossed the line into corruption and censorship. Military and civilian governments alike have long influenced media content by bribing media houses and individual journalists through what is known colloquially as the *lifafa* (envelope) culture.

Such corruption persisted under the PPP-led coalition government, often at the highest levels. The government's Ministry of Information and Broadcasting admitted that it maintained an unaudited “secret expenditure fund”,

which it claims was used to ensure the “welfare of journalists” and that was worth up to 126 million rupees (US\$1.22 million) in the 2012-13 financial year.⁷⁹

In addition to bribes, successive Pakistani governments have also sought to influence privately-owned media through censorship and regulation. During Musharraf's regime, the media was largely free to produce its own coverage, but was overtly censored when it became critical of the military or the general's actions, often through nationwide blocks of news channels or the seizure of an FM radio station's equipment.⁸⁰ Under the PPP-led coalition government, attempts to control and censor the privately-owned media were far subtler, carried out by proxy or under the guise of regulation.

In 2013, more than 3,000 cable operators distribute Pakistani television channels nationwide. Khalid Arain, chairman of the All Pakistan Cable Operators Association, maintains that cable operators base their decisions about which channels to carry on public demand.⁸¹ But channel owners complain that they have to bribe cable operators to carry their channels and, more importantly, to obtain a favourable placement among the operators' channel listing – ideally on either side of the popular Geo News.⁸²

Cable operators have also been used by the media regulatory authority PEMRA to censor content on

“Political parties also put pressure on cable operators... to block channels that are critical.”

privately-owned television channels. Cable operators will selectively block certain channels from broadcasting politically-sensitive material. In 2010, for example, PEMRA ordered cable operators to block the broadcasts of Geo News and ARY TV after they aired footage of a protester in Birmingham, UK throwing a shoe at President Asif Ali Zardari.⁸³

Cable operators consent to government requests to censor content around more politically-sensitive material in exchange for lenient regulation around entertainment, such as soap operas and pirated films from India, which consistently rank as the most popular programmes among Pakistani television audiences.⁸⁴

On the local level, political parties also put pressure

on cable operators to block channels that are critical of policies or to demand greater media coverage of the party. “We feel the political pressure,” said cable operators’ association chairman Khalid Arain, “but we have to work in the [parties’] localities, so we comply with their requests”⁸⁵.

Although this report identifies the internet as one of the freest spaces for public debate, the Pakistani government’s proxy control of the media landscape extends to cyberspace as well. As virtual debate becomes increasingly blunt, Pakistani authorities have made greater efforts to control and censor online content. As of July 2012, more than 15,000 websites had been blocked by the PTA, which regulates mobile and internet platforms under the Pakistan Telecommunications (Re-organisation) Act 1996 (see box: *Censoring cyberspace*).⁸⁶

Censoring cyberspace

The government’s stance on internet freedom became clear in February 2012 when the National ICT Research and Development Fund called for tenders for a URL filtering and blocking system capable of blocking up to 50 million websites.⁸⁷ Thanks to widespread opposition from civil society, the call for tenders was suspended. But digital rights activists fear that the authorities are continuing to develop ways to block online content⁸⁸.

In December 2012, Pakistan’s Interior Minister Rehman Malik announced in an official tweet that the PTA was in negotiations to acquire “a powerful firewall software to totally block pornographic and blasphemous material.”⁸⁹ And in June 2013, a Canada-based research group reported that Netsweeper, an internet filtering technology, was being used to categorise and block thousands of Pakistani websites.⁹⁰ Digital rights campaigners also reported that FinFisher, a UK-developed surveillance technology, had been found on a server operated by Pakistan Telecommunication Company Limited (PTCL), the government-owned telecommunications and internet provider.⁹¹

The PTA uses concerns about religious sensitivities as a way to justify its censorship of online material. For example, to protest against an anti-Islam film mocking the Muslim prophet Mohammed, the PTA banned YouTube on 17 September 2012 (the ban had not been lifted as of September 2013).⁹²

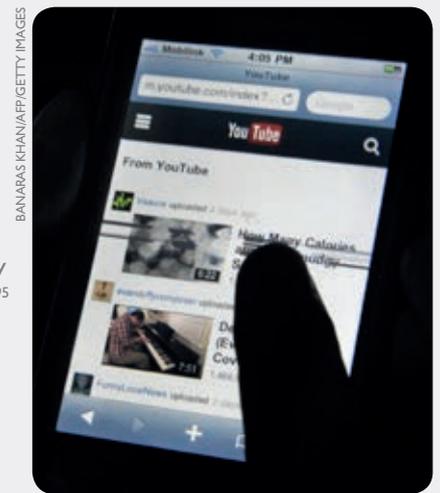
But while government officials claim that only pornographic and blasphemous material is blocked, banned websites often contain anti-government or anti-army content. In July 2011, Pakistani web users were denied online access to the American magazine Rolling Stone after it published an article criticising Pakistani Army expenditures.⁹³ Similarly, in 2010, YouTube was blocked after a video showing President Asif Zardari shouting

at a heckler during a public gathering was uploaded to the site.⁹⁴ The PTA regularly blocks hundreds of websites maintained by Baloch and Sindhi activists calling for political autonomy or secession and documenting human rights abuses by security forces against fellow activists.⁹⁵

The judiciary often supports the PTA’s efforts to censor online content. In 2010, the Lahore High Court ordered the PTA and the Ministry of Information

Technology to create a permanent system to monitor and filter “blasphemous and objectionable content” online. Reports soon followed suit that Pakistan Telecommunications Company Limited (which manages the country’s largest internet exchange point) was experimenting with proxy servers to censor content in a more targeted fashion.⁹⁶

These patterns of online censorship – which involve civilian authorities censoring content to protect military interests or in response to judicial orders – reveal how Pakistan’s political institutions collaborate to regulate media content. This media control, which extends across the state, seriously undermines the Pakistani media’s ability to play its democratic role as gatekeeper, watchdog and agenda-setter. Given that the internet is currently the fastest-growing form of media access in Pakistan – and the site of the most open public debate – state attempts to censor Pakistanis’ access to cyberspace will have serious implications for media freedom in the near future.



BANARAS KHAN/AP/GETTY IMAGES

Above
A Pakistani mobile phone user browses YouTube on his phone in Quetta on 29 December 2012 when Pakistan briefly unblocked access to the video-sharing website.

JOHN MOORE/GETTY IMAGES



Left The Pakistani Army has sought to exert control over privately-owned media outlets. Here a cameraman films a Pakistani Army soldier on a military base in the Swat valley of north-western Pakistan.

The courts have also acted as a political constraint on journalists.

Since 2007 and under the leadership of Chief Justice Chaudhry, the judiciary has emerged as a populist institution in Pakistan, disrupting Pakistan’s traditional political settlement between the military and civilian wings of the state.⁹⁷ But although the media allied with the courts during the lawyers’ movement, as the judiciary’s power has grown, that relationship has become a good deal more complicated in recent years.

According to Human Rights Watch, both national and provincial high courts have stifled media criticism of the judiciary by threatening contempt of court proceedings, which carry the threat of imprisonment. Since October 2012, the high courts in Islamabad and Lahore have also ordered television programmes critical of court proceedings and judgements to be taken off air.⁹⁸ “We’re always getting circulars telling us to refrain from criticising the judiciary and its decisions; it has kind of become a law,” claimed a Karachi-based news director at a popular television news channel.⁹⁹

In August 2012 the Supreme Court took up petitions complaining about “obscenity” and “vulgarity” in the broadcast media and tasked PEMRA with defining the term “obscenity”.¹⁰⁰ This apparent bid at regulation was perceived by media professionals as an attempt to exert pressure on media owners. Many privately-owned Pakistani media outlets rely on revenues from

broadcasting popular foreign – especially Indian – channels that contain more provocative content than is typically seen on domestic channels.

In short, although the judiciary has long advocated for the democratic separation of powers across the executive, legislative and judicial branches in Pakistan, it too is a political actor. The Supreme Court’s efforts to influence favourable media coverage place it alongside the military, government and other private interests, who also seek to advance their own interests through the media.

“We’re always getting circulars telling us to refrain from criticising the judiciary... it has kind of become a law.”

The military: still controlling the narrative?

The previous discussion of government censorship highlights the continued dominance of the army within the country’s political settlement and its influence over Pakistan’s media and communication environment. Despite successive civilian government efforts towards strengthening democratic processes and institutions, the Pakistani Army remains a significant power bloc in the country’s political landscape. Sometimes considered the country’s only working institution, the military has been described as a “state within a state” that monopolises state resources (up to 7% of GDP according to some analysts)¹⁰¹ and has interrupted democratic process in the past when it perceived Pakistan to be under threat.¹⁰²

More than any other state institution, the Pakistani Army has sought control over the country's privately-owned media outlets as part of efforts to establish a narrative of national unification. As noted above, this narrative has frequently emphasised Pakistan's Islamic identity, identifying India as the greatest security threat against which Pakistani unity is a key defence. A similar dynamic arose in the army's efforts to influence the media debate around the country's controversial role in the global fight against terrorism. In a South Asian geo-political environment characterised by growing violence and uncertainty, the Pakistani army has tried to use the media to better manage the national discourse around Pakistan's involvement in the international fight against terror. For example, the Inter-Services Public Relations – the public relations wing of the Pakistani Army – was expanded and restructured to accommodate separate wings to engage with and monitor print media, FM radio stations and privately-owned television channels.¹⁰³

Pakistan's media landscape thus remains vulnerable to political influence, especially over issues of national security and foreign policy. For example, before the Pakistani Army launched a sensitive operation against militants in the Swat Valley in April 2009, the army chief met with journalists and urged them to downplay civilian deaths and other “collateral damage” in order to muster

public support for military action.¹⁰⁴ Responding to army persuasion, news anchors have occasionally whipped up anti-American sentiment within the Pakistani public so the army can use this to influence decision-making in relation to Pakistan in Washington.¹⁰⁵

Pakistan's intelligence agencies also try to shape public opinion through the media. Following the US raid on Al Qaeda chief Osama bin Laden's Pakistani hideout in 2011, for example, Geo News aired a song titled *Kon sachā, kon jhuta* (Who's honest, who lies?), criticising the army's security policies and its close ties to the US government. In response, PEMRA threatened to suspend Geo News transmissions, citing Section 20(g) of its code of conduct, which prevents channels from airing content that “contains aspersions against... the armed forces of Pakistan”.¹⁰⁶

At times, the military has also been accused of employing more direct tactics to control the media. Pakistan's intelligence agencies have been accused of threatening and attacking journalists who cover sensitive topics. In September 2010, Umar Cheema, an investigative reporter for English-language daily *The News*, was kidnapped and tortured. He is quoted as saying, “I have suspicions, and every journalist has suspicions, that all fingers point to the ISI [Inter-Services Intelligence, Pakistan's intelligence agency]”.¹⁰⁷ Similarly, in May 2011,



Right Pakistani journalists stage a demonstration during a protest against the killing of Pakistani journalist Saleem Shahzad in 2011.

RIZWAN TABASSUM/AFI/GETTY IMAGES

Threats to media professionals

According to the Committee to Protect Journalists, 52 journalists have been killed in Pakistan in the line of duty since 1992, and Pakistan ranked as the world's most dangerous place for journalists in both 2010 and 2011.¹¹⁰ In the first four months of 2013, four journalists lost their lives. Politics is the riskiest beat for journalists in Pakistan. Of the 52 killed since 1992, 62% were covering politics.¹¹¹ Mustaq Sharki, a Sindh TV reporter from Karachi, has been beaten, kidnapped and tortured for his reporting, and said he was attacked for asking the wrong questions during a political party's press conference.¹¹²

Militant groups across the country have increasingly threatened journalists to influence coverage of their activities and stop negative reporting.¹¹³ In October 2012, for example, following the Taliban's shooting of teenage education activist Malala Yousafzai, Interior Minister Rehman Malik announced that the Pakistani Taliban was planning attacks against media houses and popular news anchors to retaliate against strong media condemnation of the incident. Geo News talk show host Hamid Mir narrowly escaped

a Pakistani Taliban car bomb following his coverage of Malala's shooting: "It's a message to me as well as [Geo TV] and the journalist community in Pakistan," he said.¹¹⁴

In some volatile parts of the country, multiple actors target journalists simultaneously. Since 2006, for example, according to the Committee to Protect Journalists, 13 journalists in the western province of Balochistan have been killed on the job by Baloch separatists, Taliban militants, security officials and criminals.¹¹⁵

Press clubs – associations of professional journalists – and prominent media representatives are also common targets of attacks. In 2008 separatist militants of the Balochistan Liberation Army bombed the Khuzdar Press Club¹¹⁶, and in October 2012 unidentified attackers killed the son of the press club's president.¹¹⁷ Not surprisingly, journalists in Balochistan often avoid publishing under bylines and focus their reportage on innocuous events such as health seminars or the opening of new roads.¹¹⁸

Saleem Shahzad, the Pakistan correspondent for the Asia Times Online, was killed after writing about Al Qaeda infiltration of the Pakistan Navy. It emerged after his death that he had received threats from the ISI (see box: *Threats to media professionals*).¹⁰⁸

The Pakistani public is apparently aware of the constraints under which the media operates and acknowledges the risks journalists face in trying to hold power to account. As one young male focus group respondent in Multan observed, "I know that if I said the truth and brought out the reality then any one of the politicians [would] shoot me. Do we know of anyone who told the truth and is alive?"¹⁰⁹

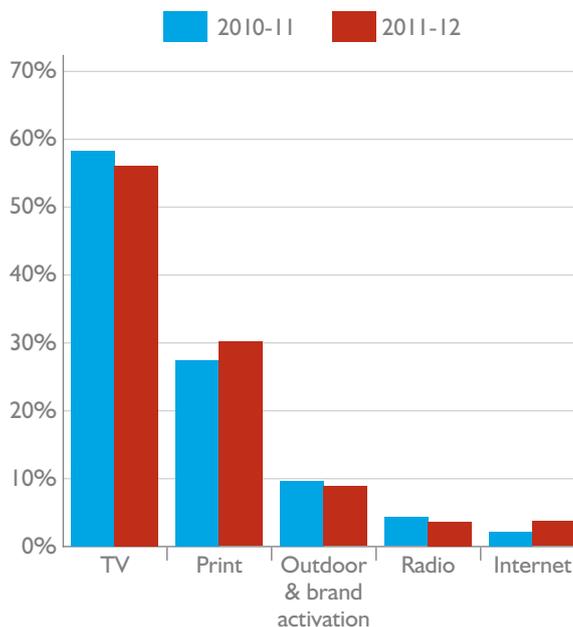
Money matters: the privately-owned media's financial model

The previous sections of this briefing show that any analysis of the media's role in Pakistan's politics needs to be framed within an understanding of the country's political dynamics and the historic association between political power and media control. One key aspect of this relationship is the media industry's financial model, which leaves the sector vulnerable to co-option and coercion by the government, military, intelligence agencies and other actors, and thus compromises its democratising potential.

In common with most market-based media sectors, the Pakistani media is highly reliant on government and private sector advertising revenues to operate. According to print media owners, less than 25% of print revenue comes from subscriptions, with advertising making up the remaining income. For television and radio, advertising is the source of almost all revenues.

Advertising expenditure in the country's media is constantly increasing: in 2010-11, total expenditure was 32 billion rupees (£199 million), a sum that has grown at an average rate of 23% each year for the past 10 years.¹¹⁹ But rapid media proliferation has also resulted in intense competition for these resources. As a result, media outlets are wary of offending any groups – whether political actors or corporations – that might be in a position to divert advertising revenue away from them.

Figure 7
Share of total advertising spend by media type



Source: Aurora, The Dawn Media Group, November-December 2012 issue
Data provided by Gallup, Pakistan

Government advertising accounts for a significant proportion of total advertising spend in the country – up to 5 billion rupees (£31 million) according to some media professionals.¹²⁰ Government resources are an especially important source of income for smaller channels, including those that broadcast in regional languages and FM radio stations. As a result, many such media organisations remain wary of attacking politicians, particularly at the provincial level, for fear of losing advertising revenue. The fact that business interests constrain media outlets' news programming is one of the main reasons why Pakistani media struggles to fulfil its watchdog function.

Ironically, greater democratisation in the form of national or local elections is likely to increase the media's reliance on government advertising, which soars during election cycles. In January 2013, a few months before the general elections, the total share of commercial airtime for regional-language channels (those normally overlooked by advertisers who prefer to target larger, national audiences) was a hefty 15% (compared with 38% for national news channels and 33% for entertainment channels).¹²¹ Similarly, although advertising revenue for the FM radio sector was only 1.3 billion rupees (£8 million) in 2011 – or 4% of the total media advertising spend – this was up 22% from the preceding year. This increase took place as politicians sought to promote their activities and campaigns at a local level before the May 2013 polls. As Mehdi Raza, the CEO of Apna Karachi FM 107 – a Karachi-based radio station, explained, "Radio stations like to cash in on the election opportunity as parties spend huge amounts on advertisements."¹²²

Another aspect of the media industry's financial model that undermines its independence and democratising potential is the prohibitive cost of entry into the sector. PEMRA charges for licence fees have soared in recent years for both television channels and FM radio stations. To take but one example, FM radio licences in Karachi cost 3.5 million rupees (approximately £20,000) in 2003, but in one exceptional case soared to 380 million rupees (approximately £2.5 million) in 2008.¹²³ In this context, media houses often rely on political connections to get better deals for new licences.¹²⁴ Returning such political favours through positive news coverage necessarily compromises the media's watchdog function.

These high costs also make media owners reluctant to risk having their transmissions blocked by the government and losing advertising revenues while off air. Geo TV network estimates that it lost US\$1 million (£645,000) each day that it was off air when General

Musharraf blocked privately-owned media transmissions during emergency rule in November 2007.¹²⁵ The more that government officials and political parties ask cable operators to block news channel transmissions, the greater caution one can expect on the part of media owners looking out for their business interests.

Intense media concentration is another by-product of the high costs of entry. Pakistan's privately-owned media is currently dominated by a few media groups, including the Independent Media Corporation (Jang Group), the Waqt Media Group, Pakistan Herald Publications Limited (the Dawn Media Group) and the Express Media Group – a subsidiary of the established business conglomerate, the Lakson Group. Along with liberal cross-media ownership laws, this media concentration means that only those groups with existing media production capacity, large amounts of capital and extensive political connections are able to bid for media licences.

Such a concentrated media landscape also has inevitable political consequences. Among other things, it allows for more effective censorship since state actors only need influence a few media groups to have a widespread impact on programming. It also means that such media houses will inevitably engage in self-censorship. A television programme examining media corruption was shut down after only 12 episodes following industry pressure. Matiullah Jan, the anchor of the show, summed it up this way: "They looked in the mirror and saw what they looked like. Then they decided to break the mirror instead of washing their own faces."¹²⁶

In addition to making privately-owned media more vulnerable to coercion and censorship, the significant commercial interests of multi-outlet media houses often drive the industry's political interventions as well. The Jang Group's persistent attacks against the PPP-led coalition government (2008-13) and subsequent alignment with the judiciary against President Zardari, for example, are interpreted by some as an attempt by the group to combat allegations of its own tax fraud.¹²⁷ In the words of one analyst, "I don't think the journalists who are on the front end necessarily know how they are being used by the corporate interest. At the back end, corporate interest plays a very vital part."¹²⁸

There is evidence that the Pakistani media's growing partisanship is beginning to damage its credibility and raise questions about its ability to hold power to account. "The folklore of the media being corrupt is spreading fast," acknowledged Express News' Talat Hussain.¹²⁹ In June 2012, a leaked behind-the-scenes video showed popular Dunya TV political talk show hosts taking instructions from politicians and the channel's management on how to pose questions during an interview with a real estate tycoon who

“Journalists who are on the front end [do not] necessarily know how they are being used by the corporate interest.”

advertises extensively on television.¹³⁰ Following this scandal, television channel CEOs reported an overall drop in viewers of political talk shows, implying public frustration with the politicisation of programming.¹³¹ As one poor male focus group participant in Quetta put it, “the TV news is the most reliable, but they hide some parts of [the truth], perhaps due to some political parties.”¹³²

The fact that Pakistani journalists are not well compensated for their work further amplifies opportunities for media corruption (see box: *Journalists’ wages*).

The close relationship between business, political interests and the media in Pakistan may be an economic necessity, but it has a real political cost. Reflecting such realities, the Press Council of Pakistan adopted a cautionary tone when submitting a code for media coverage of the 2013 elections, stating, “The upcoming polls would be a litmus test for the credibility of free media in Pakistan.”¹³⁵

Journalists’ wages

The media sector as a whole suffers from chronic job insecurity – up to 85% of journalists are freelancers and many employers pay late, if at all. In 2009, for example, ARY Digital Network was accused of not paying salaries for three consecutive months.¹³³

Journalist bodies such as the Pakistan Federal Union of Journalists (PFUJ) accuse the government of failing to uphold the Seventh Wage Board, government legislation intended to regulate print media sector salaries. The secretary of the Employees Union of Pakistan claims the government is 91 million rupees (£565,000) in arrears for 2011-12 salary increases.¹³⁴ Meanwhile, broadcast media outlets have no legislation or code requiring that they compensate journalists consistently or adequately. The resulting low compensation and persistent job insecurity make journalists all the more likely to take bribes in exchange for favourable coverage. This practice is discrediting the Pakistani media’s reputation at the grassroots level and undermining its ability to play an independent, agenda-setting role.

PART 5

Democratising or destabilising? Challenges ahead for privately-owned media

Pakistan's media has developed rapidly and continues to do so. To date, the greatest function the recently liberalised broadcast media has played is as a gatekeeper that has increased the accessibility and diversity of the public sphere. For a country in which exclusion has historically been an important driver of conflict and instability, this alone is a significant contribution to more democratic and inclusive politics. Yet if the media is to uphold its tandem roles as watchdog and agenda-setter in this emerging democratic polity, the sector will first need to overcome some of the potentially destabilising effects that are the by-product of its very successes.

The first challenge is one of public disillusionment due to the media's perceived ineffectiveness as a driver of change. While audiences clearly appreciate the media's ability to articulate their demands, they are increasingly disenchanted with the industry's inability to pressurise the government to take action. "The public is communicating different problems in television programmes, but the result is zero," complained a female focus group participant from Islamabad.¹³⁶ Similarly, a male respondent from Karachi pointed out, "Many media people ask, what are your problems? But it is not acted upon."¹³⁷ A male respondent from Mardan perhaps best articulated this sense of despondency: "There was a time when journalist interviews were heard with great interest, but now we have stopped watching them. This is because... our problems have remained unsolved. We read magazines, we watch people like you on television, but... no one takes care of us. The person who has power is the king and he doesn't care [about his subjects]."¹³⁸

There are also concerns that media decentralisation may bring with it political fragmentation and polarisation. Privately-owned media outlets such as regional-language channels, local FM radio stations and social media increasingly reflect ethnic and religious differences, which were previously airbrushed out of the cohesive national narrative by state-sanctioned media. As former Information Minister Jabbar observed, "The ironic consequence of proliferation has been fragmentation of audiences at a time when the country needs a reinforcement of the still evolving nationalism."¹³⁹

Jabbar's concerns that "regional media has fragmented the polity" – as he phrased it – are heightened by the rapid politicisation of regional-language channels and FM radio stations. Recognising that the legitimacy of provincial- and district-level politicians is increasingly dependent on how they are portrayed by local media, these politicians are beginning to woo regional-language outlets. "There are already indications of candidates looking for media

vehicles to use as their own," said Geo Network chief executive Sulaiman Lalani.¹⁴⁰ Even in remote areas such as FATA where media licences are non-existent, there are signs of district-level politicians using FM radio stations to engage directly with their constituents, going so far as to set up their own radio stations.¹⁴¹

In the run-up to the 2013 general elections, the political affiliations of regional-language channels were apparent. The Saraiki-language Rohi TV is owned by Jehangir Tareen, a former federal minister who joined Imran Khan's PTI party in 2011. Ali Kazi – the CEO of the highest rated Sindhi-language television channel, KTN, and the editor of the leading Sindhi daily *Kawish* – launched a new political party in January 2012 that seeks to advance Sindh by promoting good governance and quelling patronage politics.¹⁴² Before launching the party, Kazi published frequent opinion editorial pieces in *Kawish* and used his KTN political talk show *Opinion* with Ali Kazi to float the idea that mainstream political parties cannot fulfil Sindh's political aspirations.¹⁴³

The empowerment of regional voices was echoed in the 2013 election results, which saw a different ethnic party forming the government in each of the country's four provinces. For now, this trend is being welcomed as a much-needed shift towards increasingly representative and decentralised politics. However, this situation could also lead to political fragmentation in the future. Much will depend on how regional media chooses to portray local issues – whether stoking divisiveness, celebrating diversity or mourning a loss of national unity.

In addition to political fragmentation, there are also concerns that, together, privately-owned media and social media will exacerbate social polarisation by empowering extremist voices. Wajahat S Khan, the author of a study looking at social media in Pakistan, argued that online debate amplifies existing polarisation within Pakistani society and opens up "a strange new front in the ideological struggle for Pakistan's soul".¹⁴⁴ Khan examined online discussion surrounding the murder of former Punjab governor Salman Taseer by his bodyguard for his support for the reform of Pakistan's controversial blasphemy laws. Immediately after Taseer's assassination, Facebook pages in support of his assassin proliferated. Debate on these pages became so extreme that Facebook was eventually forced to remove them from the site.¹⁴⁵

It is possible, then, that the rising importance of regional and social media highlighted in this report could destabilise the democratic trajectory of recent years. In empowering new political actors, the nation's media will be more diverse and more decentralised, but also – potentially, at least – more divisive. Only time will tell.

“Regional media has fragmented the polity.”

increasingly reflect ethnic and religious differences, which were previously airbrushed out of the cohesive national narrative by state-sanctioned media. As

former Information Minister Jabbar observed, "The ironic consequence of proliferation has been fragmentation of audiences at a time when the country needs a reinforcement of the still evolving nationalism."¹³⁹

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PART 6

Policy recommendations

The following recommendations are based on the research conducted for this briefing. They are aimed at members of the international community and are designed to help support the Pakistani media in deepening democratic progress within the country.

Strengthening inclusive media

It is important to **support the Pakistani media in strengthening a politics of inclusion** rather than exclusion. One approach to this is to facilitate debates that cover how Pakistan’s national media can include, accommodate and celebrate the country’s diversity and how regional media can foster a sense of national unity. This is an opportunity for Pakistan’s state-owned broadcasters – which command the largest audiences – to play a key role in this.

To contribute to this process, international actors can conduct or enable media training and workshops to help **build the capacity of regional-language broadcast media** – television channels and FM radio stations – across Pakistan.

As internet access grows in Pakistan, its importance as a media and democracy debating platform will grow. **Strengthening the online presence of pro-stability, inclusive and democratic media** will help to ensure this new media space plays a constructive role in Pakistan’s future. For this reason, it is important for international actors to support the technical digital capacity of Pakistan’s national and regional media.

A democratising Pakistani media needs to be able to **counter ‘hate speech’, divisive and exclusionary online content**. The international community can assist this process by working with Pakistani regulators, broadcasters, telecommunications companies and civil society organisations to manage online content that enflames societal divisions. A key aspect of this will be helping the Pakistani government to develop internet-specific legislation that is in keeping with international standards to ensure that online regulation is not used as a form of censorship without accountability.

Another strand of harnessing the positive power of social media and other internet-enabled media is the need to **promote digital literacy across Pakistan**. A key role for international actors could include supporting Pakistani civil society to promote awareness about online security, privacy, data theft and other forms of best online practice.

Finally, a respected media will be better able to represent the citizens of Pakistan and influence democracy in a positive way. Given the financial constraints and vested

interests in the Pakistani media, the international community is perhaps best placed to **improve the quality of Pakistan’s media outputs**. This could involve long-term capacity building via institutional support for university departments and journalism training institutions as well as increasing journalistic expertise through short-term training courses.

Strengthening donor engagement

In order to maximise the outcomes of the initiatives proposed above, it is essential to promote cohesion within the international community on the issue of supporting the media in Pakistan. One approach to this could be to **convene a donors’ working group** on media support in Pakistan, ensuring that this includes both national government, regional and civil society representation.

Of course, attracting and engaging donors will be key to the success of any efforts to enhance the democratising potential of the media in Pakistan, even while recognising that this process should be – and is – country-owned. **Increasing the inclusion of media content analysis and strategy** in donor country assessments, development assistance work plans and monitoring and evaluation will all help to strengthen donor engagement in the issue and help to secure a positive future for the people of Pakistan.

Below Inclusive, democratic digital media will be better able to represent Pakistan’s citizens. Here an elderly man talks on his mobile phone as he sits at his fruit cart in Rawalpindi.



FAROOQ NAZEEM/AFP/GETTY IMAGES

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